

(b) Mail Merge

A mail merge document links to data stored in a database, spreadsheet or even another document. Whichever type of application stores the data, it is in table structure with each row representing a record and each column representing a field.

If the data is stored in a spreadsheet or other document then the first row must be a set of column headings which represent the field names. If the data is coming from a database or a query within a database, then the field names are already present as part of the database structure.

The purpose of a mail merge document is to produce a set of documents, one for each record in the data source. Each document in the set will contain data from the one record from the data source.

The original mail merge document contains ordinary text. This text will appear unchanged on each one of the set of documents produced. However, the original mail merge document also contains merge fields. These will be replaced by data from the data source making each copy in the set different, according to the data stored in the corresponding record.

Figure 41 below shows a mail merge main document with the merge fields placed between << >> brackets with a grey background. The particular document is a reminder letter to members of a club who have not paid their annual subscription.

The merge fields will be replaced by data from the data source when the merge is done with one letter being

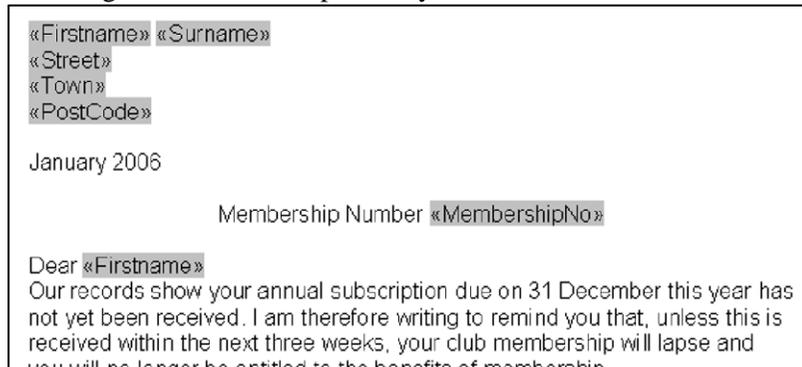


Fig 41: Merge Document Showing Merge Fields

produced for each of the records in the data source. The other text will remain the same from copy to copy of the letter.

The merge fields in the main document correspond to fields in the database or to column headings in the spreadsheet that stores the data.

A simple mail merge results in a separate copy of the document for each of the records in the data

source, but this is not always what is needed. In the situation shown the club treasurer will only want letters for those members who have not paid their subscription.

If the data is coming from a database then a query can be set up to produce a list of members who have not paid and the mail merge document can be linked to the query. Linking a mail merge document to a query rather than to a spreadsheet allows you to use all the database functionality to search, sort and select data.

If the letter is linked to a spreadsheet then it is still possible to ensure that copies are produced only for records that match certain criteria.

Assume that the source data for the example under discussion contains a field called Paid, which indicates whether or not the member has paid his or her subscription.

In Word 2003 the Edit Recipient list can be used from the mail merge wizard to set a condition based on a particular field value. A list of possible values appears when the drop down list beside the fieldname is clicked.

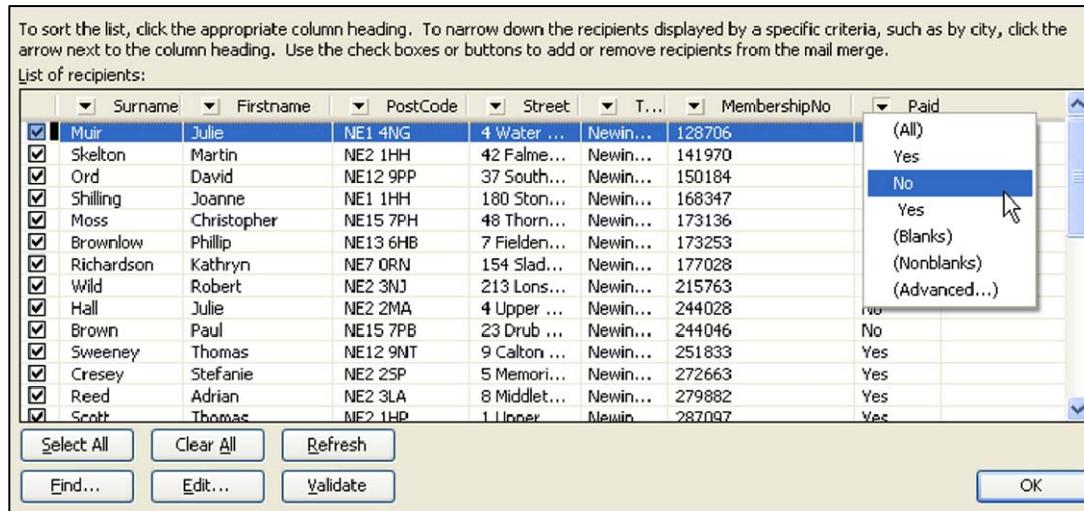


Fig 42: Selecting Records to Merge

In the case shown in Figure 42, only records with the value NO in the paid field will be used in the merge. More complex conditions can be set using the Advanced option.

The main advantages of using a mail merge are:

- (1) A single outline document can be used together with a data source to produce a set of personalised letters, labels or other documents.
- (2) The process can be selective so that documents are produced only for those records in the data source that match certain criteria.
- (3) Once set up, this is a much faster system than producing individual documents by hand.
- (4) Changes in the underlying data will be reflected the next time the mail shot is performed so that the documents produced are always based on the latest data.
- (5) More complex operations are available to give greater control over the actual document produced for each individual. These have not been discussed here but would, for example, allow certain paragraphs within the text to be inserted or omitted according to which record was being processed.