

## Computer Technology Courses

# Microsoft Word XP Mail Merge

## *Mail Merge Basics*

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Presented by: *Computer Services*

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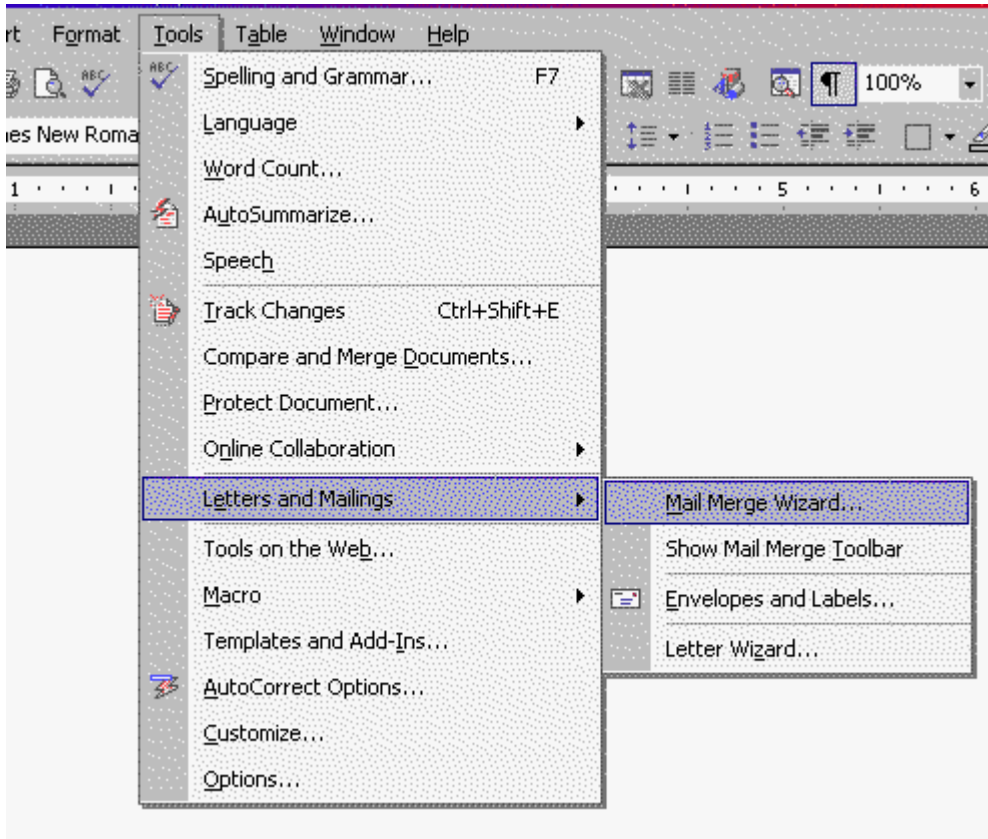
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## Start the Mail Merge Wizard



Select **T**ools

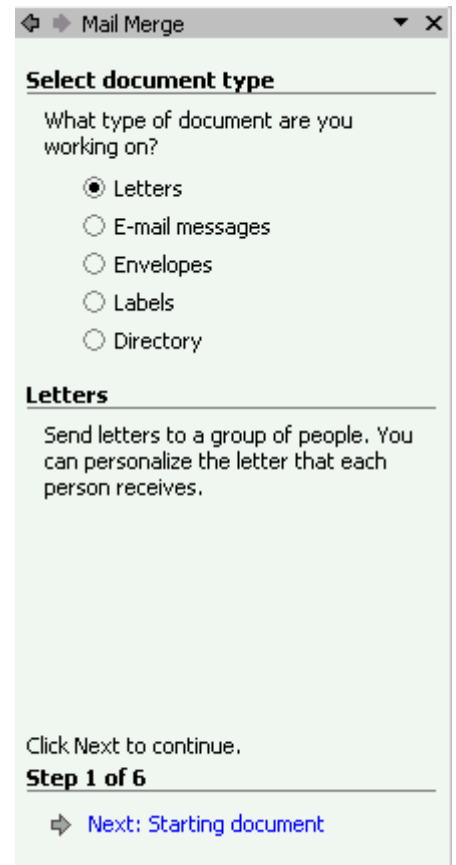
**L**etters and Mailings

**M**ail Merge Wizard...

to display the Mail Merge task pane. It will appear on the right side of the screen.



