

Mail Merge





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Introduction to Mail Merge

Overview of Mail Merge

Mail merge is the process of creating custom mailings. The most common mail merge documents are letters, labels, envelopes, and e-mails. This feature allows you to create these documents that are intended for a few people or thousands of people all at the same time. The mail merge process available in Word 2003 is a step-by-step process that has been significantly revamped from the Office 2000 version. This process uses the Mail Merge Wizard, and it is displayed in the side Task Pane.

When you are using the mail merge feature you must have a main document and a data source. It is imperative that you understand what these two concepts are and how they are involved in this process. The main document contains the text that you want to remain constant. This is the document that you create and you tell Word how to format. The main document is somewhat of a template in that it does not show the result, it just shows the instructions as to what the final product will look like once the information from the data source is identified. The data source contains the information that you want to change from one letter, label, envelope, or e-mail to another. The data source will typically be an Access Database table, Excel spreadsheet, Outlook Contacts list, or a Word table.

Note: If you turn an existing document into a mail merge main document and later want to turn it back into a regular document, click Main Document Setup on the Mail Merge toolbar, choose Normal Word Document and select OK.

Consequently, the steps to complete a mail merge are as follows:

- 1. **Select document type**: Determine if you want to create Letters, E-mail messages, Envelopes, Labels, or a Directory.
- 2. Select starting document: Determine if you want to use the current document, change the current documents layout (from regular document to labels or envelopes), or if you want to open an existing document.
- 3. **Change document layout**: For labels and envelopes only. Select the appropriate label and envelope size.
- 4. Select recipients: Decide what data source to use and locate or create it.
- 5. **Arrange your labels/Write the letter**: Determine how you want to layout the label, envelope, e-mail, or letter with the merge fields.
- 6. **Preview**: Proof the labels, envelope, e-mail, or letter and make changes if necessary.
- 7. **Complete the merge**: Print or edit the merged document.

Mail Merge Toolbar

The Word 2003 mail merge toolbar has been changed significantly from the Word 2000 toolbar. When you are first working with the mail merge process, it is recommended that you use the Mail Merge Wizard side pane to get through the process. The mail merge toolbar provides many shortcuts to the task pane and it also provides tools that are in addition to the Wizard. If you place the cursor over the icon, the name for the icon will appear.

The mail merge toolbar can be accessed by:

- Selecting from the menu View, Toolbars, Mail Merge.
- Selecting from the menu Tools, Letter and Mailings, Show Mail Merge Toolbar.
- Right clicking in the gray area at the top of the working window and select Mail Merge.

The Mail Merge Toolbar:

Mail Merge 🔲 | Insert Word Field 🕶 | 🐇 📴 | 🕅 NUPBB 👌 🔳 🛒 4

Note: The toolbar buttons only become available as you reach the stage of the mail merge process where they can be used.

The toolbar and the buttons will not be explored in this manual, as you become more comfortable using mail merge, this may be an area for you to revisit.

Mail Merge Wizard Task Pane

A new addition to Mail Merge in Word XP was the use of Task Panes, and this feature is still used in Word 2003. A task pane is a side pane that appears on the right side of Words editing window, which allows you to choose from all options available to perform a task. Furthermore, the Mail Merge Wizard task pane appears as soon as you make the selection to start the mail merge process. The Word window will appear as follows:



On the top of the task pane there are some additional navigation tools.



- The arrow buttons take you backwards and forwards through the task panes that have been active.
- The Home button will take you to the Getting Started task pane.
- The down arrow provides a short menu for common Task Panes such as Getting Started, Help, Search Results, Clip Art, Research, Clipboard, New Document Styles and Formatting, Reveal Formatting, Mail Merge, and others. If selected, the process can be done in the task pane without affecting the editing window.
- The [X] button closes the task pane.

Mail Merge Terms

When you begin using Mail Merge there may be some terms that you are unfamiliar with. Some of these terms must be understood in order for you to have a good understanding of the Mail Merge Process.

Term	Definition
Address Block	Refers to the area of the main document that contains the name,
	address, the, and company.
	For example:
	Joe Smith
	1234 Main Street
	Akron, Ohio 44325
Data Source	Data sources contain the information that will be used to create
Data Source	items with mail merge. For example, a data source can include
	fields such as name and address. Typically, the data source is an
	Access table. Excel spreadsheet. Word table, or an Outlook
	Contacts list.
Filter Records	Enables you to choose which records to print based on detailed
	criteria that you specify.
Mail Merge	Process of creating custom mailings or other documents.
Main Document	Main Documents are used as templates in mail merge. Main
	documents contain the information such as text or graphics that
	will appear in each item created using mail merge.
Mail Merge Wizard	Use the Mail Merge Wizard to create mail merge documents. It
	helps you organize your data and print the resulting items.
Merge Field	Merge Fields are placeholders used in the main document to let
	Word know where to place information from the data source.
Sort Records	Enables you to perform detailed sorts, up to three levels.
Task Pane	A side pane that appears on the right side of Words editing
	window, which allows you to choose from all the options
	available to perform a task.

Creating Labels and Envelopes

The first process that will be outlined in mail merge is creating labels. If you need to create envelopes, the process is the same as creating labels so substitute envelopes for labels. Any place where there is a significant difference there will be a "**Note**" for your reference.

You may find it easier to create labels and envelopes in Mail Merge if you display hidden characters such as spaces and paragraph marks by clicking on the **Show/Hide Paragraph**

Marks [¶] button on the standard toolbar.

What You Do	What you see
 What You Do Open Word and if necessary, click th New Blank Document button on the Standard Toolbar. 	e The Word window opens:
 Select from the menu Tools, Letters 	The Tools menu:
and Mailings, Mail Merge Wizard.	Image Image Speech Image
	Letters and Mailings Mail Merge Wizard
	Tools on the Web Show Mail Merge <u>T</u> oolbar
	Customize Envelopes and Labels
	Options

What You Do	What you see
3. The Mail Merge Wizard task pane returns.	The Word window after you open Mail Merge.
 4. You are ready for the first step. You will want to follow the task pane from top to bottom. The first step is to select the document type. At the top of the task pane under the <i>Select document type</i> title, select the radio button for Envelopes or Labels. The bottom of the task pane will adjust to the selection you just made. You are now ready to go to the next step. Click the link, Next: Starting document, at the bottom of the task pane to continue. 	The first step in the task pane:

What You Do	What you see
 What You Do 5. At the top of the task pane, under the title, <i>Select starting document</i>, determine how you want the mailing labels set up. When working with labels, you will have two options available to you: Change document layout: This allows you to adjust the document in the editing window to work with labels. Start from existing document: Allows you to select an existing mail merge file to work with. If you select 	What you see The task pane for Step 2: Mail Merge Select starting document How do you want to set up your mailing labels? Use the current document Change document layout Start from existing document Change document layout Click Label options to choose a label size. Label options
file to work with. If you select this option, Word displays a list of any mail merge documents that you have worked with recently. If you are starting a new mail merge, select, Change document layout .	Step 2 of 6 Previous: Select recipients Previous: Select document type

What You Do What you see 6. In the middle of the task pane under The Label Option box returns: Label Options X the title, Change document layout, select the link for Label options. Here Printer information 🔿 Dot <u>m</u>atrix you can select the product number for $\textcircled{\bullet}$ Laser and ink jet Tray: Default tray (Automatically Sele 💌 the label you will be using. Label information Label products: Avery standard • Product number: Select the **Product Number** and verify Label information 8377 - Business Card 8387 - Post Card Type: Address on the right under Label information 8389 - Post Card Height: 1" 8460 - Address that the data is correct for the labels Width: 2.63" 8462 - Address 8463 - Shipping Letter (8 1/2 × 11 in) Page size: that you will be using. 8660 - Addres Select OK. New Label... Details... OK Cancel *Note for Envelopes*: The Envelope Mail Merge • x Option box returns. Select the correct 😔 | 📀 | 🚮 envelope size and select OK. Select starting document How do you want to set up your mailing labels? When you return, you may notice Use the current document Change document layout some changes in the editing window. Start from existing document This is just Word adjusting/formatting Change document layout the main document to reflect the Click Label options to choose a label size. changes you just made. Label options... You are ready for the next step. Click on the link, Next: Select recipients, at the bottom of the task pane. *Note*: You can go to the previous task panes (previous steps) by clicking on the **Previous** link at the bottom of the task pane. This is true for all steps from this point forward. Step 2 of 6 Next: Select recipients Previous: Select document type

