

Microsoft[®] Word: Mail Merge for Office 2002/XP

A Workshop for San Diego State University Faculty and Staff



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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

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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:

Microsoft Word Help

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

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.

Office on the Web

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

<http://office.microsoft.com/assistance/>

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.

	Resource
Blvd. 2A	Furniture
Drive 2A	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 You can create a mail merge document using a friendly wizard which will walk you through the steps, or once you become comfortable with the process you can use the Mail Merge toolbar and skip the Wizard.

There are six basic steps to the mail merge process:

Selecting the Document Type (letter, labels, envelopes, e-mail document, directory)

Selecting or Creating the Main Document.

Selecting or Creating the Data Source (the recipients of the document).

Writing the message (if applicable)

Previewing the merge.

Completing the merge.

MAIL MERGE WIZARD

The easiest way to create a merge document is to use the Wizard. The Wizard will walk you through the process step by step. It is very user friendly.

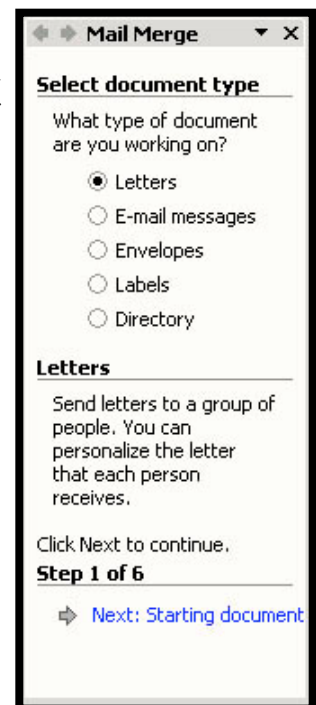
LETTERS

The following steps will walk you through the process of creating a Mail Merge to a letter.

Launching the Wizard

To start the Wizard click on **Tools** on the Menu Bar, select **Letters and Mailings** and then select **Mail Merge Wizard**. The Wizard will open in the Task Pane on the right side of your screen.

Select **Letters** as your document type.



Selecting the Starting Document

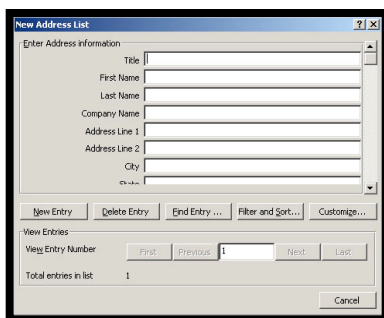
Click on **Next: Starting document** at the bottom of the Task Pane.

You will be asked how to start the letter. You can use the current document, one of the Word templates, or you can choose another document.

Selecting Recipients

Click on **Next: Select recipients** at the bottom of the Task Pane.

You can use an existing list, select from your Outlook contacts, or you can type a new list. If you use an existing list, you will need to browse to the location of the document containing your database.



If you need to type a new list, select **Type a New List**, and then click on **Create**. The New Address List will open. You can use this data form to create your new list. The fields listed reflect commonly used fields. You can add to or delete any of the listed fields.

To delete a field:

1. Click on the **Customize** button.
2. Select the field you want to delete
3. Click the **Delete** button, and then click on **Yes**.

To add fields:

1. Click on the **Add** button.
2. Enter the name of the new field.
3. Click on **OK**.

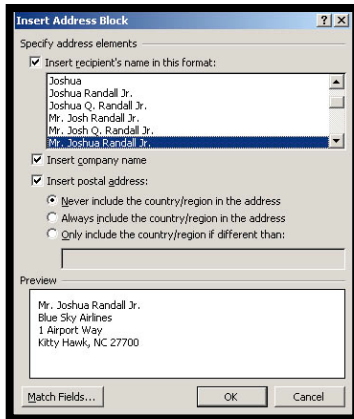
To rename a field:

1. Click on the **Rename** button.
2. Type the new field name.
3. Click on **OK**.
4. When finished, click on **OK**, and then click **Close**.
5. At the **Save Address List** window, name the new list and select a location to save the file.
6. Click on **Save**.
7. Click on **OK** to close the Mail Merge Recipients window.