*Mail Merge Task Pane*

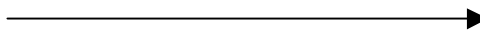


### Step 1 Select document type

Select one of the following types of documents to create. This example will use the document type *Letters*.

Notice a description of the document type displays whenever you select it.

Click Next to continue with Step 2.

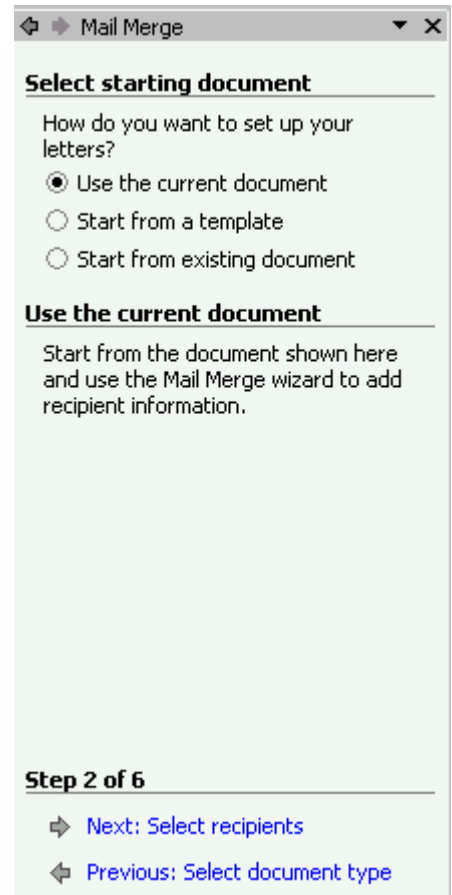
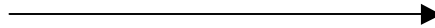


## Step 2      Select starting document

Select one of the options for the main document.

Notice a description of the starting document type displays whenever you select it.

Click Next to continue with Step 3.



### Step 3 Select recipients (Example 1)

Select where the data will be coming from.

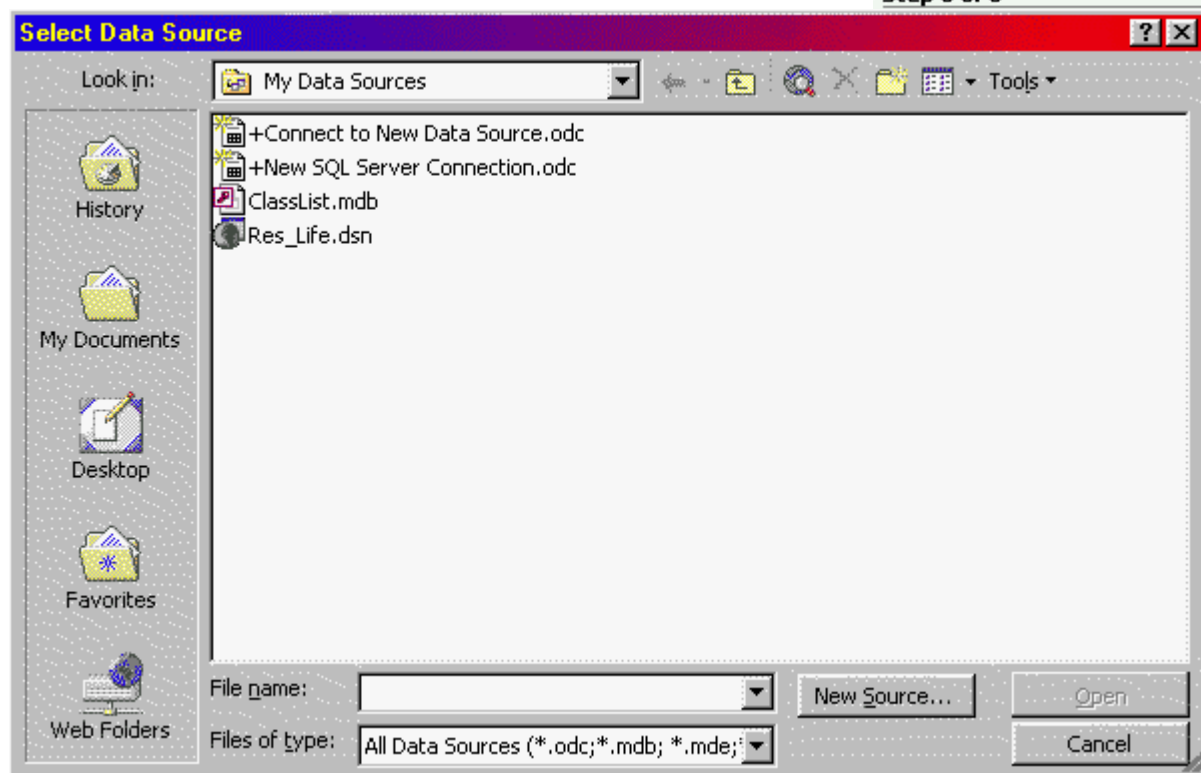
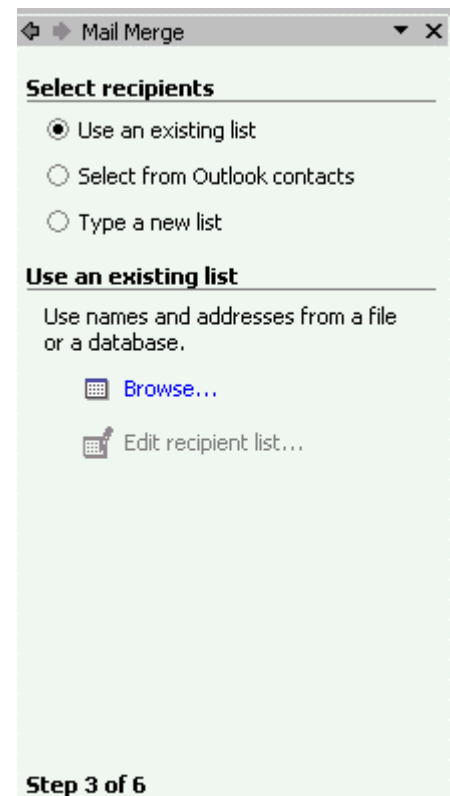
To *use an existing list* means the data file has already been created.

