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Information Technology

Mail Merge

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Mail Merge

1 Introduction

Mail merge techniques allow you to create a document which combines repetitive text elements with data drawn from an external data document.

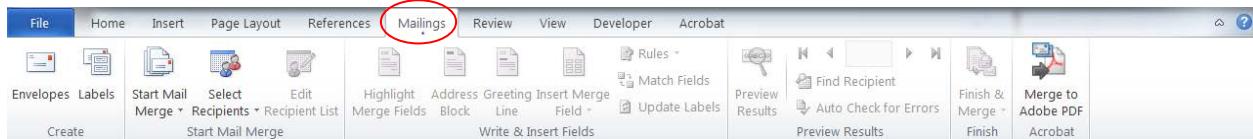
To perform a mail merge, you'll need the following:

- A document. Using Word's mail merge, you can create letters, e-mail messages, envelopes, labels, and pdf documents.
- A recipient list or data source. This data source can be a Word text file, an Excel spreadsheet, or an Access database.

Word will then create a new document by inserting the data from your data source into the structure of your template or existing document.

2 The Mailings ribbon

The Mailings ribbon, which replaces the Task Pane in Word 2003, allows you to perform mail merges.



3 Getting started

3.1 Get your document

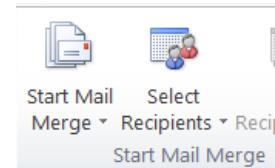
If you got an existing document that you want to use, open it up first or create a new document. In this example we will create a letter with one of the NWU templates (AFR Briefhoof or ENG Letterhead).



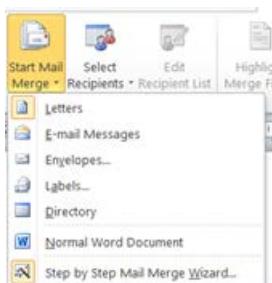
- Fill in the **Recipient** detail and the Title of the document and click on **OK**.

3.2 Choosing the type of Mail Merge

- From the Mailings ribbon locate the area labelled **Start Mail Merge** and click on the down-facing arrow.



- From the list that appears, select **Step by Step Mail Merge Wizard...** – The wizard will open on the right hand side of the screen



- Select what you want to do – for instance Letters and click on the **Next: Starting document**.
- Select how do you want to set up your letters? – choose **use the current document**.
- Now click on **next: Select recipients**.

3.3 Selecting your Recipients

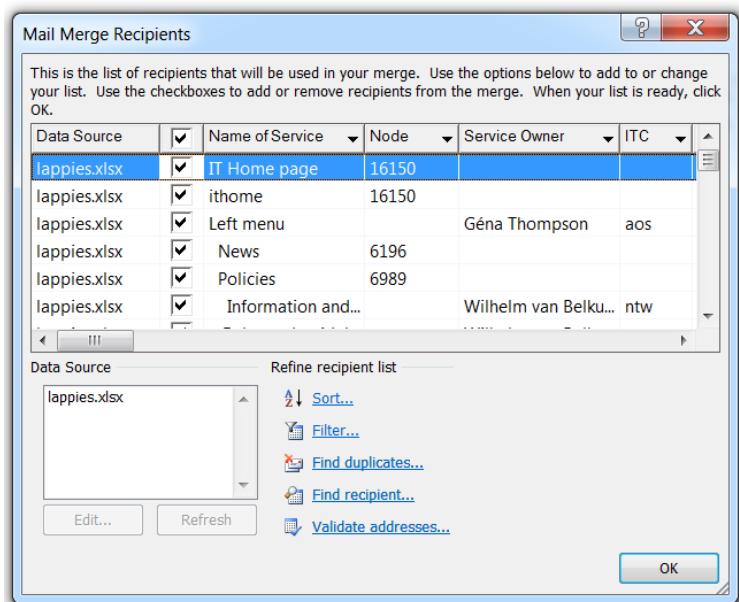
Once you have selected the type of merge you would like to perform you can select the recipient list or data source you wish to use. To select your recipients:

- From the list that appears, select **Use an existing list**.
- Click on **browse** to select your recipients data file.

3.4 Editing the Recipient List

Word 2010's Mail Merge Recipients window allows you to control your data from within Word. From this window you can:

- Select and deselect individual recipients in the list.
- Sort items in the list.
- Filter items in the list.



3.4.1 Selecting and deselecting recipients

Using the Mail Merge Recipients window you can select (or deselect) recipients from your Data Source. To select a recipient:

- When the Mail Merge Recipients window is open for the first time, all the recipients will appear with a checkmark next to their name.
- Click to remove the check mark from the box next to the recipient you wish to remove from the mail merge.

- To reselect that recipient, click to replace the checkmark in the box.

Tip: If you know you want to include most of the list in your merge, click on the checkboxes next to the names you want to deselect. Alternatively, if you want to include only a few records from the data source, click Clear All, and then click the checkboxes next to the names you want to include.

