

# Microsoft® Word 2003

## Mail Merge

---

*A Workshop for San Diego State University Faculty and Staff*



## 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](mailto: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](mailto: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

MAIL MERGE: UNDERSTANDING THE BIG PICTURE.....	1
Starting the Mail Merge Process.....	2
CREATING FORM LETTERS .....	2
Step 1 - Selecting the Document Type .....	2
Step 2 - Select Starting Document.....	3
Step 3 - Select Recipients .....	3
Step 4 - Write your letter .....	4
Address Block .....	4
Greeting Line.....	4
Match Fields .....	4
More Items.....	4
Step 5 - Preview your letters.....	5
Step 6 - Complete the merge.....	5
CREATING MAILING LABELS .....	5
Step 1 - Selecting the Document Type .....	5
Step 2 - Select Starting Document.....	5
Step 3 - Select Recipients .....	6
Step 4 - Arrange your labels .....	7
Address Block .....	7
Greeting Line.....	7
Match Fields .....	7
More Items.....	7
Step 5 - Preview your labels .....	8
Step 6 - Complete the merge.....	8
CREATING CUSTOM ENVELOPES .....	8
Step 1 - Selecting the Document Type .....	8
Step 2 - Select Starting Document.....	9
Step 3 - Select Recipients .....	9
Step 4 - Arrange your envelope .....	10
Address Block .....	10
Greeting Line.....	10
Match Fields .....	10
More Items.....	11
Step 5 - Preview your envelopes.....	11
Step 6 - Complete the merge.....	11

# Microsoft Word – Mail Merge

## 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 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.

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.

# Microsoft Word – Mail Merge

---

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.

## Starting the Mail Merge Process

To begin the mail merge process:

1. Start Word
2. Click on **Tools** from the Menu Bar, then click on **Letters and Mailings** and then click **Mail Merge**.

The task pane will open on the right of the screen and in the task pane you will find a wizard that will walk you through the mail merge process in 6 steps.

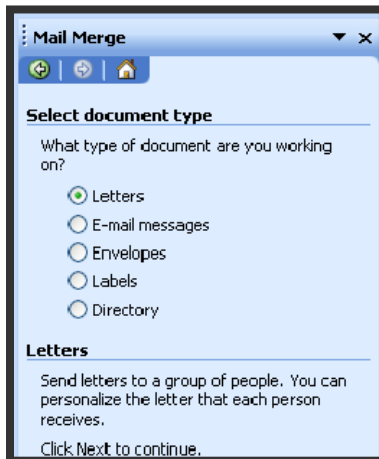
## CREATING FORM LETTERS

The first step in the process is to tell the wizard which type of document you want to create.

### Step 1 - Selecting the Document Type

To create a form letter choose **Letters** from the list of options.

To move to the next step in the process, click on **Next: Starting Document** at the bottom of the Task Pane.



# Microsoft Word – Mail Merge

**Step 2 - Select Starting Document** The wizard will give you three options to choose from. If you do not have an existing form letter, choose **Use the current document**.

If you have already created the form letter, choose **Start from existing document**. You will be prompted to find the document.

You can also choose **Start from a template** if a template that you want to use exists.

To move to the next step in the process, click on **Next: Select recipients** at the bottom of the Task Pane.

**Step 3 - Select Recipients** This is the step that allows you to link your mail merge document to a data source.

Again the wizard gives you three options to choose from.

If you use Outlook and you want to send the letters to individuals in your address book choose **Select from Outlook contacts**.

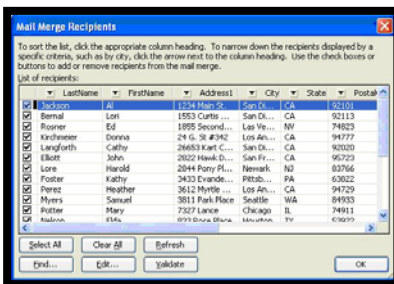
You can create your data source at this time. To do this choose **Type a new list**. At the next window choose **create** and you will be presented with a data form to use as you create your new data source. Your new data source will be saved as an Access Database.

If you have already created your data source choose **Use an existing list**. You will be prompted to find the data source.

Once you are linked to the data source the Mail Merge Recipients dialog box will open. To sort the list click on the applicable column heading.

If you want to only mail to certain recipients you can filter the list two ways:

1. You can click on the **Clear All** button and then check the names of the individuals you want to mail to. Or,
2. You can click on the downward pointing arrow next to the field name you want to filter on. In the window that opens fill in the requested information.



