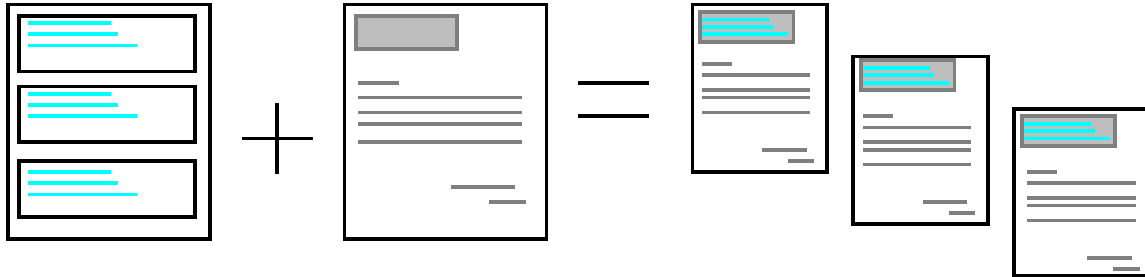


Mail Merge With Microsoft Office

David Marcovitz

Introduction

Mail merge is a method of combining information about individuals with a word processing document to create individualized documents for each individual. For example you could write a personalized letter to each of your students/clients by writing one letter and merging it with a list of students/clients.



The list of students can come from an Excel spreadsheet, an Access database, a Word table, or an Outlook address book.

In the simplest case, you might have a form letter that you want individually addressed. Your spreadsheet (or database or table or address book) could contain the name, street address, and city/state/zip.

Name	Street Address	City/State Zip
John Smith	123 Main Street	Bush City, MD 21200
Juanita Jones	456 Oak Street	Gore City, MD 21211
Tammy Baker	789 Elm Road	Nader City, MD 21222

You could write one letter to all these people and use mail merge to change the address at the top of the letter.

«Name»
 «Street_Address»
 «CityState_Zip»

Dear Sir or Madam:

This is to inform you that we are changing our fees. From now on, we will charge you based on the following fee schedule:

Coming in the door	\$10.00
Talking to the staff	\$20.00
Fixing what ails you	\$200.00
Leaving	\$10.00

After merging the above letter with the above spreadsheet, you would get three letters that are identical in every respect except for the name and address at the top:

<p>John Smith 123 Main Street Bush City, MD 21200</p>	<p>Juanita Jones 456 Oak Street Gore City, MD 21211</p>	<p>Tammy Baker 789 Elm Road Nader City, MD 21222</p>																								
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This is easy to do but not very effective. Simply personalizing the names and addresses does not make a personalized letter. However, adding more personal information is very easy. You simply need more information in your spreadsheet (or database or table or address book). Any

information you put there can be automatically inserted into your letter. Here is a slightly more complete spreadsheet:

First Name	Last Name	Title	Street Address	City/State Zip	Outstanding Balance	Insurance	Hearing
John	Smith	Mr.	123 Main Street	Bush City, MD 21200	\$25.00	Aetna	45%
Juanita	Jones	Dr.	456 Oak Street	Gore City, MD 21211	\$100.00	CareFirst	98%
Tammy	Baker	Ms.	789 Elm Road	Nader City, MD 21222	\$75.00	Medicare	99%

Now we can include all this information in our letter. Note also, that the first name and last name were separated, and the title was added, so we can put an appropriate "Dear" line in our letter ("Dear Sir or Madame" doesn't quite cut it for personalization).

«First_Name» «Last_Name»
 «Street_Address»
 «CityState_Zip»

Dear «Title» «Last_Name»:

Thank you for coming to our clinic on your most recent visit. We have billed your insurance company, «Insurance», and they have paid us for your visit. However, your insurance does not pay for your whole visit. Your outstanding balance for the visit is «Outstanding_Balance». Please pay this amount promptly.

During your visit, we conducted a hearing test. We found that your hearing is «Hearing». You should be retested in one year so we can determine the extent of your hearing loss.

Thank you for seeing us at the Hear Better Than Beethoven Speech and Hearing Clinic.

Sincerely,
The Clinic Staff

The new more personal letters would look like this:

John Smith
123 Main Street
Bush City, MD 21200

Dear Mr. Smith:

Thank you for coming to our clinic on your most recent visit. We have billed your insurance company, Aetna, and they have paid us for your visit. However, your insurance does not pay for your whole visit. Your outstanding balance for the visit is \$25.00. Please pay this amount promptly.

During your visit, we conducted a hearing test. We found that your hearing is 45%. You should be retested in one year so we can determine the extent of your hearing loss.

Thank you for seeing us at
Beethoven Speech and H

Juanita Jones
456 Oak Street
Gore City, MD 21211

Dear Dr. Jones:

Thank you for coming to our clinic on your most recent visit. We have billed your insurance company, CareFirst, and they have paid us for your visit. However, your insurance does not pay for your whole visit. Your outstanding balance for the visit is \$100.00. Please pay this amount promptly.

During your visit, we conducted a hearing test. We found that your hearing is 98%. You should be retested in one year so we can determine the extent of your hearing loss.