Click **Browse...** to open the data file.

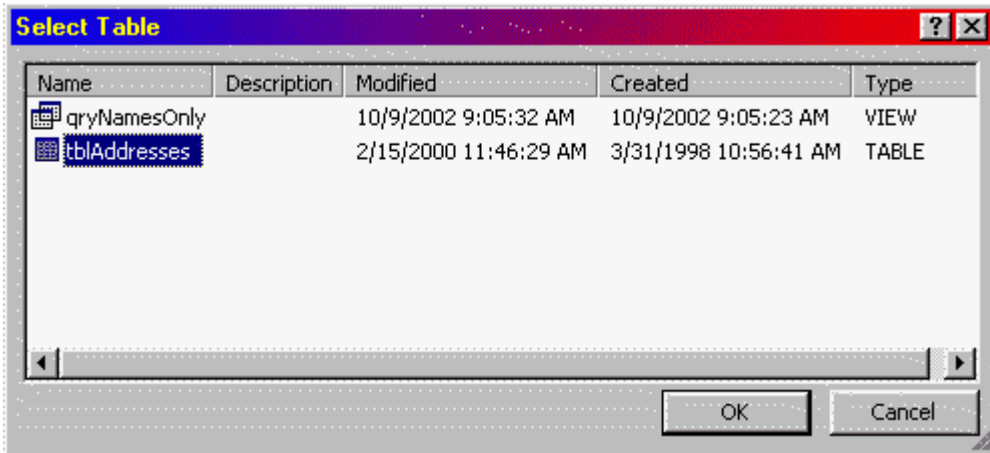
The **Select Data Source** window displays.

It defaults to the *My Data Sources* folder.