Inserting Changing Information

Once the recipients have been selected click on **Next: Write your letter**

At this point you can add text to the letter if needed and you can also add all or any of the following elements:



Address Block

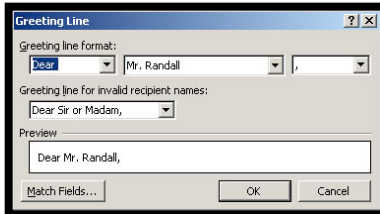
Word provides several pre-defined options to help you add name and address information to the top of your letter. To access the option, place your cursor in the document where the address information is to be printed and click on **Address Block** in the Task Pane.

Check the “**Insert recipient’s name in this format**” box and choose the format you desire.

You have the option of including or excluding the company name and you can choose to include or exclude the postal address. If you choose to include it, indicate the desired format.

Finally, you can tell Word how to match the standard field names with the field names in your database. Click on the **Match Fields** button and review how Word has matched the fields. If you are not happy with the matches Word has made, choose from the drop down list on the right of the screen.

To close the windows, click on **OK**, and then click on **OK** once again.



Greeting Line

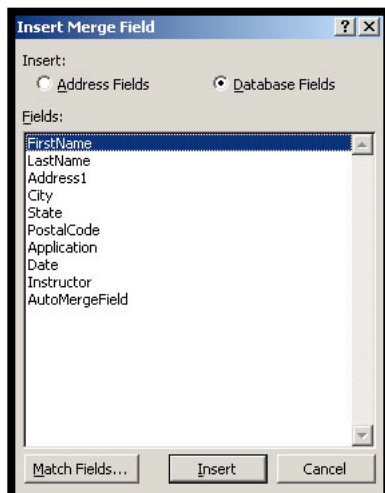
To access the option, place your cursor in the document where the greeting is to be printed and click on **Greeting Line** in the Task Pane.

Choose your desired greeting. You can tell Word how to match the standard field names with the field names in your database. Click on the **Match Fields** button and review how Word has matched the fields. If you are not happy with the matches Word has made, choose from the drop down list on the right of the screen.

To close the windows, click on **OK**, and then click on **OK** once again.

Inserting Field Codes

Now that the Address Block and Greeting Line information has been selected, it’s time to insert codes relating to the remaining changing information in the letters.



To insert a Field Code:

1. Put your cursor in the document where you want the Field Code to display.
2. Click on **More Items** in the Task Pane. The **Insert Merge Field** window will display listing all of the fields in your database.
3. Select the field you want to insert.
4. Click on the **Insert** button.
5. Click on the **Close** button.
6. Repeat these steps for all the Field Codes you want to enter.

Previewing the Letter Once the Field Codes have been entered click on **Next: Preview your letter.**

Word will display the first letter using information from your database. To view other letters, click on the arrow buttons, either forward or backward.

Completing the Merge Once the letters have been reviewed click on **Next: Complete the merge.**

The Mail Merge is ready to complete the merge. You can merge directly to a printer (not recommended) or you can choose to **Edit Individual Letters** (recommended).

Choosing either option will complete the merge. If you selected Edit Individual Letters, the merge will result in a regular MS Word document with section breaks between each letter.

Choose the records you want to merge and select **OK**. Since this is a regular MS Word document, you can make any edits you desire to any of the individual letters.

When finished, print the document.

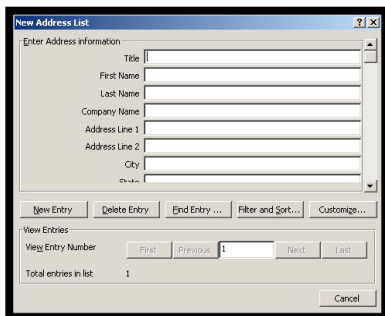
E-MAIL DOCUMENT The following steps will walk you through the process of creating a Mail Merge to e-mail.

Launching the Wizard To start the Wizard click on **Tools** on the Menu Bar, select **Letters and Mailings** and then select **Mail Merge Wizard**. The Wizard will open in the Task Pane on the right side of your screen. Select **E-mail messages** as your document type.