What You Do		What you see
 7. At the top of the task pane, title <i>Select recipients</i>, you widentify the data source. The selections that you have ava Use an existing list: See option if you already had of names that you want You would probably had stored in an Access data spreadsheet, a Word tabe as a CSV file. Select from Outlook conserved free Select this option to select recipients out of your C in Outlook Mail. Type a new list: This of allow you to create a new using an Access database of the current mail mergy. Most often, you will be select this option, you will be select this option, you will be select the file. In the middl task pane, under the title, <i>U existing list</i> select the Brow 	under the will need to ne ailable are: elect this ve the list to draw on. ve this list abase, Excel ole, or saved ontacts: ect ontacts list option will w list, se, as part ge process. ecting the list. After will need to e of the se an vse link.	The task pane for Step 3: Mail Merge
 8. The Select Data Source box Locate the file that will be u data source and select the C button. <i>Note</i>: You may need to adj field, Files of type: to All I Sources. 	a returns. used as the)pen ust the Data	Select Data Source Dox: Select Data Source Look jri My Documents Wyszynski viewiet Bestop Wyszynski viewiet Wy Conputer Bestop Wy Decuments Wy data Sources Wy Documents Wy data Sources Wy Decuments Wy data Sources Wy Decuments Wy Bestores Wy Decuments Wy Bestores Wy Nocuments Bestop Wy Netwerk Bestop Wy Netwerk Bestop Wy Documents Bestop Wy Decuments Bestop Wy Documents Bestop Wy Documents Bestop Wy Documents Bestop Wy Documents Bestop Wy Netwerk File soft Synex Wy Netwerk File soft Synex Wy Decuments La Data Sources Wy Decuments La Data Sources

What You Do	What you see
9. A box may appear asking you to select	The Select Table box returns:
a table. If this box appears, select the	Select Table
table or spreadsheet that contains your	Name Description Modified Created Type
data	Sheet1\$ 2/2/2005 2:30:01 PM 2/2/2005 2:30:01 PM TABLE III Sheet24 2/2/2005 2:30:01 PM 2/2/2005 2:30:01 PM TABLE
data.	Image: Sheet3\$ 2/2/2005 2:30:01 PM 2/2/2005 2:30:01 PM PADLE
Select OK.	
<i>Note:</i> You will notice some changes	First row of data contains column bearlers OK Cancel
in the editing window again. This is just Word adjusting/formatting the main document to reflect the selection you just made.	

OK

What You Do

10. The Mail Merge Recipients box returns. In this step, you need to select who will get your message.

The Mail Merge Recipients box shows all records that are listed in the data source. This box will allow you to remove individual people by clearing the check box to the left of the first column.

You can also **Select All** or **Clear All** by selecting the corresponding buttons at the bottom of the box.

To sort all the names in the mailing list, click on the field name you want to sort by.

You also have additional options available by clicking on the downward pointing arrow. The options that you have available are:

All: Displays all records, will turn off filtering based on specific field.

Blank: Displays records containing no information for that field.

Nonblanks: Displays only records that do contain information in that field.

Advanced: Select this option to get even more control over the search. If you select this option, the Filter and Sort box returns. See the next page (the "**Note**") for details.

After you select (or unselect), sort, and filter the Recipients list, select **OK**.

What you see The Mail Merge Recipient

The Mail Merge Recipients box:

Mail Merge Recipi<u>ents</u> X To sort the list, click the appropriate column heading. To narrow down the recipients displayed by a specific criteria, such as by city, click the arrow next to the column heading. Use the check boxes or buttons to add or remove recipients from the mail merge. List of recipients: ▼ Ln... ▼ Fn... ▼ Address ▼ City ▼ State ▼ Z.. Wise Sara 111 Cedar Rd Akron Ohio 44313 Wise Sam Sue Pam Smith 444 Main St Akron 876 Front St Akron Ohio 44313 Jones Thomas 876 Front St Akron 222 Market St Akron Ohio Ohio 44313 44313 Select All Clear All Refresh

With the Sort menu dropped down:

<u>V</u>alidate

Eind..

lail Merge Recipients
To sort the list, click the appropriate column heading. To narrow down the recipients displayed by a specific criteria, such as by city, click the arrow next to the column heading. Use the check boxes or buttors to add or remove recipients from the mail merge.
Select All Clear All Refresh
Eind Edit Validate OK

What You Do	What you see
Note: If you need to perform a Filter or Sort, you would select Advanced from the menu as seen on the previous page. The Filter and Sort box returns	
On the Filter Records tab, you can filter the recipient list. The fields are as follows: Field : Select any field from the data source. This is the field that you want to filter based on. Comparison : Select a phrase such as Equal to or Contains. Compare to : This is what you want the filter to locate and use in the final merge.	The Filter tab:
On the Sort Records tab, you can sort by any field contained in the data source. You can sort up to three levels. The fields on the Sort tab are as follows: Sort by : Choose from the dropdown list, the field that you want to sort by. Ascending or Descending : Select the radio button for the direction you want the sort to go.	The Sort tab: Filter and Sort Filter Records Signt Records Sort by: Finame
Select OK on either tab to accept the changes. Select OK again to return to the wizard.	

What You Do	What you see
11. The task pane returns and under the	The Recipient task pane:
title, Use an existing list, the filename	Mail Merge 🔹 🗙
you selected is shown.	③ ③ ▲
If you need to change the data source, select the link for Select a different list . This will allow you to select a different file. If you need to edit the Recipients list now or at a later time, select the Edit recipient list link.	Select recipients Image: Use an existing list Select from Outlook contacts Type a new list Use an existing list Currently, your recipients are selected from: [Sheet1\$] in "MailMerge2003.xls" Select a different list Edit recipient list
You are ready for the next step. Click on the link, Next: Arrange your labels , at the bottom of the task pane.	<u>Step 3 of 6</u>
	 Next: Arrange your labels Previous: Starting document

What You Do	What you see
12. At the top of the task pane, under the	The next step returns:
title Arrange your labels, you will	Mail Merge 🗸 🗙
need to layout the label with the	
appropriate fields.	Arrange your labels
For labels, select Address Block . This	If you have not already done so, lay out your label using the first label on the sheet
refers to the portion of a main document containing the recipient's name and address.	To add recipient information to your label, click a location in the first label, and then click one of the items below.
An Address Block typically looks as follows:	Greeting line Greeting line Eitectronic postage IIII Postal bar code
Mrs. Sally Zippy 123 Carroll Street Akron, Ohio 44321	More items When you have finished arranging your label, click Next. Then you can preview each recipient's label and make any individual changes.
Note for Envelopes : Before you click on the link for Address Block , click with the insertion point in the middle of the envelope where the Address Block will appear. The insertion point	Replicate labels You can copy the layout of the first label to the other labels on the page by clicking the button below. Update all labels
defaults in the upper left corner of the envelope and this is NOT where you	Step 4 of 6 Next: Preview your labels
addresses to appear.	 Previous: Select recipients
13. The Insert Address Block box returns.	The Insert Address Block box:
Make the necessary selections/changes for the name format, company name, and postal address. Verify that the preview is accurate. Click on the Match Fields button at the bottom to match the data source fields to the Address Block template.	Specify address elements ✓ Insert recipient's name in this format: Joshua Q. Randall Jr. Joshua Q. Randall Jr. Mr. Josh Q. Randall Jr. ✓ Insert company name ✓ Insert postal address: ① Never include the country/region in the address ② Always include the country/region in the address ③ Never include the country/region if different than: United States ✓ Format address according to the gestination country/region Preview Mr. Joshua Randall Jr. Blue Sky Airlines 1 Airport Way Kitty Hawk, NC 27700 United States of America Match Fields OK Cancel

What You Do	What you see
 14. The Match Fields box will return. Word is going to attempt to automatically match the field names in your data source with the field names it uses in the Address Block. If Word cannot match your fields (from the data source) you can still match the fields using this box. You will see (not matched) if Word was unsuccessful in matching. 	The Match Fields box: Match Fields Mail Merge has special features for easily working with addresses. Use the drop-down list to select the proper database field for each address field component. Required information Last Name First Name Courtesy Title Courtesy Title Cortess 1 Address 1 City State Postal Code Spouse First Name Optional information Middle Name Suffix
On the left are the fields that Word is looking for. On the right are the fields that Word has matched using your data source. You can override any field by using the down arrow and selecting the appropriate field name. For example, the required field is Last Name and Word looks at the data source to find a fit. If Word can identify a field that seems appropriate, the field will fill in with that field name. If Word cannot identify a Last Name fit, you will see (not matched) and you will need to select the corresponding field.	Use the drop-down lists to choose the field from your database that corresponds to the address information Mail Merge expects (listed on the left.) OK Cancel
You will want to check this box with all merges to verify that Word was able to match your fields and if Word could not make a match you will need to add them in order to make your merge successful. Select OK once you have verified and completed all applicable Match Fields. Select OK again to leave the Insert Address Block box.	

