Using Mail Merge in Microsoft Word 2003

Created: 12 April 2005

Mail Merge

Note: You should be competent in Microsoft Word before you attempt this Tutorial.

Open Microsoft Word 2003

Beginning the Merge

You may start Mail Merge with a blank document or one that you have already created. We will use a blank document in this tutorial.

To begin the Mail Merge sequence click Tools in the Menu Bar, select Letters and Mailings, and then Mail Merge Wizard (see arrows below).

🔮 Document1 - Microsoft Word	
Eile Edit View Insert Format	Tools Table Window Help Acrobat
i d 💕 🖬 🖪 🖨 🖪 🔍 🖤	🦃 Spelling and Grammar F7 🍃 📰 📷 🎫 🦓 🗔 ¶ 100%
: 🔂 🔁 🚽 🕂 Normal 🕞 Tir	🛍 Research Alt+Click
L 1	Language
	Word Count
	AutoSummarize
1	Speech
	Shared Workspace
1	Track Changes Ctrl+Shift+E
	Compare and Merge <u>D</u> ocuments
	Protect Document
-	Online Collaboration
:	Letters and Mailings

You will now see a Microsoft Mail Merge Task Pane appear on the right side of your screen – similar to the image at the right.

We will begin this tutorial by creating a mail merge letter. When we have completed the letter we'll discuss Envelopes, Labels, and E-mail messages.

Notice that the small circle to the left of Letters has a dot in it. This is the default selection. We'll use letters to begin.

You'll notice, at the bottom of the Task Pane that it looks like the image on the right. Now that we've selected Letters, we can proceed to the next step in the Wizard. Click Next: Starting document.

We are leaving Step 1 of the Mail Merge Wizard and moving to Step 2.

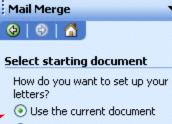
The top of the Step 2 Task Pane looks like the image on the right. We indicated earlier that we are going to use a blank document for this tutorial. So, we'll remain with the default selection – Use the current document.

At the bottom of the Step 2 of 6 Task Pane, click Next: Select recipients.

Notice, in the image on the right that, as you proceed through the Mail Merge Task Panes, you **can go back and forth at any time you desire**. This is logical and handy.



Next: Starting document.



• ×

🔘 Start from a template 👘

Start from existing document

Use the current document

Start from the document shown here and use the Mail Merge wizard to add recipient information.

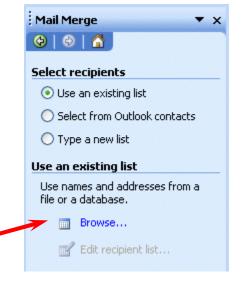
Step 2 of 6

- Next: Select recipients
- 🗣 Previous: Select document type

Selecting your merge file (Access, Excel, Word, Outlook)

You are now in **Task Pane 3**. In this task pane you will select the source list for your mail merge. We'll be using an Access database for this tutorial. You can use an Excel spreadsheet, Outlook Mail Contacts, or several other sources.

The Access database file we will be using was created with our Access 2003 tutorial. If you'd like a copy of this tutorial and database file, please e-mail the address found at the end of the tutorial, or download them from our website, which is also found on the last page.



Click the Browse button in Task Pane 3.

We, as indicated, are going to **select** an **Access Database**. It is located on our C: drive in the Folder Mail Merge Word XP.

Select Data So	urce	? 🗙
Look in:	🛅 Mail Merge Word 2003 🛛 🔮 🖓 🕶 🔯 🔀 🗡 📷 🕶 Tools 🕶	
My Recent Documents Desktop	Mail Merge 2003.doc Person 2003.mdb	
My Documents		
My Computer		
My Network Places		pen ncel

After we select our database we'll **click** the **Open** button.

You may choose several other file types, as previously indicated. If you **click** the **small down arrow** to the **right** of the **Files of type:** area in the Select Data Source menu screen (image at bottom of last page and on right), you will see many other file types from which you can merge.

File <u>n</u> ame:		~
Files of type:	All Data Sources (*.odc; *.mdb; *.mde,	~
\rightarrow	Office Database Connections (*.odc) Access Databases (*.mdb; *.mde) Microsoft Office Address Lists (*.mdb) Access Projects (*.ade; *.adp) Microsoft Data links (*.udl) ODBC File DSNs (*.dsn)	<

When we **selected** the Person 2003 **database**, the following **Select Table** menu **appeared**. This database contains three Tables – we are going to choose the **Personnel** Table.

s	elect Table				×
	Name	Description	Modified	Created	Туре
	📰 female salaries		10/11/1999 9:02:07 AM	10/11/1999 9:02:06 AM	VIEW
	📰 test query 2003		10/7/2003 4:50:51 PM	10/7/2003 4:50:51 PM	VIEW
	III Personnel		10/6/2003 4:39:11 PM	12/22/1996 12:46:32 PM	TABLE
				· · · · · ·	
	<				
				ок с	ancel