Selecting the Starting Document Once the desired type of document is selected click on **Next: Starting document** at the bottom of the Task Pane.

You will be asked how to start the message. You can use the current document, one of the Word templates, or you can choose another document.

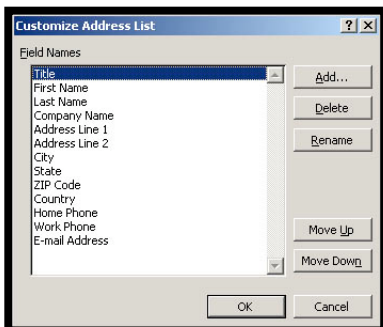
Selecting Recipients Once the starting document has been selected, click on **Next: Select recipients** at the bottom of the Task Pane.



You can use an existing list, you can select from your Outlook contacts, or you can type a new list. If you use an existing list, you will need to browse to the location of the document containing your database.

If you need to type a new list, click on **Create**. The New Address List will open. You can use this data form to create your new list. The fields listed reflect commonly used fields. You can add to or delete any of the listed fields.

To delete a field:



1. Click on the **Customize** button.
2. Select the field you want to delete
3. Click the **Delete** button.

To add fields:

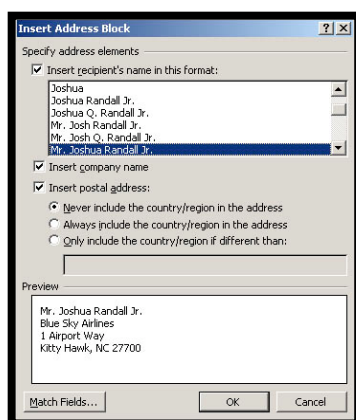
1. Click on the **Add** button.
2. Enter the name of the new field.
3. Click on **OK**.

To rename a field:

1. Click on the **Rename** button.
2. Type the new field name.
3. Click on **OK**.
4. When finished, click on **OK**, and then click **Close**.
5. At the **Save Address List** window, name the new list and select a location to save the file.
6. Click on **Save**.
7. Click on **OK** to close the Mail Merge Recipients window.

Inserting Changing Information

Once the recipients have been selected click **Next: Write your e-mail message**.



At this point you can add text to the message if needed and you can also add all or any of the following elements:

Address Block

Word provides several pre-defined options to help you add name and address information to the top of your message. To access the option, place your cursor in the document where the address information is to be printed and click on **Address Block** in the Task Pane.

Check the “**Insert recipient’s name in this format**” box and choose the format you desire.

You have the option of including or excluding the company name and you can choose to include or exclude the postal address. If you choose to include it, indicate the desired format.

Finally, you can tell Word how to match the standard field names with the field names in your database. Click on the **Match Fields** button and review how Word has matched the fields. If you are not happy with the matches Word has made, choose from the drop down list on the right of the screen.

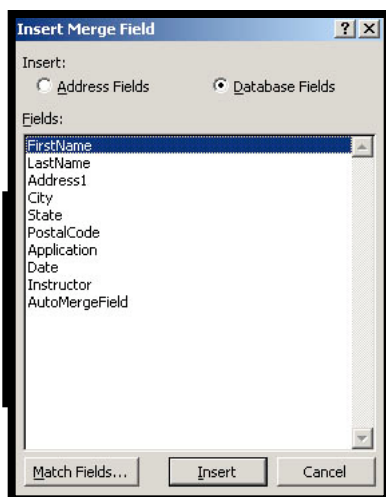
Greeting Line

To access the option, place your cursor in the document where the greeting is to be printed and click on **Greeting Line** in the Task Pane.

Choose your desired greeting. You can tell Word how to match the standard field names with the field names in your database. Click on the **Match Fields** button and review how Word has matched the fields. If you are not happy with the matches Word has made, choose from the drop down list on the right of the screen.

To close the windows, click on **OK**, and then click on **OK** once again.

Inserting Field Codes



Now that the Address Block and Greeting Line information has been selected, it's time to insert codes relating to the remaining changing information in the e-mail message.