What You Do	What you see			
15. The main document in the editing	The main document after Address Block is			
window will change again to reflect	selected:			
the changes you just made.	L			
Note how the label in the top left corner shows:				
< <auuress block="">> and the other labels show:</auuress>	i «Next-Record»¶ χ «Next-Record»¶ χ «Next-Record»¶ σ	_		
< <next record="">>.</next>	: . «Next-Record»¶ z «Next-Record»¶ z «Next-Record»¶			
You will need to add the Address Block to all labels in the document.	«Next-Record»¶ ε «Next-Record»¶ ε «Next-Record»¶ ε «Next-Record»¶ ε «N	-		
Note for Envelopes : You will notice < <address block="">> in the middle of the envelope.</address>	i «Next-Record»¶ «Next-Record»¶ «Next-Record»¶ «Next-Record»¶ γ	;		

What You Do	What you see
16. Click ONCE on the Update all Labels	The task pane with the Update all Labels button
button.	circled:
	Mail Merge 🔹 🗙
Note for Envelopes: It is not	🕲 🗇 🛣
necessary to use the Update all labels	Arrange your labels
button when working with envelopes. This button will not appear for	If you have not already done so, lay out your label using the first label on the sheet.
envelopes.	To add recipient information to your label, click a location in the first label, and then click one of the items below.
	Address block
	Greeting line
	Electronic postage
	IIII Postal bar code
	More items
	When you have finished arranging your label, click Next. Then you can preview each recipient's label and make any individual changes.
	Replicate labels
	You can copy the layout of the first label to the other labels on the proceeding the button below.
	Step 4 of 6 Image: Next: Preview your labels Image: Previous: Select recipients

What You Do	What you see			
17. The main document in the editing	The main document after you Update all labels:			
window will change once again reflect	■ ■ ■ ································			
the changes you just made.	■			
Now all labels now show: << AddressBlock>>	<pre></pre>			
You are ready for the next step. Click	<pre>eNext Record><<addressblock>>1</addressblock></pre>			
on the link, Next: Preview your labels , at the bottom of the task pane.	<next record=""><<addressblock>>1 c «Next Record><<addressblock>>1 c «Next Record></addressblock>>1 c «Next Record>>1 c «Next Record></next>			
<i>Note</i> : The template that you see in the editing window is how the label is going to appear, but with the real data from the data source. If you see extra < <addressblock>> indications, you will want to delete them from the label in the top left corner. If you do not delete the extra merge field indications, the label will print with the same name and address several times. Remember, what you see is what you get!</addressblock>	<pre>ethest Records << AddressElocks> {</pre>			

18. After you click on the link for the next step, the main document in the editing window will show you a preview of the labels.

	:···· μ∥ ≬ · 3 · · · ι · · · 4 · · · ι · ·	· 5 · · • • • • • • • • • • • • • • 7 · · · • • • •
Sara-Wise¶ 111-CedarRd¶ Akron, Ohio-44313¶	Sam-Smith¶ c 444-Main-Si¶ c Akron,-Ohio-44313¶ □	Sue-Jones¶ 876:FrontS¶ Akron, Ohio-44313¶ ¤
Pam Thomas¶ 222:Market:St¶ Akron, Ohio:44313¶	د <mark>۱</mark>	с 1
1 0	د <mark>۱</mark>	د <mark>1</mark>
1 1 2	د ۹	د 1
1 0	د ۱	د ¶ ص
		¥

What You Do	What you see
19. At the top of the task pane, under the	The next step returns:
title <i>Preview your labels</i> , you can go	Mail Merge 🔹 👻 🗙
forward or backwards through the	
labels. You can also locate a specific	Preview your labels
recipient by clicking on the link for Find a recipient .	Some of the merged labels are previewed here. To preview another label, click one of the following:
Note: When you use the forward and	Recipient: 1 Find a recipient
of the Meil Merge Wigerd you are	Make changes
only advancing one label at a time and	list:
NOT one page at a time. When you	Edit recipient list When you have finished
click on the forward button, it will	previewing your labels, click Next. Then you can print the merged
advance the next label to the top left	labels or edit individual labels to add personal comments.
position on the document. You can	
only advance through the labels by	
using the forward button and you	
cannot advance from page to page	
when previewing labels.	
If you need to edit the list of recipients,	
click on the Edit recipient list link	Step 5 of 6
under the title, <i>Make changes</i> to return	Next: Complete the merge
to the Mail Merge Recipients box.	Previous: Arrange your labels
Click on the link for Next: Complete	
the merge at the bottom of the task	
pane to move to the last step.	

What You Do	What you see
20. The last step is to complete the merge.	The last task pane returns:
To Print the labels, click on the Print link under the <i>Merge</i> title.	Mail Merge • ×
In the Merge to New Document box, select All and select OK. The Print box returns. Make the necessary selections and click OK. If you want to personalize the labels, click on the link for Edit individual labels to open a new document with the merged labels. You can save the new document as a separate file. Note that you are saving just the labels or envelopes and NOT the mail merge main document file.	Mail Merge is ready to produce your mailing labels. To personalize your labels, click "Edit Individual Labels." This will open a new document with your merged labels. To make changes to all the labels, switch back to the original document. Merge Image: Print Image: Print

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Creating a Letter

This section of the manual outlines the steps for performing a mail merge to create form letters. This will be done using the Mail Merge Wizard. When you create a form letter, Word creates a new letter for each set of merge data which means a separate letter for each recipient.

You may find it easier to do a letter in Mail Merge if you display hidden characters such as

spaces and paragraph m	arks by clicking on th	e Show/Hide Paragraph	Marks 📕 button on
the standard toolbar.			



3. The Mail Merge Wizard task pane returns.	Word window after you open Mail Merge:
m ing a star Fundamental de la star Fundamental de la star	Theme * / / · · · · · · · · · · · · · · · · ·
 4. You are ready for the first step. You will want to follow the task pane from top to bottom. The first step is to select the document type. At the top of the task pane under the <i>Select document type</i> title, select the radio button for Letters. The bottom of the task pane will adjust to the selection you just made. You are now ready to go to the next step. Click the link, Next: Starting document, at the bottom of the task pane to continue. 	first step in the task pane:

W	hat You Do	What you see
W 5.	 hat You Do At the top of the task pane, under the title, <i>Select starting document</i>, determine how you want the letter set up. When working with letters, you will have all three options available to you: Use the current document: Allows you to use the current document in the editing window as your letter. Start from a template: Allows you to choose a Word template to use as your letter. Start from existing document: Allows you to choose a Word template to use as your letter. Matter of the existing file to work with. If you select this option, Word displays a list of mail merge documents that you have worked with recently or you can choose Open to search for a file. 	What you see The task pane for Step 2: Mail Merge Select starting document How do you want to set up your letters? Use the current document Start from a template Start from existing document Use the current document Start from the document shown here and use the Mail Merge wizard to add recipient information.
	If you still need to create the letter, select Use the current document . You will type the letter in a later step.	
	If you already have a file saved and need to open it, select Start from existing document . Locate the file and the file will open in the editing window. Then, select the radio button for Use the current document .	Step 2 of 6 Image: Next: Select recipients Image: Previous: Select document type
	You are ready for the next step. Click on the link, Next: Select recipients , at the bottom of the task pane.	
	<i>Note</i> : You can go to the previous task panes (previous steps) by clicking on the Previous link at the bottom of the task pane. This is true for all steps from this point forward.	

