Mail Merge: Working with the Recipient List

For a successful *Mail Merge*, you will need to establish a recipient list, which is also referred to as the data source. This contains the information that will vary with each record, such as names or identification numbers. If you are creating a mailing list, for example, names and addresses will be included in your data source.

You can either create a new data source or use a pre-existing source (such as your Outlook Contacts). You may also wish to alter which entries are included from your data source without having to open it, change the appropriate entries, and then save the changes. *Mail Merge* allows you to specify which individual entries you want to include as well as add and delete data source entries and fields. This document covers the following topics:

Creating a New Data Source

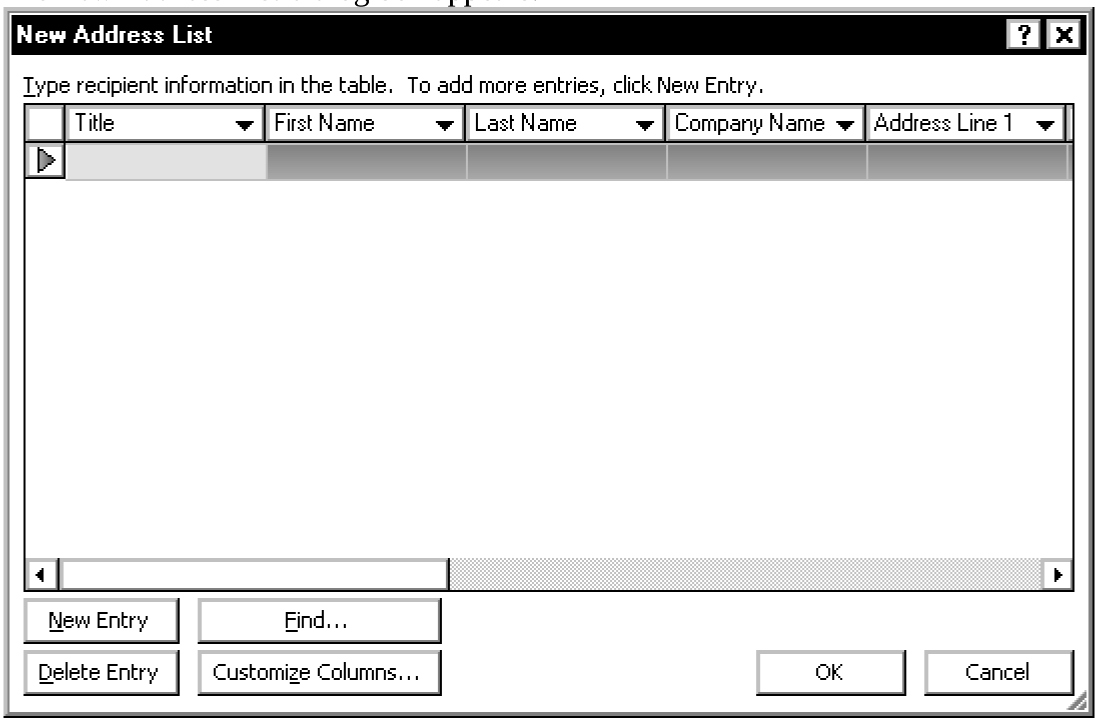
Before creating the data source document, take a moment to plan out the information you want to include. While you can always add or remove fields after creating your data document, it is most efficient to know which fields will be necessary before creating the data document in the first place.

1. From the ***Mailings*** tab, in the *Start Mail Merge* group, click **START MAIL MERGE**
   

   The *Start Mail Merge* sub-menu appears.
2. From the *Start Mail Merge* sub-menu, select the desired type of starting document
   EXAMPLE: Select ***Letters***

3. Click **SELECT RECIPIENTS** 

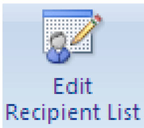
» select ***Type New List***
The *New Address List* dialog box appears.