To access these codes click on **More Items** in the Task Pane. The Insert Merge Field window will display listing all of the fields in your database.

To insert a Field Code:

1. Put your cursor in the document where you want the Field Code to go.
2. Click on **More Items** in the Task Pane.
3. Select the field you want to insert.
4. Click on the **Insert** button.
5. Click on the **Close** button.
6. Repeat these steps for all the Field Codes you want to enter.

Previewing the Message

Once the Field Codes have been entered click on **Next: Preview your e-mail messages**.

Word will display the first letter using information from your database. To view other letters, click on the arrow buttons, either forward or backward.

Completing the Merge

Once the message has been reviewed click on **Next: Complete the merge**.



The Mail Merge is ready to complete the merge. Click on **Electronic Mail** and a window will open that will allow to enter the “Subject Line”.

Select the records to receive the message and click on **OK**.

ENVELOPES

The following steps will walk you through the process of creating a Mail Merge to envelopes.

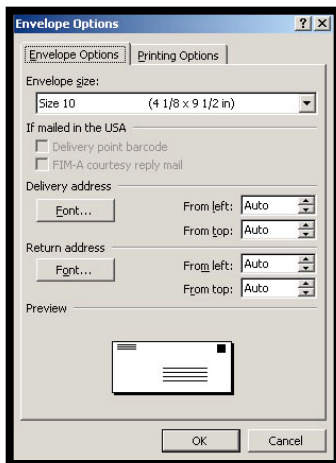
Launching the Wizard

To start the Wizard click on **Tools** on the Menu Bar, select **Letters and Mailings** and then select **Mail Merge Wizard**. The Wizard will open in the Task Pane on the right side of your screen.

Select **Envelopes** as your document type.

Selecting the Starting Document

Once the desired type of document is selected click on **Next: Starting document** at the bottom of the Task Pane.



You will have the option to change the current document layout or you can start from an existing Mail Merge document that you previously saved.

If you choose “existing document”, you will be asked to locate the document. If you choose to “change the current document layout”, click on **Envelope options...** to tell Word which envelope stock you are using. The Envelope Options Window will open.

Select the type of envelope you are using. You can also change the font of the delivery and return address, and you can modify the positions of each. Click on the **Printing Options** tab and choose the proper selection for your printer. Once the selections have been made, click on **OK** and your Word screen will change to reflect a page that is the size of the envelope.

Return address information comes from “User Information”. You can access this by clicking on **Tools** on the Menu Bar and selecting **Options**. Click on the **User Information** tab and enter your return address information.

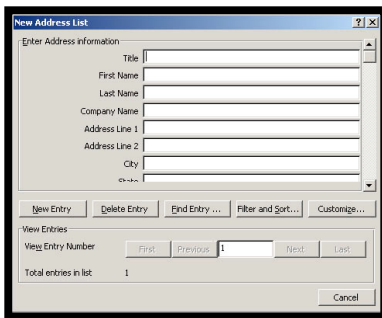
You can also simply type your return address information in the upper

left corner of the envelope.

Selecting Recipients Once the starting document has been selected, click on **Next: Select recipients** at the bottom of the Task Pane.

You can use an existing list, you can select from your Outlook contacts, or you can type a new list. If you use an existing list, you will need to browse to the location of the document containing your database.

If you need to type a new list, click on **Create**. The New Address List will open. You can use this data form to create your new list. The fields listed reflect commonly used fields. You can add to or delete any of the listed fields.

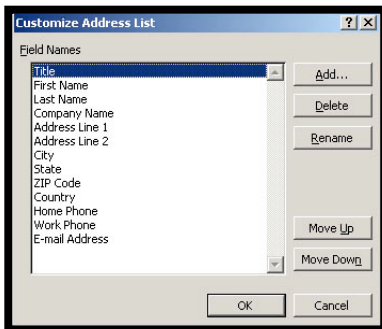


To delete a field:

1. Click on the **Customize** button.
2. Select the field you want to delete
3. Click the **Delete** button.

To add fields:

1. Click on the **Add** button.
2. Enter the name of the new field.
3. Click on **OK**.



To rename a field:

1. Click on the **Rename** button.
2. Type the new field name.
3. Click on **OK**.

Inserting Changing Information

Once the recipients have been selected click on **Next: Arrange your envelope**.