_

What You Do	What you see		
6. At the top of the task pane, under the	The task pane for Step 3:		
title Select recipients, you will need to	Mail Merge 🔻 🗙		
identify the data source. The			
selections that you have available are:			
Use an existing list: Select this	Select recipients		
option if you already have the list	Use an existing list		
of names that you want to draw on.	 Select from Outlook contacts 		
You would probably have this list	○ Type a new list		
stored in an Access database,	Use an existing list		
Excel spreadsneet, word table or	Use names and addresses from a		
III a CSV IIIe. Select from Outlook contactor	file or a database.		
- Select from Outlook contacts.	Browse		
recipients out of your Contacts list	Edit recipient list		
in Outlook Mail			
 Type a new list: This option will 			
allow you to create a new list using			
an Access database.			
Most often, you will be selecting the			
option for Use an existing list. After			
you select this option, you will need to			
locate the file. In the middle of the			
task pane, under the title, Use an			
existing list select the Browse link.			
	Step 3 of 6		
	Next: Write your letter		
	Previous: Starting document		

What you see			
The Select Data Source box:			
Select Data Source Image: Select Data Source Look in: Image: My Documents Image: Select Data Sources My Recent Documents Image: Sources Image: Sources My Copbuter Projects Image: Sources Image: Sources Desktop Image: Sources Image: Sources My Computer Image: Sources Image: Sources My Kework File game: Image: Sources Image: Computer My Network Files of type: Al Data Sources Image: Computer My Letwork Files of type: Al Data Sources Image: Computer			
Name X Select Table X Street15 2/2/2005 2:30:01 PM 2/2/2005 2:30:01 PM TABLE Sheet24 2/2/2005 2:30:01 PM 2/2/2005 2:30:01 PM TABLE Sheet35 2/2/2005 2:30:01 PM 2/2/2005 2:30:01 PM TABLE Image: Sheet35 2/2/2005 2:30:01 PM 2/2/2005 2:30:01 PM TABLE Image: Sheet35 2/2/2005 2:30:01 PM 2/2/2005 2:30:01 PM TABLE Image: Sheet35 2/2/2005 2:30:01 PM 2/2/2005 2:30:01 PM TABLE Image: Sheet35 2/2/2005 2:30:01 PM 2/2/2005 2:30:01 PM TABLE			

×

What You Do

9. The Mail Merge Recipients box returns. In this step, you need to select who will get your message.

The Mail Merge Recipients box shows all records that are listed in the data source. This box will allow you to remove individual records by clearing the check box to the left of the first column.

You can also **Select All** or **Clear All** by selecting the corresponding buttons at the bottom of the box.

To Sort all the names in the mailing list, click on the field name you want to sort by.

You also have additional options available by clicking on the downward pointing arrow. The options that you have available are:

All: Displays all records, will turn off filtering based on specific field.
Blank: Displays records containing no information for that field.
Nonblanks: Displays only records that do contain information in that field.

Advanced: Select this option to get even more control over the search. If you select this option, the Filter and Sort box returns. See the next row (the "**Note**") for details.

After you select (or unselect), sort, and filter the Recipients list, select **OK**.

What you see The Mail Merge Recipients box: Mail Merge Recipients To sort the list, click the appropriate column heading. To narrow down the recipients displayed by a specific criteria, such as by city, click the arrow next to the column heading. Use the check boxes or buttons to add or remove recipients from the mail merge. List of recipients: ▼ Ln... ▼ Fn... ▼ Address ▼ City ▼ State ▼ Z.. Wise Sara 111 Cedar Rd Akron Ohio 44313 Mis Mis 444 Main St Smith Sam Akron Ohio 44313 876 Front St Akron 44313

		Thomas	Pam	222 Market St	Akron	Ohio	44313	
	-							
1								
	<u>5</u> e	elect All	Clear <u>A</u> ll	<u>R</u> efresh		·		
	E	ind	Edit	Validate				OK

With the Sort menu dropped down:

Mail Merge Reci	pients				×
To sort the list, cl specific criteria, su buttons to add or List of recipients: Ust of r	ck the appropriate colum uch as by city, click the a remove recipients from t (All) Sara Sam Sue Pam (Blanks) (Nonblanks) (Advanced)	n heading. To na nrrw next to the o the mail merge. ress V City Rd Akron St Akron St Akron t St Akron	vrow down the column heading State Ohio Ohio Ohio Ohio Ohio	 ▼ Z ▼ Z 44313 44313 44313 44313 	played by a ck boxes or
Select All	Clear <u>A</u> ll <u>R</u> ef	iresh date			ОК

What You Do	What you see
Note: If you need to perform a Filter or Sort, you would select Advanced from the menu as seen in the previous step. The Filter and Sort box returns	
On the Filter tab, you can filter the recipient list. The fields are as follows: Field : Select any field from the data source. This is the field that you want to filter based on. Comparison : Select a phrase such as Equal to or Contains. Compare to : This is what you want the filter to locate and use in the final merge.	The Filter tab:
On the Sort tab, you can sort by any field contained in the data source. You can sort up to three levels. The fields on the Sort tab are as follows: Sort by : Choose from the dropdown, the field that you want to sort by. Ascending or Descending : Select the radio button for the direction you want the sort to go.	Filter and Sot X Filter Records Sgit Records Sgit by: Fname C Ascending Ihen by: C Ascending C Descending Then by: C Ascending C Descending Gear All OK Cancel
Select OK on either tab to accept the changes. Select OK again to return to the wizard.	

What You Do	What you see
10. The task pane returns and under the title, <i>Use an existing list</i> , the filename you selected is shown.	The Recipient task pane:
If you need to change the data source, select the link for Select a different list . This will allow you to select a different file.	Use an existing list Select from Outlook contacts Type a new list Use an existing list Currently, your recipients are selected from: [Sheet1\$] in "MailMerge2003.xls"
If you need to edit the Recipients list now or at a later time, select the Edit recipient list link.	 Select a different list Edit recipient list
You are ready for the next step. Click on the link, Next: Write your letter , at the bottom of the task pane.	
	Step 3 of 6 Image: Starting document Image: Previous: Starting document

What You Do	What you see
11. At the top of the task pane, under the	The next step returns:
title <i>Write your letter</i> , you will need to layout the letter with the appropriate	Mail Merge x
First, if you want the recipients	Write your letter If you have not already done so,
address to print in the upper left corner of the letter, place the insertion point where you want this to appear in the editing window. Then, select Address Block . The Address Block refers to the portion of a main document containing the recipient's name and address, the same as it appears for labels and envelopes.	To add recipient information to your letter, click a location in the document, and then click one of the items below. Address block Greeting line Electronic postage Dostal bar code More items When you have finished writing your letter, click Next. Then you
An Address Block typically looks as follows: Mrs. Sally Zippy 123 Carroll Street Akron, Ohio 44321	can preview and personalize each recipient's letter.
	Step 4 of 6 Image: Select recipients

What You Do	What you see
12. The Insert Address Block box returns.	The Insert Address Block box:
Make the necessary selections/changes for the name format, company name, and postal address.	Specify address elements
Verify that the Preview is accurate.	Mr. Joshua Randall Jr. Insert company name
Click on the Match Fields button at the bottom to match the data source fields to the Address Block template.	✓ Insert postal address: ○ Never include the country/region in the address ○ Always include the country/region if different than: □ United States ✓ Format address according to the destination country/region Preview Mr. Joshua Randall Jr. Blue Sky Airlines 1 Airport Way Kitty Hawk, NC 27700 United States of America

What You Do	What you see
 13. The Match Fields box will return. Word is going to attempt to automatically match the field names in your data source with the field names it uses in the Address Block. If Word cannot match your fields (from the data source) you can still match the fields using this box. You will see (not matched) if Word was unsuccessful in matching. 	The Match Fields box: Match Fields Mail Merge has special features for easily working with addresses. Use the drop-down list to select the proper database field for each address field component. Required information Last Name First Name Courtesy Title Company Address 1 City State Postal Code Spouse First Name Optional information Middle Name Suffix
 On the left are the fields that Word is looking for. On the right are the fields that Word has matched using your data source. You can override any field by using the down arrow and selecting the appropriate field name. For example, the required field is Last Name and Word looks at the data source to find a fit. If Word can identify a field that seems appropriate, the field will fill in with that field name. If Word cannot identify a Last Name fit, you will see (not matched) and you will need to select the appropriate field. 	Use the drop-down lists to choose the field from your database that corresponds to the address information Mail Merge expects (listed on the left.) OK Cancel
 You will want to check the Match Field box with all merges to verify that Word was able to match your fields and if Word could not make a match you will need to add them in order to make your merge successful. Select OK once you have verified and completed all applicable Match Fields. Select OK again to leave the Insert Address Block box. 	

