

Microsoft® Word: Mail Merge

A Workshop for San Diego State University Faculty and Staff



© 2000. San Diego State University. All Rights Reserved
Sponsored by Academic Affairs

Where to Find Help when you Need It

Help from your Division/College's Computer Consultant

Some divisions and colleges have computer consultants assigned to them. You can contact these consultants when you need help. To determine if you have a consultant assigned to your division or college, look to: <http://rohan.sdsu.edu/~facstaff>

Help from the BATS Web Page

BATS (Baseline Access, Training and Support) is a California State University initiative to provide all students, faculty, and staff with "baseline" access to information resources via networks, training in the uses of baseline hardware and software systems, and ongoing professional and technical support for utilization of computer resources at San Diego State University. You can access the BATS Web Page by pointing your browser to: <http://rohan.sdsu.edu/~bats/>

Help in the San Diego State University, Faculty Room

The Faculty Room is staffed Monday through Friday with computing consultants who will try to answer your questions.

Location: Adams Humanities, 1109
Phone Number: x45727
Semester Hours: 7:30am – 6:00pm Monday -Thursday
7:30am – 4:30pm Friday
Semester Intersession: 7:30am – 4:30pm Monday – Friday

Help from the Faculty Computing Help Line

Phone Number: x41348 **E-mail:** helpline@mail.sdsu.edu
Semester Hours: 7:30am – 6:00pm Monday – Thursday
7:30am – 4:30pm Friday
Semester Intersession: 7:30am – 4:30pm Monday – Friday

Help from the Staff Computing Help Line

Phone Number: x40824 **E-mail:** staffhelp@sdsu.edu
Semester Hours: 7:30am – 6:00pm Monday – Thursday
7:30am – 4:30pm Friday
Semester Intersession: 7:30am – 4:30pm Monday – Friday

Table of Contents

Onscreen Help	1
Show the Office Assistant	1
What's This?	1
Help in the User's Manual	1
Help on the Web.....	1
Mail Merge: Understanding the Big Picture	2
The Mail Merge Process	2
The Mail	3
Merge Toolbar.....	3
STEP1.....	3
Creating a Main Document Form Letter	3
Setting up a Form Letter Main	3
Document	3
STEP 2.....	4
Specifying the Data Source	4
Opening an Existing Data Source	4
Creating a New.....	4
Data Source	4
Adding Information to a Data Source	5
Inserting Merge Fields into the Main.....	6
Document	6
Step 3.....	6
Merging Data with the Main Document	6
Previewing Merged Records	6
Checking for Errors.....	7
Merging into One Document	7
Merging to the Printer	7
Selecting Merge Options.....	7
Printing Addresses on Mailing Labels	7
Modifying a Data Source	9
Adding, Removing and Renaming Data Fields to a Data Source	9
Sorting Data	10
Records.....	10

Onscreen Help

To view onscreen help, click on **Help**. The Help menu will pull down. Once the menu is displayed, select one of the following tabs:

Show the Office Assistant

An icon will appear. Click on icon and a menu will appear. Click on subject that you are interested in or type in your question in the blank box at the bottom of the menu. Then press the enter key. Hide the Office Assistant by clicking on the Assistant icon, the click on the right side of the mouse and select hide.

What's This?

Select this option and your cursor will include a Question Mark next to it. Click on anything on the screen and Word will provide an explanation of the item.

Help in the User's Manual

You can also use the User's manual that came with your software to help you answer questions and find solutions to problems.

Help on the Web

Additionally, Microsoft offers Help for "frequently asked questions" at their support website located at:

<http://www.microsoft.com/support/>

Mail Merge: Understanding the Big Picture

Creating any type of mail merge document, a form letter or mailing labels involves merging a main document with a data source. A main document contains the text and other information that remain the same in each document. A data source contains the information that changes in each document, such a name or address. Merge fields, which you insert in the main document, instructs Word where to print information from the data source.

Company	Contact First Name	Contact Last Name	Address	Resource
Greco Systems	James	Hart	372 Sunset Blvd. San Diego, CA 92101	Furniture
Hilti Inc.	Susan	Roberts	6540 Lusk Drive San Diego, CA 92126	Office Supplies

September 28, 1998

«Contact_First_name» «Contact_Last_name»
«Company»
«Address»

Dear «Contact_First_name»,

XYZ Department is pleased to announce plans to expand our facilities. We are requesting proposals from your company to provide «Resource» services or products for our new facility.

Enclosed is a description of our planned facility and services. Should your company choose to submit a proposal, please follow the format specified on the sample proposal attached.

September 28, 1998

James Hart
Greco Systems
372 Sunset Blvd.
San Diego, CA 92101

Dear James,

XYZ Department is pleased to announce plans to expand our facilities. We are requesting proposals from your company to provide furniture services or products for our new facility.