You can add an Address Block to the addressee portion of the envelope or you can insert merge fields individually.

Address Block

Word provides several pre-defined options to help you add name and address information to your envelopes. To access the option, place your cursor in the envelope where the address information is to be printed and click on **Address Block** in the Task Pane.

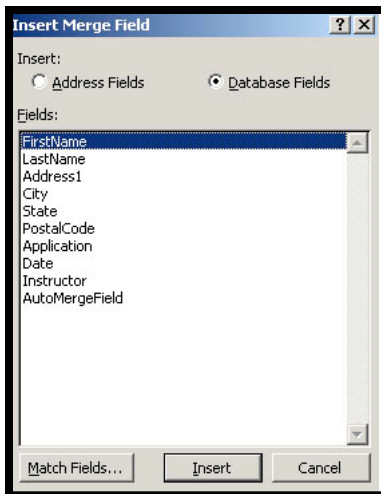
Check the “**Insert recipient’s name in this format**” box and choose the format you desire.

You have the option of including or excluding the company name and you can choose to include or exclude the postal address. If you choose to include it, indicate the desired format.

Finally, you can tell Word how to match the standard field names with the field names in your database. Click on the **Match Fields** button and review how Word has matched the fields. If you are not happy with the matches Word has made, choose from the drop down list on the right of the screen. When done click **OK** then click **OK** again.

Inserting Field Codes

To access these codes you will click on **More Items** in the Task Pane. The Insert Merge Field window will display a listing all of the fields in your database.



To insert a Field Code:

1. Put your cursor in the recipient’s address area on the envelope.
2. Click on **More Items** in the Task Pane.
3. Select the field you want to insert (such as FirstName).
4. Click on the **Insert** button.
5. Click on the **Close** button.
6. Repeat these steps for all the Field Codes you want to enter.

Previewing the Envelopes

Once the Field Codes have been entered click on **Next: Preview your envelopes**.

Word will display the first envelope using information from your database. To view other envelopes, click on the arrow buttons, either forward or backward.

Completing the Merge Once the envelopes have been reviewed click on **Next: Complete the merge**.

The Mail Merge is ready to complete the merge. You can either print (click on **Print**) the envelopes or go into edit mode (click on **Edit individual envelopes...**) to review all the envelopes. It's generally best to review the envelopes before printing.

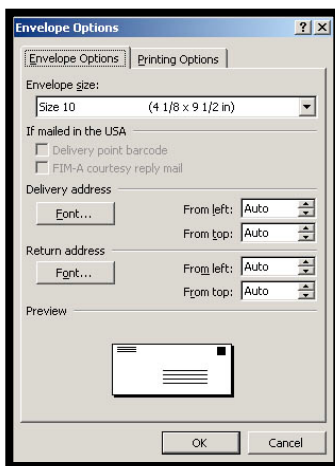
Select the records to have envelopes printed and click on **OK**.

LABELS The following steps will walk you through the process of creating a Mail Merge to labels.

Launching the Wizard To start the Wizard click on **Tools** on the Menu Bar, select **Letters and Mailings** and then select **Mail Merge Wizard**. The Wizard will open in the Task Pane on the right side of your screen.

Select **Labels** as your document type.

Selecting the Starting Document Once the desired type of document is selected click on **Next: Starting document** at the bottom of the Task Pane.

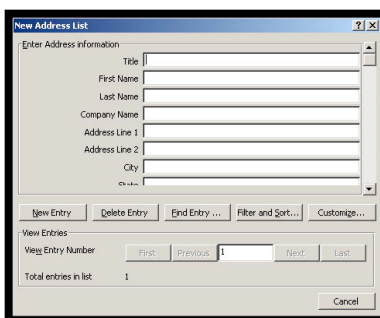


You will have the option to change the current document layout or you can start from an existing Mail Merge document that you previously saved.

