

ISSInfo



Mail Merge Using MS Office XP Word

Setting Up a Mail Merge

A mail merge involves creating a *main document* that contains elements (text, graphics, tables, other) that are to remain constant and inserting individualized data from a data source to create personalized letters, labels, envelopes, other. The latter document is referred to as the *data document*.

To begin the mail merge process:

- Select the **Tools** menu
- Point to **Letters and Mailings**
- Click **Mail Merge Wizard**.

*Note: To work outside the wizard, select the **Mail Merge Toolbar** option instead of the Wizard option. The buttons are arranged in sequence from left to right.*

Select Document Type

The following describes the six-step process to perform a mail merge using the Wizard.

Step 1: Select document type.
(letters, e-mail messages, envelopes, labels or directory)

Click the **Next: Start document** link at the bottom of the wizard pane.

Create Main Document

Step 2: Set up and display the letter.
Do one of the following:

- To start with the document currently shown in the document window:
 - Click **Use the current document**.
 - Either type the letter in the document window or wait until the wizard prompts to do so in a later step.

or

- To start with a template:
 - Click **Start** from a template.
 - Click **Select template**.
 - On the **Mail Merge tab** in the **Select Template** dialog box, select a template, and then click **OK**.

or

Create Data Source Connections

- To start with any other existing document:
 - Click **Start** from existing document.
 - In the **Start from existing** box, select the document you want, and then click **Open**.

If the document is not visible, click **More files**, and then click **Open**. In the **Open** dialog box, locate the document you want, and then click **Open**.

Click **Next: Select recipients**

Step 3: Select recipients

To locate or create a data source and then select recipients, do one of the following:

- Connect to an existing list such as a database of office address list
 - Under **Select recipients**, click **Use an existing list**.
 - Click **Browse**.
 - In the **Select Data Source** dialog box, locate and click the data source.
 - By default Word opens the **My Data Sources** folder.
 - Click **Open**.
 - Depending on the type of data source, other dialog boxes may appear asking for specific information; e.g., if data source is an Excel worksheet that has information on multiple tabs, select the tab containing the information, and then click OK.

All of the entries in the data source appear in the **Mail Merge Recipients** dialog box, where the list of recipients can be refined.

or

- Create a simple new address list
 - Under **Select recipients**, click **Type a new list**.
 - Click **Create**.
 - In the **New Address List** dialog box, type the information you want to include for the first entry under **Enter Address information**; e.g., title, name, and address information. Some fields may be left blank.
 - To complete the first entry and move on to a new entry, click **New Entry**.
 - Repeat the last two steps all address entries have been made, and then click **Close**.
 - In the **Save Address List** dialog box, type a name for the address list in the **File name** box, and select a folder in which to save the list.

By default, the address list is saved in the **My Data Sources** folder. It's best to keep the address list here because this is also the default folder in which Word looks for data sources. To use this address list in a later mail merge, navigating through files and folders to locate it will be unnecessary.

Click **Save**.

*Note: All of the contacts in your new list appear in the **Mail Merge Recipients** dialog box, where the list of recipients can be refined.*

In the **Mail Merge Recipients** dialog box, select records to be merged.

Click **Next: Write your letter**.

Create Main Document

Step 4: Complete the letter and add merge fields

- If not already added to the main document, type or cut and paste the text to appear in every form letter.
- Insert merge fields where merge names, addresses, and other data from the data source are to appear by using the following procedure.
 - In the main document click where the field is to be inserted.
 - Insert any of the following:
 - Address block with name, address, and other information
 - Greeting line

For other fields of information, click **More items** and follow the prompts.

Click **Next: Preview your letters**.

Preview the Merged Document

Step 5: To preview the letters and fine-tune the recipient list.

Do one of the following:

- To preview the merged items, click the double chevron buttons located in the wizard pane.
- or**
- To locate and preview a specific item, click Find a recipient, and then enter the search criteria in the Find Entry dialog box. For Help on an option, click the question mark, and then click the option.
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- If necessary, fine-tune the recipient list; do one of the following:
 - To exclude a particular recipient from the merge, click **Exclude this recipient**.
 - To change the list of recipients, click **Edit recipient list**, and then make your changes in the **Mail Merge Recipients** dialog box.

Click **Next: Complete the merge**.

Complete the Merge

Step 6: **Complete the merge.**

Do any of the following:

- To personalize individual documents, edit the information in the resulting merged document.
 - Click Edit individual letters.
 - In the Merge to New Document dialog box, select the records you want to merge.
 - For Help on an option, click the question mark, and then click the option.
 - Click OK.
 - (Microsoft Word creates and opens a new merged document. The main document also remains open; switch back to it to make a

- change to all documents.)
- Scroll to the information to edit and make changes.
- Print or save the document.
- Print the letters do one of the following:
 - If items were personalized and the merged document is active:
 - On the **File** menu, click **Print**.
 - Select the options you want.
 - If you want to print directly from the Mail Merge Wizard:
 - In Step 6 of the **Mail Merge Wizard** (Complete the merge), click **Print**.
 - In the **Merge to Printer** dialog box, do one of the following, and then click OK.
 - To print all the documents, click **All**.
 - To print the document that you see in the document window, click **Current record**.
 - To print a range of documents, click **From**, and then type the record numbers in the **From** and **To** boxes.
 - In the **Print** dialog box, select from options provided.

For Help on an option, click the question mark and then click the option.

If you have questions or need assistance, please call the Help Desk at (805) 493-3698 or send an e-mail to helpdesk@callutheran.edu.