

Section Eight: Mail Merge

Mail Merge

The mail merge process comes in handy if you need to send similar documents to many individuals at once. The recipient's name and other personal information are often added to a document to create a more personal impression.

The three steps in mail merge process:

1. Create the main document.
2. Create the data source.
3. Merge the data source and main document.

The **main document** in the mail merge process contains the basic text that is common to all the versions of the merged documents.

The **data source** contains the personalized information that varies for each merged document, such as name, address, and telephone number.

To merge a main document with a data source, merge fields must be inserted into the document. A merge field is a code that represents a field name from the data source.

Practice:

You are the president of a bank. Your bank is celebrating its 5th anniversary. In honour of the occasion, starting September 1, 2000, you are offering your preferred customers some rewards.

Create the main document

1. Type a letter to your Preferred Customers to let them know that in appreciation of their business you are giving them free Interac Direct Payment purchases, and free bill payments. Following is a sample letter:

West Man Bank
1234 Pacific Avenue
Brandon, Manitoba
R7A 1Y9

February 2, 2000

Joe Boles
111 - 1st Street
Brandon, Manitoba
R1B 1C1

Dear Joe:

We have some great news for you! Effective September 1, 2000, we're adding some great new features to your West Man Chequing Account - free!

On September 1, 2000, your chequing account #001-23456 will be upgraded to a Preferred Customer Account. This special account is exclusive to our best clients.

Right now, you are charged 30 cents each time you make Interac Direct Payment debit and purchases, and up to \$1.30 if you make bill payments at a branch. With a Preferred Customer Account, these services will be free! Simply maintain your minimum balance of \$500 throughout the calendar month and enjoy free Interac Direct Payment purchases, and free bill payments, regardless of whether you pay by phone, by PC, or at a branch. A Preferred Customer Account really does give you more!

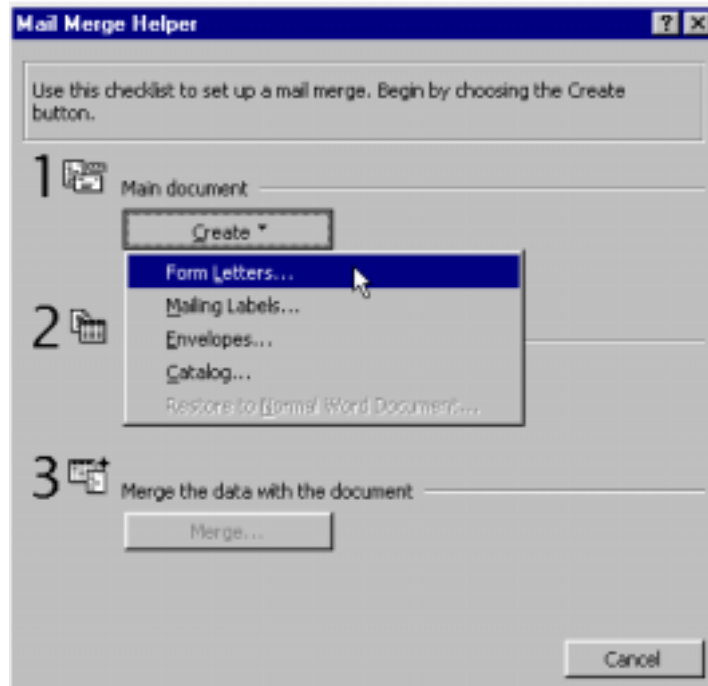
Having you as a customer is very important to us. We appreciate your business, and want to ensure that you get the best possible value for your money.

If you have any questions about this new account, I invite you to call us at 727-4567. We'd be happy to answer any questions you have.

