MICROSOFT WORD 2003

MAIL MERGE

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MAIL MERGE

LESSON 1 -
USING MAIL MERGE

WORKING WITH MAIL MERGE

Discussion

The Mail Merge Wizard provides a quick and easy way to create merged documents such as form letters. Mail Merge utilizes two types of documents, a main document and a data source. The main document (often a form letter) contains the information common to each letter or form. The data source contains the variable information (such as names and addresses). You only have to create the main document once; when you merge the variable information into the main document, one merged document is created for each record in data source, with the variable information inserted into the corresponding merge fields.

In addition to form letters, you can use Mail Merge to print mailing labels and envelopes or create a directory. Mail Merge can produce documents in many formats, including printed letters, files stored to disk to be printed at a later time, fax documents, and electronic mail messages.

Mail Merge involves the following six basic steps:

1. Selecting the document type.
2. Creating or selecting the main document.
3. Creating or opening the data source.
4. Inserting the merge fields into the main document.
5. Previewing the merged document.
6. Completing the merge.

Mail Merge involves opening the Mail Merge Wizard and using the steps outlined in the **Mail Merge** task pane to complete the mail merge. The **Mail Merge** task pane provides the most guidance when merging documents.

You can also use buttons available on the **Mail Merge** toolbar to merge documents. These buttons are arranged in order of usage, from left to right. The buttons on the **Mail Merge** toolbar are context-sensitive and change depending upon where you are in the Mail Merge Wizard.

STARTING THE MAIL MERGE WIZARD

Discussion

The first step in performing a mail merge is to open the Mail Merge Wizard. The Mail Merge Wizard uses the **Mail Merge** task pane to guide you in creating, opening, and modifying both the main document and the data source. The **Mail Merge** task pane provides instructions for each step in the process. In addition, you can go back to any previous step to review or modify the mail merge.

Procedures

1. Create or open the form letter you want to use as the main document.
2. Select the **Tools** menu.
3. Point to the **Letters and Mailings** command.
4. Select the **Mail Merge Wizard** command.

IDENTIFYING THE MAIN DOCUMENT

Discussion

Before you can perform a mail merge, you must identify the type of main document you want to use. The main document contains the information common to all merged documents.

The following types of documents are available in Mail Merge:

Document Type	Definition
Letters	Creates standard form letters
E-mail messages	Creates e-mail messages
Envelopes	Creates envelopes
Labels	Creates mailing and other types of labels
Directory	Creates a single catalog list or printed list of addresses

After you have identified the type of main document, the next step is choosing whether to use the current document or to create a new one.

Procedures

1. Open the document you want to use as a form letter. If you don’t have the letter written yet, begin with a blank document.
2. Open the **Mail Merge** task pane, if necessary.
3. Under **Select document type**, select the desired document type option.
4. Under **Step 1 of 6**, select the **Next: Starting document** link.
5. Under **Select starting document**, select the **Use the current document** option.

CREATING A DATA SOURCE

Discussion

The next Mail Merge step is to create or identify the data source. The data source contains the variable information that will be inserted into the merge fields in the main document. A data source can be a Word document, a spreadsheet (such as an Excel workbook), a database (such as an Access database), or an Outlook contact list.

It is helpful to think of the data source as an index card file, with each index card containing one record (i.e., all the information about one person, such as name, address, telephone number, etc.). If you create a data source in Word, it is saved as an Access database (with an **.mdb** extension) in the **My Data Sources** folder.

Before you create a data source, you must first define what information you want to store in each record. Each individual piece of information in a record is called a field. For example, first name, last name, street, city, etc., are all fields.

> If your data source already exists, see the section entitled “Using an Existing Data Source” on page 7.

Procedures

1. Begin a mail merge and complete steps 1 and 2.
2. Under **Step 2 of 6**, select the **Next: Select recipients** link.
3. Under **Select recipients**, select the **Type a new list** option.
4. Select the **Create** link.