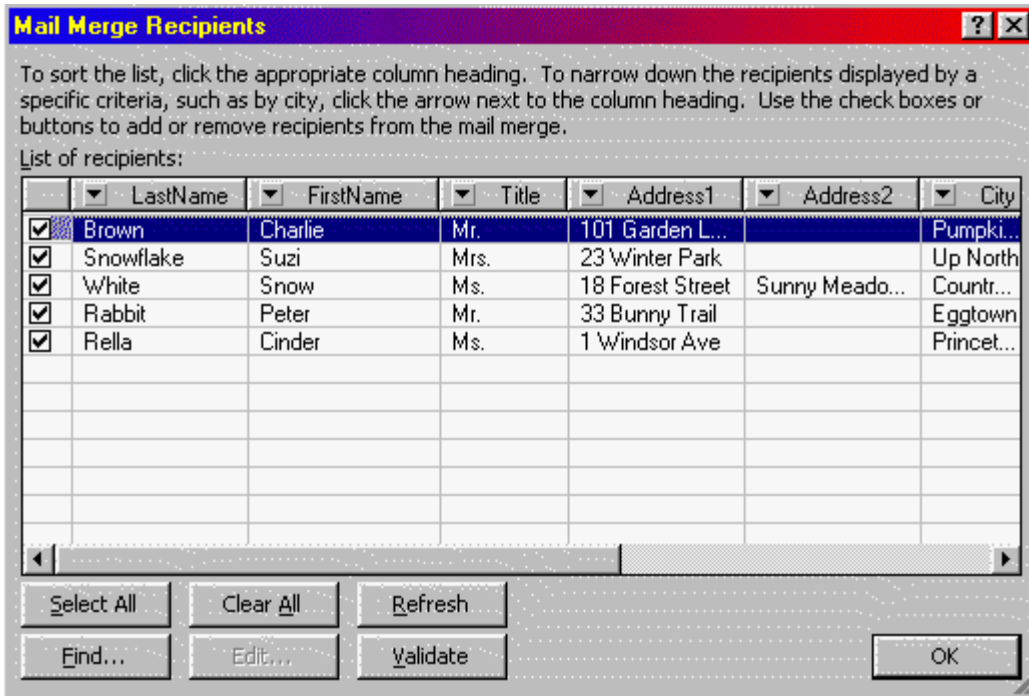
Locate and open the data file; it could be an Excel or Access file.



If an Access file was selected and it contains more than one table or query, the following window displays prompting you to select one of the data lists. Otherwise, the **Mail Merge Recipients** window will display.



The selected data list records will appear in the **Mail Merge Recipients** window.



By default all the records in the list will be checked, indicating they will all be included in the merge.

Clear the check for the records not to include in the merge.

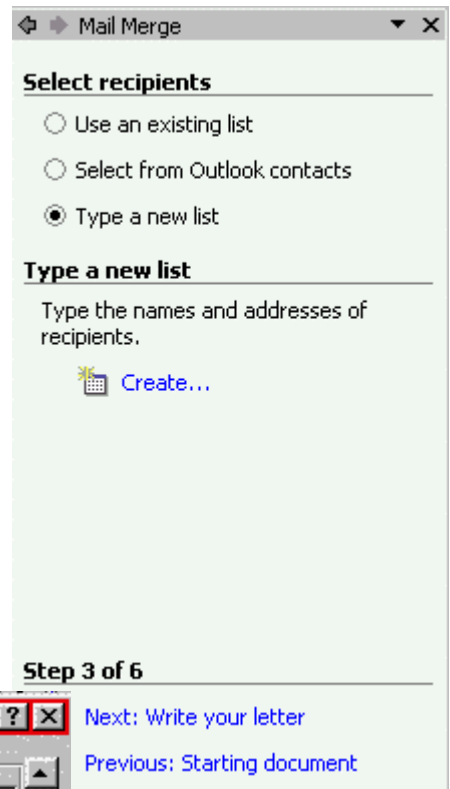
Click the OK button and you will be returned to Step 3 of 6 in the Mail Merge Wizard. The main document is now linked to this data source. Click Next to continue with Step 4.

### Step 3 Select recipients (Example 2)

Select where the data will be coming from.

To *Type a new list* means the data file has not been created.

Click **Create...** to enter the data records.



The **New Address List** window displays.