Thank you for seeing us at
Beethoven Speech and H

Tammy Baker
789 Elm Road
Nader City, MD 21222

Dear Ms. Baker:

Thank you for coming to our clinic on your most recent visit. We have billed your insurance company, Medicare, and they have paid us for your visit. However, your insurance does not pay for your whole visit. Your outstanding balance for the visit is \$75.00. Please pay this amount promptly.

During your visit, we conducted a hearing test. We found that your hearing is 99%. You should be retested in one year so we can determine the extent of your hearing loss.

Thank you for seeing us at the Hear Better Than
Beethoven Speech and Hearing Clinic.

Sincerely,
The Clinic Staff

If you add to this a complex database or spreadsheet that automatically calculates some of its

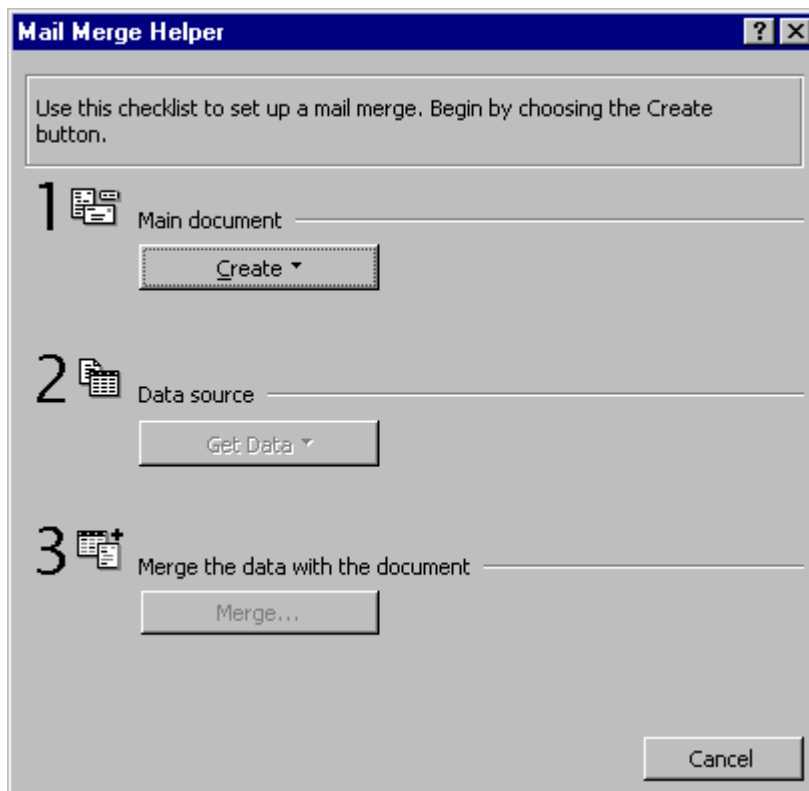
information (such as balance due or combined score or ...), you have a very powerful tool for reporting personalized information to individuals.

Getting Started With Mail Merge

In order to perform a mail merge, you will need to follow a five step process (the numbering of the steps corresponds to the numbers in the dialog box below):

0. Create the data source (probably an Excel spreadsheet)
1. Choose the main document (probably a Word file)
2. Choose the data source (by selecting the Excel spreadsheet you created in step 0)
- 1.a. Edit the main document
3. Perform the merge.

When you choose Mail Merge from the Tools menu, you will be taken to the dialog box below.



You need a main document. This is your Word document that contains the text that is common to all the personalized letters and the fields that will vary for each letter.

You need a data source. This is your Excel spreadsheet (or Access database or Word table, or Outlook address book) that contains rows of information for each individual.

Finally, you need to perform the merge. This is where the main document and the data source get combined to create personalized documents.

The Data Source

Generally, you will use mail merge with an existing file of information. For example, all your student/client records might already be contained in an Excel spreadsheet. At other times, you will find that you want to create something quick "on-the-fly" to use for mail merge. Your student/client spreadsheet might not exist or it might not have the data you want. You might quickly throw together a spreadsheet with exactly the data you need to merge.

When creating a spreadsheet that is going to be used for mail merge, you should think carefully about how you want to store the data and what you will want to do with it. For example, for a simple spreadsheet, it might be sufficient to have one column for the name. This is fine until you want to address your letter to Dr. John Smith as "Dear John" or "Dear Dr. Smith." If the data is already in many separate fields, it can all be used in any way you like.

Creating the Main Document

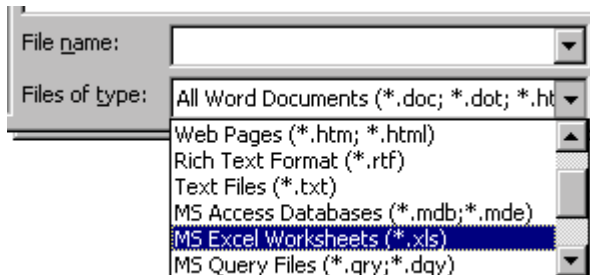
Once you have a spreadsheet with your data, you can create a main document. To do this, create a new Word document and choose Mail Merge from the Tools menu.