What You Do	What you see
14. The main document in the editing	The main document after Address Block is
window will change again to reflect	selected:
the changes you just made.	■ maxage · · · · · · · · · · · · · · · · · · ·
Note how the letter shows < <address block="">> in the top left corner.</address>	February-2,2005¶ *AddressEliocka¶

What You Do	What you see	
15. You can customize the salutation of the letter, for example, to read: "Dear Mr. Smith,"		
The first step is to place the insertion point in the document where you want the greeting line to be.	The Greeting Line box:	
Then, select the link for Greeting line in the task pane.	Greeting line format: Greeting line for invalid recipient names: Dear Sir or Madam,	
The Greeting Line box returns. Make the appropriate selections in the Greeting line format and Greeting	Preview	
line for invalid recipients names fields.	The main document after greeting line is	
After you make those selections, click on the Match Fields button so you can verify and/or finish mapping the merge fields.	selected:	
At this point, you can type the remainder of your letter.		
Note : If you are using the Greeting Line, punctuation is included. You do not need to enter a comma or colon after the merge field, < <greetingline>>.</greetingline>		
What You Do	What you see	
--	--	
16. Another type of customization that you can make to the form letter is to put merge fields in the body of the letter.		
First, place the insertion point in the letter where you want the merge field to go.		
Then, select the link for More items	The Insert Merge Field:	
and the Insert Merge Field box returns.	Insert Merge Field	
Select the merge field from the data source Fields list that you want added to the letter. For example, you may want to add the person's first name in the body of the letter; therefore, you would select the data source field name that represents the recipients first name. Then, select Insert . Add any additional merge fields and then select Close .	Insert: Address Fields Fields: Fname Address City State Zip Match Fields Insert Cancel	

What You Do	What you see				
7. After you have the Address Block, Greeting Line, and any other merge fields inserted into					
the letter, it will look similar to the follow	wing:				
L	• • • • • • • • • • • • • • • • • • • •				
February-2,-2005¶ ¶ *AddressBlock»¶ ¶ GreetingLine»¶ Hello·«Fname»,.it·was·nice-to-meet-you·at-the-o	open house. ••¶				

Your main document is finished. You are ready for the next step. Click on the link **Next: Preview your letters** to advance.

Note: The template that you see in the editing window is how the letter is going to appear, but with the real data from the data source. If you see extra indications of merge fields, you will want to delete them from the letter. If you do not delete the extra merge field indications, the letter will print with the same name and address several times. Also, be sure to place appropriate spacing before and after the merge fields. If you do not place spaces appropriately you may have gaps or words that run together. Remember, what you see is what you get!

What You DoWhat you see

18. After you click on the link for the next step, the main document in the editing window will show you a preview of the letters.





What You Do	What you see
20. The last step is to complete the merge.	The last task pane returns:
To Print the labels, click on the Print link under the <i>Merge</i> title.	Mail Merge × Image: Second s
In the Merge to New Document box, select All and select OK. The Print box returns. Make the necessary selections and click OK. If you want to personalize the letters, click on the link for Edit individual letters to open a new document with the merged letters. You can save the new document as a separate file. Note that you are saving just the letters and NOT the mail merge main document file.	Mail Merge is ready to produce your letters. To personalize your letters, click "Edit Individual Letters, This will open a new document with your merged letters, To make changes to all the letters, switch back to the original document. Merge Image: Print Image: Edit individual letters Step 6 of 6 Previous: Preview your letters The Merge to New Document box returns: Merge to New Document Merge records Image: Current record

Merging to an Outlook E-mail Message

This section of the manual outlines the steps for performing a mail merge to create an e-mail message. This will be done using the Mail Merge Wizard. When you create an e-mail message, Word creates a new message for each set of merge data which means a separate e-mail message for each recipient. The recipients email address must be contained in the data source.

You may find it easier to do an email message in Mail Merge if you display hidden characters

such as spaces and paragraph marks by clicking on the **Show/Hide Paragraph Marks** If button on the standard toolbar.

What	t You Do	What you see	
1. O N St	ppen Word and if necessary, click the lew Blank Document button on the tandard Toolbar.	The Word window opens:	Addition for the second s
2. Se ar	elect from the menu Tools, Letters nd Mailings, Mail Merge Wizard.	The Tools menu: Spelling and Grammar F7 Language Speech Letters and Mailings Tools on the Web Customize Options *	

What You Do		What you see	
3. The Mai returns.	l Merge Wizard task pane	The Word window a	the contract of the second of
4. You are	ready for the first step.	The first step in the	task pane:
You will from top The first type. At the to Select do radio but The botto to the sel You are step. Cli documen pane to c	want to follow the task pane to bottom. step is to select the document p of the task pane under the <i>cument type</i> title, select the ton for E-mail messages . om of the task pane will adjust lection you just made. now ready to go to the next ick the link, Next: Starting nt , at the bottom of the task continue.	Mail Merge	

What You Do	What you see
5. At the top of the task pane, under the	The task pane for Step 2:
title, Select starting document,	Mail Merge 🗸 🗙
determine how you want the message set up.	
	Select starting document
 When working with e-mail messages, you will have all three options available to you: Use the current document: Allows you to use the current document in the editing window as your e-mail. Start from a template: Allows you to choose a Word template to use for your e-mail. Start from existing document: Allows you to select an existing file to work with. If you select this option, Word displays a list of mail merge documents that you have worked with recently or you can aboose Onen to search 	How do you want to set up your E-Mail messages? Use the current document Start from a template Start from existing document Use the current document Start from the document shown here and use the Mail Merge wizard to add recipient information.
for a file.	
If you still need to create the message, select Use the current document . You will type the message at a later step.	Step 2 of 6
If you already have a file saved and	An Device Solect depictes
need to open it, select Start from existing document . Locate the file and the file will open in the editing window. Then, select the radio button for Use the current document .	
You are ready for the next step. Click on the link, Next: Select recipients , at the bottom of the task pane.	
<i>Note</i> : You can go to the previous task panes (previous steps) by clicking on the Previous link at the bottom of the	

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task pane. This is true for all steps

What You Do	What you see
 6. At the top of the task pane, under the title <i>Select recipients</i>, you will need to identify the data source. The selections that you have available are: Use an existing list: Select this option if you already have the list of names that you want to draw on. You would probably have this list stored in an Access database, Excel spreadsheet, Word table or a CSV file. Select from Outlook contacts: Select this option to select recipients out of your Contacts list in Outlook Mail. Type a new list: This option will allow you to create a new list using an Access Database as part of the current mail merge process. Most often, you will be selecting the option for Use an existing list. After you select this option, you will need to locate the file. In the middle of the task pane, under the title, <i>Use an existing list</i> select the Browse link. 	The task pane for Step 3: Mail Merge X Select recipients Use an existing list Select from Outlook contacts Type a new list Use names and addresses from a file or a database. Browse C Edit recipient list Step 3 of 6 A Next: Write your e-mail message Previous: Starting document
 7. The Select Data Source box returns. Locate the file that will be used as the data source and select the Open button. <i>Note</i>: You may need to adjust the field, Files of type to All Data Sources. 	The Select Data Source box: Select Data Source Image: Im

What you see
The Select Table box returns:
Select Table
Name Description Modified Created Type
Sheet1\$ 2/2/2005 2:30:01 PM 2/2/2005 2:30:01 PM TABLE IIII Sheet2\$ 2/2/2005 2:30:01 PM 2/2/2005 2:30:01 PM TABLE
III Sheet3\$ 2/2/2005 2:30:01 PM 2/2/2005 2:30:01 PM TABLE
First row of data contains column headers OK Cancel

X

What You Do

9. The Mail Merge Recipients box returns. In this step, you need to select who will get your message.

The Mail Merge Recipients box shows all records that are listed in the data source. This box will allow you to remove individual recipients by clearing the check box to the left of the first column.