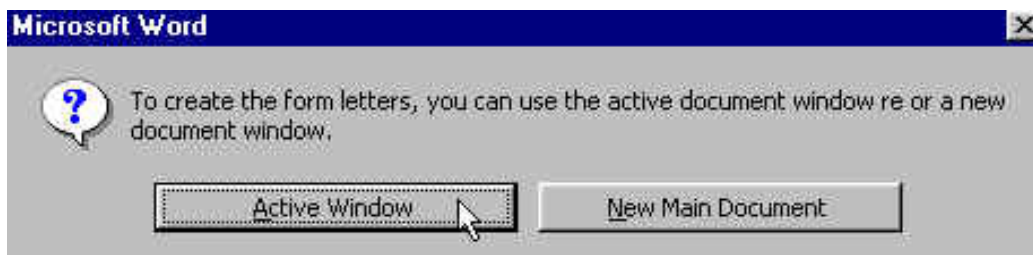
Sincerely,

Your name
President
Core Banking Services

2. Save your letter as “**Rewards**”.
3. Click **Tools** on the Menu bar. Choose **Mail Merge**. Click the **Create** button. Choose **Form Letters** to create a main document.



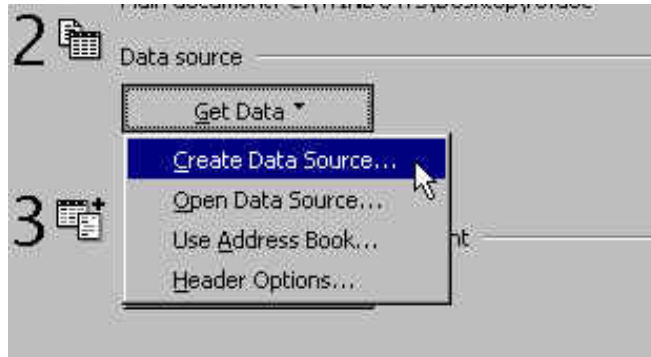
4. Choose the Active Window button if your document is already open, otherwise click the New Main document button. For this exercise click the **Active Window** button to select the document displayed on your screen.



Create data source

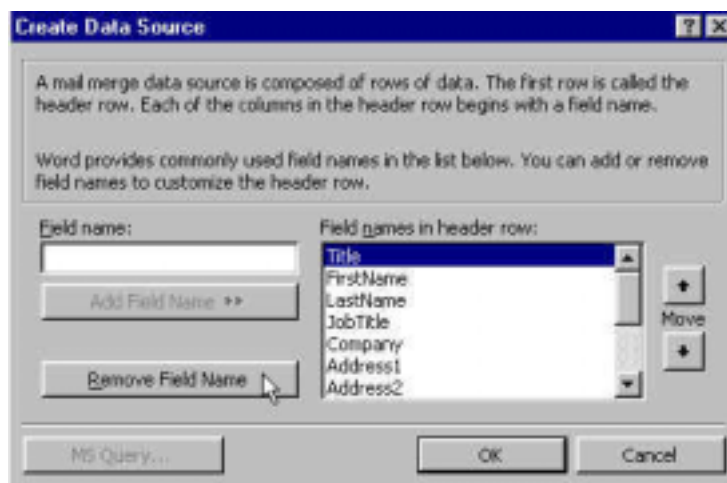
5. Click **Get Data** button.

Choose the Create Data Source button to attach a new data source. Click the Open Data Source button to attach an existing data source. In this exercise click the **Create Data Source** button.

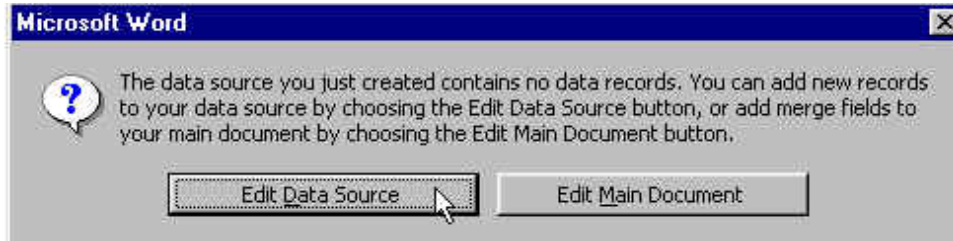


Since we need only First name, Last name, Address, City, State, and Postal code fields, in the **Field names in header row** box select and **remove** the following field names:

- ◆ **Title**
- ◆ **Job Title**
- ◆ **Company**
- ◆ **Address2**
- ◆ **Country**
- ◆ **HomePhone**
- ◆ **WorkPhone**



6. Click OK.
7. Save the data source as “**MailingList**”.
8. Click **Edit Data Source** button to add new records to the data source.




