Word 2003
Mail Merge

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Version 2005.03.14

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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:

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:
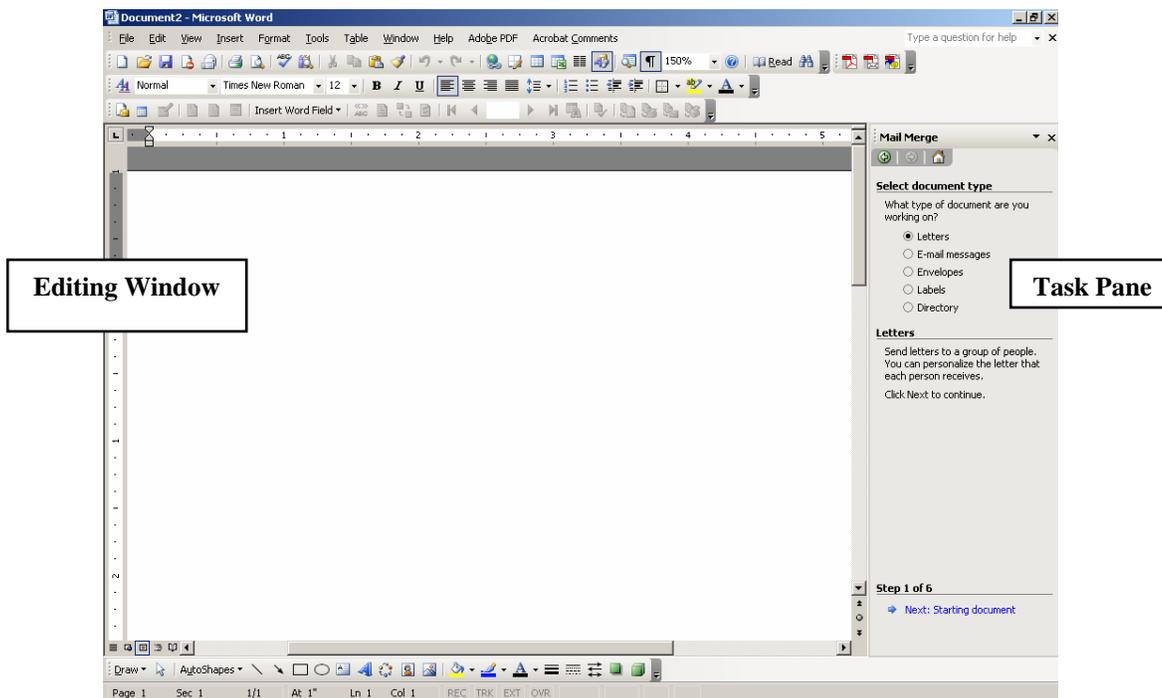
On the top of the task pane there are some additional navigation tools.
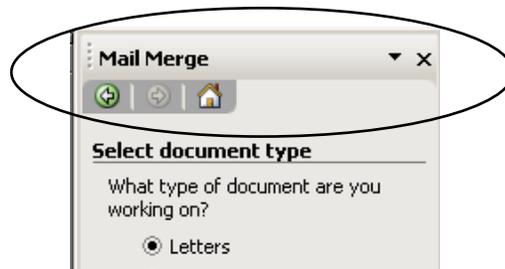
- The arrow buttons take you backwards and forwards through the task panes that have been active.
- The Home button will take you to the Getting Started task pane.
- The down arrow provides a short menu for common Task Panes such as Getting Started, Help, Search Results, Clip Art, Research, Clipboard, 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.
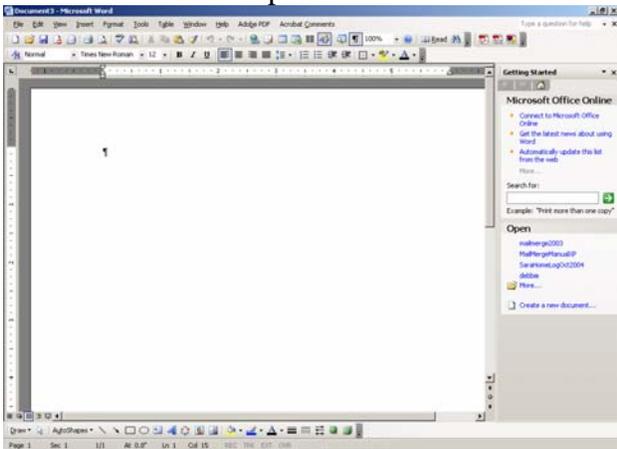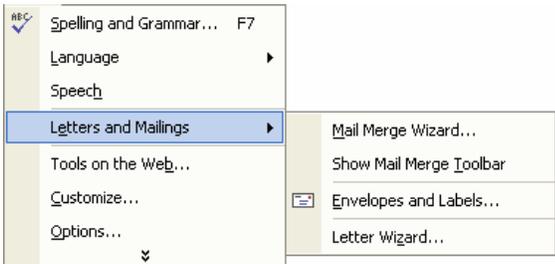
Mail Merge Terms

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.
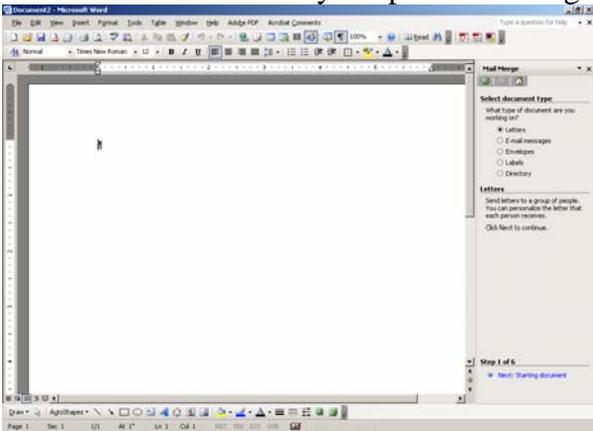
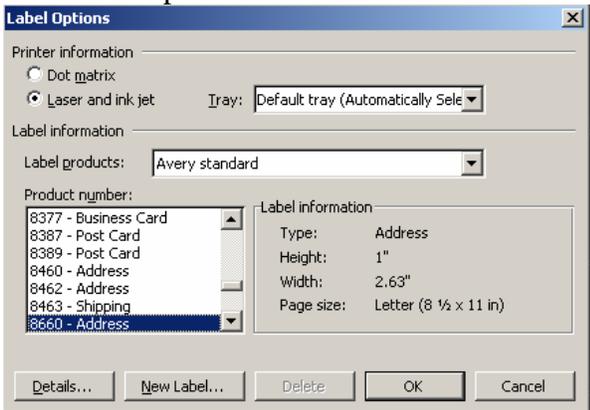| Term	Definition
Address Block	Refers to the area of the main document that contains the name, address, title, and company. **For example:** Joe Smith 1234 Main Street Akron, Ohio 44325
Data Source	Data sources contain the information that will be used to create items with mail merge. For example, a 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.
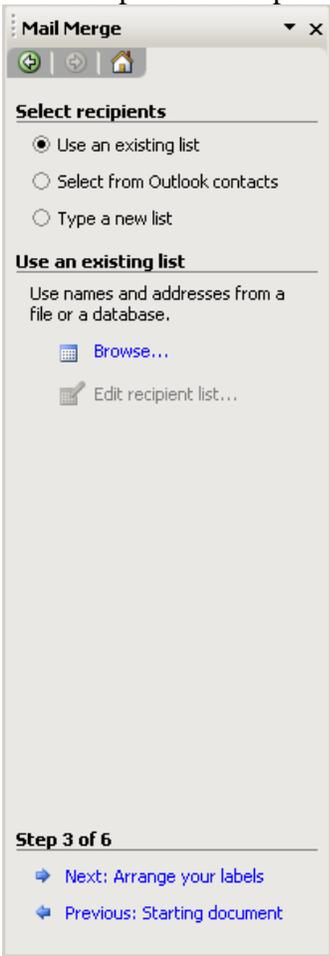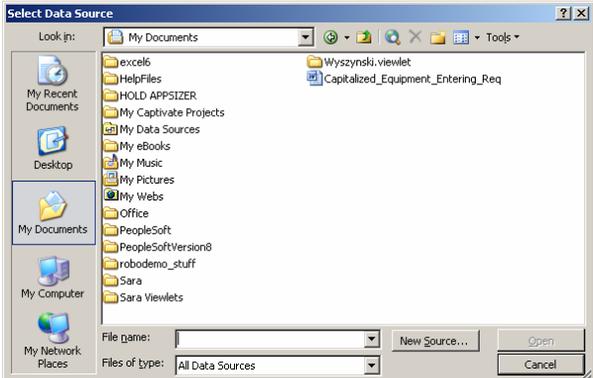
You may find it easier to create labels and envelopes in Mail Merge if you display hidden characters such as spaces and paragraph marks by clicking on the **Show/Hide Paragraph Marks** ¶ button on the standard toolbar.

What You Do	What you see
1. Open Word and if necessary, click the **New Blank Document** button on the Standard Toolbar.	The Word window opens:
2. Select from the menu **Tools, Letters and Mailings, Mail Merge Wizard**.	The Tools menu:

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 *Select document type* 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
5. At the top of the task pane, under the title, ***Select starting document***, 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 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**.	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... **Step 2 of 6** ➡ Next: Select recipients ⬅ Previous: Select document type

What You Do	What you see
6. In the middle of the task pane under the title, ***Change document layout***, select the link for **Label options**. Here you can select the product number for the label you will be using. Select the **Product Number** and verify on the right under ***Label information*** that the data is correct for the labels that you will be using. Select **OK**. ***Note for Envelopes***: The Envelope Option box returns. Select the correct envelope size and select **OK**. When you return, you may notice some changes in the editing window. This is just Word adjusting/formatting the main document to reflect the changes you just made. 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.	The Label Option box returns:

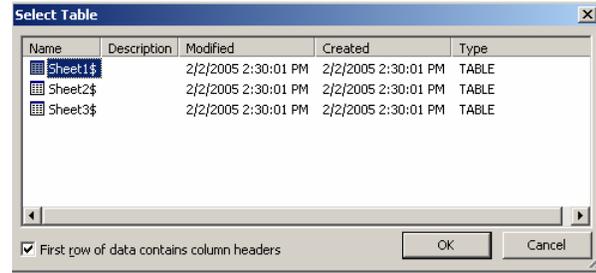| What You Do	What you see
7. At the top of the task pane, under the title *Select recipients*, you will need to identify the data source. The selections that you have available are: ▪ **Use an existing list**: Select this option if you already have the list of names that you want to draw on. You would probably have this list stored in an Access database, Excel spreadsheet, a Word table, or saved as 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, *Use an existing list* select the **Browse** link.	The task pane for Step 3:
8. The Select Data Source box returns. Locate the file that will be used as the data source and select the **Open** button. *Note*: You may need to adjust the field, **Files of type**: to All Data Sources.	The Select Data Source box:

What You Do	What you see
9. A box may appear asking you to select a table. If this box appears, select the table or spreadsheet that contains your data. Select **OK**. *Note:* You will notice some changes in the editing window again. This is just Word adjusting/formatting the main document to reflect the selection you just made.	The Select Table box returns: <table><tr><th>Select Table</th><th></th><th></th><th></th><th>x</th></tr><tr><td>Name</td><td>Description</td><td>Modified</td><td>Created</td><td>Type</td></tr><tr><td>Sheet1$</td><td></td><td>2/2/2005 2:30:01 PM</td><td>2/2/2005 2:30:01 PM</td><td>TABLE</td></tr><tr><td>Sheet2$</td><td></td><td>2/2/2005 2:30:01 PM</td><td>2/2/2005 2:30:01 PM</td><td>TABLE</td></tr><tr><td>Sheet3$</td><td></td><td>2/2/2005 2:30:01 PM</td><td>2/2/2005 2:30:01 PM</td><td>TABLE</td></tr></table>☑ First <u>r</u>ow of data contains column headers OK Cancel