This will give you the above dialog box. When you click on Create (under Main Document), you will have to select if you want Form Letters, Mailing Labels, Envelopes, or Catalogs. Choose the option you want. For most documents, you will want Form Letters, but if you are doing Mailing Labels or Envelopes, Mail Merge will make it easy for you when you select the correct option.

Once you choose the type of document you want (probably Form Letters), you will be asked if you want to create a new document or use the active window. If you started with a blank document, the active window is fine.

Linking the Data Source to the Main Document

Next, you want to choose the data source (probably an Excel spreadsheet). Click on the Get Data button and select Open Data Source. Find the spreadsheet you created. You probably saved it on your floppy disk, so look for the Floppy Drive (A:) in the Open dialog box. Be sure to select what type of file your data is in. If your data is in an Excel spreadsheet, you'll have to choose that from the list under Files of Type:

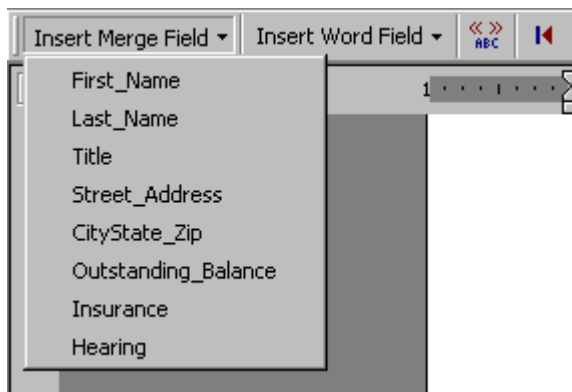


Editing the Main Document

Now you are ready to edit the main document. Click on the Edit button under Main Document (it's not in the picture above, but it appeared after you created the main document). You will be taken back to your (probably blank) Word document. Word will be exactly the same as what you are used to, but you will have an extra toolbar.



This is the Mail Merge toolbar. The most important part of this toolbar is the Insert Merge Field menu. This will allow you to choose data fields to put into your document. These data fields are based on the header row of your spreadsheet. For example for the letters we created above, we used a spreadsheet with the following headers.





Every time you want to use one of these items, rather than typing in a specific entry, you select the field from the list. So, if you want to write letters to Dear John, Dear Juanita, and Dear Tammy, you would type "Dear " and insert the First Name field. Be careful to include all appropriate spacing and punctuation around your fields. For example, don't forget to type "Dear" with a space after it. You don't want letters that say DearJohn, DearJuanita, and DearMary (with no spaces between Dear and the name).

When you insert a field, the name of the field will appear in the letters surrounded by double angle brackets. For example, if you insert the First Name field, it will appear as follows:

«First_Name»

Once you have typed some or all of your letter with some merged fields, you might want to see how it is going to look with the correct data. For this, you will use the following part of the Mail Merge toolbar:

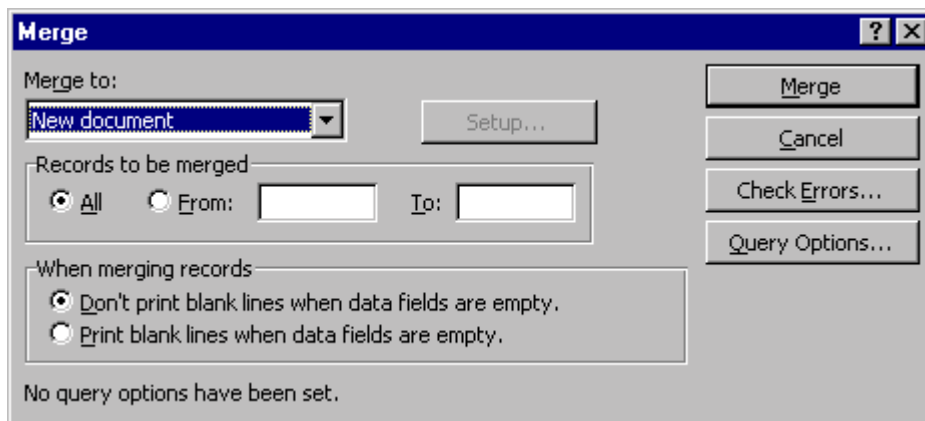


Click on the  button to show the letter as it will actually look for one individual. Use the arrows to move back and forth from among the individuals. This will help you catch problems with spacing and punctuation around merged fields. For example, it might be harder to see a problem with Dear«First_Name» than it will be to see a problem with DearJohn. When you are done looking at the data, click on the  button again to go back to looking at the field names.

Merging

After you have completed your main document, it is time to merge. You have two choices to merge: merge to a new document or merge to the printer. If you merge to a new document, the new document will be one big Word document with all your letters in it. This is good if you want to make some small changes for individuals. You could add in a personal note for someone, for example ("Hey John, thanks for bringing the fruit cake to your last appointment"). When you have edited the document, you can print it out. If you choose to merge to the printer, the letters will simply be printed out.

To merge the document, go back to the Tools menu and choose Mail Merge. Now click on step 3: Merge.



Under Merge to, choose New document or Printer, and click the Merge button. That is it. You have created a set of personalized documents.