You can also **Select All** or **Clear All** by selecting the corresponding buttons at the bottom of the box.

To Sort all the names in the mailing list, click on the field name you want to sort by.

You also have additional options available by clicking on the downward pointing arrow. The options that you have available are:

All: Displays all records, will turn off filtering based on specific field.
Blank: Displays records containing no information for that field.
Nonblanks: Displays only records that do contain information in that field.

Advanced: Select this option to get even more control over the search. If you select this option, the Filter and Sort box returns. See the next row (the "**Note**") for details.

After you select (or unselect), sort, and filter the Recipients list, select **OK**.

The Mail Merge Recipients box:

What you see

Mail Merge Recipients To sort the list, click the appropriate column heading. To narrow down the recipients displayed by a specific criteria, such as by city, click the arrow next to the column heading. Use the check boxes or buttons to add or remove recipients from the mail merge.

	💌 Ln	💌 Fn	✓ Address	💌 City	 State 	▼ Z	💌 Email
	Wise	Sara	111 Cedar Rd	Akron	Ohio	44313	wsara@
✓	Smith	Sam	444 Main St	Akron	Ohio	44313	wsara@
✓	Jones	Sue	876 Front St	Akron	Ohio	44313	wsara@
V	Thomas	Pam	222 Market St	Akron	Ohio	44313	wsara@
		-					
S	elect All	Clear <u>A</u> ll	Refresh				

With the Sort menu dropped down:

Mail	Merge Recij	pient <i>s</i>									×
To se spec butto List o	ort the list, clio ific criteria, su ons to add or i of recipients:	k the appropr ch as by city, remove recipi	riate clicł ents	column hea the arrow i from the ma	iding. next to ail meri	To i o th ge.	nari e co	row down th olumn headin	e recipient ıg, Use th	s displayed by e check boxes	a or
	💌 Ln	▼ Fn	-	Address	•	Cįt	y I	 State 	💌 Z	💌 Email	
	Wise	Sara		(All)				Ohio	44313	wsara@	
	Smith	Sam		111 Cedar	Rd			Ohio	44313	wsara@	- 1
	Jones	Sue		444 Main 9	it.			Ohio	44313	wsara@	- 1
	Thomas	Pam		876 Front	<f< td=""><td></td><td></td><td>Ohio</td><td>44313</td><td>wsara@</td><td></td></f<>			Ohio	44313	wsara@	
				020 Maulual) 						
				ZZZ Marke	0.20						
				(Blanks)							
				(Nonblanks	5)						- 11
				(Advanced	l)						
			-								- 11
5	elect All	Clear <u>A</u> ll		<u>R</u> efresh							
	Eind	Edit,		⊻alidate						ОК	
											11

What You Do	What you see
Note: If you need to perform a Filter or Sort, you would select Advanced from the menu as seen in the previous step. The Filter and Sort box returns	The Filter tab
recipient list. The fields are as follows: Field : Select any field from the data source. This is the field that you want to filter based on. Comparison : Select a phrase such as Equal to or Contains. Compare to : This is what you want the filter to locate and use in the final merge.	Filter and Sort X Filter Records Sgrt Records Field: Comparison: V V
On the Sort tab, you can sort by any field contained in the data source. You can sort up to three levels. The fields on the Sort tab are as follows: Sort by : Choose from the dropdown, the field that you want to sort by. Ascending or Descending : Select the radio button for the direction you want the sort to go	Filter and Sort X Filter and Sort X Filter Records Sgrt Records Sort by: Fname C Ascending C Descending Then by: C Ascending C Descending C Descending Then by: C Ascending C Descending C Descending Gear All OK Cancel
Select OK on either tab to accept the changes. Select OK again to return to the wizard.	

What You Do	What you see
10. The task pane returns and under the	The Recipient task pane:
title, Use an existing list, the filename	Mail Merge 🔹 👻
you selected is shown.	
	Select recipients
If you need to change the data source.	Use an existing list
select the link for Select a different	Select from Outlook contacts Type a new list
list This will allow you to select a	
different file	Currently, your recipients are
	selected from: [Sheet1\$] in "MailMerce2003 v/c"
If you need to edit the Recipients list	
now or at a later time, select the Edit	Edit recipient list
now of at a fater time, select the Eult	
recipient list link.	
Versions and the fourth constration of the	
You are ready for the next step. Click	
on the link, Next: Write your email	
message , at the bottom of the task	
pane.	
	Step 3 of 6
	Next: Write your e-mail message
	Previous: Starting document
	1

What You Do	What you see
11. At the top of the task pane, under the	The next step returns:
title <i>Write your e-mail message</i> , you	Mail Merge 🔹 🗙
will need to layout the message with	🐵 🗇 🟠
the appropriate merge fields.	Write your e-mail message
First, if you want the recipients address to be sent in the message, place the insertion point where you want this to appear in the editing window. Then, select Address Block . The Address Block refers to the portion of a main document containing the recipient's name and address, the same as it appears for labels and	If you have not already done so, write your e-mail message now. To add recipient information to your message, click a location in the message, and then click one of the items below. Address block Address block Greeting line Electronic postage Where items
An Address Block typically looks as follows:	When you have finished writing your message, click Next. Then you can preview and personalize each recipient's message.
Mrs. Sally Zippy 123 Carroll Street Akron, Ohio 44321	
	Step 4 of 6
	Next: Preview your e-mail messag
	Previous: Select recipients

What You Do	What you see
 Vhat You Do 2. The Insert Address Block box returns. Make the necessary selections/changes for the name format, company name, and postal address. Verify that the Preview is accurate. Click on the Match Fields button at the bottom to match the data source fields to the Address Block template 	What you see The Insert Address Block box: Insert Address Block Specify address elements Insert recipient's name in this format: Joshua Q. Randall Jr. Joshua Q. Randall Jr. Mr. Josh Randall Jr. Mr. Josh Q. Randall Jr. Mr. Joshua Randall Jr. Joshua Randall Jr. Mr. Joshua Ra
fields to the Address Block template.	United States ✓ Format address according to the destination country/region Preview Mr. Joshua Randall Jr. Blue Sky Airlines 1 Airport Way Kitty Hawk, NC 27700 United States of America Match Fields OK Cancel

What You Do	What you see
 13. The Match Fields box will return. Word is going to attempt to automatically match the field names in your data source with the field names it uses in the Address Block. If Word cannot match your fields (from the data source) you can still match the fields using this box. You will see (not matched) if Word was 	Required information Last Name Iname First Name Iname Courtesy Title (not matched) Company Address 1 Address 1 Address v City State State State Postal Code Zip
unsuccessful in matching. On the left are the fields that Word is using to create the Address Block. On the right are the fields that Word has matched using your data source. You can override any field by using the down arrow and selecting the appropriate field name.	Optional information Middle Name Suffix Use the drop-down lists to choose the field from your database that corresponds to the address information Mail Merge expects (listed on the left.) OK
For example, the required field is Last Name and Word looks at the data source to find a fit. If Word can identify a field that seems appropriate, the field will fill in with that field name. If Word cannot identify a Last Name fit, you will see (not matched) and you will need to select the corresponding field.	
You will want to check the Match Field box with all merges to verify that Word was able to match your fields and if Word could not make a match you will need to add them in order to make your merge successful.	
Select OK once you have verified and completed all applicable Match Fields. Select OK again to leave the Insert Address Block box.	