ADDING FIELDS TO A DATA SOURCE

Discussion

When creating a data source, Word provides a variety of predefined fields. Each field is identified by a label called a field name. You can select which fields you want to include in your data source. You should fill in as much information as possible; you can select which fields you want to include in the mail merge itself at a later time.

Your data source can be customized by adding, deleting, or renaming fields. Word also allows you to arrange the order of the fields.

A new field is always entered below the current field in the Customize Address List dialog box.

Field names can contain spaces (e.g., **Zip Code**).

Procedures

1. Begin a mail merge and create a new data source in step 3.
2. Select **Customize** in the New Address List dialog box.
3. Select **Add**.
4. Type the desired field name in the **Type a name for your field** box.
5. Select **OK**.

REMOVING FIELDS FROM A DATA SOURCE

Discussion

When you are creating a data source, you can probably use many of the default fields provided by Word. You can and should, however, remove fields you do not plan on using in the mail merge.

Procedures

1. Begin a mail merge, create a new data source in step 3, and open the Customize Address List dialog box.
2. Select the field you want to remove from the **Field Names** list box.
3. Select **Delete**.
4. Select **Yes**.

REARRANGING FIELDS IN A DATA SOURCE

Discussion

After you have added and removed fields, you should arrange them in the appropriate order for entering data. For example, if you want to enter the last name into a record before entering the first name, you should move the **Last Name** field above the **First Name** field.

> The order in which you enter data does not affect the order of the data in the merged document.

Procedures

1. Begin a mail merge, create a new data source in step 3, and open the Customize Address List dialog box.
2. Select the field you want to move in the **Field Names** list box.
3. Select **Move Up** or **Move Down** as desired.

SAVING A DATA SOURCE

Discussion

After you have created the desired fields, it is a good idea to save your data source before you begin to enter records. When you save the data source, it is earmarked as a Mail Merge data source.

> You can open the data source in Microsoft Access to make changes to it.

By default, data source files are saved to the **My Data Source** folder in the **My Documents** folder.

Procedures

1. Begin a mail merge, create a new data source in step 3, and open the Customize Address List dialog box.
2. Select **OK**.
3. Select **Close**.
4. Type the desired file name in the **File name** box.
5. Select **Save**.

ENTERING RECORDS INTO A DATA SOURCE

Discussion

After you have saved the data source in a mail merge, you are ready to enter the variable information into each individual record.

You cannot enter multiple lines in a data source field.

You can use the **[Enter]** or **[Tab]** key to move to the next field in the address list dialog box and the **[Shift+Tab]** key combination to move to the previous field.

When you press the **[Enter]** key twice at the end of a record in the address list dialog box, the next record appears. You can also use the **New Entry** button to create a new data record.

Procedures

1. Begin a mail merge and create and save a new data source in step 3.
2. In the Mail Merge Recipients dialog box, select **Edit**.
3. Type the desired information into the first field.
4. Press **[Enter]**.

5. Enter information as desired into the remaining data fields.
6. After completing the first record, select **New Entry** to add a second record.
7. Enter information into additional records as desired.
8. When you have entered all the desired records, select **Close**.
9. Select **OK**.

USING AN EXISTING DATA SOURCE

Discussion

Often times, the data that you will use for your mail merge will come from an external data source, such as Excel, Oracle Discoverer, Banner, or Access. If this is the case, in Step 3 of 6 of the Mail Merge Wizard, you will need to select **Use and existing list** instead of **Type a new list**. Once you have selected **Use an existing list**, you must **Browse** for that data source and select the data file from a list.

Word 2003 will import just about any type of data file into the Mail Merge Wizard, including Excel spreadsheets (even those exported from Oracle Discoverer), comma-delimited text files, and Access tables and queries, to name a few.

> Before using an Excel spreadsheet or data file exported from Oracle Discoverer, it is a good idea to open the file in Excel to make sure that the first row contains the field names and that there are not empty rows at the top of the file.

> When browsing for your existing data source, if you don’t see your file, you may need to change the “Files of Type” box to “All Files (*.*).”