Enclosed is a description of our planned facility and services. Should your company choose to submit a proposal, please follow the format specified on the sample proposal attached.

September 28, 1998

Susan Roberts
Hilti Inc.
6540 Lusk Drive
San Diego, CA 92126

Dear Susan,

XYZ Department is pleased to announce plans to expand our facilities. We are requesting proposals from your company to provide office supplies services or products for our new facility.

Enclosed is a description of our planned facility and our new requirements for equipment and services. Should your company choose to submit a proposal, please follow the format specified on the sample proposal attached.

The Mail Merge Process

There are three basic steps to the mail merge process:

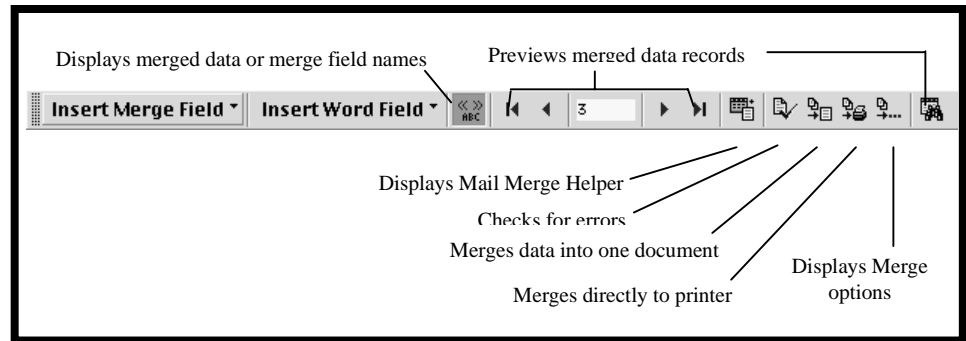
Creating the Main Document.

Creating the Data Source.

Combining the main document with the data source.

The Mail Merge Toolbar

When you open a main document, Word displays the Mail Merge toolbar. You can use the buttons on this toolbar to control the way the main document is displayed and the way it is merged with the data source.



STEP1 Creating a Main Document Form Letter

The first step in creating a form letter is to open the document you will use as the *main document*. The main document contains the text, punctuation, spaces, graphics, and other information you want to be the same in each form letter.

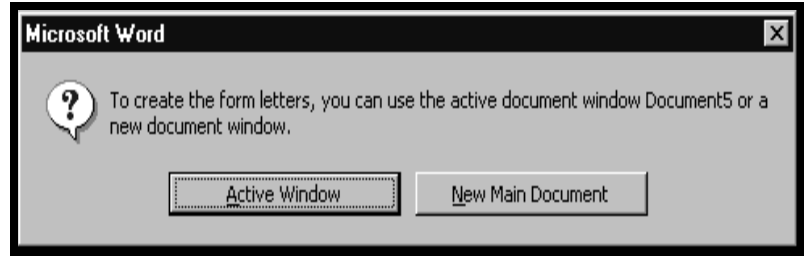
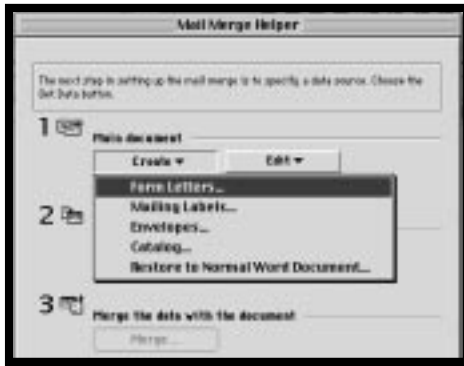
You can use any of the following as a main document:

1. An existing document
2. A new document
3. A main document created in an earlier version of Word or a WordPerfect primary file

You do not have to insert all of the text or graphics in the document at this point. You simply indicate the main document you intend to use.

Setting up a Form Letter Main Document

1. Open the document you want to use as the main document. If you are creating a new document, open a new file.
2. From the **tools** menu, select **Mail Merge**.
3. Under the section titled **1. Main Document**, select the **Create** button.
4. Select **Form Letters**.
5. Select **the Active Window** button.

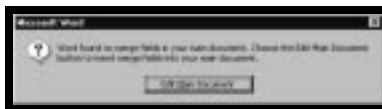
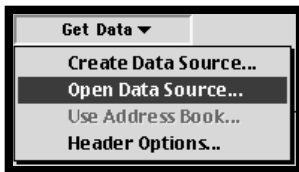


STEP 2 Specifying the Data Source

To indicate which information you want to merge with the main document for the form letter, you must specify the *data source*. The data source contains the information that can vary in each version of a form letter, such as names and addresses. You can open an existing data source created in Word or create a new data source and fill in the information.

