



Let's say you want to send a letter to a number of people. The letter will basically be the same for each person, but you want to personalize each letter with the recipient's name and address. You also want to customize certain parts of the letter. There's two ways of doing this – type each letter individually, or use a feature called mail merge that will do all the hard work for you.

Mail Merge is a powerful tool used to print personalized documents quickly. It involves creating a document and inserting data fields into your document. The data will be plugged in at print or merge time. Sounds complicated? It's really not. Word provides you with a Mail Merge helper which takes you through the mail merge process step by step. Start running the mail

merge helper by pulling down the *Tools* menu and selecting *Mail Merge*.



Notice that the Create button is 'highlighted' with a dark border and black letters. It is suggesting that you click on the button as the first step.

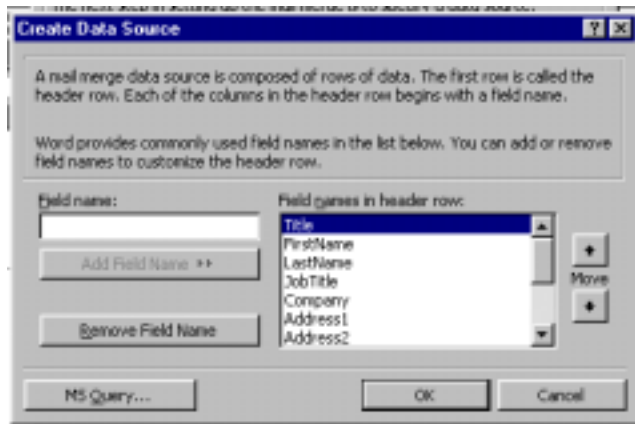
When you click on the Create button, a submenu appears. Choose *Create Form Letters*. The program will ask you where you want to create the Form Letter; choose *Active Window*.

The program will then go back to the Mail Merge helper. Notice now that a different button

is highlighted; the *Get Data* button is yearning to be pushed. Click on it and

choose *Create Data Source*. This option will bring up a window

allowing you to customize your data file with any fields you want. On the left is a box of suggestions. You will probably never use these, so do as I do and hit *Remove Field Name* until they are all gone. Now, in the *Field name*, begin typing in your field names. **NOTE: You cannot use any spaces in the Field**



Name. Start by typing **Name** in the Field Name window. If it is correct, click on *Add Field Name*. It will appear on the right under *Field names in header row*.

Continue by adding the following fields: **Team, Boy, Amount**. When you are done, the four fields you just added should appear in the window to the left. If everything is OK, click on OK.

Next, you will be asked for a file name to save your data file as. Make sure you are saving it into your System folder, and for a name, type **Data**, and then click OK.

The program will then check to see if there are any records in your data file, and will display a window suggesting that you edit your data file now. Click on the *Edit data source* button to begin entering records into your data file.

RHP Computer Applications Class

7-4 Mail Merge



A window will pop up with the names of your data fields and blank spaces for you to enter data. To navigate through the different fields, you can use the return key or the tab key (or even the mouse, but it's slow). To go back to a previous field, hit Shift-Tab.

Enter in the following records into your data table. Do not click the OK button until you are done entering records.

Name	Team	Boy	Amount
John Stevens	Indian	Y	\$25.00
Jerry Quick	Atlantic	Y	\$12.50
Henry Huggins	Superior	Y	\$18.50
Ramona Quimby	Indian	N	\$76.33
Jane Peabody	Atlantic	N	\$12.55
Alex Thennerslug	Coral	Y	\$43.00
Debbie Gibson	Coral	N	\$9.44
Steven Wonderinski	Atlantic	Y	\$15.25
Indiana Jonez	Superior	Y	\$23.90
Eleanor Gastritis	Indian	N	\$19.99

]

Make sure to put the amounts in correctly! There are a total of 10 records to be entered. When you are done, click on OK.

When you get back to your original document (still blank), you will notice the addition of a toolbar; this is the mail merge toolbar.



Notice the buttons on the left of the toolbar; *Insert Merge Field* and *Insert Word Field*. These buttons allow you to insert fields. Click on the *Insert Merge Field* button, and you will see the field names you entered earlier in your document.

We will be printing out bills for people who owe money to Kare Youth League.

Start by typing a heading: **KYL Billing Statement**.

Next, type the following (on a new line):

This is to inform you that as of

Here's a tricky part! Next to the *of*, insert a space, and then pull down the *Insert* menu (at the top) and choose *Date and Time*. Next select the date (in MM/DD/YY format) and click OK. This field will now update to the current date each time you print this document. If you had just typed in today's date manually, it would stay the same. By inserting a *Date field*, it will update the date to the current date each day.

After the date, type a comma and a space. Now we are going to insert the NAME field. Click on the *Insert Merge Field* button, and choose Name. Type in a space, then type **has not paid his/her fee for Christmas Cards in the amount of**

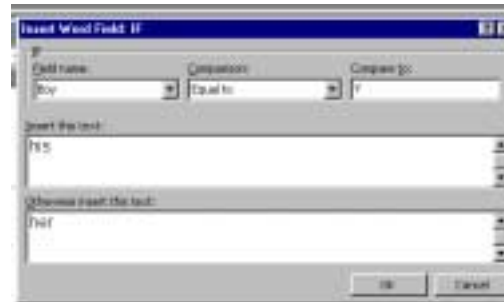
Make sure to put a space after *of*, and then click on the *Insert Merge Field* button and select Amount.



Finish the letter by typing **Please pay this amount! If you do not pay, we cannot pay our bills, therefore we will go out of business, therefore your children will have no place to play, therefore they will be out on the streets, where they will be involved in malicious activity which could result in their subsequent arrest and removal from society in a federal penitentiary, where they will finally be released and sue you for not paying your bills so that they could have stayed off the streets, which will cost you much more than what you owe now. Thank you!**

Now you're ready to merge the data. On the mail merge toolbar, find the Merge to New Document icon. Click on it. All 10 of your letters will be merged and a new document will be created called **Letter1**. Scroll through this new document and notice how the data has been inserted into your document. This can sure save you a lot of time! But we're not done yet! We can still improve and fine-tune this letter.

First, close the New Document you just created; no need to save it. In your mail merge document, find the words **his/her**. This sounds very computerish and impersonal. We will use a little programming skill to make this sound better. Select *his/her* and delete it. Then, in it's place, click on the *Merge Word Field* button and choose *If...Then...Else*. If..Then...Else is a commonly used programming tool to evaluate a circumstance and proceed with an action. When you choose *If..Then..Else*, a dialog box will pop up. Under field name, choose *Boy*. In comparison, choose *equal to*. Under compare to, type *Y*. Under *Insert this text*, type **his**. Under *Otherwise insert this text*, type in **her**.



What this will do is analyze every record from your data file. If the field called BOY is equal to Y, the word will insert the word *his* into your document. If BOY is not equal to Y, then it will insert the word *her*.

Click on OK to insert this equation into your document. Make sure to save your document!

Click on the *Merge to New Document* icon. Scroll through the merged documents to make sure everything worked OK. Save this merged file (the file with the ten letters in it) as **mailmerge.doc** in your system folder!

NOTE: When you exit Word, it will ask you if you want to save the data file. Click on yes to save it, we will be using it again on the next assignment.

Email me the file **mailmerge.doc** to me at rhp@denovodental.com. The subject is **Compapp 7-4 lastname**.