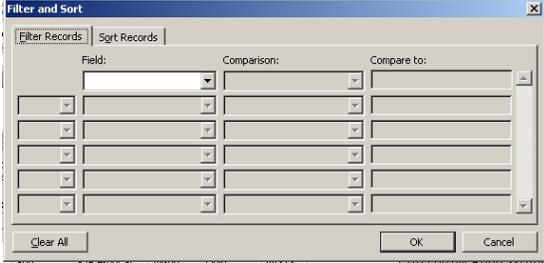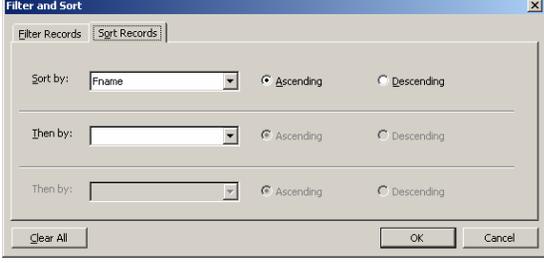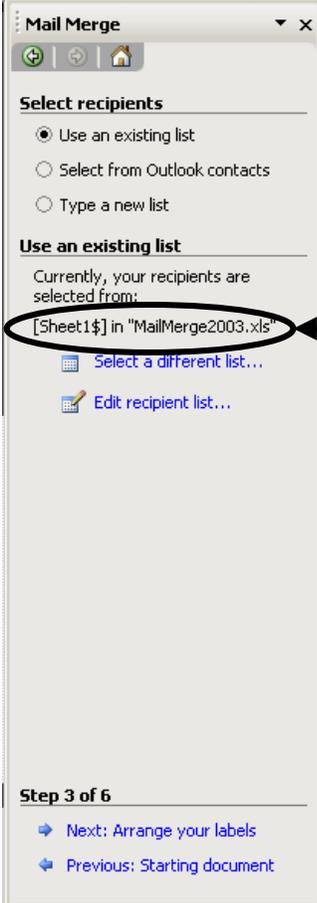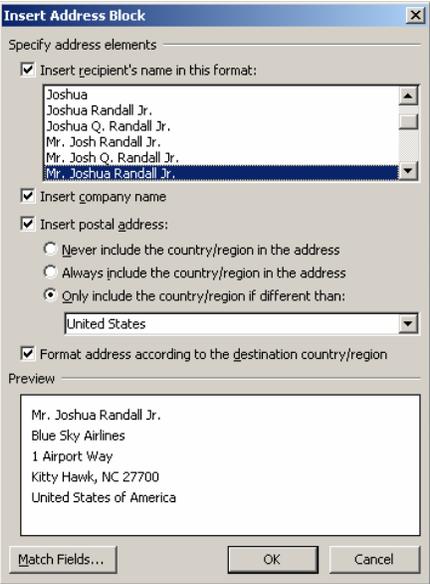| What You Do	What you see
10. The Mail Merge Recipients box returns. In this step, you need to select who will get your message. The Mail Merge Recipients box shows all records that are listed in the data source. This box will allow you to remove individual people by clearing the check box to the left 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**.	The Mail Merge Recipients box: With the Sort menu dropped down:

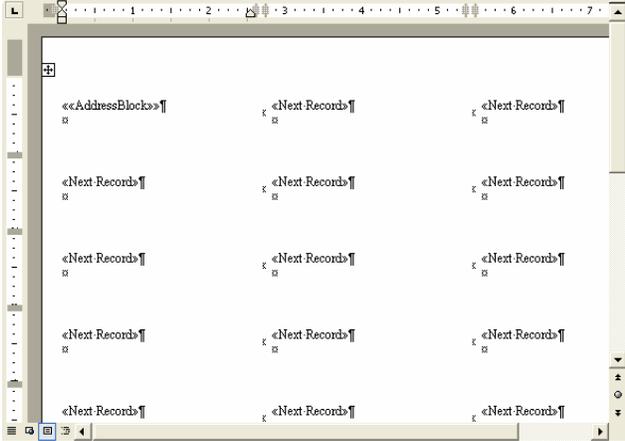| What You Do	What you see
Note: If you need to perform a Filter or Sort, you would select **Advanced** from the menu as seen on the previous page. The Filter and Sort box returns On the Filter Records tab, you can filter the recipient list. The fields are as follows: **Field**: Select any field from 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. 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. Select **OK** on either tab to accept the changes. Select **OK** again to return to the wizard.	The Filter tab: The Sort tab:

What You Do	What you see
11. The task pane returns and under the title, *Use an existing list*, the filename you selected is shown. 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. You are ready for the next step. Click on the link, **Next: Arrange your labels**, at the bottom of the task pane.	The Recipient task pane:

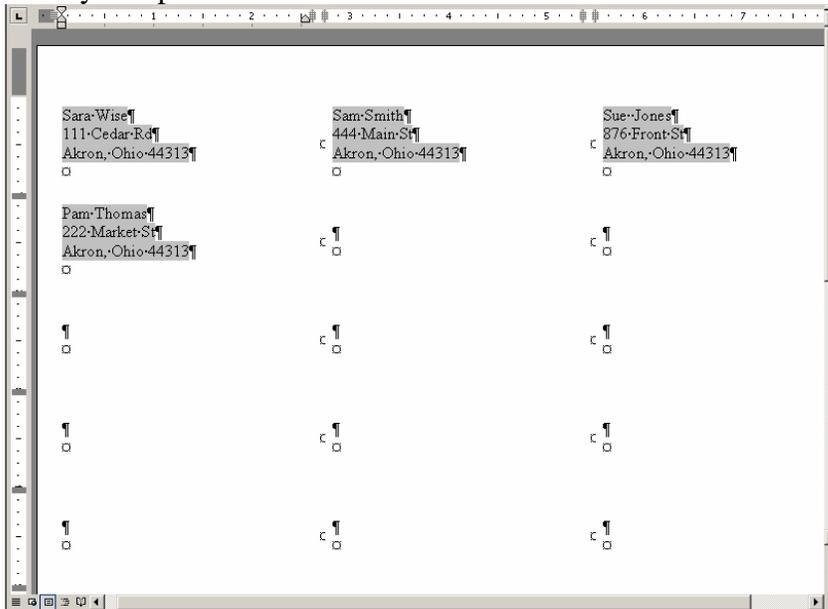| What You Do	What you see
12. At the top of the task pane, under the title ***Arrange your labels***, you will need to layout the label with the appropriate fields. For labels, select **Address Block**. This refers to the portion of a main document containing the recipient's name and address. An Address Block typically looks as follows: Mrs. Sally Zippy 123 Carroll Street Akron, Ohio 44321 **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 defaults in the upper left corner of the envelope and this is **NOT** where you want the outgoing names and addresses to appear.	The next step returns:
13. 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.	The Insert Address Block box:

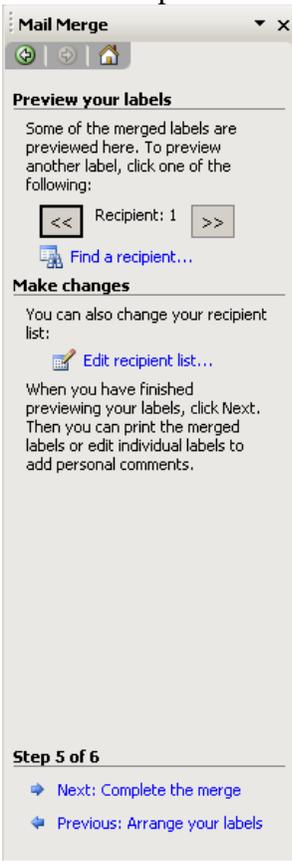| What You Do	What you see
14. The Match Fields box will return. Word is going to attempt to automatically match the field names in your data source with the field names it uses in the Address Block. If Word cannot match your fields (from the data source) you can still match the fields using this box. You will see **(not matched)** if Word was unsuccessful in matching. 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. 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.	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 — Lname First Name — Fname Courtesy Title — (not matched) Company — (not matched) Address 1 — Address City — City State — State Postal Code — Zip Spouse First Name — (not matched) **Optional information** Middle Name — (not matched) Suffix — (not matched) 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

What You Do	What you see
15. The main document in the editing window will change again to reflect the changes you just made. Note how the label in the top left corner shows: **<<Address Block>>** and the other labels show: **<<Next Record>>**. You will need to add the Address Block to all labels in the document. **Note for Envelopes**: You will notice <<Address Block>> in the middle of the envelope.	The main document after Address Block is selected:

What You Do	What you see
16. Click ONCE on the **Update all Labels** button. **Note for Envelopes**: It is not necessary to use the **Update all labels** button when working with envelopes. This button will not appear for envelopes.	The task pane with the Update all Labels button circled: **Mail Merge** **Arrange your labels** If you have not already done so, lay out your label using the first label on the sheet. 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... 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 page by clicking the button below. Update all labels **Step 4 of 6** ➡ Next: Preview your labels ⬅ Previous: Select recipients

What You Do	What you see
17. The main document in the editing window will change once again reflect the changes you just made. Now all labels now show: **<<AddressBlock>>** You are ready for the next step. Click on the link, **Next: Preview your labels**, at the bottom of the task pane. *Note*: 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!	The main document after you Update all labels:

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.
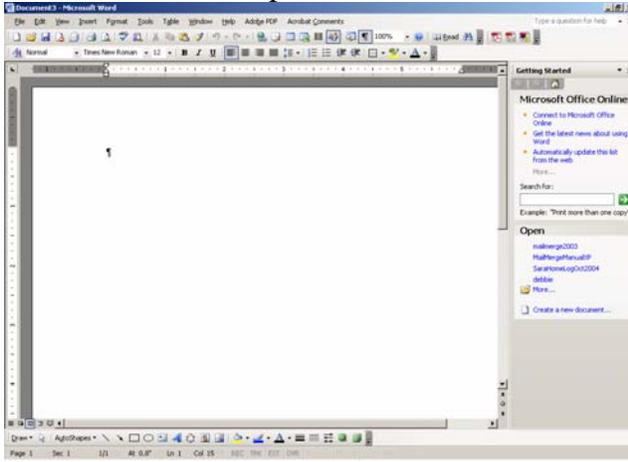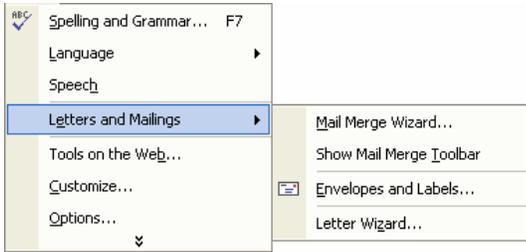
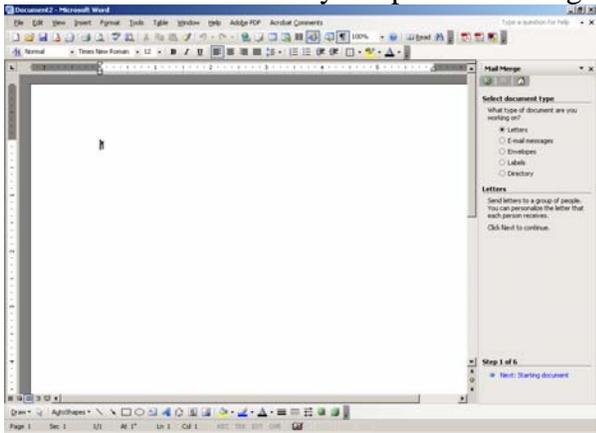| What You Do	What you see
19. At the top of the task pane, under the title ***Preview your labels***, you can go forward or backwards through the labels. You can also locate a specific recipient by clicking on the link for **Find a recipient**. **Note**: When you use the forward and backwards arrows in the Preview Step of the Mail Merge Wizard, you are only advancing one label at a time and NOT one page at a time. When you click on the forward button, it will advance the next label to the top left 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 under the title, ***Make changes*** to return to the Mail Merge Recipients box. Click on the link for **Next: Complete the merge** at the bottom of the task pane to move to the last step.	The next step returns:

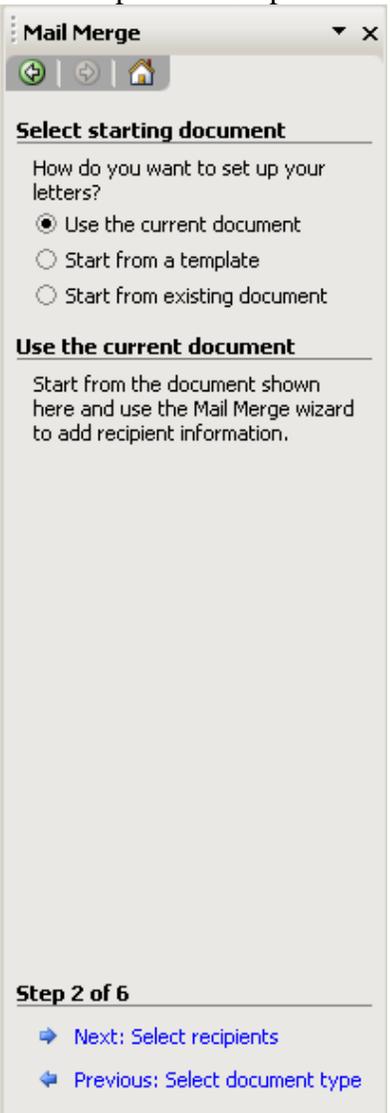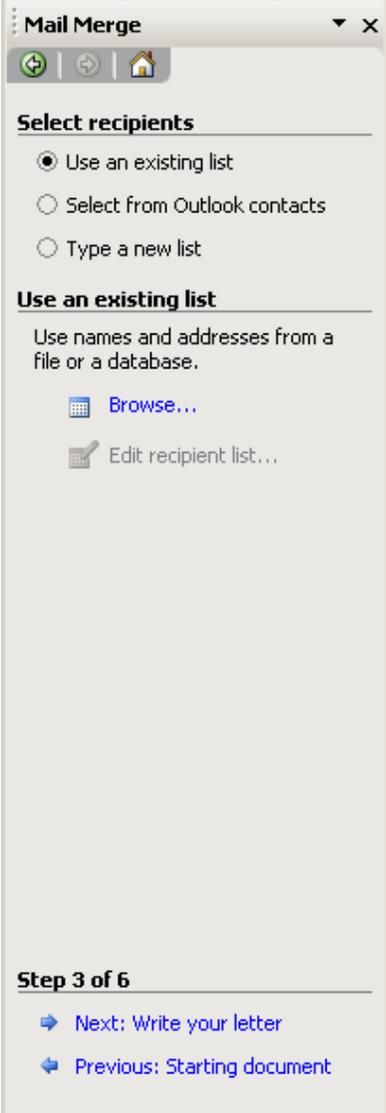| What You Do	What you see
20. The last step is to complete the merge. To Print the labels, click on the **Print** link under the *Merge* title. In the **Merge to New Document** box, select **All** and select **OK**. The Print box returns. Make the necessary selections and click **OK**. If you want to 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.	The last task pane returns: **Mail Merge** **Complete the merge** 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** Print... Edit individual labels... Step 6 of 6 Previous: Preview your labels The Merge to New Document box returns: **Merge to New Document** Merge records ● All ○ Current record ○ From: [ ] To: [ ] OK Cancel

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.
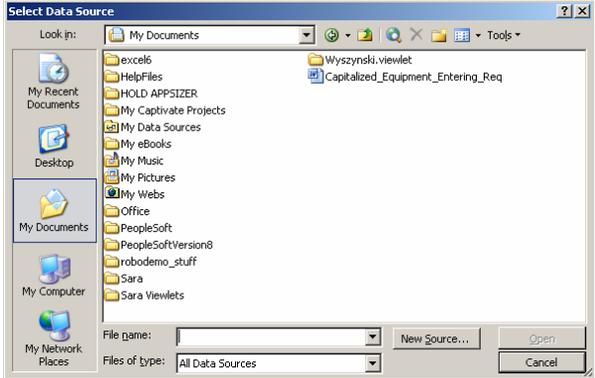
You may find it easier to do a letter in Mail Merge if you display hidden characters such as spaces and paragraph marks by clicking on the **Show/Hide Paragraph Marks** ¶ button on the standard toolbar.

What You Do	What you see
1. Open Word and if necessary, click the **New Blank Document** button on the Standard Toolbar.	The Word window opens:
2. Select from the menu **Tools, Letters and Mailings, Mail Merge Wizard**.	The Tools menu:

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 ***Select document type*** 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.	The first step in the task pane:

What You Do	What you see
5. At the top of the task pane, under the title, *Select starting document*, 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 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 choose **Open** to search for a file. 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**. 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.	The task pane for Step 2:

What You Do	What you see

6. At the top of the task pane, under the title *Select recipients*, 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 in 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.
 	
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.
	The task pane for Step 3:

What You Do	What you see
7. The Select Data Source box returns. Locate the file that will be used as the data source and select the **Open** button. *Note*: You may need to adjust the field, **Files of type** to All Data Sources.	The Select Data Source box:
8. A box may appear asking you to select a table. If this box appears, select the table or spreadsheet that contains your data. Select **OK**. *Note:* You may notice some changes in the editing window again. This is just Word adjusting/formatting the main document to reflect the selection you just made.	The Select Table box returns:
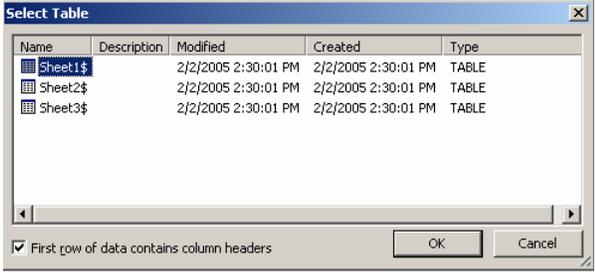
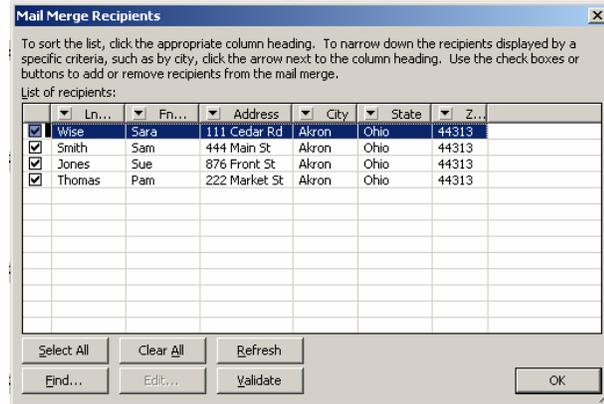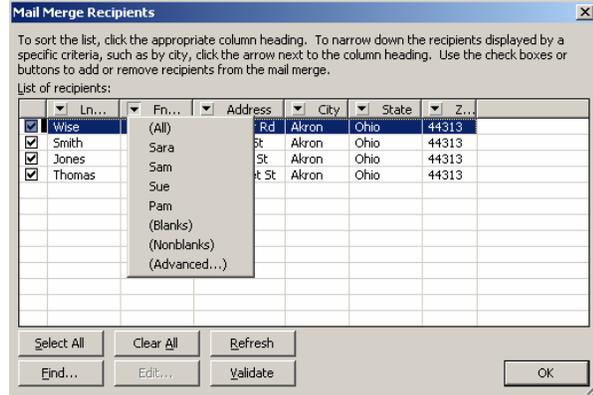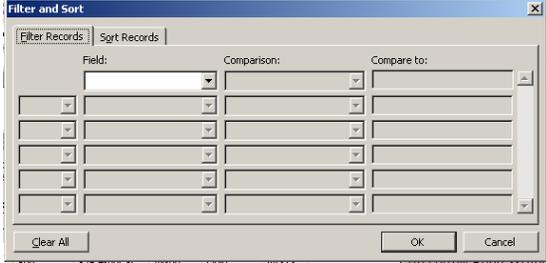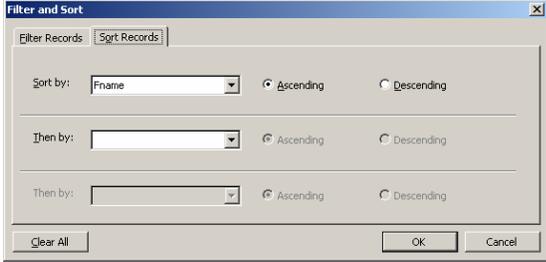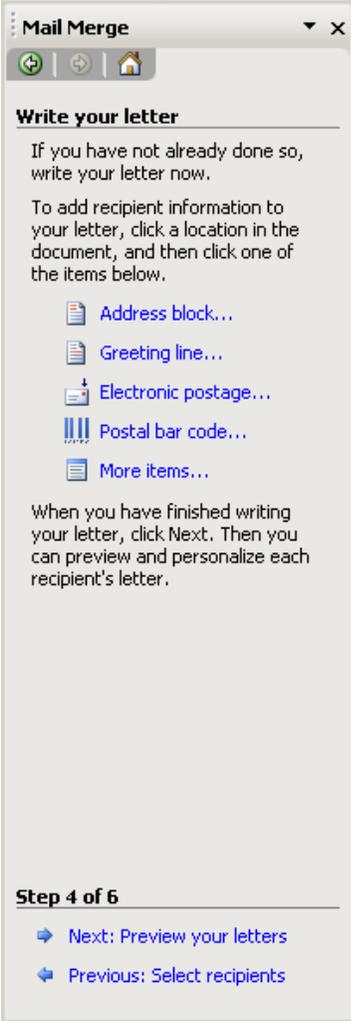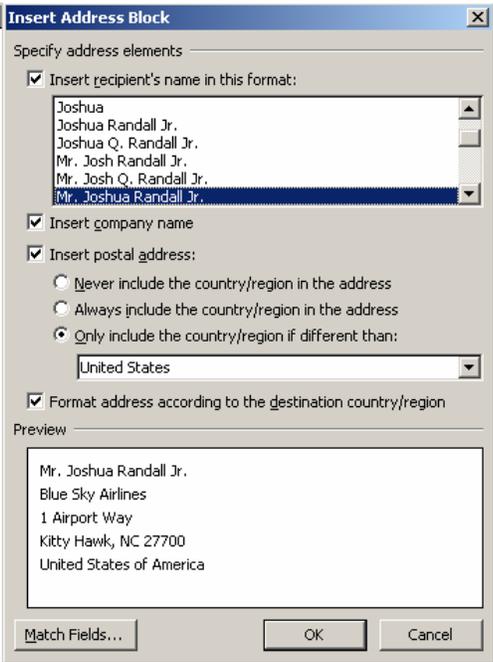| What You Do	What you see
9. The Mail Merge Recipients box returns. In this step, you need to select who will get your message. The Mail Merge Recipients box shows all records that are listed in the data source. This box will allow you to remove individual records by clearing the check box to the left 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**.	The Mail Merge Recipients box: With the Sort menu dropped down:

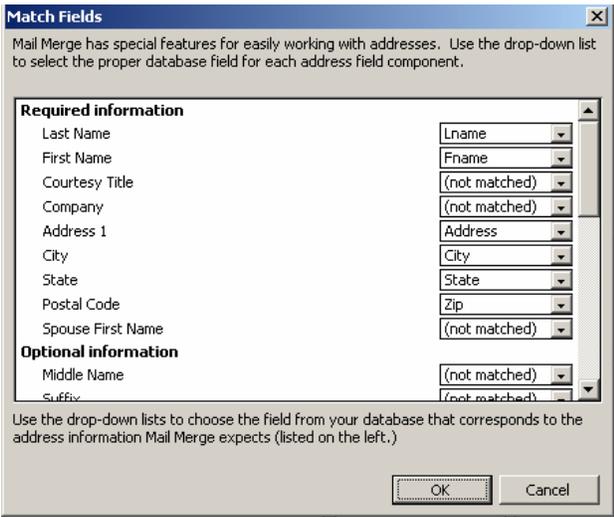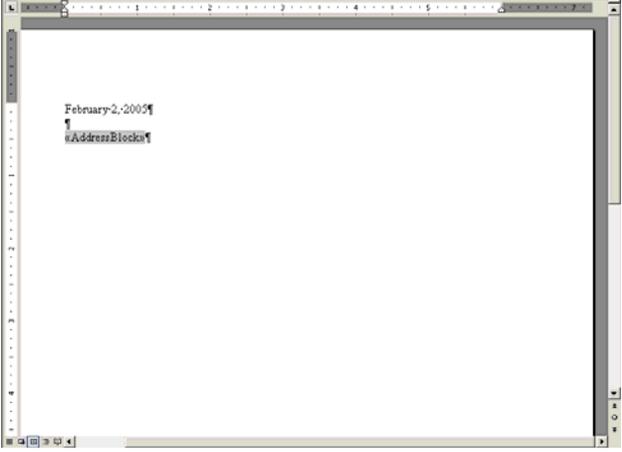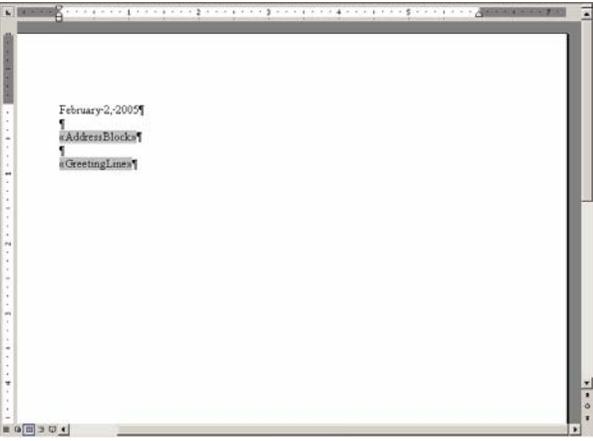| What You Do	What you see
Note: If you need to perform a Filter or Sort, you would select **Advanced** from the menu as seen in the previous step. The Filter and Sort box returns On the Filter tab, you can filter the recipient list. The fields are as follows: **Field**: Select any field from the data 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. 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. Select **OK** on either tab to accept the changes. Select **OK** again to return to the wizard.	The Filter tab: The Sort tab:

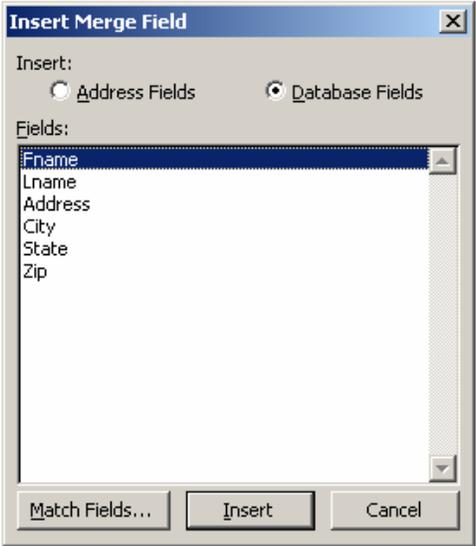| What You Do	What you see

10. The task pane returns and under the title, *Use an existing list*, the filename you selected is shown.
 	
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.
 	
You are ready for the next step. Click on the link, **Next: Write your letter**, at the bottom of the task pane.
	The Recipient task pane:
	
	Mail Merge
	
	Select recipients
	● 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...
	
	Step 3 of 6
	➡ Next: Write your letter
	⬅ Previous: Starting document

What You Do	What you see
11. At the top of the task pane, under the title *Write your letter*, you will need to layout the letter with the appropriate merge fields. First, if you want the recipients 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. An Address Block typically looks as follows: Mrs. Sally Zippy 123 Carroll Street Akron, Ohio 44321	The next step returns: **Mail Merge** **Write your letter** If you have not already done so, write your letter now. 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... ││││ Postal bar code... ☐ More items... When you have finished writing your letter, click Next. Then you can preview and personalize each recipient's letter. **Step 4 of 6** ➡ Next: Preview your letters ⬅ Previous: Select recipients

What You Do	**What you see**
12. 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.	The Insert Address Block box:

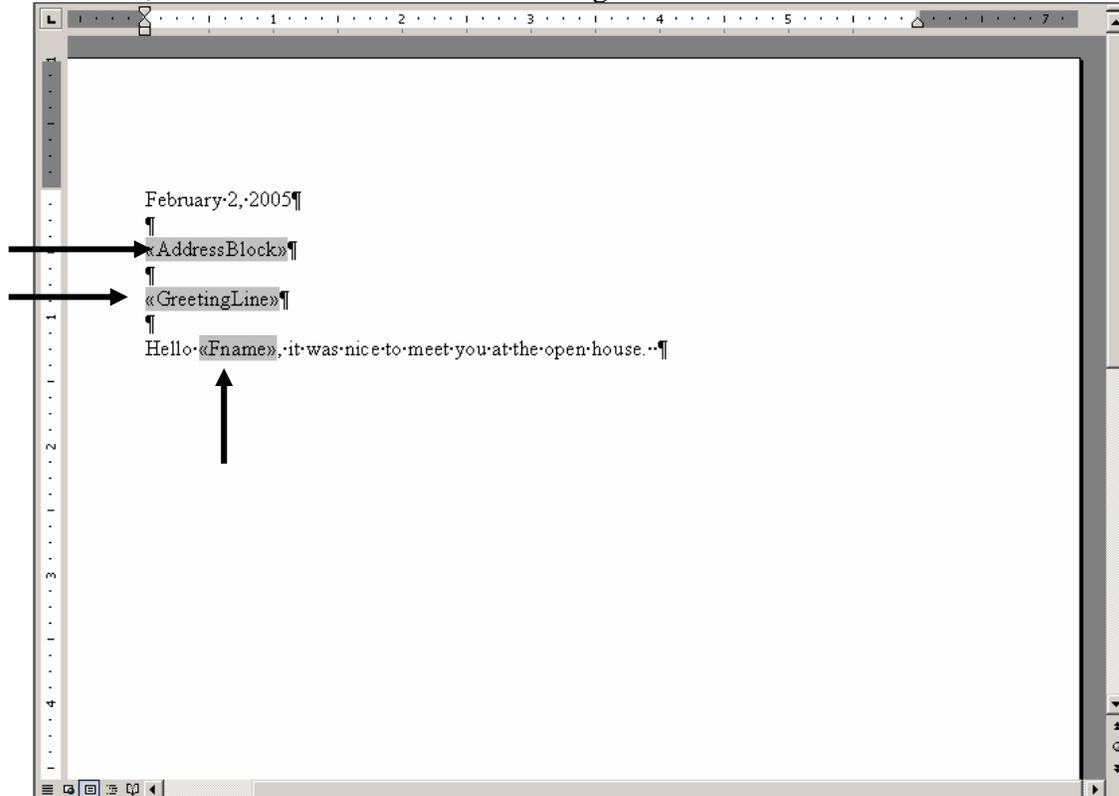| What You Do	What you see
13. The Match Fields box will return. Word is going to attempt to automatically match the field names in your data source with the field names it uses in the Address Block. If Word cannot match your fields (from the data source) you can still match the fields using this box. You will see **(not matched)** if Word was unsuccessful in matching. 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. 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.	The Match Fields box:

What You Do	What you see
14. The main document in the editing window will change again to reflect the changes you just made. Note how the letter shows **<<Address Block>>** in the top left corner.	The main document after Address Block is selected: February 2, 2005¶ ¶ «AddressBlock»¶

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. Then, select the link for **Greeting line** in the task pane. The Greeting Line box returns. Make the appropriate selections in the **Greeting line format** and **Greeting line for invalid recipients names** fields. After you make those selections, click on the **Match Fields** button so you can verify and/or finish mapping the merge fields. 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>>.	The Greeting Line box: The main document after greeting line is selected:

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** and the Insert Merge Field box returns. 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**.	The Insert Merge Field:

What You Do	What you see

17. After you have the Address Block, Greeting Line, and any other merge fields inserted into the letter, it will look similar to the following:

February·2,·2005¶
¶
«AddressBlock»¶
¶
«GreetingLine»¶
¶
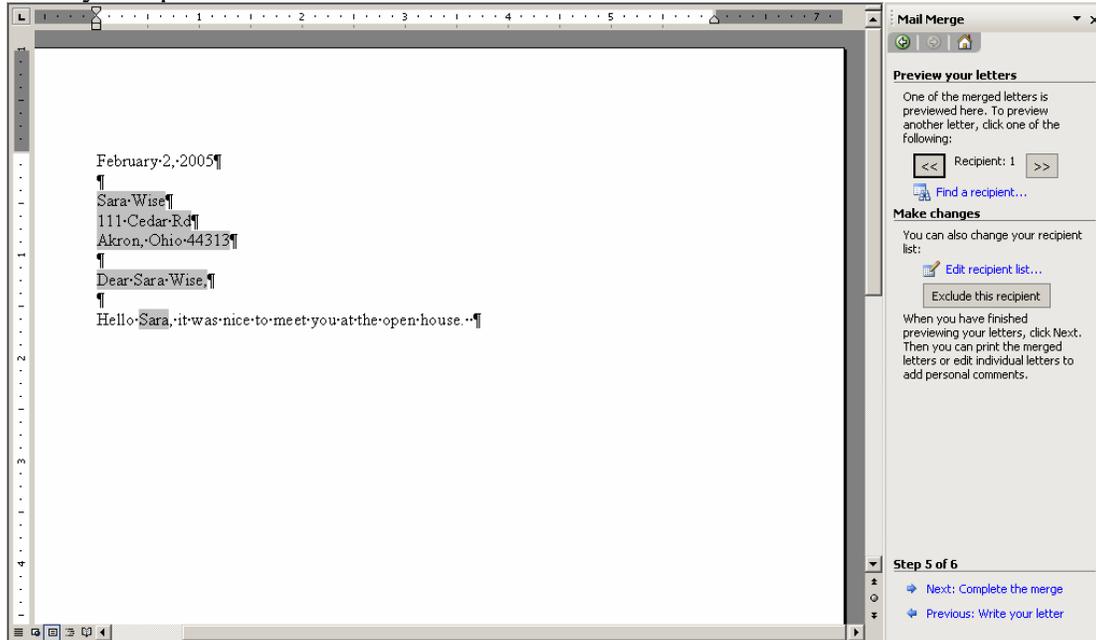Hello·«Fname»,·it·was·nice·to·meet·you·at·the·open·house.··¶

Your main document is finished. You are ready for the next step. Click on the link **Next: Preview your letters** to advance.
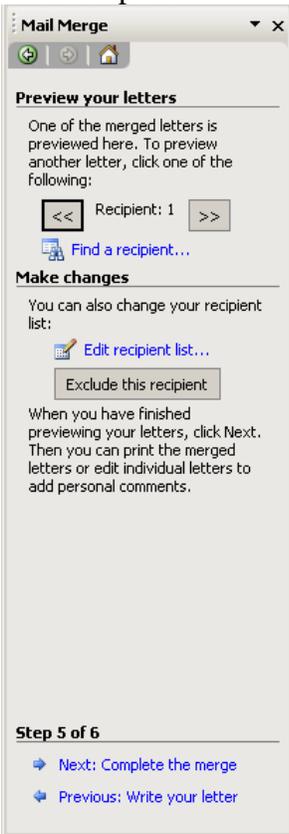
Note: The template that you see in the editing window is how the letter is going to appear, but with the real data from the data source. If you see extra indications of merge fields, you will want to delete them from the letter. If you do not delete the extra merge field indications, the letter will 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 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.
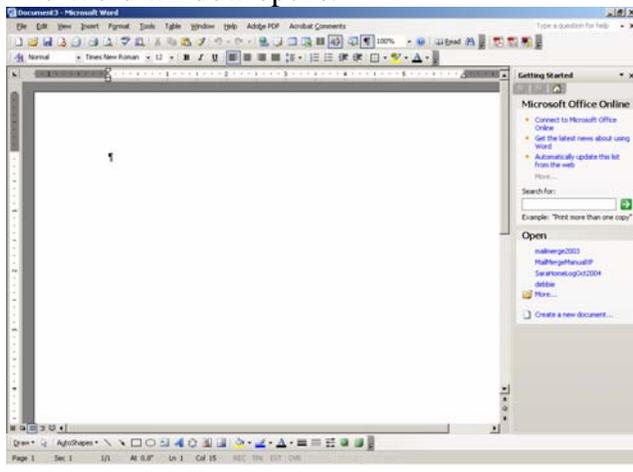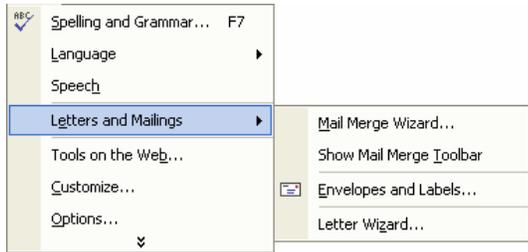
February·2,·2005¶
¶
Sara·Wise¶
111·Cedar·Rd¶
Akron,·Ohio·44313¶
¶
Dear·Sara·Wise,¶
¶
Hello·Sara,·it·was·nice·to·meet·you·at·the·open·house.··¶

Mail Merge

Preview your letters

One of the merged letters is previewed here. To preview another letter, click one of the following:

`<<` Recipient: 1 `>>`

Find a recipient...

