

## Mail Merge Letters

Mail Merging letters is the term given to the process where details about customers, suppliers, members, etc. are merged into a letter to produce a set of documents individualised for each customer, member etc. This process is more efficient than individualising each document with details, one at a time.

The first requirement of a Mail Merge is a main document. The main document consists of the general information that will go to all recipients. The main document is often a letter or flyer. Next most common is a mailing label. In this exercise you will create a letter to send out to prospective customers to take part in an expo you are organising.

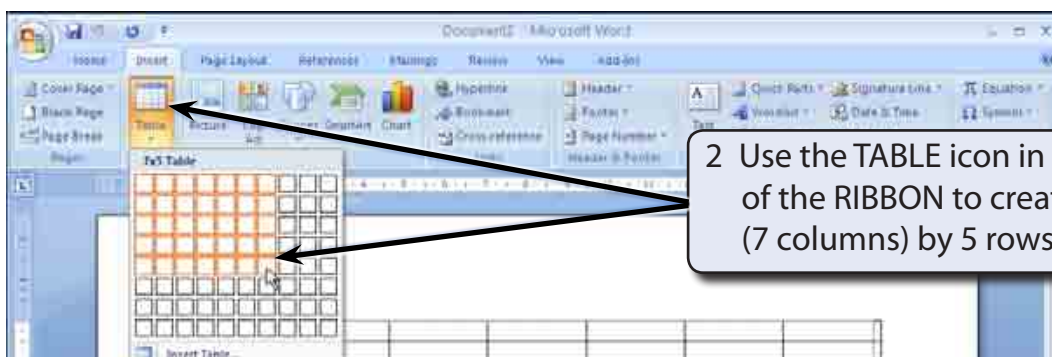
### Loading the Prepared Letter

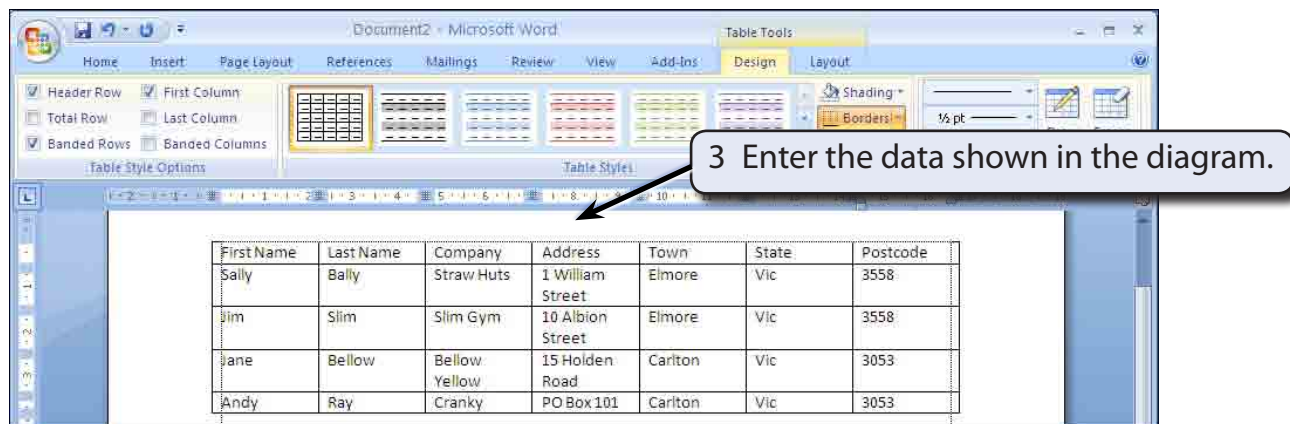
- 1 Load Microsoft Word or close the current files.
- 2 Display the FILE menu and select OPEN.
- 3 Access the PIT2 SUPPORT FILES, open the WORD PROCESSING folder and load the EXERCISE 7 TEXT file.
- 4 Save the file as EXPO INVITE in your STORAGE folder, selecting OK to the compatibility warning and leave it open.

### Creating the Data Source File

The data to be merged into the letter will be created in a separate file.

- 1 Start a NEW BLANK DOCUMENT.





3 Enter the data shown in the diagram.

First Name	Last Name	Company	Address	Town	State	Postcode
Sally	Bally	Straw Huts	1 William Street	Elmore	Vic	3558
Jim	Slim	Slim Gym	10 Albion Street	Elmore	Vic	3558
Jane	Bellow	Bellow Yellow	15 Holden Road	Carlton	Vic	3053
Andy	Ray	Cranky	PO Box 101	Carlton	Vic	3053

**NOTE:** The first row contains the headings for the data. These headings are called **FIELDS**.

4 Check your entries, save the file in your STORAGE folder as:

Expo Exhibitors

then close the file.