> When you browse for an existing data source, or list, Word first looks in the “My Data Sources” subfolder of your My Documents folder. You may need to change the “Look in” to your My Documents folder or the folder or drive that the data file is stored in.

Procedures

1. Begin a mail merge and complete steps 1 and 2.
2. Under **Step 2 of 6**, select the **Next: Select recipients** link.
3. Under **Select recipients**, select the **Use an existing list** option.
4. Select the **Browse** link.

5. When the **Select Data Source** window opens, select your existing data file.
6. If you do not see your data file, you may need to change the **Files of Type** to **All Files** and the **Look in** window to the drive/folder where the file is located.
7. If the data file is in Excel format, you will be asked which worksheet you want to use.
8. If the data file is in txt or csv format, you will be asked to **Select the encoding to make your file readable**. Select the **Windows (Default)** and click **OK**.
9. Your data file will be imported into the Mail Merge Recipients window and you are ready to proceed to step 4.

SETTING VIEW OPTIONS FOR MERGING

Discussion

Before you begin inserting merge fields into the main document, you should set two specific **View** options in the Options dialog box.

You should deselect the **Field codes** option so that the field codes are hidden. In this way, you cannot inadvertently change a field name and the chance of error in the Mail Merge process is reduced. In addition, the field codes must be hidden in order to view the merged documents properly.

It is also a good idea to set the **Field shading** list option to **Always**. When merge fields are shaded in gray, they are easy to recognize.

Procedures

1. Select the **Tools** menu.
2. Select the **Options** command.
3. Select the **View** tab.
4. Under **Show**, deselect the **Field codes** option.
5. Select the **Field shading** list.
6. Select **Always**.
7. Select **OK**.

INSERTING MERGE FIELDS INTO A DOCUMENT

Discussion

The next step in the Mail Merge process is to insert merge fields into the main document.

Merge fields are inserted at the insertion point. When inserted, a merge field is enclosed in chevrons (e.g., **<<First Name>>**); the merge field will be shaded if the **Always** option on the **View** page in the Options dialog box has been selected.

Clicking the **More items...** link in the **Mail Merge Step 4 of 6** task pane opens the Insert Merge Field dialog box. This dialog box is not a modeless dialog box; therefore, after you have inserted a merge field, you must close the dialog box to insert another merge field in a different document location. Another method is to insert all the fields at the top of the document first, and then move them to the desired position.

In addition to inserting the merge field, you must include all necessary spacing and punctuation, both before and after the inserted merge field. For example, if you are inserting the **City**, **State**, and **ZIP Code** fields in a return address, you must type a comma and a space after the **City** field and a space after the **State** field if that is how you want the address to appear.

Word also provides groupings for common main document items, including addresses, greeting lines, and postal bar codes. These groupings include all necessary spacing and punctuation. You can easily insert a grouped merge field by clicking the corresponding link in the **Mail Merge** task pane. When you click a grouped item link, a dialog box opens, from which you can select the desired formats and options.

*IMPORTANT NOTE: You can reposition the insertion point and add punctuation while inserting fields if you add the **Insert Merge Field** menu (which displays fields in a drop-down list) to the **Mail Merge** toolbar. You can add this menu by clicking the **Toolbar Options** button at the end of the **Mail Merge** toolbar, pointing to the **Add or Remove Buttons** command, pointing to the **Mail Merge** command, and finally selecting the **Insert Merge Field** command at the bottom of the list. Then click away from the list. To save this change, hold Shift and click **File** on the menubar. Select Save All. If promoted, give your document a name and click **Save**.*

You can detach a main document from its data source by clicking the **Main document setup** button on the **Mail Merge** toolbar and then selecting the **Normal Word document** option.

Word also provides buttons on the **Mail Merge** toolbar for inserting an address block or a greeting line, as well as the **Insert Merge Fields** button, which opens the Insert Merge Fields dialog box.