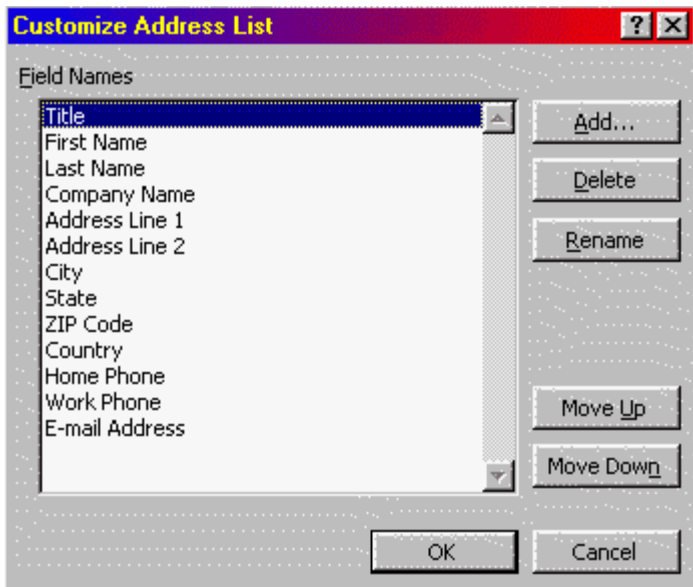
The image shows the 'New Address List' window. It has a title bar with a question mark and a close button. The main area is titled 'Enter Address information' and contains several text input fields: Title, First Name, Last Name, Company Name, Address Line 1, Address Line 2, City, and State. Below the fields are five buttons: 'New Entry', 'Delete Entry', 'Find Entry ...', 'Filter and Sort...', and 'Customize...'. At the bottom, there is a 'View Entries' section with a 'View Entry Number' field set to '1', and buttons for 'First', 'Previous', 'Next', and 'Last'. A 'Total entries in list' field shows '1'. A 'Cancel' button is located at the bottom right.

Enter the information in the fields. Fields can be left blank.

Click the **New Entry** button to save the first record and begin a new one. The **Cancel** button will change to a **Close** button.

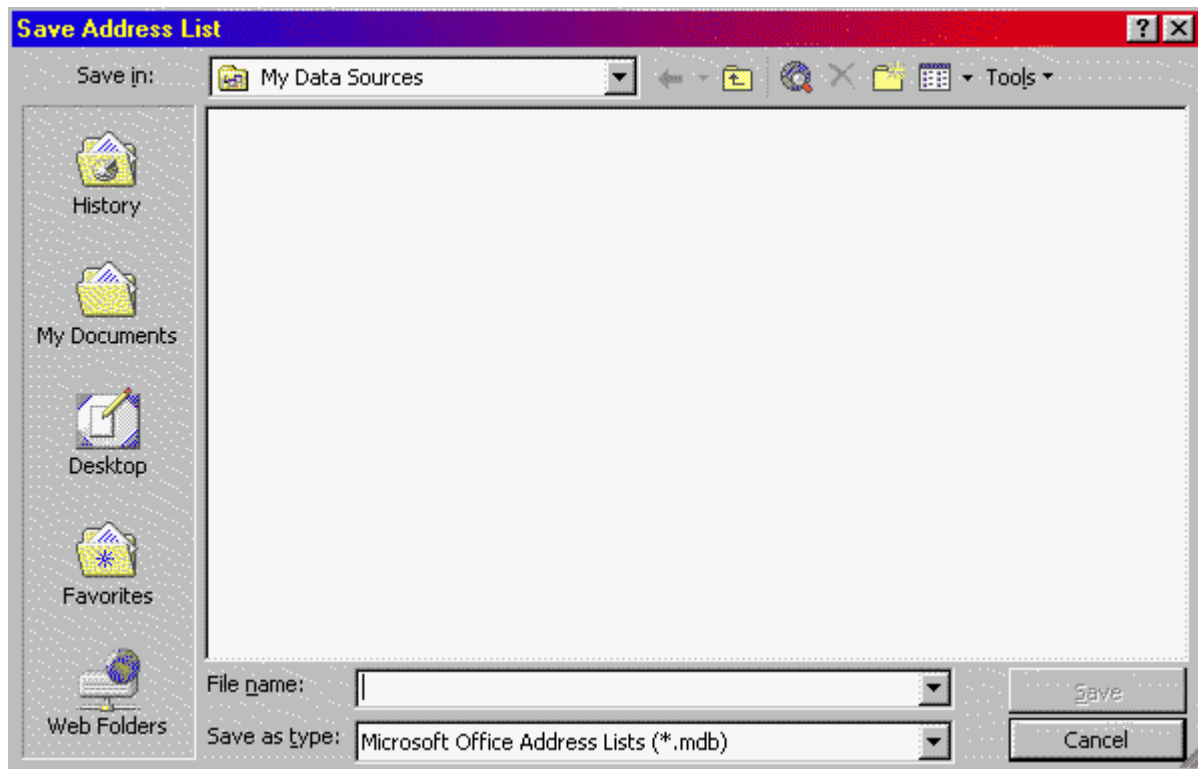
The fields listed are the default. If you want to delete, rename, add, or change the order of the fields, then click the **Customize** button.