9. Now, enter the information for each customer on your mailing list. (Enter at least eight customers)
(Hints: Press **Tab** to move to next area.
Click on **Add New** to enter the information for the next customer.)
10. Click **View Source** to view the data source.



11. Your data source should look something like this:

<u>FirstName</u>	<u>LastName</u>	<u>Address1</u>	<u>City</u>	<u>State</u>	<u>PostalCode</u>
Joe	Boles	111 - 1st Street	Bran don	Manit oba	R1B 1C1
Mary	Brown	222 - 6th Street	Neep awa	Manit oba	R7A 1A2
John	Smith	333 Summer Ave.	Virde n	Manit oba	R1A Y7G
Kathy	Sallans	444 Lucky Cres.	Bran don	Manit oba	R9V 4V5
Tracy	Hayward	555 -5th Street	Swan River	Manit oba	R7J 9V2
Ruth	Conway	888 Winter Bay	Bran don	Manit oba	R9B 7H6
Lisa	Kozak	777 Summer Bay	Bran don	Manit oba	R9T 1D5
Theresa	McDonald	666 Princess Ave	Mmn edosa	Manit oba	R8C 1D5

12. Click the **Save**  button on the Toolbar to save the information you entered.

Merge the data source and main document

13. Click the **Mail Merge Main Document** button to return to the main document.



Mail Merge Main Document

14. Select the area of text that you want to change in each letter. (e.g.: the first name)

West Man Bank
1234 Pacific Avenue
Brandon, Manitoba
R7A 1Y9

February 2, 2000

Joe Boles
456 6th Street
Brandon, Manitoba
R7A 1A2

15. Click the **Insert Merge Field** button to display a list of field names. Click the field name that corresponds to the text you selected.



16. Repeat the above 2 steps for all the text you want to change in each letter.

(In this exercise we still need to change the following fields:

Last name

Address

City

Province

Postal code

First name in the salutation area)

17. Click the **Save** button on the Toolbar to save your document. Your document should look something like this:

West Man Bank
1234 Pacific Avenue
Brandon, Manitoba
R7A 1Y9

February 2, 2000

«FirstName» «LastName»
«Address1»
«City», «State»
«PostalCode»

Dear «FirstName»:

We have some great news for you! Effective September 1, 2000, we're adding some great new features to your West Man Chequing Account - free!