# Microsoft Word – Mail Merge

To move to the next step in the process, close the Mail Merge Recipients window and click on **Next: Write your letter** at the bottom of the Task Pane.

**Step 4 - Write your letter** Once your letter is written you will need to insert fields into the letter. These fields indicate where the data from the data source is to be displayed in the letter.

You have several choices to pick from:

## Address Block

If you choose to insert an Address Block, Word will give you a variety of ways to display the address information.

## Greeting Line

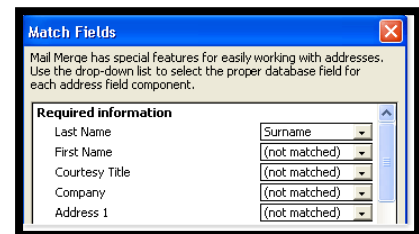
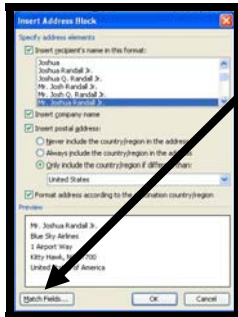
If you choose to insert a Greeting Line, Word will give you a variety of ways to display the greeting.



## Match Fields

Once you choose Address Block or Greeting Line, make your selections and then click on **Match Fields**.

You will want to make sure that Word is using the correct fields from your database. The fields listed under Required Information are the fields that will comprise the Address Block.



To the right you will see boxes that will indicate Word's best guess as to which fields in your database match up with the field listed on the left. If Word does not guess correctly, click on the downward pointing arrow and choose the correct field name from the list.

## More Items

Instead of using the pre-formatted Address Block and Greeting Line you can insert the Merge Fields one at a time into your document. Fields appear in your document within chevrons, for example, «FirstName».

# Microsoft Word – Mail Merge

To do this, place your cursor where you want the Merge Field to reside and click on **More Items**. You will see a window listing all the fields in your database so you just select the field and then click on **Insert**.

To move to the next step in the process, click on **Next: Preview your letter** at the bottom of the Task Pane.

**Step 5 - Preview your letters** - At this step you are able to see the letters as they will look when printed. You can review all your letters or you can choose to just review a few.

To move to the next step in the process, click on **Next: Complete the merge** at the bottom of the Task Pane.

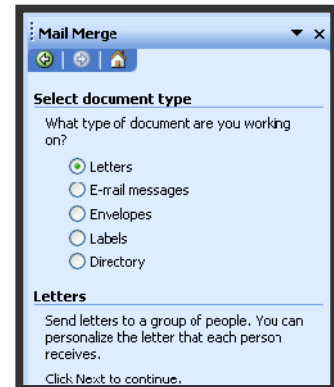
**Step 6 - Complete the merge** - You have the ability to send your letters directly to the printer or you can choose to **Edit Individual Letters**. You are encouraged to choose the latter option so that you can find any errors in your letters before they are printed.

## CREATING MAILING LABELS

The basic steps are the same as those taken to create form letters. Following are the steps that are specific to labels:

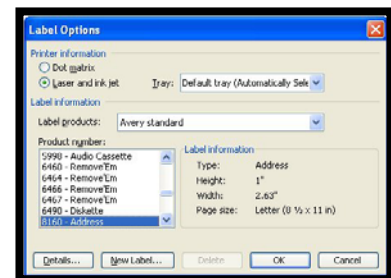
**Step 1 - Selecting the Document Type** - To create labels, choose **Labels** from the list of options.

To move to the next step in the process, click on **Next: Starting Document** at the bottom of the Task Pane.



**Step 2 - Select Starting Document** - The wizard will give you two options to choose from:

If you do not have an existing label document, choose **Change Document Format**.



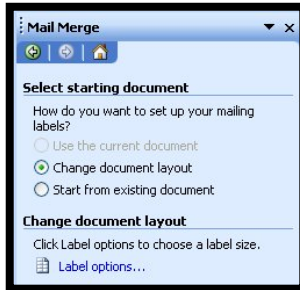
# Microsoft Word – Mail Merge

If you have already created labels, choose **Start from existing document**. You will be prompted to find the document.

To set up your labels, click on **Label options**.

Choose the type of label stock you are using. If you are using label stock not listed you will have to click on New Label and input all the measurements into a new window. Click on **OK**.

To move to the next step in the process, click on **Next: Select recipients** at the bottom of the Task Pane.



## Step 3 - Select Recipients

This is the step that allows you to link your mail merge document to a data source.

Again the wizard gives you three options to choose from.