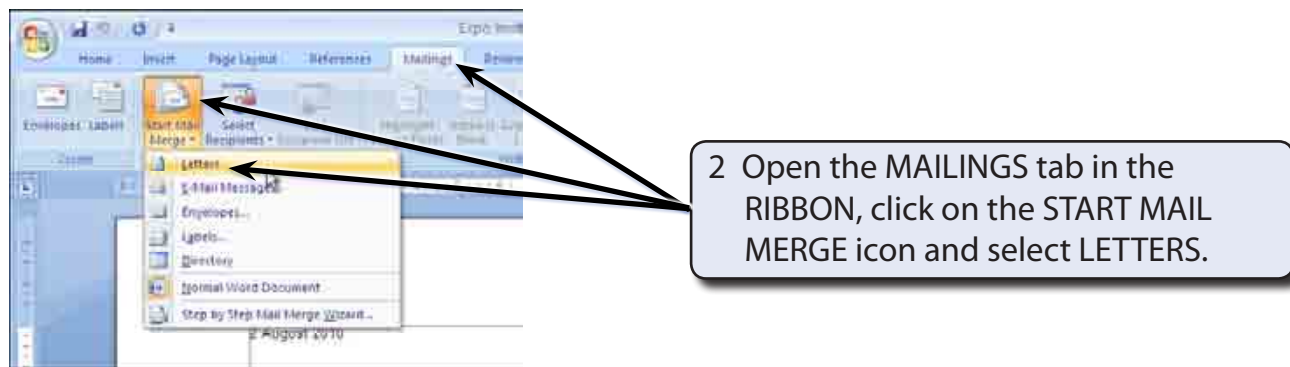
## Mail Merging

Now you have the two files required for a Mail Merge. The main document will be EXPO INVITE and the data source file will be EXPO EXHIBITORS.

### A Setting the Main Document

Microsoft Word needs to be told which file is the main document and the type of mail merge that is required.

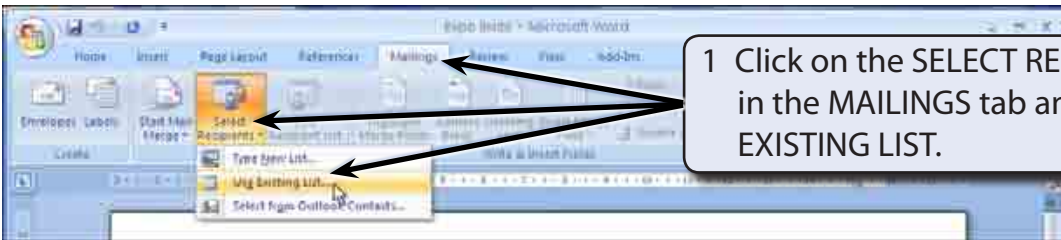
1 The EXPO INVITE file should be open.



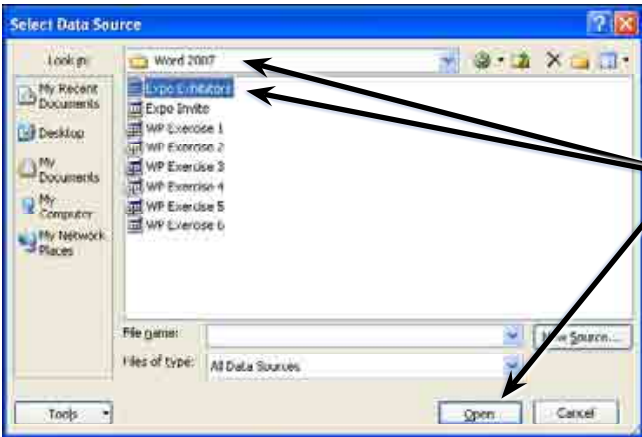
2 Open the MAILINGS tab in the RIBBON, click on the START MAIL MERGE icon and select LETTERS.

**NOTE:** This will set the open Expo Invite file to be the Main document and set it to be a FORM LETTER.

### B Setting the Data Source File



1 Click on the SELECT RECIPIENTS icon in the MAILINGS tab and select USE EXISTING LIST.



2 Access your STORAGE folder and open the EXPO EXHIBITORS file.

**NOTE:** You can edit the data at any time using the EDIT RECIPIENT LIST icon in the MAILINGS tab of the RIBBON.

### C Inserting the Fields

The fields can now be added to the letter.

