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Mail Merge in Microsoft Word 2003

For Windows

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As California's community colleges take on the challenge of effectively integrating technology into instruction and services, they do so with the goals of increased student access and improved student outcomes. The @ONE project has been funded by the California Community Colleges Chancellor's Office to build a statewide training infrastructure with an electronic learning community as an integral support and connection for faculty throughout the state. The @ONE project is a faculty driven community college consortium that is dedicated to providing resources to community college faculty and staff to support learning and students in the 21st century.

@ONE Mission

The mission of @ONE is to assist California Community College faculty and staff to enhance student learning and success through expanded uses of effective technology by providing training, online resources and support.

About this Guide

This booklet contains information about merging documents in Office 2003 and assumes familiarity with the Windows operating system and Microsoft Word 2003. **In order to successfully use Mail Merge, you need to have familiarity with creating tables in Word OR with creating spreadsheets in Excel.** You can find out more information on each of these tools/applications at the @ONE website: <http://one.evc.edu> from the "Tables in Microsoft Word 2003" booklet and the "Introduction to Microsoft Excel 2003" booklet.

We would like to thank De Anza College for providing us with the original documentation from their "Merging Documents in Office 97/98" that provided the framework for this material.

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About Merging

Mail merge is used when you want to create form letters, mailing labels or envelopes in a Word document using data from a database of names and addresses. When you use the Mail Merge feature you are taking information from one source/document in Office 2003 and placing it into a Word document (e.g. a form letter, mailing labels or envelope).

Before beginning work with merging, there are some key terms you need to understand:

- Main Document The document containing the actual form letter that you want data to be applied to.
- Data Source The Word document/table or Excel spreadsheet where the data to be applied to your main document are located.
- Mail Merge Helper The helper window that appears to assist you with the mail merge process.
- Mail Merge Toolbar This appears once you have specified your Main Document and Data Source and have merged the documents. It allows you to modify your Main Document/Form Letter.
- Merge Field The data located in your Data Source that you want to appear in your Main Document/Form Letter. For instance, if you had a Data Source pulled from a Word table and that table contained headings such as First Name and Last Name, the merge fields you could place in your Main Document would be First_Name and Last_Name.

Form Letters

You can merge names, addresses and other information from existing Word tables or Excel spreadsheets into a form letter, where a different letter is automatically created for every person in the existing Word table or Excel spreadsheet.

Creating the Main Document/Form Letter

1. Start a new, blank document in Word.
2. Type in the content of your form letter. To make placement of data from your data source easier, you may want to press enter once to give yourself an extra line above your letter text.

Here is some text you can use as an example:

<p>Dear</p> <p>Thank you for your generous donation to the department. Your contribution makes it possible for us to obtain new equipment and offer our students the best facilities possible in which to learn.</p> <p>Your contribution will be listed in our upcoming issue of Student Voice, our campus' newspaper. Expect your courtesy copy of this newspaper the week of October 1.</p> <p>Thank you again.</p> <p>Sincerely,</p> <p>Department Head</p>

3. Once you have created your form letter, save your document. For this practice, save your file on your desktop and call it My Letter.

Create Your Data Source

If you don't have an existing data source (either a Word table or an Excel spreadsheet) to use with your form letter, you will need to create one. Each table or spreadsheet column should have a heading. You should also try to avoid blank lines/rows in your table/spreadsheet or this will create blank form letters, envelopes, or mailing labels.

1. Start a new blank document in Word and create a table with the correct number of rows and columns for your data OR start a new workbook in Excel.
2. Enter your data. Here is a sample data source you can create for practice, either in Excel or in a table in Word:

First	Last	Title	Amount	Department	Dept. Head
Dan	Johnson	Mr.	\$150	Biology	Julie Smith
Karen	Brown	Mrs.	\$2000	Computer Science	Edith Bradford
Leslie	Waters	Ms.	\$450	Mathematics	Steve Hampton

3. Save your document/spreadsheet. For this example, save your file on your desktop and call it My Addresses.

Note: For more information on tables in Word, see the “Tables in Microsoft Word 2003” booklet. For more information on Spreadsheets in Excel, see the “Introduction to Microsoft Excel 2003” booklet. These booklets can be found at <http://one.evc.edu/>

Mail Merge

Choose your Main Document and Data Source

1. Open the Form Letter you created on page 2 (“My Letter”)
2. Go to the Tools pull-down menu and select Letters and Mailings→Mail Merge. The Mail Merge task pane will open on the right hand side.
3. Click on the Letters button, and then Next at the bottom of the task pane to move to Step 2.
4. The next pane appears, asking you if you want to set up your letter. Under Select starting document, choose “Use the current document” since you’ve already created your letter. Click Next at the bottom of the task pane to go to Step 3.
5. Under Select recipients, click on “Use an existing list”, and then “Browse” under “Use an existing list.”
6. Locate your data source in the window that appears and double-click on it. If you created a data source using the instructions on the previous page, you should select the “My Addresses” file on your desktop. Click Next when you have selected your data source, to go to Step 4.
7. Since you have already prepared your form letter, you can modify your recipient information, which is discussed in the next section.



Place Fields in your Form Letter

You can set up certain fields in your form letter by using items listed in the task pane or Mail Merge toolbar. If you do not see the Mail Merge Toolbar, go to View→Toolbars→Mail Merge.