The **Customize Address List window** displays when the Customize button is clicked.



Make the necessary changes to the list and click the **OK button**. You will be returned to the *Address List window*.

Clicking the **Close button** on the *New Address List window* will open the following window, prompting you to save the list of records you just entered. It defaults to the **My Data Sources folder**, which is located under the My Documents folder. It is recommended you save the file in this folder.



The file type will be a **Microsoft Office Address Lists (\*.mdb)**, which will be an Access file containing a table with the data you just entered. Enter the file name. Click the **Save button** and you will be returned to Step 3 of 6 in the Mail Merge Wizard. The main document is now linked to this data source. Note: This data file you just saved can be opened and edited using Microsoft Access. Click Next to continue with Step 4.

## Step 4 Write your letter

Type the text in the document that will be printed on every letter.

### Process to insert the merge fields:

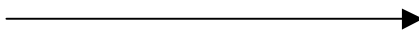
Click to place the insertion point inside the document where a merged field should go.

Click **More items...** and select the merge field you want to insert. Click the Insert button and then the Close button. Enter spaces and punctuation as needed.

Continue following the process to insert the merge fields until completed.

Save the main document which includes the text and merged fields. Click **File Save**.

Click Next to continue with Step 5.

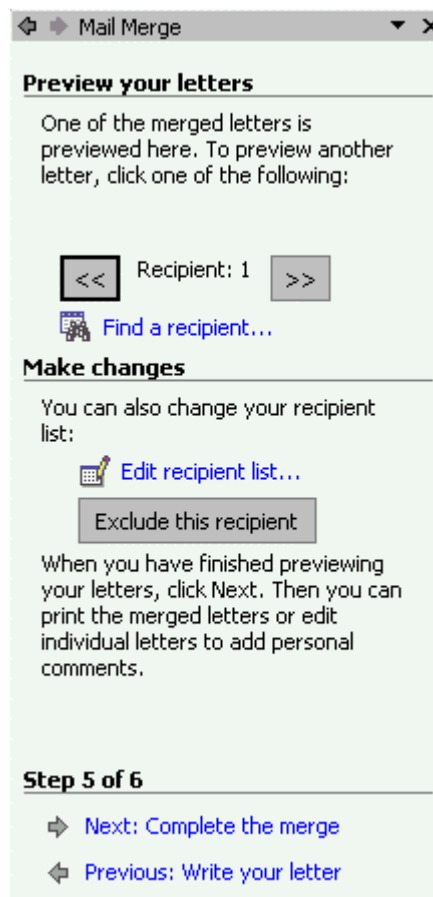
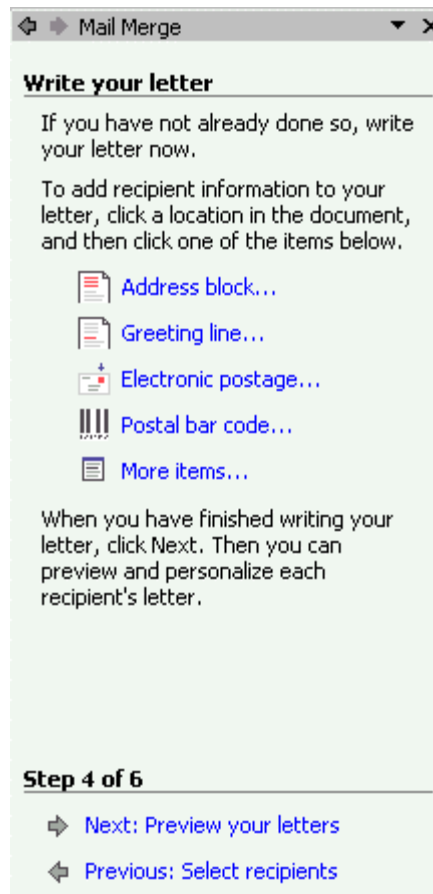


## Step 5 Preview your letters

In the document window you will see the first merged letter. It is a **preview** of how the letter will print. This is to give you the chance to make any changes to the wording in the main document or to change how the merged fields were inserted before completing the merge with all the records.