3.4.2 Sorting Recipients

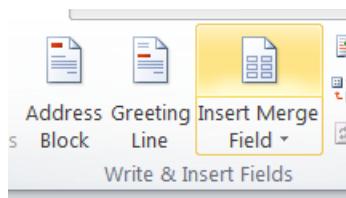
Sorting your data can be helpful if you want your merged document to be organized in alphabetical or numerical order. When you sort using the Mail Merge Recipients window, you'll immediately see the results of your sort in your recipient list. To sort data:

- Click the column heading of the item by which you want to sort (if you want to display the name in alphabetical order, for example, click on Last Name).
- From the list that appears, select **Sort Ascending**.
- If necessary, click to place (or to remove) check marks next to the boxes to the left of the recipient's names.
- Click **OK** to select the recipients you wish to include.

3.5 Writing & Inserting Merged Fields

Now that you have selected your recipient list, you will be able to create your merge document.

- Click on **Next: Write your letter**.
- You have to stand on the place in the document where you want to insert the address.
- From the Mailings ribbon locate the area labelled **Write & Insert Fields**.



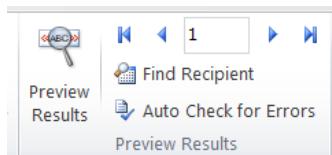
- Click on the button labelled **Insert Merge Field**.
- Select the field you wish to insert (for example Name).
- Repeat the previous steps until you have inserted all the necessary fields.

3.6 Preview your merge document

Using Word's preview option you can view the data in your document and navigate through the recipients in your data document.

3.6.1 Previewing your results

- From the mailing ribbon locate the labelled **Preview Results** – click on **preview results** button.
- The field will be replaced with the name of the first recipient in your data file.



- To navigate through your data click on one of the following buttons as shown above the **Find Recipient**.

3.7 Finishing your merge

Once you have created your document, inserted merged fields, and previewed your results, you can complete your merge in one of the following ways:

- Printing your letter (one per recipient)
- Editing individual letters (creating a new document with one letter per recipient).
- Sending email messages.

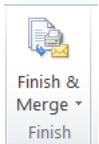
- Merging your letter to a PDF for e-mailing.

3.7.1 Printing your document

To merge your document directly to your printer:

From the Mailings ribbon locate the area labelled **Finish**.

- Click on the button labelled **Finish & Merge**.



- From the list that appears, select **Print Documents**.
- The **Merge to Printer** window will appear.
- Confirm that the radio button labelled **All** is selected.
- Click on the button labelled **OK**.

3.7.2 Editing Individual letters

If you wish to edit individual letters you can finish your merge by creating a new document with one letter per recipient. One document with a letter for each recipient e.g. 5 recipients 5 pages.

From the Mailings ribbon locate the area labelled **Finish**.

- Click on the button labelled **Finish & Merge**.
- From the list that appears, select **Edit Individual Documents**.
- The Merge to New Document window will appear.
- Click on the option button labelled **All**.
- Click on the button labelled **OK**.
- A new document will open with one letter per recipient.

3.7.3 Sending E-mail Messages

To send email messages to each of your recipients:

From the Mailings ribbon locate the area labelled **Finish**.

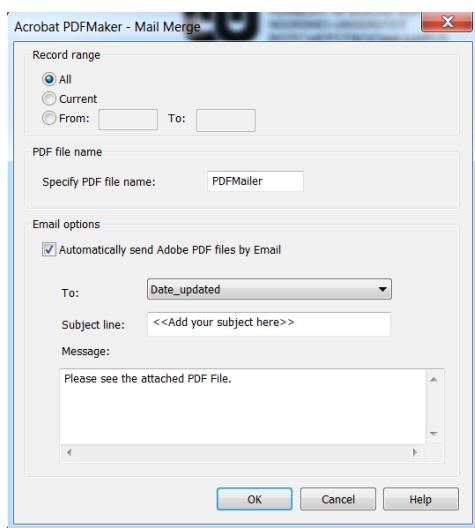
- Click on the button labelled **Finish & Merge**.
- From the list that appears, select **Send E-mail Messages**.
- The Merge to E-mail window will appear.
- Click on the down-facing arrow next to the button labelled **To**.
- From the list that appears, select the field name that contains e-mail address of your recipients (for example, Email).
- In the box labelled **Subject line**, type a name for your email (for example, Entrance Letter).
- Click on the option button labelled **All**.
- Click on the button labelled **OK**.
- An e-mail message will be sent to each recipient.

3.8 To create an Adobe PDF attachment (one document per recipient) that you can email to each recipient

From the Mailings ribbon locate the area labelled **Acrobat**



- Click on the button labelled **Merge to Adobe PDF**



- The Acrobat PDF Maker – Mail Merge window will appear.
- Click to place a check-mark in the box labelled **Automatically send Adobe PDF files by Email**.
- Click on the down-facing arrow next to the box labelled To.
- From the list that appears, select the field that contains the email address of your recipient (for example, Email).
- In the box labelled **Subject line**, type the subject for your email.
- In the box labelled **Message**, type the text for the body of your email.
- Click on the **OK** button.
- The Browse for Folder window will appear.
- Click on the location where you wish to save your PDF.
- Click on the **OK** button.
- The **Acrobat PDF Maker – Mail Merge** window will appear displaying the status of your email.
- The **Emails sent successfully** window will appear upon completion of the merge.

Original details: Petra Gainsford(12098795) C:\Users\12098795\Desktop\handleidings\Mail Merge.docm
15 April 2013

Current details: Petra Gainsford(12098795) C:\Users\12098795\Desktop\handleidings\Mail Merge.docm
04 September 2013