

## MAIL MERGE – GENERAL INFORMATION

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- ❖ A Mail Merge produces letters for mailings that are mass-produced, but look individualized.
- ❖ A single letter is written and then merged into several letters.
- ❖ The recipient information appears in another document called a Recipient List or Data Source.
- ❖ The recipient list and the letter are merged to produce the letter as a personalized letter to all or some of the entries in the records from the Recipient List or Data Source.

### KEY TERMS

#### Main Document

- ❖ This document 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

- ❖ This list contains the personalized information that varies for each Merged Document such as the name and address of a person, a payment due amount, or an appointment date and time.
- ❖ It contains the field names that represents the variable information that is to be inserted into the letter, envelope, labels, e-mail message, or directory.

#### Boilerplate Text

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

#### Data Form

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

#### Field

- ❖ A field 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

- ❖ This field 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.