Procedures

1. Begin a mail merge and complete steps 1 through 3.
2. Under **Step 3 of 6**, select the **Next: Write your letter** link.
3. Position the insertion point where you want to insert the first merge field.
4. Under **Write your letter**, position the insertion point where you want to insert a grouped merge field and then select the desired grouped item link in the **Mail Merge** task pane, such as the **Address Block** or **Greeting Line**.

OR

5. Select the **More items** button and insert the mail merge fields one at a time, in the order that you want them to appear in the document. If you want to add punctuation and spacing, or if you want to move further down in the letter to insert additional items, you must close the **Insert Merge Field** window to do so. You can add punctuation and spacing at the end, if you'd like.

   See the IMPORTANT NOTE on the previous page for help in making this process easier.

6. When all of your fields are entered into the letter and your letter is written, you are ready to move on to step 5.

PREVIEWING MERGED DATA

Discussion

You can preview the main document with the merged data before you actually perform the mail merge.

Previewing the merged document is a good idea; you can use the preview to check for formatting and spelling errors.

If you find an error in the main document, you should correct it. If you find an error in a data record, you can correct it in the merged document, but you should also correct it in the data source if you plan to use it for another merge.

> You can also use the **Next Record** or **Previous Record** buttons on the **Mail Merge** toolbar to preview merged records.

Procedures

1. Begin a mail merge and proceed to step 4.
2. Under **Step 4 of 6**, select the **Next: Preview your letters** link.

3. Click the forward arrow >> in the task pane as desired to preview the next merged records.
4. Click the back arrow << in the task pane as desired to preview the previous records.

MERGING TO A NEW DOCUMENT

Discussion

After you have previewed the merged records, you can edit the main document or the recipient list as needed, or you can complete the merge. Editing the main document before you merge will affect all merged letters; editing a data source record permanently changes the record.

When you complete a merge, you can merge letters directly to the printer, or you can send them to a new document. Selecting the **Edit individual letters** link in the **Mail Merge Step 6 of 6** task pane automatically sends the merged letters to a new document so that you can make changes to individual letters. Changes made to individual letters in the merged document will not be saved back to the main document or to the data source. Once the changes have been made, you can save the merged document, or send the letters to the printer.

When you select the **Edit individual letters** link, you can also choose which data records you want to merge; all of them or only selected ones.

> You can exclude a record from a merge by deselecting the check box to its left in the Mail Merge Recipients dialog box.

> You can also use the **Merge to New Document** and **Merge to Printer** buttons on the **Mail Merge** toolbar to complete a merge.

> You can detach a main document from its data source by clicking the **Main document setup** button on the **Mail Merge** toolbar and then selecting the **Normal Word document** option.

Procedures

1. Begin a mail merge and proceed to step 5.
2. Under **Step 5 of 6**, select the **Next: Complete the merge** link.
3. Select the **Edit individual letters** link.
4. Select the records you want to merge.
5. Select **OK**.

SORTING RECORDS TO BE MERGED

Discussion

You can sort a data source by any field simply by clicking the corresponding column heading in the Mail Merge Recipients dialog box. For example, you may want to sort records in alphabetical order by the **Last Name** field or in chronological order by the **Birth Date** field. Clicking the column heading once sorts the records in ascending order; clicking it a second time changes the sort to descending order.

To sort on up to three fields, you can use the **(Advanced)** option, available from the drop-down list in the column heading of any field, to open the Filter and Sort dialog box. For example, if you have several people in a data source named Smith, you can sort the records first by the **Last Name** field and then by the **First Name** field.

The data source can also be filtered to display only specific records. The drop-down list in any column heading displays all the values for that field, as well as several filter options. For instance, you can filter the records to merge only those people from New Jersey by selecting **NJ** from the **State** field.

You can also select one of the filter options available on any column heading drop-down list. The **(Blanks)** option displays all the records in which the corresponding field is blank. The **(Nonblanks)** option displays all records in which the corresponding field contains any information at all. The **(All)** option displays all records. The **(Advanced)** option opens the Filter and Sort dialog box, in which you can create any number of filters.