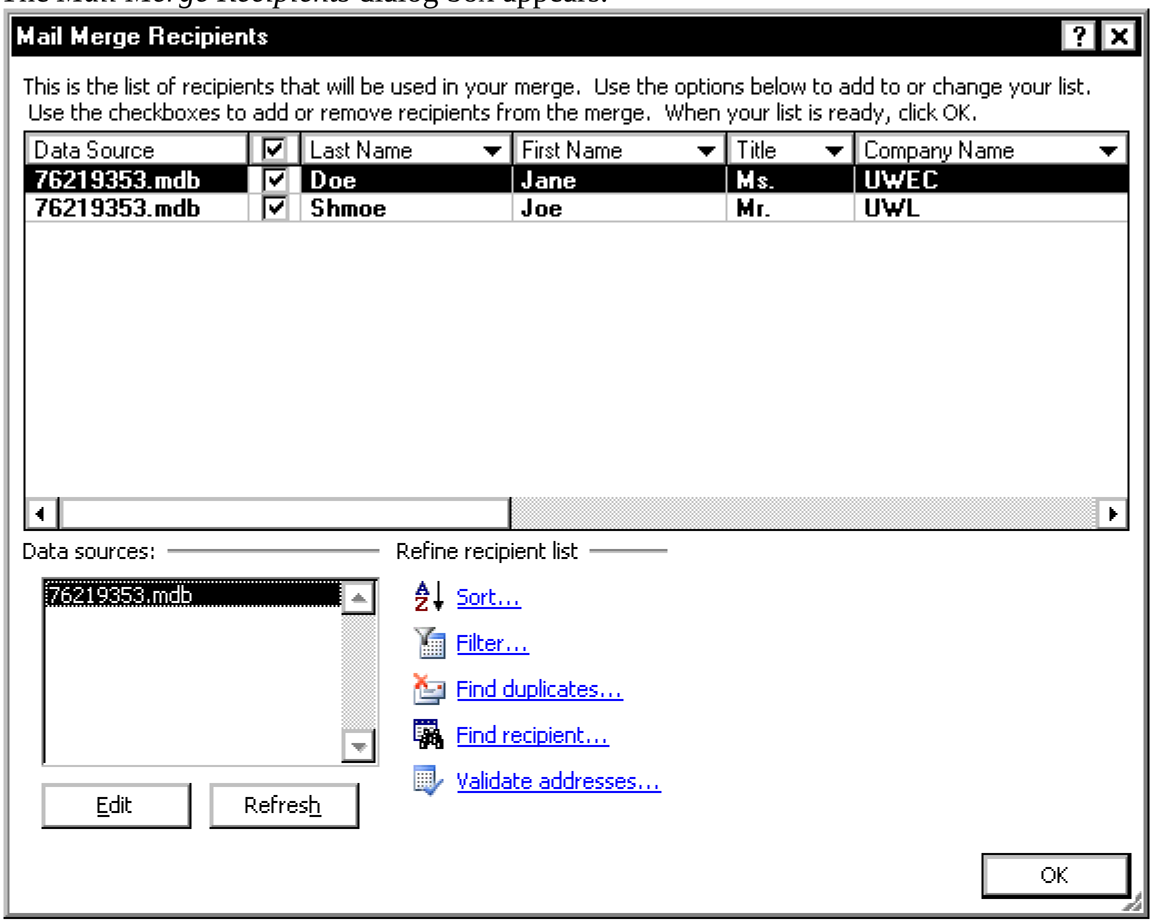


4. Click in a field to add information
5. In the appropriate fields, type the desired information for the data source
6. OPTIONAL:
    a. To remove fields, refer to Deleting Fields
    b. To add fields, refer to Adding Fields
    c. Repeat steps a and b until you are left with the desired data fields
    d. Click **OK** to return to the *New Address List* dialog box
7. OPTIONAL:
    a. To add additional entries, refer to Adding an Entry
    b. To delete an entry, refer to Deleting an Entry
    c. Repeat steps a and b until all of your entries have been made
8. When all entries are complete, click **OK,**
   The *Save Address List* dialog box appears.
   NOTE: The default save location is *My Data Sources* and the file extension is *.mdb* (Microsoft Office Address Lists).
9. Using the *Save in* pull-down list, navigate to the desired save location
10. In the *File name* text box, type the desired name for your address list
11. Click **SAVE**
    The *Mail Merge Recipients* dialog box appears.
12. OPTIONAL: To include recipients in the merge, select the checkbox beside their entry
    To exclude them, deselect the checkbox beside their entry
13. When finished, click **OK**