Make changes

You can also change your recipient list:

Edit recipient list...

Exclude this recipient

When you have finished previewing your letters, click Next. Then you can print the merged letters or edit individual letters to add personal comments.

Step 5 of 6

➡ Next: Complete the merge
⬅ Previous: Write your letter

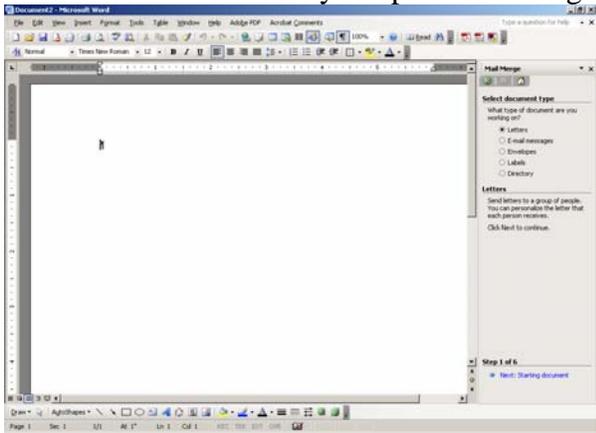| What You Do	What you see
19. At the top of the task pane, under the title ***Preview your letters***, you can go forward or backwards through the letters using the arrows buttons. You can also locate a specific recipient by clicking on the link for **Find a recipient**. If you need to edit the list 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 specific 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:

What You Do	What you see
20. The last step is to complete the merge. To Print the labels, click on the **Print** link under the *Merge* title. 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.	The last task pane returns: The Merge to New Document box returns:

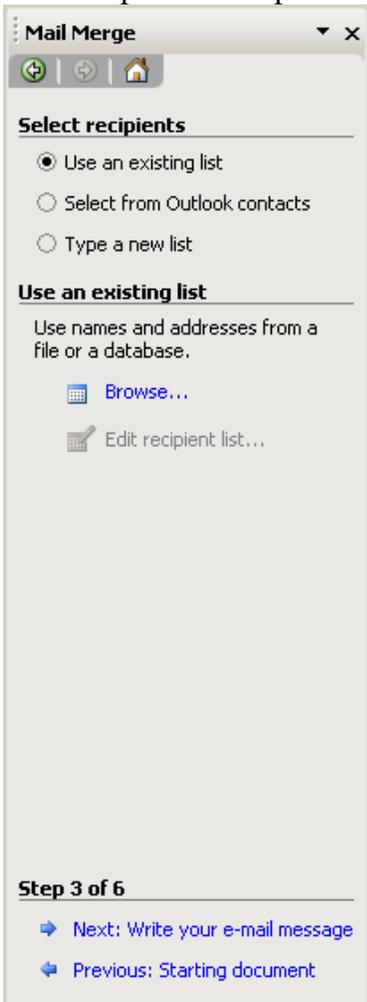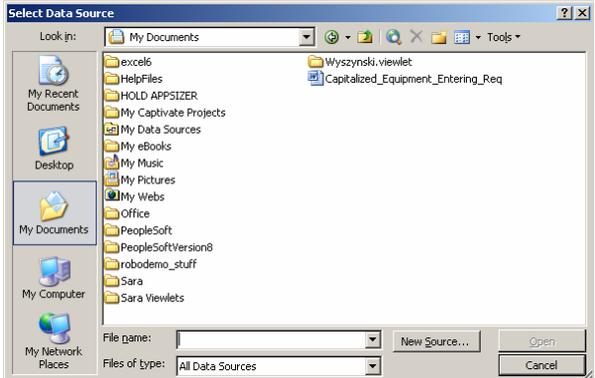## Merging to an Outlook E-mail Message

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** ¶ button on the standard toolbar.

What You Do	What you see
1. Open Word and if necessary, click the **New Blank Document** button on the Standard Toolbar.	The Word window opens:
2. Select from the menu **Tools, Letters and Mailings, Mail Merge Wizard**.	The Tools menu:

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 *Select document type* title, select the radio button for **E-mail messages**. 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
5. At the top of the task pane, under the title, *Select starting document*, determine how you want the message set up. 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 choose **Open** to search 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. 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**. 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.	The task pane for Step 2:

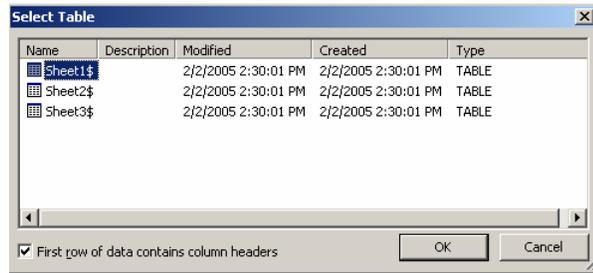| What You Do	What you see

6. At the top of the task pane, under the title **Select recipients**, 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, ***Use an existing list*** select the **Browse** link.
	The task pane for Step 3:

7. The Select Data Source box returns. Locate the file that will be used as the data source and select the **Open** button. *Note*: You may need to adjust the field, **Files of type** to All Data Sources.	The Select Data Source box:

What You Do	What you see
8. A box may appear asking you to select a table. If this box appears, select the table or spreadsheet that contains your data. Select **OK**. *Note:* You may notice some changes in the editing window again. This is just Word adjusting/formatting the main document to reflect the selection you just made.	The Select Table box returns:

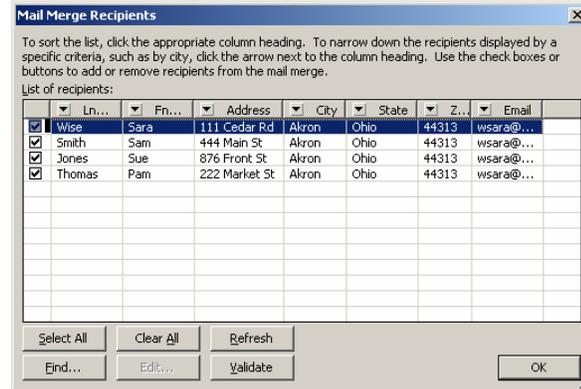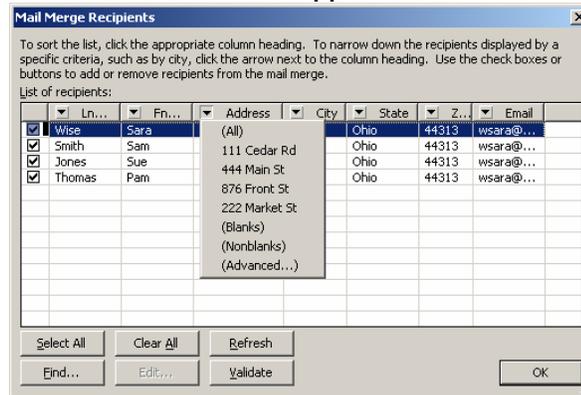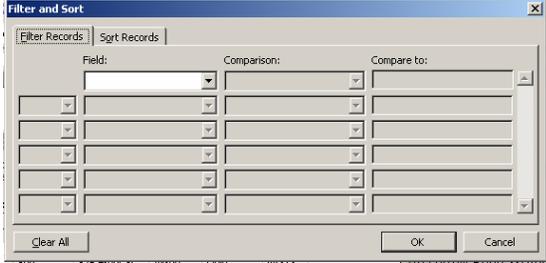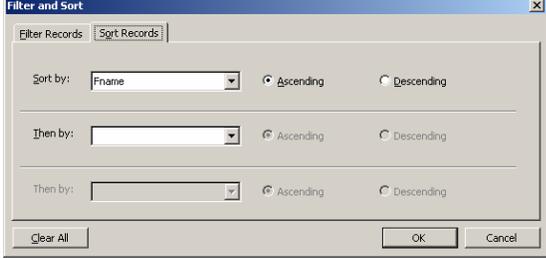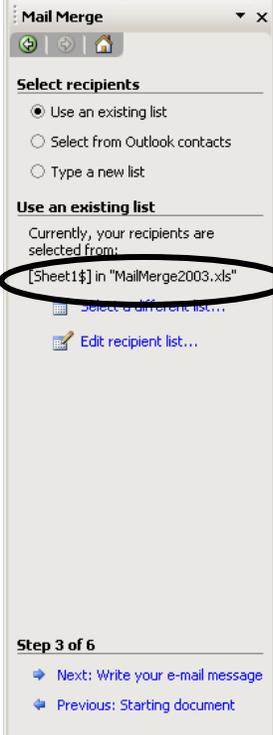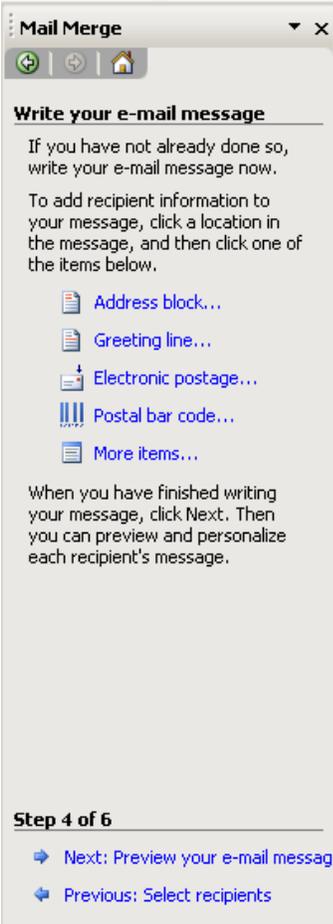| What You Do	What you see
9. The Mail Merge Recipients box returns. In this step, you need to select who will get your message. The Mail Merge Recipients box shows all records that are listed in the data source. This box will allow you to remove individual recipients by clearing the check box to the 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: With the Sort menu dropped down:

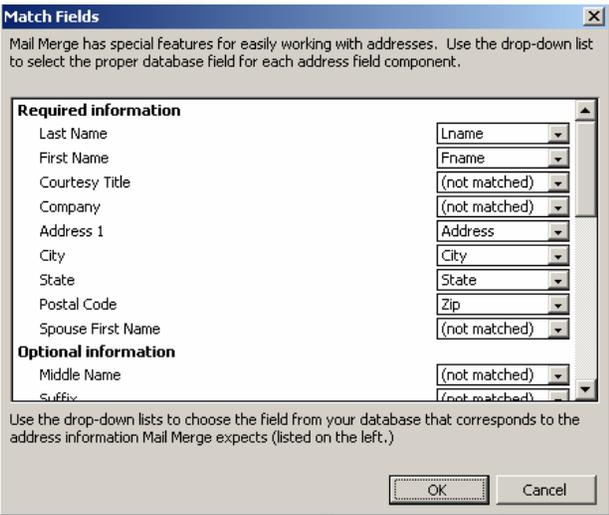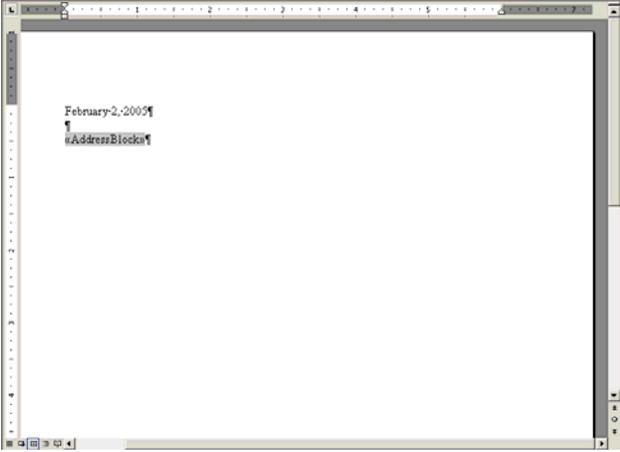| What You Do	What you see
Note: If you need to perform a Filter or Sort, you would select **Advanced** from the menu as seen in the previous step. The Filter and Sort box returns On the Filter tab, you can filter the recipient list. The fields are as follows: **Field**: Select any field from the data 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. 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. Select **OK** on either tab to accept the changes. Select **OK** again to return to the wizard.	The Filter tab: The Sort tab:

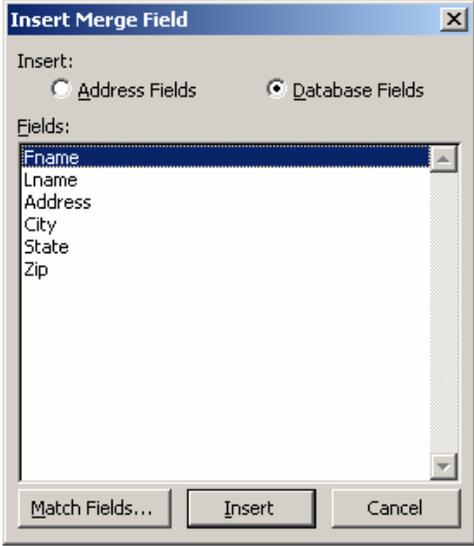| What You Do	What you see
10. The task pane returns and under the title, *Use an existing list*, the filename you selected is shown. If you need to change the data source, select the link for **Select a different list**. This will allow you to select a different file. If you need to edit the Recipients list now or at a later time, select the **Edit recipient list** link. You are ready for the next step. Click on the link, **Next: Write your email message**, at the bottom of the task pane.	The Recipient task pane: Mail Merge Select recipients ⦿ 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... Step 3 of 6 ➡ Next: Write your e-mail message ⬅ Previous: Starting document

What You Do	What you see
11. At the top of the task pane, under the title ***Write your e-mail message***, you will need to layout the message with the appropriate merge fields. 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 envelopes. An Address Block typically looks as follows: Mrs. Sally Zippy 123 Carroll Street Akron, Ohio 44321	The next step returns: **Mail Merge** **Write your e-mail message** 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… 📄 Greeting line… 📑 Electronic postage… ‖‖‖ Postal bar code… ☰ More items… When you have finished writing your message, click Next. Then you can preview and personalize each recipient's message. **Step 4 of 6** ➡ Next: Preview your e-mail messag ⬅ Previous: Select recipients

What You Do	What you see
12. 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.	The Insert Address Block box: **Insert Address Block** Specify address elements ☑ Insert recipient's name in this format: Joshua Joshua Randall Jr. Joshua Q. Randall Jr. Mr. Josh Randall Jr. Mr. Josh Q. Randall Jr. Mr. Joshua Randall Jr. ☑ Insert company name ☑ Insert postal address: 　○ Never include the country/region in the address 　○ Always include the country/region in the address 　◉ Only 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 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 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. 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.	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 — Lname First Name — Fname Courtesy Title — (not matched) Company — (not matched) Address 1 — Address City — City State — State Postal Code — Zip Spouse First Name — (not matched) **Optional information** Middle Name — (not matched) Suffix — (not matched) 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

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

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. Then, select the link for **Greeting line** in the task pane. The Greeting Line box returns. Make the appropriate selections in the **Greeting line format** and **Greeting line for invalid recipients names** fields. After you make those selections, click on the **Match Fields** button so you can verify and/or finish mapping the merge fields. At this point, you can type the remainder of your letter.	The Greeting Line box: The main document after greeting line is selected:

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** and the Insert Merge Field box returns. 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**.	The Insert Merge Field:

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:
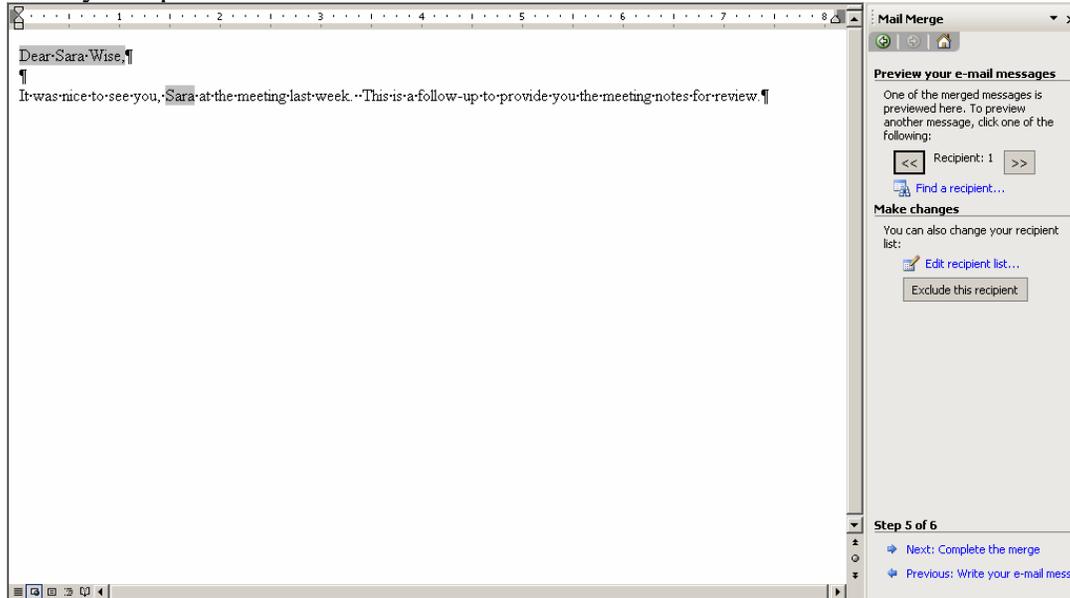

Your main document is finished. You are ready for the next step. Click on the link **Next: Preview your e-mail message** to advance.

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.	

Dear·Sara·Wise,¶
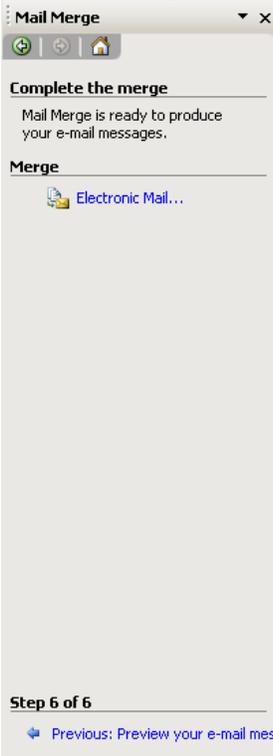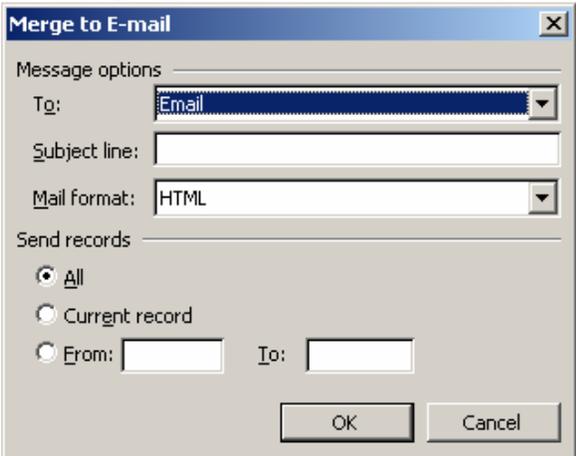¶
It·was·nice·to·see·you,·Sara·at·the·meeting·last·week.··This·is·a·follow-up·to·provide·you·the·meeting·notes·for·review.¶

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:

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 *Merge* title.
 	
    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).
	The last task pane returns:
	
	Mail Merge
	
	Complete the merge
	Mail Merge is ready to produce your e-mail messages.
	Merge
	    Electronic Mail…
	
	Step 6 of 6
	    Previous: Preview your e-mail mes
	
	The Merge to E-mail box:
	
	Merge to E-mail
	Message options
	To: Email
	Subject line:
	Mail format: HTML
	Send records
	  All
	  Current record
	  From: To:
	          OK Cancel

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:
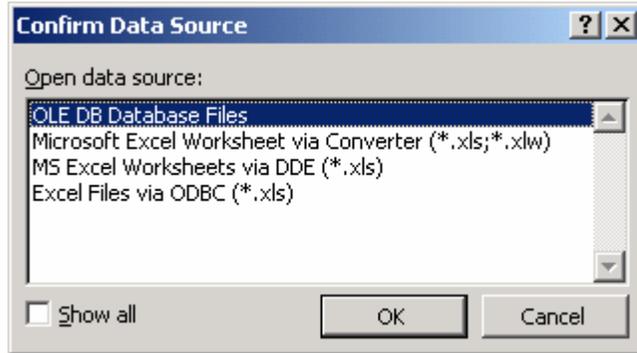
4. In most cases, you will select the option for **MS Excel Worksheets via DDE (*.xls)**. Select **OK**.

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."
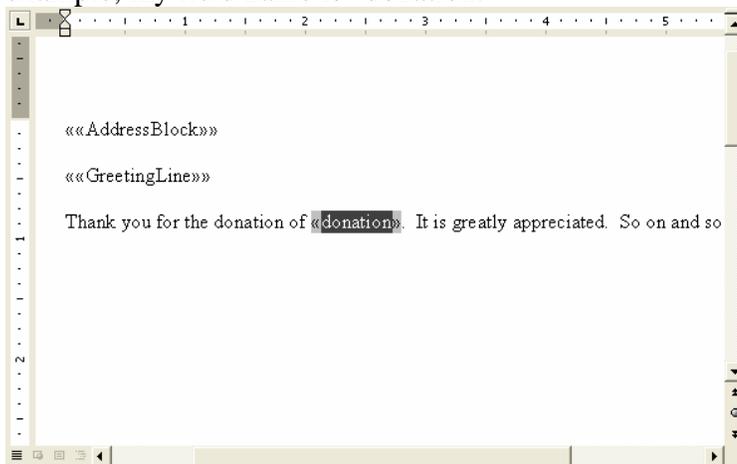
3. After you select the merge field press **Alt + F9** and the field will change and reveal its code (as well as the other merge fields you have created.)
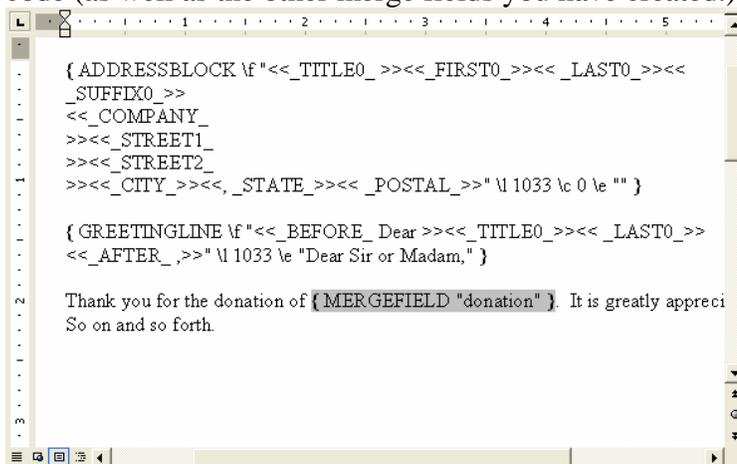
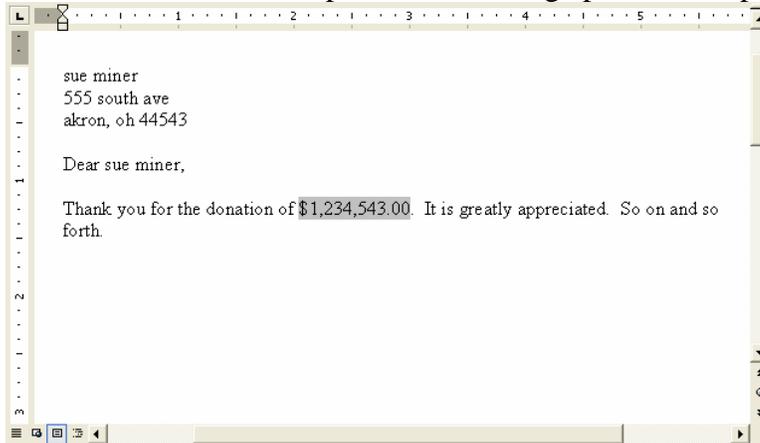4. After the end quote of the merge field name (with no spaces before, after, or in between) type:

\#$#,###.00

The main document will then appear similar to the following:

```
{ ADDRESSBLOCK \f "<<_TITLE0_ >><<_FIRST0_>><< _LAST0_>><<
_SUFFIX0_>>
<<_COMPANY_
>><<_STREET1_
>><<_STREET2_
>><<_CITY_>><<,_STATE_>><< _POSTAL_>>" \l 1033 \c 0 \e "" }

{ GREETINGLINE \f "<<_BEFORE_ Dear >><<_TITLE0_>><< _LAST0_>>
<<_AFTER_,>>" \l 1033 \e "Dear Sir or Madam," }

Thank you for the donation of { MERGEFIELD "donation" \#$#,###.00}.  It is greatly
appreciated.  So on and so forth.
```
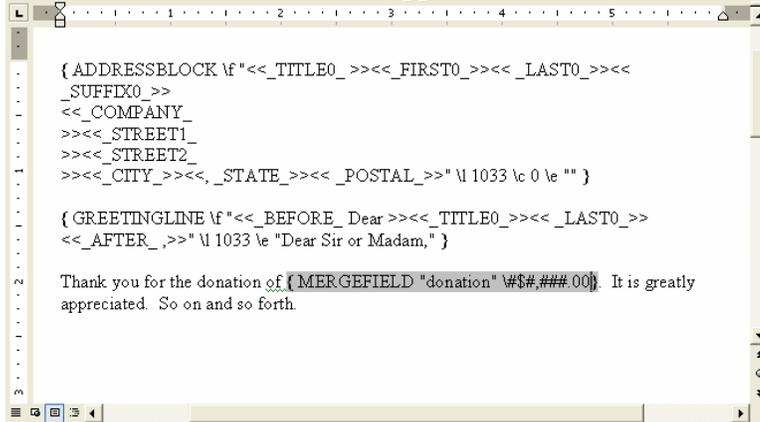
Note: This must be typed inside the **}**

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.

```
sue miner
555 south ave
akron, oh 44543

Dear sue miner,

Thank you for the donation of $1,234,543.00.  It is greatly appreciated.  So on and so
forth.
```

Notes:
For phone numbers, use the switch (step 4) of:
> \# ###'-'###'-'####
> or
> \# "(000)'-'000'-'0000"

For dates, use the switch (step 4) of:
> \@ "MMM d, yyyy"

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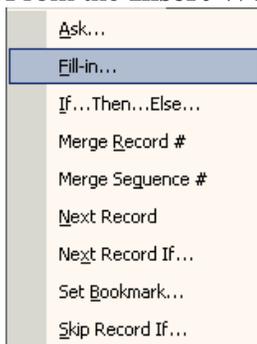
Select the **Next Record** option to insert the <<Next Record>> merge field.

## 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**.
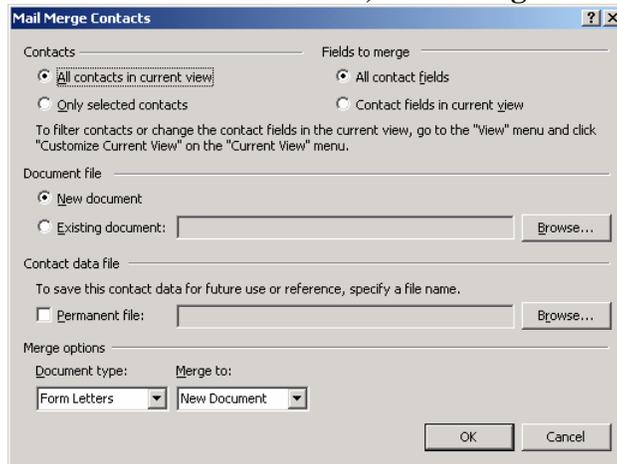
3. In the **Document type** field, select what type of merge you want to create (Letters, Labels, Envelopes, Catalog) and then select **OK**.

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:
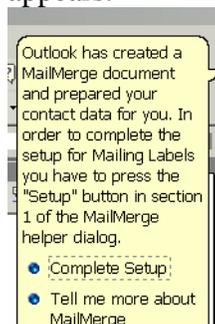
Select the link for **Complete Setup**.

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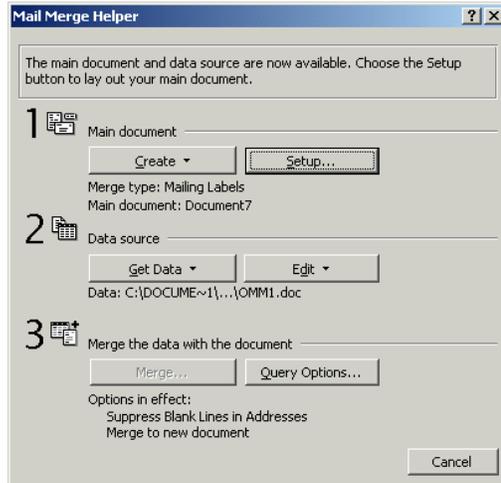
     Click on the **Setup** button in Step 1 and select the label size.

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

     For labels or envelopes, 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")
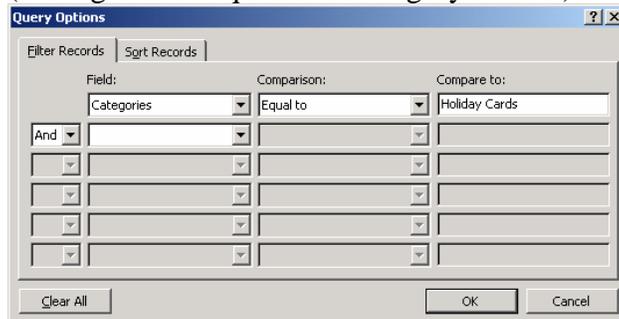
     Select **OK**.

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:
http://support.microsoft.com/newsgroups/default.aspx?NewsGroup=microsoft.public.word.mailmerge.fields&SLCID=US&ICP=GSS3&sd=GN&id=fh;EN-US;newsgword

"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:
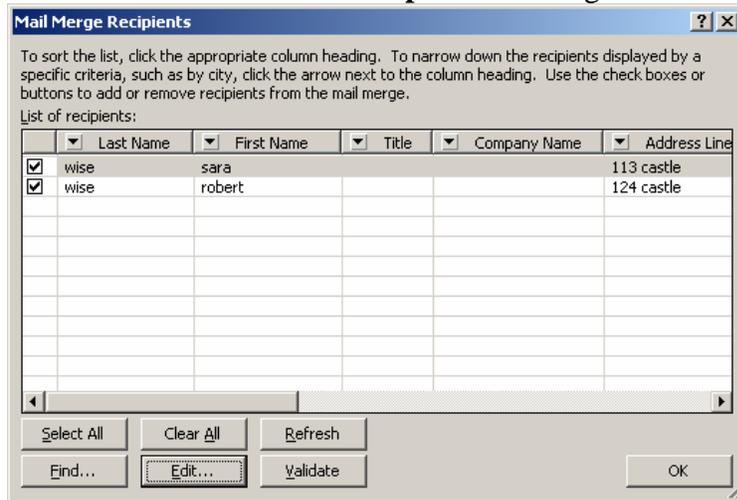
To edit a recipient, select the row, and click on the **Edit** button at the bottom of the box.
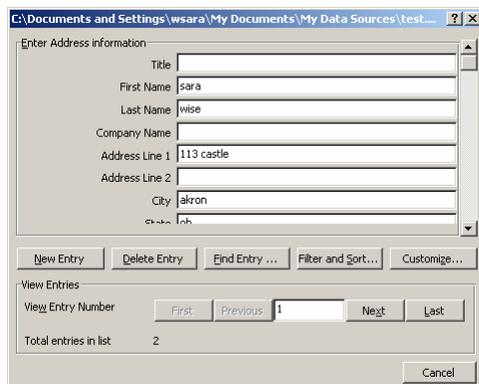
Make the necessary changes, and then use the **Cancel** button.

Export to Excel:
1. On the computer desktop, open the **My Documents** folder.
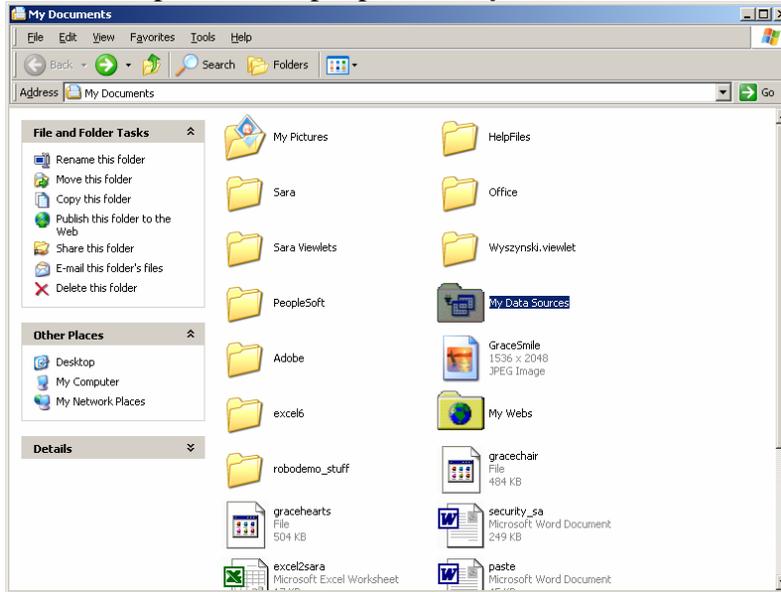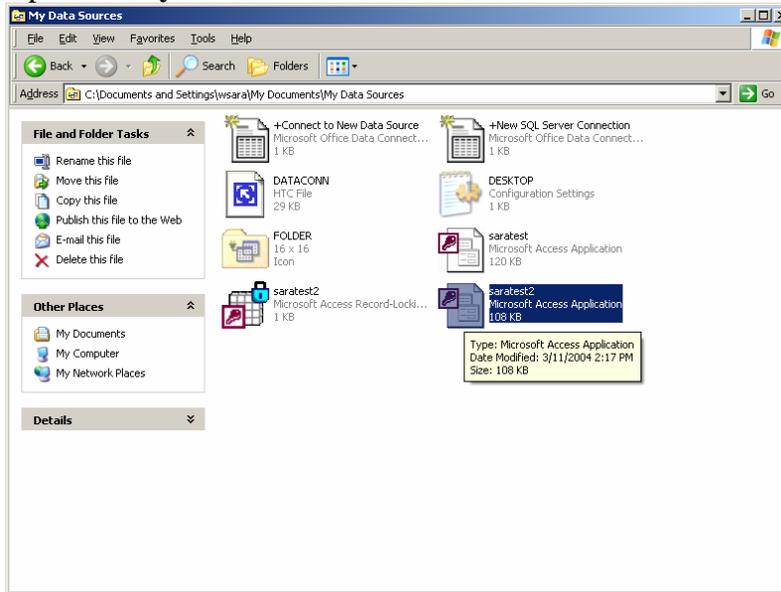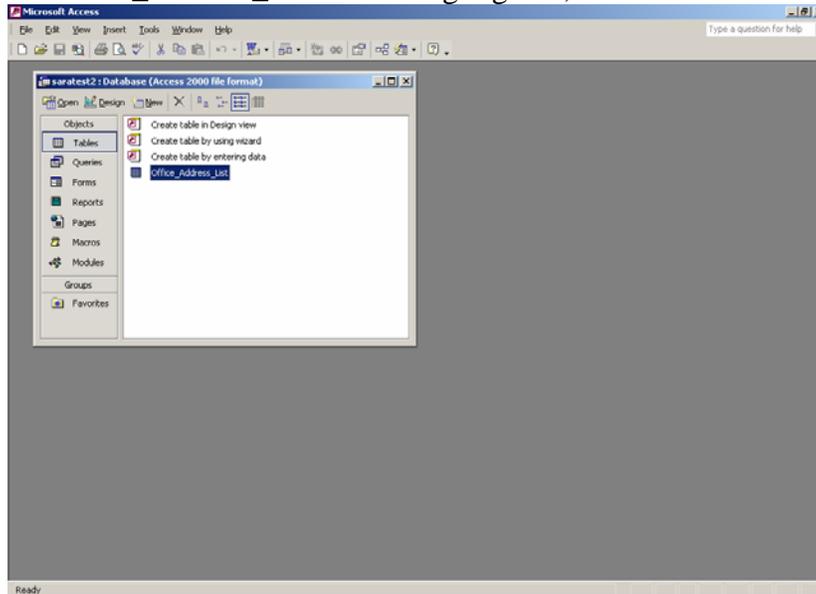