If everything looks fine with the preview letter, click **Next** to continue to Step 6.

If changes need to be made to the letter, click **Previous** to return to Step 4.

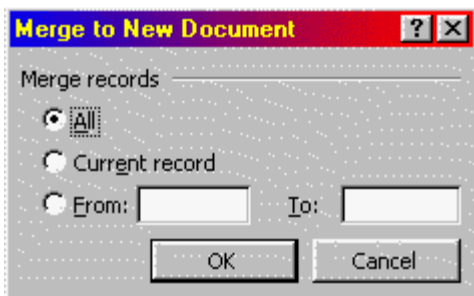


## Step 6 Complete the merge

Select **Print...** to merge the letters to the *Printer*. This window displays. Enter which records to print and click the OK button.



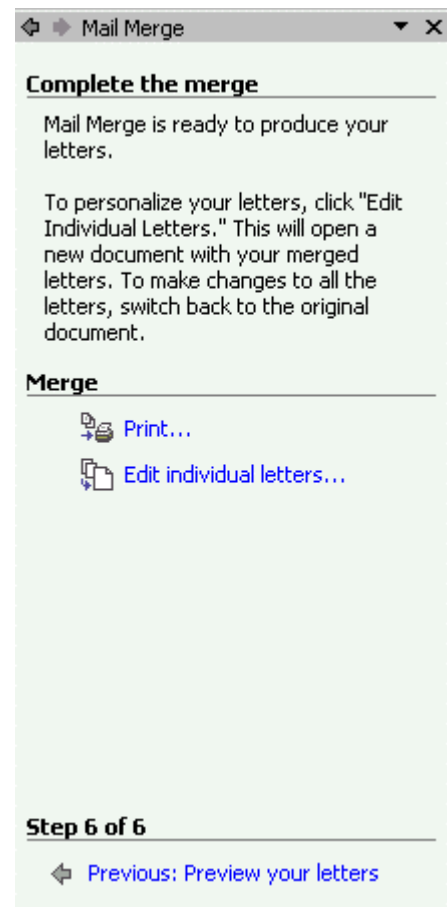
Select **Edit individual letters...** to merge the letters to a *New Document*. This window displays. Enter which records to merge and click the OK button.



**Note:** *Merge to a New Document* will create a third file. When you close this file, you will be prompted to save it.

### Attention!!!

Please pay attention to the prompts about saving the changes to the files when you close them or exit Word. It is a good practice to always save the changes you made to the main document file and to the data source file. It is optional to save the changes to the third document that was created, if you chose to *Merge to a New Document*.



## Frequently Asked Questions

### 1. How do I tell if the Word file I opened is a mail merge main document?

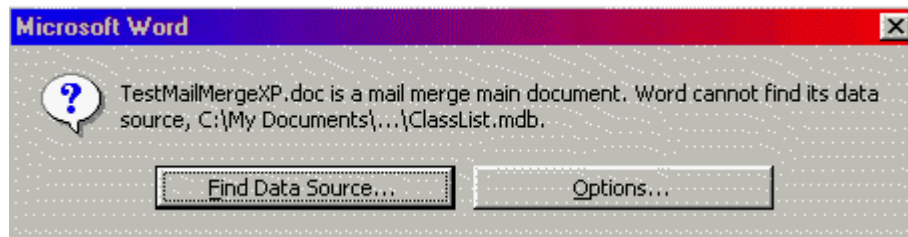
Click **Tools Letters and Mailings Mail Merge Wizard**.

Step 3 of the wizard, *Select Recipients*, will show the file name for the existing list. If the document is not a mail merge file, a file name will not be displayed.

If merged fields were inserted into the document, the fields would be grayed with either the record data displaying or the field names displaying, e.g. <<First\_Name>>.