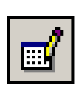
> The Filter and Sort dialog box sorts only those records in which the check box is selected in the Mail Merge Recipients dialog box.

> If the data source you want to sort or filter is not open, you can use the **Open Data Source** button on the **Mail Merge** toolbar to locate and open it.

> **!** When merging records, any existing filters and sorts in the Filter and Sort dialog box are applied. To remove existing filters or sorts, select the **Clear All** button on the appropriate page.

Procedures

1. Begin a mail merge, create or select a data source, and insert the merge fields into the main document, if necessary.

2. Click the **Mail Merge Recipients** button  on the **Mail Merge** toolbar.

3. Click the column heading of the field by which you want to sort.
4. Click the arrow on the column heading of the field you want to sort.
5. Select **(Advanced...)**.
6. Select the **Sort Records** tab.
7. Select the **Sort by** list.
8. Select the field by which you want to sort.
9. Select the desired sort order.
10. To sort by additional fields, select one or both **Then by** lists and the desired fields and sort orders.
11. Select **OK** to close the Filter and Sort dialog box.
12. Select **OK** to close the Mail Merge Recipients dialog box.

MERGING TO THE PRINTER

Discussion

Once you have reviewed the merged documents, you can merge them directly to the printer. This option allows you to easily print merged documents.

> You can also click the **Merge to Printer** button on the **Mail Merge** toolbar to send the merged documents to the printer.

> You can detach a main document from its data source by clicking the **Main document setup** button on the **Mail Merge** toolbar and then selecting the **Normal Word document** option.

Procedures

1. Begin a mail merge and proceed to step 6.
2. Under **Merge**, select the **Print** link.
3. Select the records you want to merge.
4. Select **OK**.
5. Select **OK**.

LESSON 2 -
MERGING MAILING LABELS, ENVELOPES & DIRECTORIES

USING MAILING LABELS & ENVELOPES

Discussion

You can use Mail Merge to create mailing labels and envelopes. Since you do not have to use all the fields in a data source, you can use the same data source for both form letters and mailing labels/envelopes; it is not necessary to create separate data sources for each.

You create labels using the following six steps:

1. Identify the main document.
2. Set up the main document.
3. Create or identify the data source.
4. Insert merge fields into the main document.
5. Preview the merged labels.
6. Perform the merge.

To create labels, you must select the **Labels** option in the **Mail Merge** task pane for the main document. To create envelopes, you must select the **Envelopes** option in the **Mail Merge** task pane for the main document.

CREATING MAILING LABELS/ENVELOPES

Discussion

The first step in creating mailing labels and envelopes is to create or open the main document. After the main document has been identified, you can select which type of labels/envelopes you want to create. Word offers many standard label/envelope sizes.

Procedures

1. Create a new, blank document, if necessary.
2. Select the **Tools** menu.

3. Select the **Letters and Mailings** command.
4. Select the **Mail Merge Wizard** command.
5. Under **Select document type**, select the **Labels** or **Envelopes** option.

Selecting Label/ Envelope Options

Discussion

After you have decided to create labels or envelopes, you can set up the main document. To set up the main document, you must specify which type of labels/envelopes you want to create and what printer you plan on using.

Procedures

1. Begin a mail merge and select the **Labels or Envelopes** option in step 1.
2. Under **Step 1 of 6**, select the **Next: Starting document** link.
3. Under **Select starting document**, select the **Change document layout** option.
4. Under **Change document layout**, select the **Label options** or **Envelope Options** link.
5. Select the **Label** or **Envelope** type that you are using.
6. If you are creating labels, refer to the label number on the outside of your box of labels.
7. If you are creating envelopes, select the envelope size. You can also change the font and location of the delivery and return addresses.
8. Click **OK**.

Attaching a Data Source

Discussion

Once you have created the main document for mailing labels/envelopes, you must create or identify the data source. The data source contains the variable information to be inserted into the labels/ envelopes (such as names and addresses). You can either open an existing data source or create a new one.

