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Creating a Mail Merge with Microsoft Office

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Introduction

- A merge primarily **automates the process of sending bulk mail** to list of recipients.
- Mail merge works with two documents, the data file and the letter template. The **data file** includes the information of the recipients to whom the letter is to be sent. This file can be a spreadsheet or database file containing separate fields for each different type of information to be merged within the letter.
- The second file is the word document or the **letter template**. The recipients' information on the letter template is kept empty. When the mail merge process is initiated, the recipients' data from the spreadsheet or database data file is fetched and placed within the empty field in the letter, one by one, until all letters are created.

The process typically involves the following steps:

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1. **Template Creation**: First, you create a template document in a word processing software like Microsoft Word or Google Docs. This template contains fixed text and placeholders, also known as "merge fields," for the variable information that will be different for each recipient.

2. **Data Source:** You need a data source containing the recipient information, usually in the form of a spreadsheet, database, or contact list. The data source should include the individual details that will be used to personalize each document, such as names, addresses, or any other relevant data.

3. **Linking Data and Template:** The mail merge software or feature in your word processing application allows you to connect the template with the data source. You map the merge fields in the template to the corresponding columns in the data source. This association tells the software where to insert the specific recipient's information within the document.

4. **Execute Mail Merge:** Once everything looks good, you execute the mail merge, and the software generates individualized documents for each recipient using the information from the data source. For emails, the merge might send them directly, while for printed letters, the merge can create a new file or print the documents.

5. **Preview and Send:** Finally, you review the merged documents or emails to confirm that they appear as intended, and if everything is satisfactory, you send the personalized emails or print the letters to send them out to the recipients.

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Conclusion & Questions

Mail merges are particularly useful for tasks that involve mass communication while maintaining a personal touch. It saves time and effort by automating the process of generating personalized content for each recipient, eliminating the need to create and send individual emails or letters manually.

Lunch & Learn Resources

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