

MAIL MERGE - GENERAL INFORMATION

- ❖ It produces letters for mailings that are mass-produced, but look individualized.
- ❖ It is possible to write a single letter in one document.
- ❖ The recipient information appears in another document.
- ❖ The recipient list and the letter are merged to produce the letter as a personalized letter.

KEY TERMS

Main Document

- ❖ It contains information that is the same for each document.
- ❖ It contains the field names that represent the variable information to be inserted into the document.

Recipient List/Data Source

- ❖ It contains the personalized information that varies for each Merged Document such as:
 - Name and Address
 - Payment Due Amount
 - Appointment Date and Time

Boilerplate Text

- ❖ This is the text in the Main Document that is the same for each version of the document.

Data Form

- ❖ It represents one data record.
- ❖ It is used to add, delete, or modify a record in the Recipient List/Data Source.

Field

- ❖ It is a piece of information specific to an item or individual.
- ❖ It contains the Merge Field's name.

Record

- ❖ This is the entire collection of fields related to an item or individual contained in the Recipient List/Data Source.

Field Name

- ❖ This is the name of a Data Field, such as Last Name or First Name.
- ❖ It identifies what type of data is to be included in the field.

Merge Field

- ❖ It identifies which category (field) of the Recipient List/Data Source information will be printed in the Main Document.
- ❖ It appears in both the Main Document and the Recipient List/Data Source.

SIX BASIC STEPS TO FOLLOW WHEN SETTING UP A MERGE

- ❖ Select the Type of Document.
- ❖ Select or Create a Main Document.
- ❖ Select or Create a Recipient List/Data Source.
- ❖ Write the Letter.
- ❖ Preview the Letters.
- ❖ Complete the Merge.