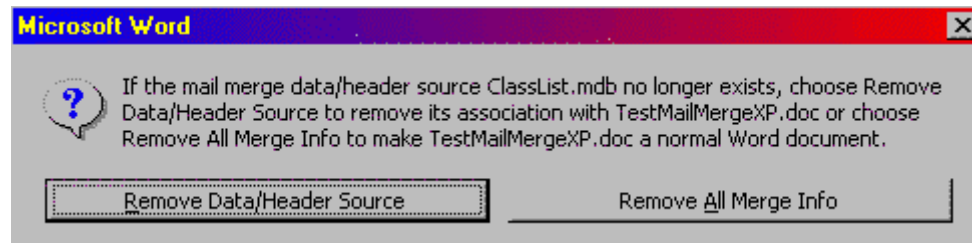
### 2. What happens if I move, rename, or delete a data source file that is linked to a main document?

When you open the main document, you will receive the following error:



If you know where the data source file is stored, click the **Find Data Source ... button**. The open window will appear for you to find and locate the file.

If you do **not** know where the data source file is stored, click the **Options... button**. The following message appears:



To remove the link between the main document and this data source file, click the **Remove Data/Header Source button**.

To return the main document back to a normal Word document, meaning it will no longer be a mail merge document, click the **Remove All Merge Info button**.

### 3. Can I keep my main document, but change the data source file that is linked to it?

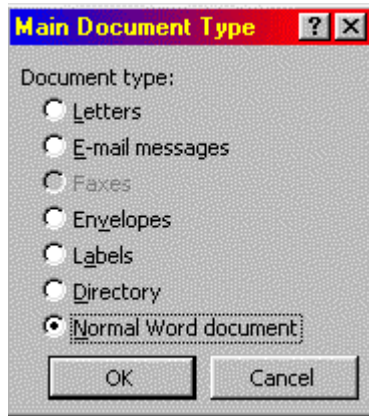
Yes. Using the *Mail Merge Wizard* at the step where you **Select the recipients**, click **Select a different list...** Locate the new data source file. If the field names in the new data source file are different from the existing inserted field names in the main document, you need to delete the existing field names and insert the field names from the new data source.

#### 4. How do I return my main document to a normal Word document?

Show the **Mail Merge toolbar** by clicking **View** **Toolbars** select **Mail Merge**.



Click the **Main document setup button** and the following window displays:



Select the document type called **Normal Word document** and click the **OK button**. This will remove the link between the main document and the data source and return it to a normal Word file.

#### 5. How do I print only specific pages if I merged to a new document?

Keep in mind the document created when merged to a new document will actually consist of **one page with several section page breaks**. Look at the status bar at the bottom left of the screen. When you page down, the page number remains at 1, but the section number changes.

When you click **File** **Print...** you will have to specify which **Pages** under the **Page Range option**. You have to prefix the number with an **s** for *section number*.

##### **Example:**

To print letters 3, 5, and 12, type the section numbers with commas separating them.

**s3, s5, s12**

If you clicked **Current Page** under the Page Range option, **all the letters would print**. Remember there is only one Page to the merged file containing many sections.

If you **entered** the number **1** at **Pages** under the Page Range option, **all the letters would print**.

**6. How do I format a merged field to contain hyphens or other characters?**

1. **Right click** on the merged field to display a popup menu.
2. Click on **Toggle Field Codes** to display the field codes.
3. Edit the field code in order to achieve one of the formats illustrated below.
4. After editing the field code, do Steps 1 and 2 to not display the field codes. You need to turn it off, otherwise, the field codes will print and not the data.

<u>Field Name</u>	<u>Not Formateed Field Code</u>
SSN	111223333            { MERGEFIELD SSN }
	 <u>After Formatted</u> <u>Field Code</u>
	111-22-3333            { MERGEFIELD SSN \# ###'-##'-#### }

\*\*\*\*\*

<u>Field Name</u>	<u>Not Formateed Field Code</u>
Phone	5735555555            { MERGEFIELD Phone }
	 <u>After Formatted</u> <u>Field Code</u>
	(573)555-5555            { MERGEFIELD Phone \# '(###)'###'-#### }

\*\*\*\*\*

<u>Field Name</u>	<u>Not Formateed Field Code</u>
Amount	1210.68                { MERGEFIELD Amount }
	 <u>After Formatted</u> <u>Field Code</u>
	\$1,210.68                { MERGEFIELD Amount \# \$#,##0.00 }