What You Do	What you see
14. The main document in the editing	The main document after Address Block is
window will change again to reflect	selected:
the changes you just made.	■ maxing
Note how the letter shows < <address block="">> in the top left corner.</address>	February-2,2005¶ *AddressEliocka¶

What You Do	What you see
15. You can customize the salutation of the message, for example, to read: "Dear Mr. Smith,"	
The first step is to place the insertion point in the main document where you want the greeting line to be.	The Greeting Line box:
Then, select the link for Greeting line in the task pane.	Greeting Line
The Greeting Line box returns. Make the appropriate selections in the Greeting line format and Greeting line for invalid recipients names fields.	Dear Sir or Madam, Preview Dear Mr. Randall, Match Fields OK Cancel
After you make those selections, click on the Match Fields button so you can verify and/or finish mapping the merge fields.	The main document after greeting line is selected:
At this point, you can type the remainder of your letter.	
	• • • • •

What You Do	What you see
16. Another type of customization that you can make to the email message is to put merge fields in the body of the message.	
First, place the insertion point in the message where you want the merge field to go.	
Then, select the link for More items	The Insert Merge Field:
and the Insert Merge Field box returns.	Insert Merge Field
Select the merge field from the data source Fields list that you want added to the message. For example, you may want to add the person's first name in the body of the message; therefore, you would select the Fname field. Then, select Insert . Add any additional merge fields and then select Close .	Insert: Address Fields Fields: Fname Address City State Zip Match Fields Insert Cancel

What You Do	What you see
17. After you have the greeting line and any	other merge fields inserted into the message, it
will look similar to the following:	
	4 · · · · · · · 5 · · · · ! · · · 6 · · · · ! · · · 7 · · · ! · · · 8 🛆 🔺
«GreetingLine»	
1	
It-was-nice-to-see-you,-«Fname»-at-the-meeting-last-weekThis	'is a follow-up-to-provide-you-the-meeting-notes-for-review.
-	
	¥ ±
	• •

Your main document is finished. You are ready for the next step. Click on the link **Next: Preview your e-mail message** to advance.

Note: The template that you see in the editing window is how the message is going to appear, but with the real data from the data source. If you see extra indications of merge fields, you will want to delete them from the message. If you do not delete the extra merge field indications, the message will be sent with the extra dat several times. Also, be sure to place appropriate spacing before and after the merge fields. If you do not place spaces appropriately you may have gaps or words that run together. Remember, what you see is what you get!

What You Do

What you see

18. After you click on the link for the next step, the main document in the editing window will show you a preview of the letters.



19. At the top of the task pane, under the title *Preview your e-mail messages*, you can go forward or backwards through the letters using the arrow buttons. You can also locate a specific recipient by clicking on the link for **Find a recipient**.

If you need to edit the list of recipients, click on the **Edit recipient list** link under the title, *Make changes* to return to the Mail Merge Recipients box. You can also use the button to **Exclude this recipient** to remove a person from the merge.

Click on the link for **Next: Complete the merge** at the bottom of the task pane to move to the last step.

The task pane:
Mail Merge 🔹 🗙
🐵 🐵 🟠
Preview your e-mail messages
One of the merged messages is previewed here. To preview another message, click one of the following:
<
Make changes
You can also change your recipient list: Edit recipient list
Step 5 of 6
Next: Complete the merge

🔶 Previous: Write your e-mail messa

What You Do	What you see
20. The last step is to complete the merge. To e-mail the message, click on the Electronic Mail link under the <i>Merge</i> title.	The last task pane returns: Mail Merge
 In the To field, use the drop down arrow to select the merge field name that contains the e-mail address. In the Subject line field, enter a subject for the e-mail message. Leave the Mail format field HTML. Under Send records, verify All is selected to send the message to all recipients (that you selected during previous step). 	Step 6 of 6 Previous: Preview your e-mail mes The Merge to E-mail box: Merge to E-mail Message options To: Subject line: Mail format: HTML Send records All Current record From: Io: OK The message will be sent to the email addresses
21. Click on the OK button.	The message will be sent to the email addresses found in the data source.

Appendix A: Problems and Solutions

Problem A: Formatting Issues

You experience problems with formatting when you are completing a mail merge. When you preview the merge, you will notice that fields are not formatted correctly. This may occur when you are using a pre-XP (2002) data source and mail merge file or when you are starting a new mail merge with a new data source. Some of the formatting that may be affected:

- Currency
- Phone Numbers
- Dates
- Fields with Letters and Number combinations
- Capitalized letters
- Percentages
- Zip Codes

Solution A

Word XP introduced a new connection method for connecting to the data file. In previous versions of Word, Dynamic Data Exchange (DDE) was used. Now, OLEDB is used and this new type of connection expects Word to provide formatting. There are two ways to fix most of these formatting issues.

- 1. Apply formatting by using a switch (see Problem/Solution B) to correct the fields
- 2. Revert to the DDE connection that was used in previous versions of Word.

This Solution outlines how to revert to the DDE connection that was used in previous versions of Word.

1. From the menu, select **Tools, Options**. Advance to the General tab.



2. Turn on the option for **Confirm conversion at Open** (resulting in a checkmark in the field). Select **OK**.

3. When you are working through the mail merge, and after you select the data source, the Confirm Data Source box returns:



- 4. In most cases, you will select the option for **MS Excel Worksheets via DDE** (*.xls). Select **OK**.
- 5. Complete the mail merge and the fields should be formatted as they appear in the Excel spreadsheet.

Note: See Problem/Solution B for instructions on changing the formatting for a field using a switch. If you would prefer to use switches, then you do not need to follow this Solution. Or when you get to the Confirm Data Source box, select OLE DB Database.

Problem B: Formatting Issues

Your data sheet has formatted currency, such as \$2,345.00 and when you complete the merge, your data appears as follows: 2345. See notes at the end for instruction on using phone numbers and dates.

Solution B

This solution uses switches in Word to format the fields correctly. If you use formatted fields from Excel, you may want to consider using Problem/Solution A. That is a more permanent fix.

- 1. Follow the mail merge steps of choosing the document type, locating the data source, select recipients and inserting the merge fields into the letter.
- 2. Select the merge field that contains currency from the main document. In my example, my field name is "donation."



3. After you select the merge field press **Alt** + **F9** and the field will change and reveal its code (as well as the other merge fields you have created.)



4. After the end quote of the merge field name (with no spaces before, after, or in between) type:

\#\$#,###.00

The main document will then appear similar to the following:



Note: This must be typed inside the }

- 5. Press Alt + F9 again to remove the field codes.
- 6. Proceed with the next step of the mail merge process and preview the letters.



Notes:

Problem C: Merge Fields not Recognized

You are using a mail merge document from Pre-XP (2002) and the labels or letter will not merge correctly. The merge fields are not recognized.

Solution C

For Labels:

It will be easier and more time advantageous to recreate the labels using Word 2003. This means that you will be starting the mail merge process from the beginning. When you add the Address Block in Step 4, be sure to go to the Match Fields box to verify that the fields are mapped correctly.

For Letters:

You should be able to use the letter, but you will need to re-add the merge fields. When you get to Step 4, delete the existing (OLD) merge fields and add new ones using the new Mail Merge Wizard fields (Address Block, Greeting line, More Items). Be sure to go to the Match Fields box to verify that the fields are mapped correctly.

Other:

If you have a mail merge document with special formatting, such as three items per page (BUT NOT FOR LABELS). You should be able to use the same main document with your previous setup. You will need to delete the existing (OLD) merge fields and add new ones using the new Mail Merge Wizard fields (Address Block, Greeting line, More Items). Be sure to go to the Match Fields box to verify that the fields are mapped correctly. Also, you will need to add again, the <<Next Record>> field to the main document. To do this, follow these steps:

- 1. Place the cursor in the main document where you want to insert the <<Next Record>> field. In most cases, you will be deleting the old <<Next Record>> field so you will know where to place it.
- 2. Display the Mail Merge Toolbar. Use the menu option of **View**, **Toolbars**, **Mail Merge**.



3. From the **Insert Word Field** button, click on the down arrow.

<u>A</u> sk
<u>F</u> ill-in
IfThenElse
Merge <u>R</u> ecord #
Merge Seguence #
<u>N</u> ext Record
Ne <u>x</u> t Record If
Set <u>B</u> ookmark
<u>S</u> kip Record If

Select the **Next Record** option to insert the <<Next Record>> merge field.

Problem D: Outlook Contacts and Categories not Present

You are performing a Mail Merge using Microsoft Outlook Contacts and the Categories field is not there. You can also use this solution for other fields that are not appearing in the Query Options such as fields that you custom created in your Outlook Contact Folder.