18. Click **Merge To New Document** to merge the main document and the data source.

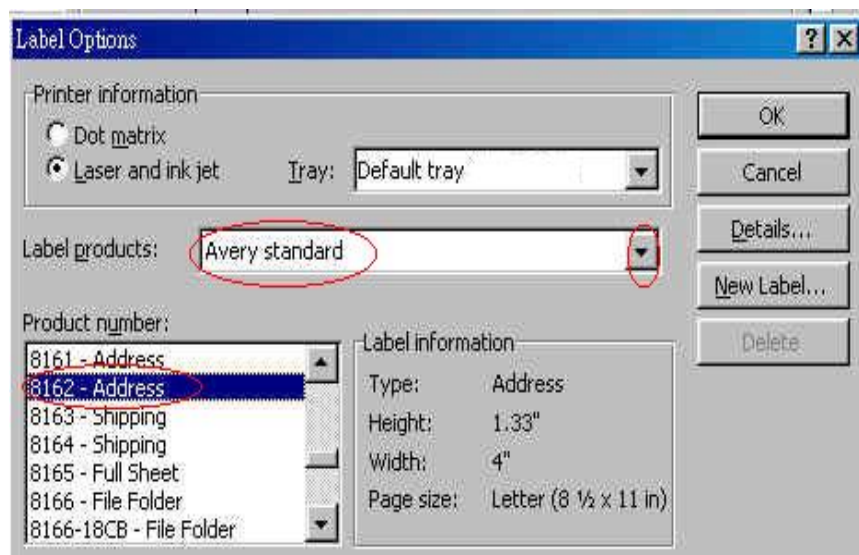


Merge To New Document

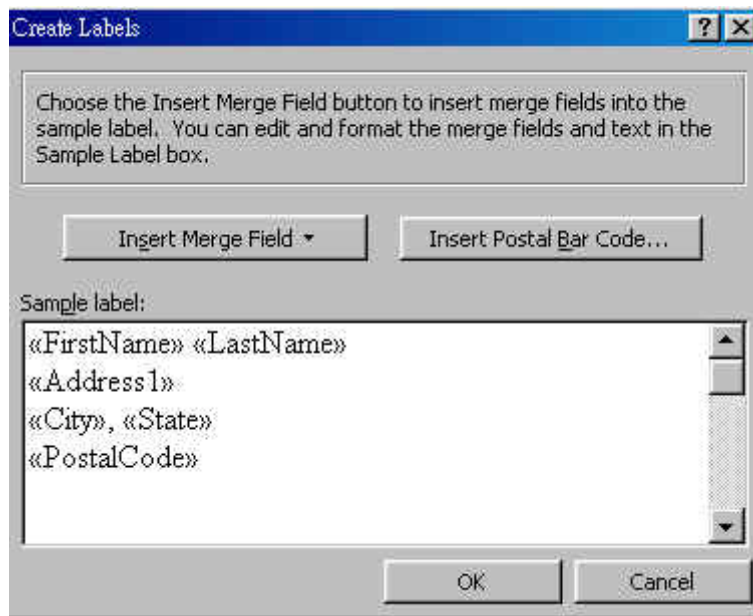
19. Scroll through your document to look at your letters.

Print Mailing Labels

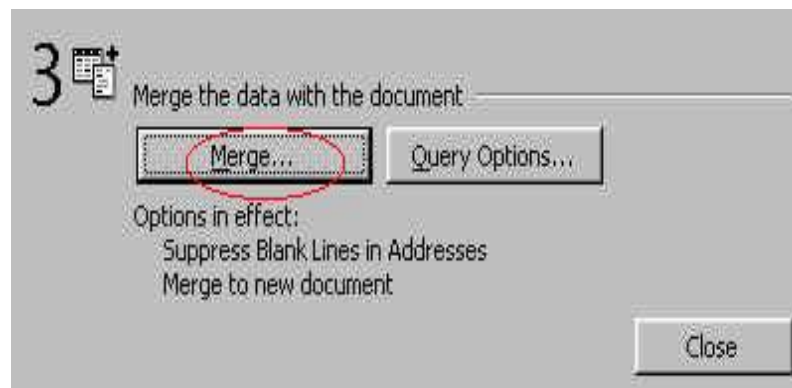
- ◆ Open a new document under Microsoft Word.
- ◆ Click **Tools** on the Menu bar. Choose **Mail Merge**. Click the **Create** button.
- ◆ Choose **Mailing Labels** to create a main document.
- ◆ Click the **Active Window** button.
- ◆ Click the **Get Data** button. Choose **Open Data Source**.
- ◆ An Open Data Source dialogue box appears.
- ◆ In the **Look In** box click the drop-down arrow.
- ◆ Choose **3 ½ Floppy (A:)**.
- ◆ Select the file **MailingList**.
- ◆ Click the **Open** button.
- ◆ Click the **Set Up Main Document** button.
- ◆ The **Label Options** dialogue box appears.
- ◆ In the **Label products** field click the drop-down arrow. Choose a product name. (Check your package of labels for a product name.) In this exercise choose **Avery standard**.
- ◆ From the **Product number** field choose an option. (Check your package of labels for a product number.) In this exercise choose **8162 – Address**.
- ◆ Click the **OK** button.



- ◆ Click the **Insert Merge Field** button.
- ◆ Click **FirstName**.
- ◆ Press the space bar on your keyboard once.
- ◆ Click the **Insert Merge Field** button.
- ◆ Click **LastName**.
- ◆ Press the Enter on your keyboard once.
- ◆ Insert the remaining fields.
- ◆ Once all the fields are inserted your screen should look something like this:



- ◆ Click the **OK** button.
- ◆ Click the **Merge** button.



- ◆ Click the **Merge** button.



- ◆ Load the label sheet into your printer. To print the labels click the **Print** button on the toolbar.
- ◆ Close all the files.