If you use Outlook and you want to send the letters to individuals in your address book choose **Select from Outlook contacts**.

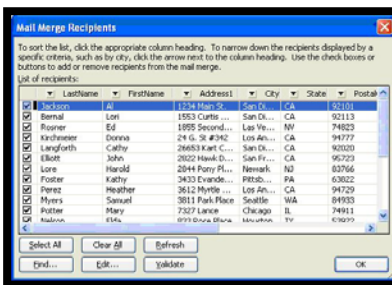
You can create your data source at this time. To do this choose **Type a new list**. At the next window choose **create** and you will be presented with a data form to use as you create your new data source. Your new data source will be saved as an Access Database.

If you have already created your data source choose **Use an existing list**. You will be prompted to find the data source.

Once you are linked to the data source the Mail Merge Recipients dialog box will open. To sort the list click on the applicable column heading.

If you want to only mail to certain recipients you can filter the list two ways:

1. You can click on the **Clear All** button and then check the names of the individuals you want to mail to. Or,
2. You can click on the downward pointing arrow next to the field name you want to filter on. In the window that opens fill in the requested information.



# Microsoft Word – Mail Merge

To move to the next step in the process, close the Mail Merge Recipients window and click on **Next: Arrange your labels** at the bottom of the Task Pane.

**Step 4 - Arrange your labels** - Once your letter is written you will need to insert fields into the letter. These fields indicate where the data from the data source is to be displayed in the letter.

You have several choices to pick from:

## Address Block

If you choose to insert an Address Block, Word will give you a variety of ways to display the address information.

## Greeting Line

If you choose to insert a Greeting Line, Word will give you a variety of ways to display the greeting.

## Match Fields

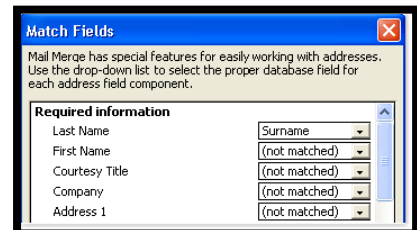
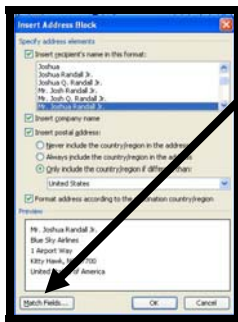
Once you choose Address Block or Greeting Line, make your selections and then click on **Match Fields**.

You will want to make sure that Word is using the correct fields from your database. The fields listed under Required Information are the fields that will comprise the Address Block.

To the right you will see boxes that will indicate Word's best guess as to which fields in your database match up with the field listed on the left. If Word does not guess correctly, click on the downward pointing arrow and choose the correct field name from the list.

## More Items

Instead of using the pre-formatted Address Block and Greeting Line you can insert the Merge Fields one at a time into your document. Fields appear in your document within chevrons, for example, «FirstName».



# Microsoft Word – Mail Merge

---

To do this, place your cursor where you want the Merge Field to reside and click on **More Items**. You will see a window listing all the fields in your database so you just select the field and then click on **Insert**.

Once you have the first label set up, click on **Update all labels** to propagate the settings to all the labels.

To move to the next step in the process, click on **Next: Preview your labels** at the bottom of the Task Pane.

**Step 5 - Preview your labels** At this step you are able to see the labels as they will look when printed. You can review all your labels or you can choose to just review a few.

To move to the next step in the process, click on **Next: Complete the merge** at the bottom of the Task Pane.

**Step 6 - Complete the merge** You have the ability to send your labels directly to the printer or you can choose to **Edit Individual Labels**. You are encouraged to choose the latter option so that you can find any errors in your labels before they are printed.

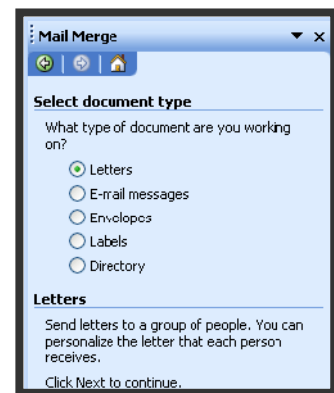
## CREATING CUSTOM ENVELOPES

The basic steps are the same as those taken to create form letters or labels. Following are the steps that are specific to envelopes:

**NOTE:** Set up your return address by clicking on **Tools** on the Menu Bar and then select **Options**. Click on the **User Information** tab and enter your return address in the **Address Window**.

**Step 1 - Selecting the Document Type** To create envelopes, choose **Envelopes** from the list of options.

To move to the next step in the process, click on **Next: Starting Document** at the bottom of the Task Pane.