Solution D

- 1. In Outlook, go to the **Contacts** Folder.
- 2. From the menu select **Tools, Mail Merge**.

Mail Merge Contacts				? ×	
Contacts		Fields to merge			
All contacts in current	t view	All contact	fields		
O Only selected contact	ts	C Contact fie	C Contact fields in current view		
To filter contacts or chan "Customize Current View	ige the contact fields in " on the "Current View"	the current view, menu.	go to the "View" n	nenu and click	
Document file					
New document					
C Existing document:				Browse	
Contact data file					
To save this contact data	a for future use or refe	rence, specify a file	e name.		
Permanent file:				Browse	
Merge options					
Document type:	Merge to:				
Form Letters	New Document 📃				
			ОК	Cancel	

- 3. In the **Document type** field, select what type of merge you want to create (Letters, Labels, Envelopes, Catalog) and then select **OK**.
- 4. If you get a dialogue box about Distribution lists, say **OK**. You cannot use Distributions as part of the mail merge process.
- 5. If you are creating Labels or Envelopes, Word opens and the following message appears:



Select the link for **Complete Setup**.

6. If you are creating Letters or Catalogs, continue with the Mail Merge steps. The Mail Merge toolbar will appear, but you will have to open the Mail Merge Task Pane. To do this select from the menu **Tools, Letters and Mailings, Mail Merge Wizard**.

7. If you are creating labels or envelopes, the "old" (Pre-XP) Mail Merge Helper box will return:

Mail Merg	e Helper	? ×
The main button to	document and data source are now available. Choose the Setu lay out your main document.	p
18	Main document	
	<u>C</u> reate ▼ <u>Setup</u>	
3.0	Merge type: Mailing Labels Main document: Document7	
2 🖻	Data source	
	Get Data ▼ Edit ▼	
	Data: C:\DOCUME~1\\OMM1.doc	
3 ℡	Merge the data with the document	
	Merge Query Options	
	Options in effect: Suppress Blank Lines in Addresses Merge to new document	
	Can	cel

Click on the **Setup** button in Step 1 and select the label size.

8. You need to get to the Query Option box to filter the merge based on a category.

<u>For labels or envelopes</u>, click on the Cancel button in the "old" (Pre-XP) Mail Merge Helper box and select from the menu **Tools, Letters and Mailings, Mail Merge Wizard** to open the "new" (XP) Mail Merge Task Pane.

For letters or catalogs, the current (2003) task pane is present.

Then, select the link for **Edit recipient list** and then locate the field for Categories. Click the down arrow for Categories and select **Advanced**.

The Query Options box returns. The box should show similar to the following: ("Categories" "Equal to" "Category Name")

Query Options			? ×
Eilter Records Sort Records			
Field:	Comparison:	Compare to:	
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Select OK.

9. Follow the necessary remaining steps to complete the merge using the Mail Merge Task Pane.

Problem E: Using Outlook Distribution Lists

You are performing a mail merge and you want to use an Outlook Distribution list for your recipients and you are getting the following message:

"Your selection contains distribution lists which will not be merged."



Solution E

Per a question posted on Microsoft's newsgroups site at the following address: <u>http://support.microsoft.com/newsgroups/default.aspx?NewsGroup=microsoft.public.word.m</u> <u>ailmerge.fields&SLCID=US&ICP=GSS3&sd=GN&id=fh;EN-US;newsgword</u>

"As far as I know you cannot do this however you initiate the merge, using the built-in features of Outlook and Word. IMO Outlook Distribution lists are rather less versatile than you might hope.

Your best bet might be to write and run some Outlook VBA code to process a selected distribution list, either generating a data source you could use with a merge or even "rolling your own" merge.

Peter Jamieson - Word MVP" December 16[,]2003

Problem F: Creating a Data Source as Part of the Mail Merge

If you create the data source as part of the Mail Merge Wizard, you are creating an Access Database (.mdb file). In previous versions of Word, the data source was created as a Word table and could be retrieved as a Word Document. This is no longer the case. If you want to retrieve the data source for reference, you will need to open it in Access. After you open it in Access, you can export the data to Excel or publish a table in Word. You can also view, edit, or print the table in Access.

Solution F

If you need to edit, you can edit recipients in Word, in the Mail Merge Wizard. At Step 3, You can click on the **Edit Recipients** link to get the Mail Merge Recipients box:

Mail M	Mail Merge Recipients					
To sort the list, click the appropriate column heading. To narrow down the recipients displayed by a specific criteria, such as by city, click the arrow next to the column heading. Use the check boxes or buttons to add or remove recipients from the mail merge. List of recipients:						
	💌 Last Name	First Name	💌 Title	Company Name	💌 Address Line	
	wise	sara			113 castle	
	wise	robert			124 castle	
•) b	
<u>S</u> elect All Clear <u>A</u> ll <u>R</u> efresh						
F	ind	t Validate			ок	

To edit a recipient, select the row, and click on the **Edit** button at the bottom of the box.

C:\Documents and Settings\	wsara\My Documents\My Data Sources\test 🍳 🗙	
Enter Address information	· · · · · · · · · · · · · · · · · · ·	
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New Entry Delete Ent	ry Eind Entry Filter and Sort Customize	
View Entry Number	First Previous 1 Next Last	
Total entries in list 2		
	Cancel	

Make the necessary changes, and then use the **Cancel** button.

Export to Excel:

1. On the computer desktop, open the **My Documents** folder.

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	gracehearts File 504 KB	Microsoft Word Document 249 KB	
	excel2sara Microsoft Excel Workshe	et Paste Microsoft Word Document	•

2. Open the My Data Source folder.

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Other Places \$	Microsoft Access Record-Locki 1 KB	saratest2 Microsoft Access Application 108 KB	
 My Documents My Computer My Network Places 		Type: Microsoft Access Application Date Modified: 3/11/2004 2:17 PM Size: 108 KB	
Details ¥			

3. Locate the Microsoft Access Database, with the name you provided in the Mail Merge Process, and double click on it to open. Access will open.



4. If "Office_Address_List" is not highlighted, click on it once to select it.



- 5. From the menu select File, Export.
- 6. The Export Table... box returns.



In the **Save as type** field use the down arrow to select **Microsoft Excel 4**. It will, by default, save in the My Documents Folder. Click on the **Export** button.

- 7. Open Excel. Select from the menu **File**, **Open** and in the My Documents folder look for the Office_Address_List file (or the name of the file, if you changed it from the default) and open it.
- 8. The data returns in an Excel spreadsheet. You may need to resize or delete columns to make the spreadsheet easier to read.
Publish in Word:

1. On the computer desktop, open the My Documents folder.



2. Open the My Data Source folder.

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3. Locate the Microsoft Access Database, with the name you provided in the Mail Merge Process, and double click on it to open. Access will open.



4. If "Office_Address_List" is not highlighted, click on it once to select it.



- 5. Select from the menu Tools, Office Links, Publish with Microsoft Word.
- 6. In the Convert File box, leave the default, Rich Text Format (RTF) and select OK.



7. Word will return with the data in a Word table. You will need to resize and/or delete columns and make the Page Layout landscape to make the table easier to read.

Print the table in Access:

1. On the computer desktop, open the **My Documents** folder.

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2. Open the My Data Source folder.

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Details ¥			

3. Locate the Microsoft Access Database, with the name you provided in the Mail Merge Process, and double click on it to open. Access will open.



4. Double click on the "Office_Address_List" table to open it.



5. The table opens.

			AT 7 18 -						
saratest2:D	atabase (Access 2)	000 file format)							
fice_Address	_List : Table								
Title	First Name	Last Name	Company Name	Address Line 1	Address Line 2	City	State	ZIP Code	Country
	Sara	Wise		115 Castle Blvd	Apt B	Akron	Ohio	44313	
	Beth	Smith		1853 Hadden Ci		Akron	Ohio	44313	

Ver. 2005.03.14 Learning Technologies/Software Training Page 74 ©2005 The University of Akron. These materials may not be reproduced in whole or in part without the express written permission of The University of Akron 6. You will want to landscape the page to print it in a format that will be easier to read. To do this select from the menu **File, Page Setup**. On the Page tab, select **Landscape**. Select **File, Print** or use the **Print** icon the toolbar.