Opening an Existing Data Source

If the data records in an existing data source are not in a Word table or Excel file, they must be organized in separate paragraphs with tab characters or commas separating the data fields.

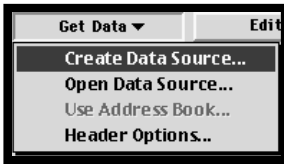


1. Open the **Mail Merge Helper** dialog box by selecting **Mail Merge** from the **Tools** menu or clicking the **Mail Merge Helper** button on the toolbar.
2. In the **Mail Merge Helper** dialog box, select the **Get Data** button under the section titled **2. Data Source**.
3. Select **Open Data Source**.
4. In the **File Name** box, select the data source you want to use, and then click the **OK** button.
5. Word will display a message indicating that there are no merge fields in the main document. Click the **Edit Main Document** button.

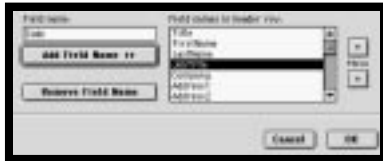
Creating a New Data Source

When you create a data source, Word organizes the information in a table. The table contains a column for each category of information or *data field*. The first row of cells in the table is called the *header row* and lists the field names to be merged. Each subsequent row of cells is called a *data record* and contains all the unique information for each letter.

To create a new data source:



1. In the **Mail Merge Helper** dialog box, select the **Get Data** button in the section titled **2. Data Source**.
2. Select **Create Data Source**.
3. In the **Field Names In Header Row** box, Word lists names for categories of commonly used data.

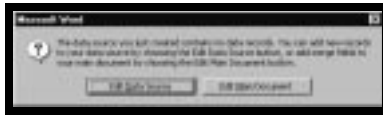


To delete a category from the data source:

- a. Select the field name.
- b. Select the **Remove Field Name** button.

To add a category to the data source:

- a. Type the new field name in the **Field Name** box.
- b. Select the **Add Field Name** button.



4. When you finish creating the field names, click the **OK** button. Word displays the **Save Data Source** dialog box so you can save the new data source file.
5. In the **File Name** box, type a name for the new document.
6. Click the **SAVE** button.
7. In the message box that appears, select the **Edit Data Source** button to add records.

Adding Information to a Data Source

Information can easily be entered into a data source via a Data Form. Records are created one at a time with only information about a specific record displayed.



If the **Data Form** dialog box is not already displayed, click the **Mail Merge Helper** button on the toolbar.

To add information to a data source:

1. In the section titled **2. Data Source**, select the **Edit** button.
2. Select the data source filename.
3. In the **Data Form** dialog box, type the information for each data field.
4. Press the **tab** key to move to the next field.
5. Click the **Add New** button to start a new record.



6. When you are finished adding information, click the **OK** button
7. Be sure to save the data source after adding new records.

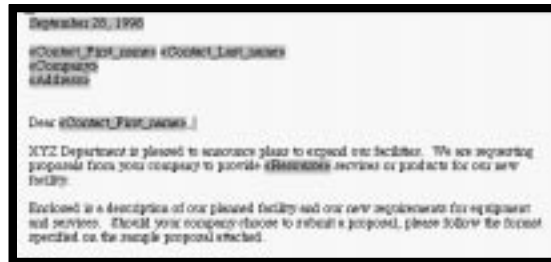
Inserting Merge Fields into the Main Document

Once you have opened an existing data source or specified the data source, you can complete the main document by inserting the merge fields into the document.

To complete a form letter main document:



1. In the main document, type or edit the text and graphics you want to appear in each version of the form letter.
2. Each time you come to a place where you want to insert information from the data source, click the **Insert Merge Field** button on the **Mail Merge** toolbar.
3. Select the appropriate merge field from the list. Make sure that you type any spaces or punctuation you want between two merge fields or after a merge field.
4. When you finish editing the document be sure to save the file.



Step 3 Merging Data with the Main Document

You can use the Mail Merge toolbar to merge individual data records and view each resulting form letter on the screen. You can print any individually merged letter while it is displayed.

To merge the data with the main document:

1. Open the main document or make the main document the active window.
2. Verify that merged data is appearing in the appropriate places in the document. Click the **View Merged data** button on the **Mail Merge** toolbar. Word displays information from the first data record in place of the merge fields in the main document text. The merge field codes are still part of the main document even though actual data is being viewed.

Previewing Merged Records



Checking for Errors



To check the entire data source for merging errors, click the **Check for Errors** button.

Merging into One Document



3. Merge the entire data source in one of the following ways:

- To place the resulting form letters in a single new document, click the **Merge to New Document** button.