# Microsoft Word – Mail Merge

## Step 2 - Select Starting Document

The wizard will give you two options to choose from:

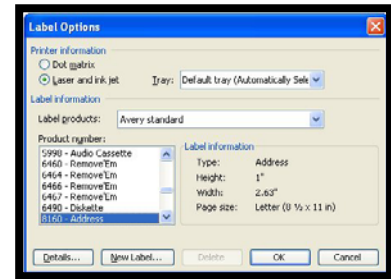
If you do not have an existing envelope document, choose **Change Document Format**.

If you have already created envelopes, choose **Start from existing document**. You will be prompted to find the document.

To set up your envelopes, click on **Envelope options**.

Choose the type of envelope you are using. If you are using envelopes not listed you will have to click on **New Envelope** and input all the measurements into a new window. Click on **OK**.

To move to the next step in the process, click on **Next: Select recipients** at the bottom of the Task Pane.



## Step 3 - Select Recipients

This is the step that allows you to link your envelopes to a data source.

Again the wizard gives you three options to choose from.

If you use Outlook and you want to create envelopes for individuals in your address book choose **Select from Outlook contacts**.

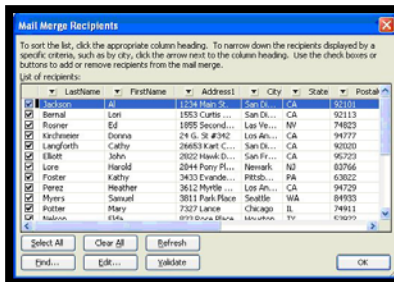
You can create your data source at this time. To do this choose **Type a new list**. At the next window choose **create** and you will be presented with a data form to use as you create your new data source. Your new data source will be saved as an Access Database.

If you have already created your data source choose **Use an existing list**. You will be prompted to find the data source.

Once you are linked to the data source the Mail Merge Recipients dialog box will open. To sort the list click on the applicable column heading.

If you want to only mail to certain recipients you can filter the list two ways:

1. You can click on the **Clear All** button and then check the names of the individuals you want to mail to. Or,



# Microsoft Word – Mail Merge

2. You can click on the **downward pointing arrow** next to the field name you want to filter on. In the window that opens fill in the requested information.

To move to the next step in the process, close the Mail Merge Recipients window and click on **Next: Arrange your envelope** at the bottom of the Task Pane.

**Step 4 - Arrange your envelope** Once your envelope is formatted you will need to insert fields into the envelope. These fields indicate where the data from the data source is to be displayed in the envelope.

You have several choices to pick from:

## Address Block

If you choose to insert an Address Block, Word will give you a variety of ways to display the address information.

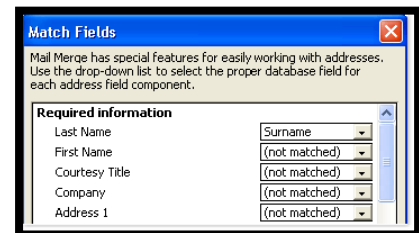
## Greeting Line

If you choose to insert a Greeting Line, Word will give you a variety of ways to display the greeting.

## Match Fields

Once you choose Address Block or Greeting Line, make your selections and then click on Match Fields.

You will want to make sure that Word is using the correct fields from your database. The fields listed under Required Information are the fields that will comprise the Address Block.



To the right you will see boxes that will indicate Word's best guess as to which fields in your database match up with the field listed on the left.

## Microsoft Word – Mail Merge

---

If Word does not guess correctly, click on the downward pointing arrow and choose the correct field name from the list.

### **More Items**

Instead of using the pre-formatted Address Block and Greeting Line you can insert the Merge Fields one at a time into your envelope. Fields appear in your document within chevrons, for example, «FirstName».

To do this, place your cursor where you want the Merge Field to reside and click on **More Items**. You will see a window listing all the fields in your database so you just select the field and then click on **Insert**.

To move to the next step in the process, click on **Next: Preview your envelopes** at the bottom of the Task Pane.

**Step 5 - Preview your envelopes** At this step you are able to see the envelopes as they will look when printed. You can review all your envelopes or you can choose to just review a few.

To move to the next step in the process, click on **Next: Complete the merge** at the bottom of the Task Pane.

**Step 6 - Complete the merge** You have the ability to send your envelopes directly to the printer or you can choose to Edit Individual Envelopes. You are encouraged to choose the latter option so that you can find any errors in your envelopes before they are printed.