

Word 2003

Word Merge

User's Manual

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The Mail Merge Process


Mail Merge is one of the most helpful tools available in Word 2003. The idea is to take two separate documents and merge them together into a set of new documents, that although have slight differences share the same basic structure.

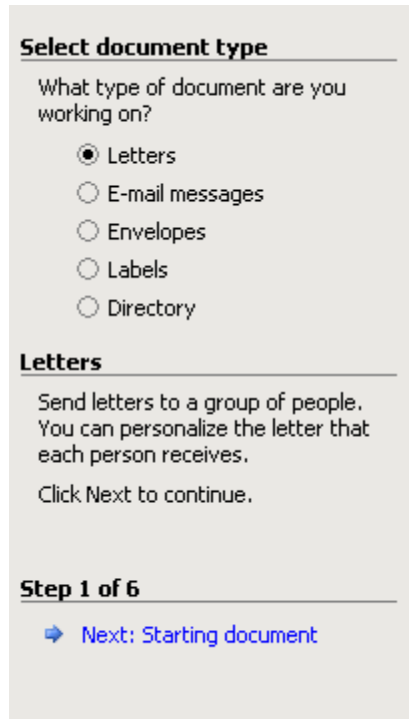
For example, imagine that you need to send out a series of letters to alumni thanking them for their generous donations to the university. You have a basic form letter written but the thought of changing the inside address for each individual letter seems like an overwhelming task. This is where a mail merge comes in handy.

In order to complete the mail merge process you will need two pieces of information, the first is the letter, form, etc. that you will be sending out, this is referred to as the **main document**. The second piece is the set of recipients and their unique information that will change for each document merged. In the Thank you letter example used above, this would be a list of the people and address that would need to change for each letter sent. This second piece of information is called the **data source**.

Step 1: Select Document Type

Once you get more comfortable with Mail Merges you will be able to jump into the process at different points. For now, it will be best to start from the beginning.

1. Open a new blank document
 - a. Ctrl+N
 - b. File Menu → New
 - c. Click the New button on the standard toolbar. 
2. Click the **Tools Menu**
3. Click **Letters and Mailings**
4. Click **Mail Merge**
5. Notice that the Task Pane appears on the right side of the screen.
6. Select the type of document you would like to have for your Main Document from the choices provided
 - a. Letters
 - b. E-mail messages
 - c. Envelopes
 - d. Labels
 - e. Directory
7. Click **Next: Starting document**



Select document type

What type of document are you working on?

- Letters
- E-mail messages
- Envelopes
- Labels
- Directory

Letters

Send letters to a group of people. You can personalize the letter that each person receives. Click Next to continue.

Step 1 of 6

[Next: Starting document](#)

Step 2: Select Starting Document

In the second step of a Mail Merge you need to tell word where you would like to get your Main Document from.

1. Select the radio button next to the appropriate choice
 - a. **Use the current document:** If you have not yet written your letter and would like to use the current blank document to do so, click here.
 - b. **Start from a template:** This option will allow you to choose a document that has been pre-made by Microsoft, there are various types of form letters, fax forms, etc.
 - c. **Start from an existing document:** If you already have a letter written and saved, select this option.
 - i. Once this radio button is clicked a window will appear on the task pane. See right.
 - ii. Click the name of the document you would like to use. If you don't see it, click the "more files" option, then click the "Open" button to browse for the appropriate document.
2. Click **Next: Select Recipients**

Select starting document

How do you want to set up your letters?

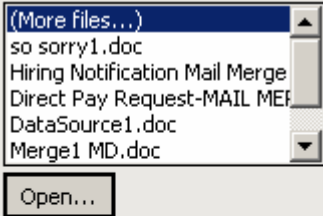
Use the current document

Start from a template

Start from existing document

Start from existing

Start from an existing mail merge document and make changes to the content or recipients.



Step 2 of 6

[Next: Select recipients](#)

[Previous: Select document type](#)

Step 3: Select Recipients

The third step is where you begin to link your main document with your data source. Click the radio button next to the appropriate choice, the options are explained below.

Use an existing List

1. If you already have a list of recipients saved in Excel, Access or Word, click this option.
2. Click the blue "Browse" link that appears in the lower half of the task pane
3. Locate the desired data source by clicking the appropriate drive, file and document.
4. If your data source is an excel file, a new window will open asking which worksheet in the Excel workbook holds the required information, click the appropriate sheet and click OK.
5. The "Mail Merge Recipients" dialog box will immediately open.
6. Please see the "**Mail Merge Recipients**" portion of this manual for further instructions.

Select recipients


Use an existing list


Select from Outlook contacts

Type a new list

Use an existing list

Use names and addresses from a file or a database.

 [Browse...](#)

 [Edit recipient list...](#)

Step 3 of 6

[Next: Write your letter](#)

[Previous: Starting document](#)

Select from Outlook contacts

1. Contact information in Outlook can be used as a data source in a word Merge, to use this method the desired recipients need to be stored in the Personal folder in the Contacts section of Outlook
2. Click “Select from Outlook Contacts”
3. Click the blue “Choose Contacts Folder” link that appears in the lower half of the task pane.
4. A new dialog box will appear titled **Select Contacts Folder**
5. Click the icon next to the appropriate folder
6. Click OK
7. Please see the “**Mail Merge Recipients**” portion of this manual for further instructions.