If you choose “existing document”, you will be asked to locate the document. If you choose to “change the current document layout”, click on **label options...** to tell Word which label stock you are using. The Label Options Window will open.

Select the type of label you are using. Once the selection has been made, click on **OK** and your Word screen will change to reflect a page of blank labels.

Selecting Recipients Once the starting document has been selected, click on **Next: Select recipients** at the bottom of the Task Pane.



You can use an existing list, you can select from your Outlook contacts, or you can type a new list. If you use an existing list, you will need to browse to the location of the document containing your database.

If you need to type a new list, click on **Create**. The New Address List will open. You can use this data form to create your new list. The fields listed reflect commonly used fields. You can add to or delete any of the

listed fields.

To delete a field:

Click on the **Customize** button.

2. Select the field you want to delete

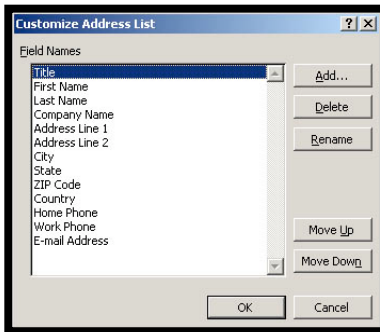
3. Click the **Delete** button.

To add fields:

1. Click on the **Add** button.

2. Enter the name of the new field.

3. Click on **OK**.



To rename a field:

1. Click on the **Rename** button.

2. Type the new field name.

3. Click on **OK**.

Inserting Changing Information

Once the recipients have been selected click on **Next: Arrange your labels**.

You can add an Address Block to the addressee portion of the label or you can insert merge fields individually.

Address Block

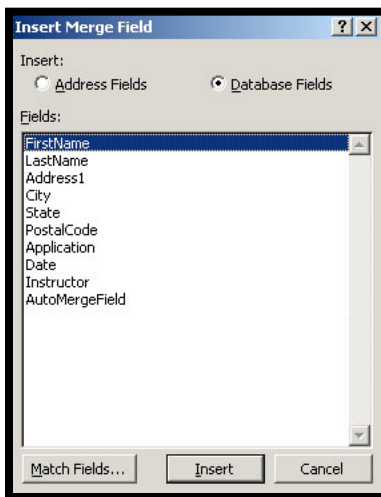
Word provides several pre-defined options to help you add name and address information to your labels. To access the option, place your cursor in the label where the address information is to be printed and click on **Address Block** in the Task Pane.

Check the “**Insert recipient’s name in this format**” box and choose the format you desire.

You have the option of including or excluding the company name and you can choose to include or exclude the postal address. If you choose to include it, indicate the desired format.

Finally, you can tell Word how to match the standard field names with the field names in your database. Click on the **Match Fields** button and

review how Word has matched the fields. If you are not happy with the matches Word has made, choose from the drop down list on the right of the screen. When done click **OK** then click **OK** again.



Inserting Field Codes

To access these codes you will click on **More Items** in the Task Pane. The Insert Merge Field window will display a listing all of the fields in your database.

To insert a Field Code:

1. Put your cursor in the recipient's address area on the envelope.
2. Click on **More Items** in the Task Pane.
3. Select the field you want to insert (such as FirstName).
4. Click on the **Insert** button.
5. Click on the **Close** button.
6. Repeat these steps for all the Field Codes you want to enter.

Once you have the prototype label formatted, you can copy that layout to the remaining labels. To do so, click on **Update all labels**.

Previewing the Labels Once the Field Codes have been entered click on **Next: Preview your labels**.

Word will display the labels using information from your database. To view other labels, click on the arrow buttons, either forward or backward.

Completing the Merge Once the labels have been reviewed click on **Next: Complete the merge**.

The Mail Merge is ready to complete the merge. You can either print (click on **Print**) the labels or go into edit mode (click on **Edit individual labels...**) to review all the envelopes. It's generally best to review the labels before printing.

Select the records to have labels printed and click on **OK**.

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. Use either the Mail Merge Wizard or the Toolbar Buttons.