2. Open the **My Data Source** folder.

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.
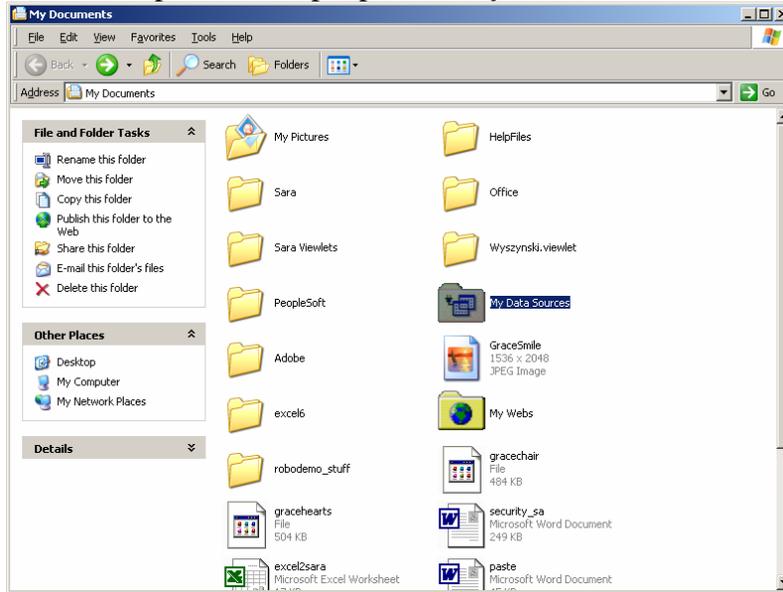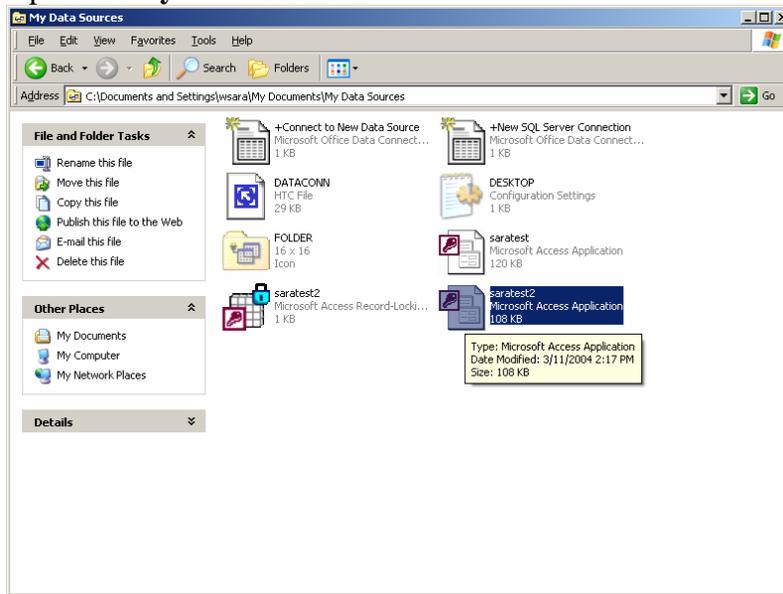
2. Open the **My Data Source** folder.

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.
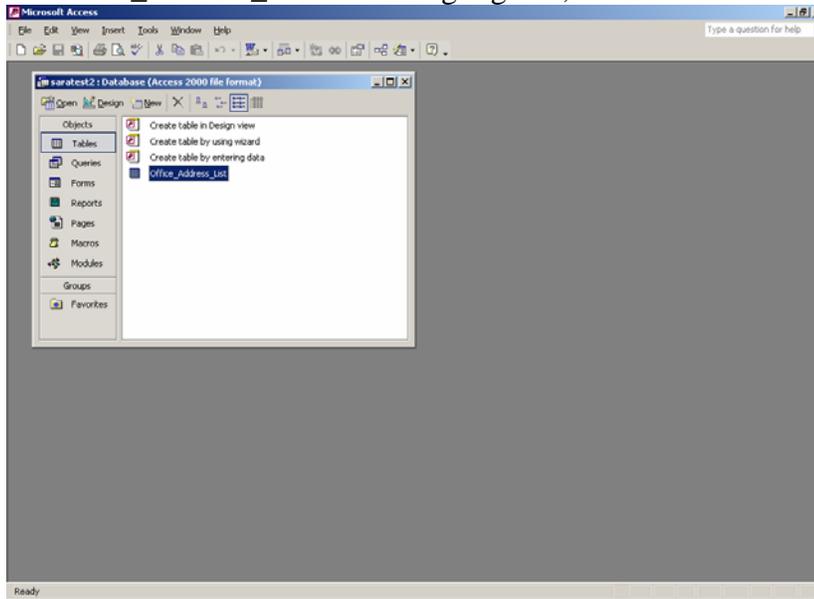
5. Select from the menu **Tools, Office Links, Publish with Microsoft Word**.

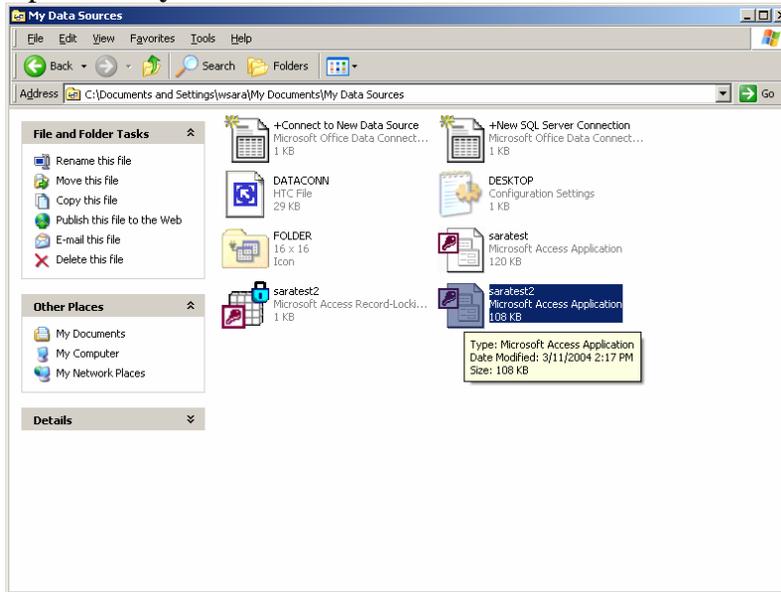6. In the Convert File box, leave the default, Rich Text Format (RTF) and select **OK**.
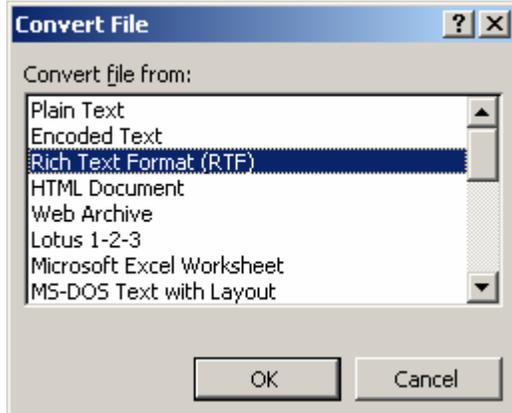
7. Word will return with the data in a Word table. You will need to resize and/or delete columns and make the Page Layout landscape to make the table easier to read.

Print the table in Access:

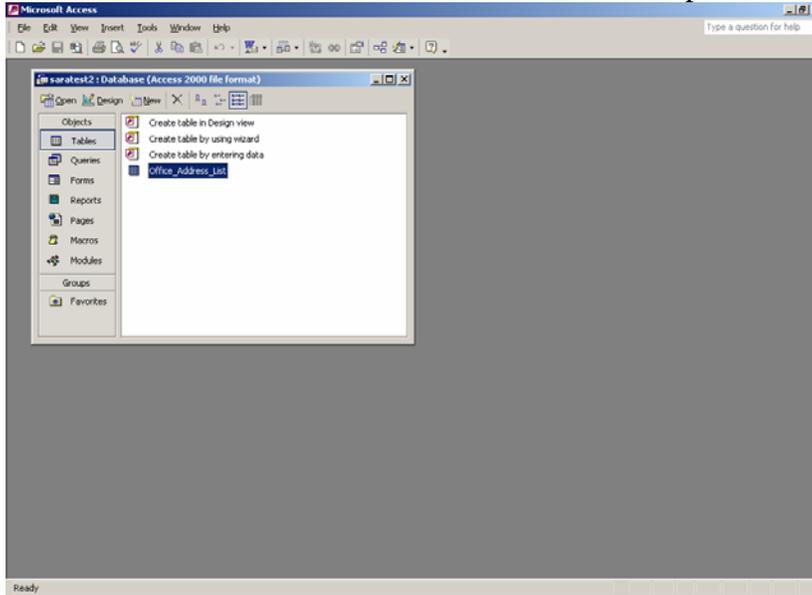1. On the computer desktop, open the **My Documents** folder.
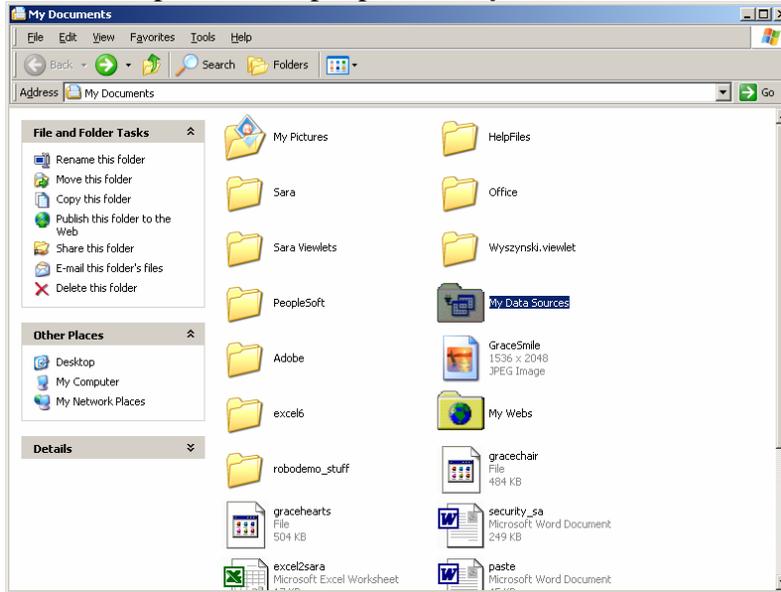
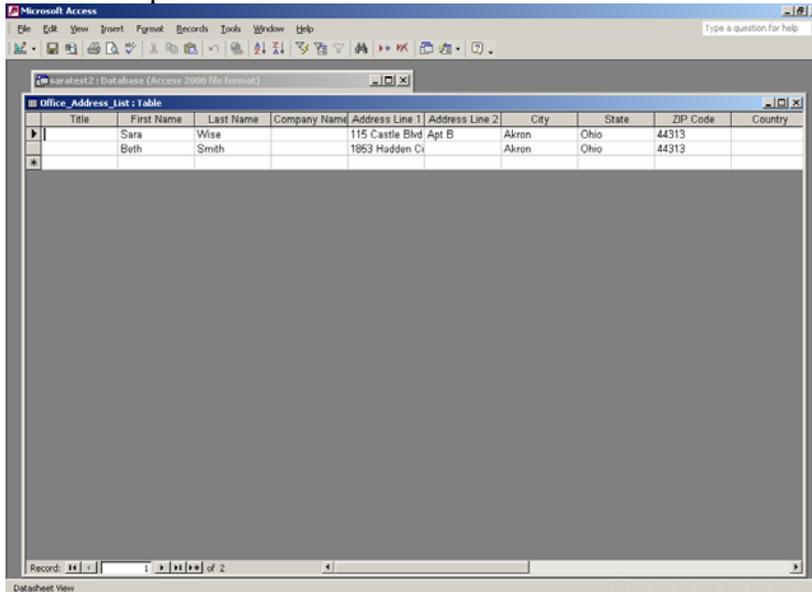2. Open the **My Data Source** folder.

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.

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.