Accessing the Data Document

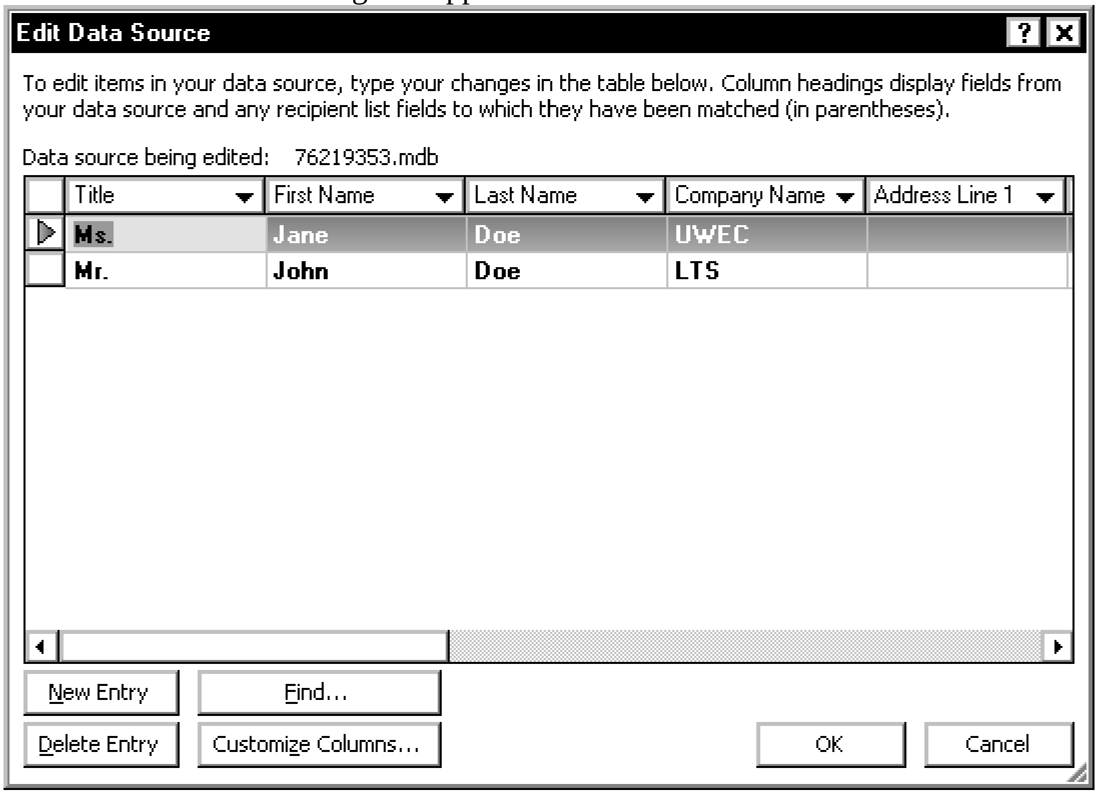
Once your data source has been created, you can continue to make changes to it. In order to do so, you must open the data source.

1. Open the main document
2. From the ***Mailings*** tab, in the *Start Mail Merge* group, click **EDIT RECIPIENT LIST**
   

   The *Mail Merge Recipients* dialog box appears.
   

3. From the *Data sources* list, select the desired entry by clicking it once

4. Click **EDIT**
   The *Edit Data Source* dialog box appears.



Adding and Deleting Data Source Fields

You can add or delete field names even after you have merged the data and main documents.

Adding Fields

1. Access the Data Document
2. From the *Address List* dialog box, click **CUSTOMIZE COLUMNS...**
   The *Customize Address List* dialog box appears.
3. Click **ADD...**
   The *Add Field* dialog box appears.
4. In the *Type a name for your field* text box, type the desired field name
5. Click **OK**
   The new field appears in the *Field Names* section.
6. Repeat steps 3–5 until all desired fields have been added
7. Click **OK**
8. For the added field(s), type the appropriate information
9. Click **OK**
   The *Mail Merge Recipients* dialog box appears, with the new field and information added.

Changing Field Order

1. Access the Data Document
2. From the *Address List* dialog box, click **CUSTOMIZE COLUMNS...**
   The *Customize Address List* dialog box appears.
3. From the *Field Names* scroll list, select the field name you want to move
4. Click **MOVE UP** or **MOVE DOWN**
5. Repeat steps 3–4 until all desired field names have been repositioned
6. Click **OK**
7. Click **OK**
   The *Mail Merge Recipients* dialog box appears.

Deleting Fields

If you delete a field, the data in the field is also deleted.

1. Access the Data Document
2. From the *Address List* dialog box, click **CUSTOMIZE COLUMNS...**
   The *Customize Address List* dialog box appears.
3. In the *Field Names* section, select the field you want to remove
4. Click **DELETE**
   A confirmation dialog box appears.
5. To delete the field, click **YES**
6. Repeat steps 3–5 until all desired fields have been added
7. Click **OK**
8. Click **OK**
   The *Mail Merge Recipients* dialog box appears.

Adding and Deleting Data Source Entries

You can add, edit, or delete records even after you have merged the data and main documents. For the changes to take effect, however, you will have to re-merge the documents. If you want to create a new data source document, refer to Creating a New Data Source.

Adding an Entry

1. Access the Data Document
2. Click **NEW ENTRY**
3. Type the new record information
4. Repeat steps 2–3 as necessary
5. Once all new records are entered, click **OK**
   A confirmation dialog box appears.
6. To save your changes, click **YES**
   To close without saving changes, click **NO**

Deleting an Entry

1. Access the Data Document
2. In the *Edit Data Source* dialog box, select the record you wish to delete
3. Click **DELETE ENTRY**
   A confirmation dialog box appears.
4. To delete the entry, click **YES**
5. Repeat steps 2–4 as necessary
6. Once all changes have been made, click **OK**
   A confirmation dialog box appears.
7. To save your changes, click **YES**
   To close without saving changes, click **NO**