Type a New List

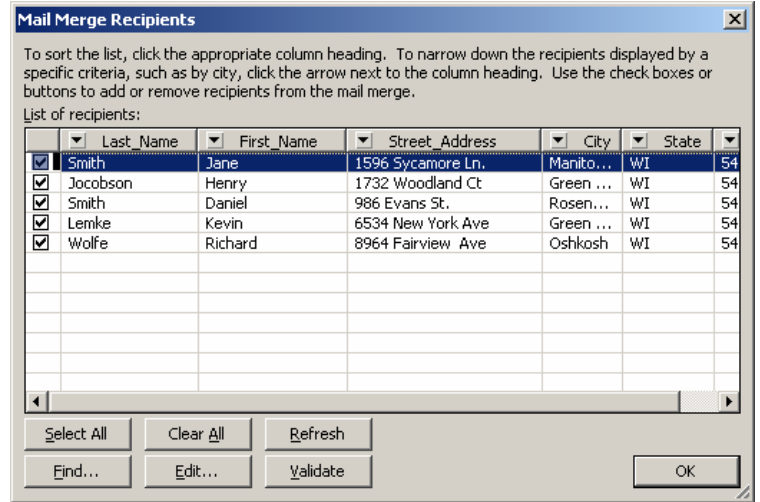
1. If you do not have a list of recipients saved anywhere, a new when can be created by clicking this option.
2. Click the blue “create” link that appears in the lower section of the task pane.
3. The **New Address List** dialog box appears on the screen.
4. Type the information for the first recipient into the appropriate boxes.
5. Click **New Entry** to enter information for the next recipient.
6. The **First, Previous, Next** and **Last** buttons are used to scroll through recipient entries.
7. When finished entering recipient information click **Close**.
8. You will be prompted to save the list as a data source. The list will need to be saved in order for the mail merge to be effective.
9. Please see the “**Mail Merge Recipients**” portion of this manual for further instructions.

The screenshot shows the "New Address List" dialog box. It features a title bar with the text "New Address List" and a close button. The main area is divided into two sections. The top section, "Enter Address information", contains several text input fields: "Title" (with "Ms." entered), "First Name" (with "Sarah" entered), "Last Name" (with "Blodgett" entered), "Company Name", "Address Line 1", "Address Line 2", "City", and "State". The bottom section, "View Entries", contains a row of buttons: "New Entry", "Delete Entry", "Find Entry...", "Filter and Sort...", and "Customize...". Below these buttons is a "View Entry Number" section with buttons for "First", "Previous", "2" (in a text box), "Next", and "Last". At the bottom of this section, it says "Total entries in list 4". A "Close" button is located at the bottom right of the dialog box.

Mail Merge Recipients

Once you have your data source connected to your document the Mail Merge Recipient Dialog Box Appears. Any slight changes that need to be made to your recipient list can be made in this window.

1. **Include Recipients:** Every name has a check box next to it; these are the people who will be included in the Mail Merge. If you decide not to send the letter to one of them, simply uncheck their name.
2. **Select All:** will add checkmarks to all names
3. **Clear All:** will remove checkmarks from all names
4. **Find:** To find a particular recipient in a long list, click find and enter appropriate information.
5. **Edit:** To make a change to recipient information, click the Edit button.
6. **Sort Recipients:** Recipients can be sorted by clicking the heading of a particular column. For example to alphabetically sort all last names, just click the Last Name Heading.
7. **Filter Recipients:** Recipients can also be filtered by type of information. For example, a mailing needs to be sent to only those people living in Oshkosh. Click the triangle next to "City" and select Oshkosh.
8. Once your recipient list is the way you would like it, click OK
9. Click **Next: Write your letter**



Step 4: Write Your Letter

Although you may already have the majority of your letter written, in this step you will insert the portion of your letter that will change with each recipient.

1. Maneuver your insertion point to the place on your document where you would like to include a piece of recipient information.
2. Click one of the blue options listed in the task pane. The corresponding code will be inserted into your document.
3. If the field you want to enter is not listed as a blue link, click the "More items" option.
4. When finished entering desired information click **Next: Preview your letters**

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](#)

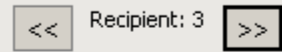
Step 5: Preview Your Letters

The mail merge process is almost complete. Now is the time to make any needed changes.

1. Use the  and  buttons to scroll through individual letters. Make sure everything looks the way you want it to.
2. If you want to look at a particular recipient, click the blue **Find a recipient** link.
3. If you notice that a piece of information needs to be changed, click the blue **Edit recipient list** link.
4. If you would like to exclude a recipient from the mailing, click the **Exclude this recipient** button while viewing their individual letter.
5. When finished click **Next: Complete the merge**

Preview your letters

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



 [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](#)

Step 6: Complete the Merge

Looks can be deceiving. Although it may appear as though you are done and that your merge is completed, this is not really the case.

1. Click the blue **Edit individual letters** link located in the lower part of the task pane.
2. The Merge to New Document will appear. Click the choice that best fits what you would like to do.
 - a. **All:** will complete the merge for all the recipients
 - b. **Current Record:** will complete the merge for only the record you are currently viewing.
 - c. **From: To:** You can specify exactly which records to complete.
3. Press OK
4. A new document containing the desired amount of merged letters will open.
5. Print as you see fit.


Complete the merge

Mail Merge is ready to produce your letters.

To personalize your letters, click "Edit Individual Letters." This will open a new document with your merged letters. To make changes to all the letters, switch back to the original document.

Merge

 [Print...](#)

 [Edit individual letters...](#)

Step 6 of 6

[Previous: Preview your letters](#)