1. Place your insertion point where you want your first Merge Field to appear, creating spaces and punctuation as necessary.
2. Click on the Insert Merge Fields button in the toolbar, or “More items” hyperlink in the task pane. An Insert Merge field dialog box appears.
3. Select the field you want to insert.
For instance, if you want to place a person’s title and last name in your form letter after “Dear,” you would
 - click after “Dear” and insert a space,
 - insert the “Title” field and insert a space, and
 - insert the “Last” field, and insert a comma.
4. Continue placing fields into your document where necessary. If you are using the sample letter from page two, your document should look similar to the one on the next page when you’re finished inserting fields.



Dear «Title» «Last»

Thank you for your generous donation to the department. Your contribution makes it possible for us to obtain new equipment and offer our students the best facilities possible in which to learn.

Your contribution will be listed in our upcoming issue of Student Voice, our campus’ newspaper. Expect your courtesy copy of this newspaper the week of October 1.

Thank you again.

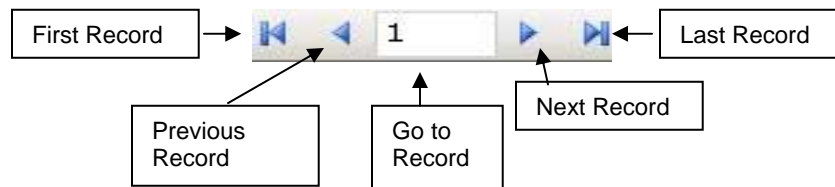
Sincerely,

«Dept_Head»
Department Head

Preview Your Form Letter

1. Click the View Merged Data button in your Mail Merge Toolbar, or Next to go to Step 5 in your task pane, to see a sample of your form letter as it will look with information merged into it from your data source (instead of the data fields). Click this button again to view the fields in your form letter.
2. With the View Merged Data button selected, use the navigational buttons to look through your form letters.





In View Merged Data mode, record 1 of the above letter would look like the sample below:

Dear Mr. Johnson

Thank you for your generous donation to the department. Your contribution makes it possible for us to obtain new equipment and offer our students the best facilities possible in which to learn.

Your contribution will be listed in our upcoming issue of Student Voice, our campus' newspaper. Expect your courtesy copy of this newspaper the week of October 1.

Thank you again.

Sincerely,

Julie Smith
Department Head

Checking your Mail Merge Data

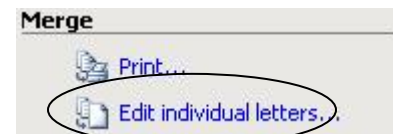
If you are working with a particularly large data source to create form letters, envelopes, or labels, you may want to use the Check For Errors button in your Mail Merge Toolbar. Do this before you merge your data.



Merging Data

Once you've previewed your form letter, it's time to merge the data.

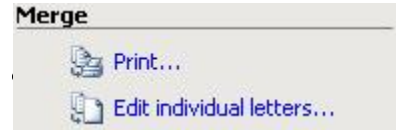
1. Click the Merge to New Document button in your Mail Merge Toolbar, or click Next in your task pane to go to Step 6, and click on the Edit individual letters hyperlink. The Merge to New Document window will appear.



2. You can also select other merge options:

Merge to Printer

When you choose this option, the Merge to Printer dialogue box will open, allowing you to select options for printing your form letters.



Merge to a New Document

A new file will be created with all your form letters contained in it, each on a different page. This option is best if you want to make individual additions to each form letter. For example, if you want to type a special note on a few of the form letters, you'll want to choose this option.

Merge to Electronic Mail

This option only works with the Microsoft Outlook application and in order to use this option, you need an email field in your data source. When you click on the Merge to Email button, a dialogue box will open. You will need to choose the field from your data source that contains the email addresses and type in your subject line. When you click OK, Microsoft Outlook will automatically launch and the emails will be sent to your outbox. When you send mail, those messages will be sent.

3. Specify the records you want to merge. If you don't want to create form letters for all the records in your database, you can specify that using the From and To boxes in the dialogue box.
4. Click OK.

Creating Envelopes and Labels Using Mail Merge

Creating envelopes and labels is similar to creating form letters.

To Create Envelopes

1. Start a new blank document in Word.
2. Open the Mail Merge Helper (Tools→Letters and Mailings→Mail Merge). The Mail Merge task pane appears on the right hand side.
3. Click on the Envelopes button, and then Next to go to Step 2. Click on the "Envelope options" hyperlink to specify your envelope and printing options. Click Next to go to Step 3 when you are finished.
4. Chose your data source (page 3) and then click Next to go to Step 4.
5. To arrange your envelope, insert your Merge Fields



- into the space provided in the Envelope Address window, inserting spaces and punctuation as necessary.
6. Click Next to go to Step 5 and preview your envelope. You will see your envelope with the data fields visible.
 7. Type in your return address, if necessary.
 8. Click Next to go to Step 6 and merge your envelopes (page 6).

To Create Labels

1. Start a new blank document in Word.
2. Open the Mail Merge task pane (Tools→Letters and Mailings→Mail Merge).
3. Click on Labels, and then Next to go to Step 2. Click on the “Label options” hyperlink to specify your label and printing options. Click Next to go to Step 3.
4. Choose your data source (page 3) and then Next to go to Step 4.
5. To arrange your labels, insert your Merge Fields in the space provided in the Label Address window, inserting spaces and punctuation as necessary.
6. Click Next to go to Step 5 and preview your labels. You will see your labels with the data fields visible.
7. Click Next to go to Step 6 and merge your labels (page 6).



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