Procedures

1. Begin a mail merge and proceed to step 2.
2. Under **Step 2 of 6**, select the **Next: Select recipients** link.
3. Under **Select recipients**, select the **Use an existing list** option.
4. Under **Use an existing list**, select the **Browse** link.
5. Select the **Look in** list.
6. Select the drive or folder where the data source is stored and select the desired data source.
7. Select **Open** and then **OK**.

INSERTING LABEL/ENVELOPE MERGE FIELDS

Discussion

Label/envelope merge fields are inserted directly into the main document. You set up the first label or envelope as desired, making sure to include all the necessary punctuation and spacing. For example, if you insert the **Title** and **LastName** fields on the first line, you should include a space between the two merge fields.

For labels, after the first label has been set up, then you use the **Update all labels** button to copy the merge fields to the rest of the labels.

For envelopes, you do not have an update button. Simply click on the next step in the Mail Merge Wizard to preview your envelopes.

Procedures

1. Begin a mail merge and proceed to step 3.
2. Under **Step 3 of 6**, select the **Next: Arrange your labels** or **Arrange your envelope** link.
3. Position the insertion point in the first label, if necessary. For envelopes, position the insertion point in the envelope address area.
4. To insert individual fields, select the **More items** link under **Arrange your labels** or **Arrange your envelope**.
5. Select the field you want to insert. Select **Insert**.
6. Insert additional merge fields as desired.

7. Select **Close**.
8. Insert punctuation and spacing as needed.
9. To insert an address block, select the **Address block** link under **Arrange your labels**.
10. Select or deselect options as desired.
11. Select **OK**.
12. For labels, select **Update all labels**.
13. For envelopes, click **Next: Preview Your Envelopes** at the bottom of the Mail Merge task pane.

MERGING LABELS TO A NEW DOCUMENT

Discussion

Once you have set up the main document and selected the data source, you are ready to perform the merge.

You should view your labels before printing so that you can make any necessary changes. If you find typographic errors, you can correct them in the merged document, but you must also correct them in the data source if you intend to use it again.

After you have completed the merge, you can print or edit the merged labels as desired.

Procedures

1. Begin a mail merge and proceed to step 4.
2. Under **Step 4 of 6**, select the **Next: Preview your labels** or **Next: Preview your labels** link.
3. Under **Step 5 of 6**, select the **Next: Complete the merge** link.
4. Print or edit the merged labels or envelopes, as desired.

CREATING A DIRECTORY

Discussion

In addition to form letters, mailing labels, and envelopes, you can create directories, catalogs, and mailing lists by creating a Mail Merge directory. Unlike a form letter, which merges only one record per page, a directory merges multiple records to the same page. The **Directory** feature is useful for creating any type of list or filling in tables.

The directory main document should only include the desired merge fields and information that you want repeated for each record. If you create the following directory main document, the text **Name** and **Region** will appear to the left of each merged record. To separate the records, you should include at least one or two blank lines after the last merge field.

Name: <<Customer Name>>
Region: <<Region>>

Directory main documents can be used to merge data into a table. The main document table should only be a single row, but it can contain multiple columns. You can enter multiple merge fields into each cell.

<<First>> <<Last>>	<<Department>>	<<Phone>>

Table column headings and additional text can be added after the table has been merged.

> You can format the directory main document to prevent column or page breaks from splitting records. To keep table rows together, deselect the **Allow row to break across pages option** on the **Row** page in the Table Properties dialog box. To keep paragraphs together, select the **Keep lines together** and **Keep with next** options on the **Line and Page Breaks** page in the Paragraphs dialog box.

Procedures

1. Select the **Tools** menu.
2. Select the **Letters and Mailings** command.
3. Select the **Mail Merge Wizard** command.
4. Under **Select document type**, select the **Directory** option.
5. Under **Step 1 of 6**, select the **Next: Starting document** link.
6. Under **Select starting document**, select the desired option.

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