Word places all of the resulting form letters into a single document, separating the letters with section breaks. Each section starts a new page.

Merging to the Printer



- To send the resulting form letters directly to the printer, click the **Merge to Printer** button.

Word prints resulting form letters with the formatting set in the main document. You will not be able to change or preview individual form letters with this option.

Selecting Merge Options



- To display the **Merge** dialog box to specify a range of data records or other options, click the **Mail Merge** button.

Select the desired options then click the **Merge** button.



Printing Addresses on Mailing Labels

You can use mail merge to print names and addresses on many kinds of commonly used mailing labels, nametags, and other labels. You can use address information from an existing data source or create a new data source.

To setup and print mailing labels:

1. Open a new document.
2. From the **Tools** menu, select **Mail Merge**.
3. In the **Mail Merge Helper** section titled **1. Main Document**, select **Create**.
4. Select the **Mailing Labels** option.
5. A message appears asking if you want to use the current window or a new window for the labels. Click the **Active Window** button.
6. In the **Mail Merge Helper** section titled **2. Data Source**, select the **Get Data** button.
7. If you are using an existing data source, select **Open Data Source**.
Select the data source filename. Click the **OK** button. When Word displays a message, select the **Set Up Main Document** button.

If you are going to create a new data source, select **Create Data Source**.

- In the **Create Data Source** dialog box, make sure that all of the field names you want to include are listed in the **Field Names In Header Row** box.
 - Click the **OK** button
 - Save the new data source.
 - When Word displays a message, click the **Edit Data Source** button.
 - Fill in the address information in the **Data Form** dialog box.
 - Click the **OK** button when finished adding records.
 - Click the **Mail Merge Helper** button on the **Mail Merge** toolbar.
 - In the section titled **1. Main Document**, click the **Setup** button.
8. In the **Label Options** dialog box, select the type of printer and label feed method you are using.
 9. Select the type of label and label product number to be used.
 10. Click the **OK** button.

11. In the **Create Labels** dialog box, position the insertion point in the **Sample Label** box.
12. Click the **Insert Merge Field** button and select the appropriate merge fields. Type any spaces and punctuation needed.
13. Press the **RETURN** key (Macintosh) or **ENTER** key (Windows) at the end of each line.
14. When you finish inserting the merge fields, click the **OK** button. Word automatically duplicates the set of merge fields for each label on a sheet of labels.
15. Check that your printer is ready and labels have been loaded.
16. In the **Mail Merge Helper** section titled **3. Merge the data with the document**, then click the **Merge** button.
17. Select the options you want to apply.
18. Click the **Merge** button.

Modifying a Data Source

If you are using a data source in Word format, you can use the Data Form dialog box to edit, add, and delete data records. In the Data Form dialog box, you can quickly locate and view specific data records without scrolling through a large table.

To display the Data Form dialog box:

1. From the **Tools** menu, select **Mail Merge**.
2. In the **Mail Merge Helper** section titled **2. Data Source**, click the **Edit** button.
3. Select the data source filename.

or

If you are working in the main document, click the **Edit Data Source** button on the **Mail Merge** toolbar.

Adding, Removing and Renaming Data Fields to a Data Source

There are various ways to change information contained in a data source.

To add new categories of information to a data source, you create new data fields.

1. On the **Database** toolbar, click the **Manage Fields** button.

2. In the **Manage Fields** dialog box, type a name for the new category of data.
3. Click the **Add** button.
4. Click on the **OK** button.

To type information in the new data fields, click the **Data Form** button on the **Database** toolbar to display the **Data Form** dialog box.

If you choose the **Remove** button to delete a selected field name, any data in the associated field is deleted from the data source.

If you choose the **Rename** button, you can change the name of the data field without losing the corresponding data in the records.

Sorting Data Records

By sorting the data records you plan to merge, you can arrange them in alphabetic or numeric order, based on the information in the data fields you select. You can view the records in the order you prefer, and you can determine the order in which the records are merged with the main document.

You can use up to three data fields as sorting keys. When you sort on more than one data field, Word sorts the data records according to the contents of the first selected data field. Records having identical information in that field are then sorted according to the contents of the second and third data fields.

The sorting order is stored with any record-selection rules you have specified. Each time Word retrieves the selected set of records, the records are automatically sorted in the specified order.

To sort data records by more than one data field:

1. Verify the main document is the active window.
2. Choose **Mail Merge** from the **Tools** menu.
3. Choose the **Query Options** button.
4. Select the **Sort Records** tabs.
5. In the **Sort By** box, select the data field to sort the data records by, and then select **Ascending** or **Descending** sort order.
6. Click the **OK** button.