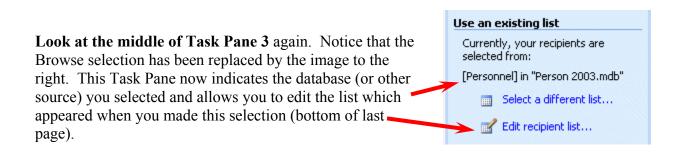
After we selected Personnel, we **clicked** the **OK** button. The Mail Merge Recipients menu screen appears.

utto	fic criteria, such as t		ading. To narrow down the v next to the column heading nail merge.		
scu	 Last Name 	 First Name 	 Street Address 	City	💌 State
~	Sandston	Wally	22 Eddy Court	Lynch	va
2	Kern	Virginia	1060 Whistling Swan Di	Bedford	va
~	Warren	Charles	100 Faculty Drive	Lynch	va
<	Smith	Ed	23 Main Street	Albany	NY
~	Warren	Freda	2233 South Road	Lynch	va
<	Smith	Wanda	1 Only Way	Bartow	WV
<	James	Linda	1254 Indian Way	Watonka	WV
<	Binswager	Harold	7 East West Drive	Bigfoot	mo
~	Ziplowski	Ezod	2798 Old Mink Place	Sheldon	al
~	Karpowski	Enid	12 Sagmon Drive	Winetka	il
~	Billingsley	Wally	2319 Back Creek Circle	Kapokla	hi
2	Smith	Frieda	1224 Wart Wallo Wao	Lynch	US .
					>

Spend a few moments viewing Mail Merge Recipients screen (at the bottom of the last page). Use the elevator bars at the bottom and on the right of the screen to view your data.

If you are not familiar with the Mail Merge Recipients Filter Screen, an addendum on how to use this filter screen is provided at the end of this tutorial on Page 30.

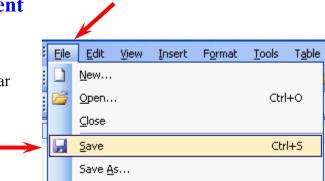
Click the OK button when you have viewed the screen to your satisfaction.



You are now ready to begin inserting fields into your mail merge document. However it would be prudent to save your mail merge letter at this time. **Once you've accessed your database**, **the save feature will not only save your document**, **but preserve the link to your data source** (database, spreadsheet, etc.)

Saving your Mail Merge document

You will want to save your mail merge documents periodically. Use your favorite Save method. We'll click File in the Menu Bar and select Save (as shown in the image on the right.



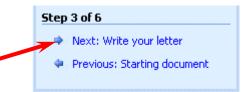
The Save As menu screen will appear (image at the top of the next page).

Save As		?×
Save jn:	🛅 Mail Merge Word 2003 🔹 🕑 - 🖄 😋 🗙 🕍 🧱 🔻 Tools -	
My Recent Documents	Mail Merge 2003.doc Mail Merge Letter.doc	
Desktop		
My Documents		
My Computer		
Mu biobuerk	File <u>n</u> ame: Mail Merge Letter.doc Sav	/e
My Network Places	Save as type: Word Document (*.doc)	cel

We will save our document as Mail Merge Letter in the Mail Merge Word 2003 Folder on our C: drive.

Creating the Mail Merge Document

Having selected our data source, we are now ready to create our mail merge document. Look at the bottom of the Step 3 of 6 Task Pane and click Next: Write your letter.



Mail Merge 🛛 🔻 🗙		
😔 😔 🚮]		
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		
IIII Postal bar code		
🗐 More items 🔫		
When you have finished writing your letter, click Next. Then you can preview and personalize each		

recipient's letter.

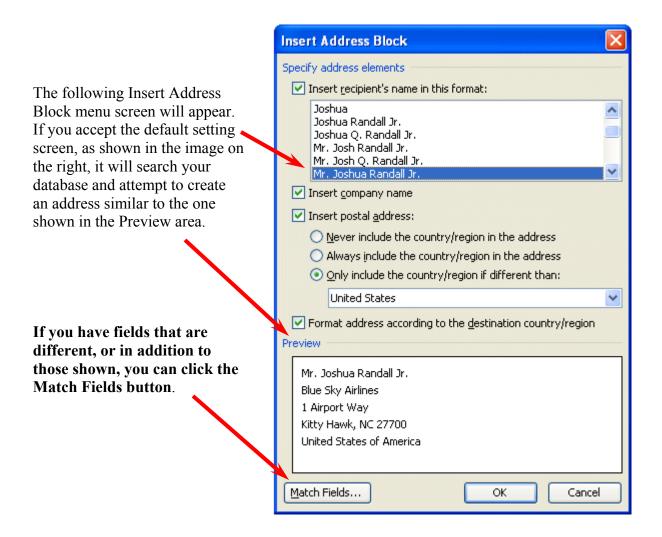
You will now be taken to the **Mail Merge Step 4 of 6 Task Pane**. The top of this Task Pane looks like the image on the left.

We'll cover two of the selections you see at the left – Address block and More items. Greeting line is similar to Address block.

If the cursor is not visible at the top of your document, click the top left corner of your document.

We'll begin our letter with the Address Block.

Click the Address Block selection (as indicated at the bottom of the last page).



Examples of how to use the Match Fields menu screen are furnished at the top of the next page.

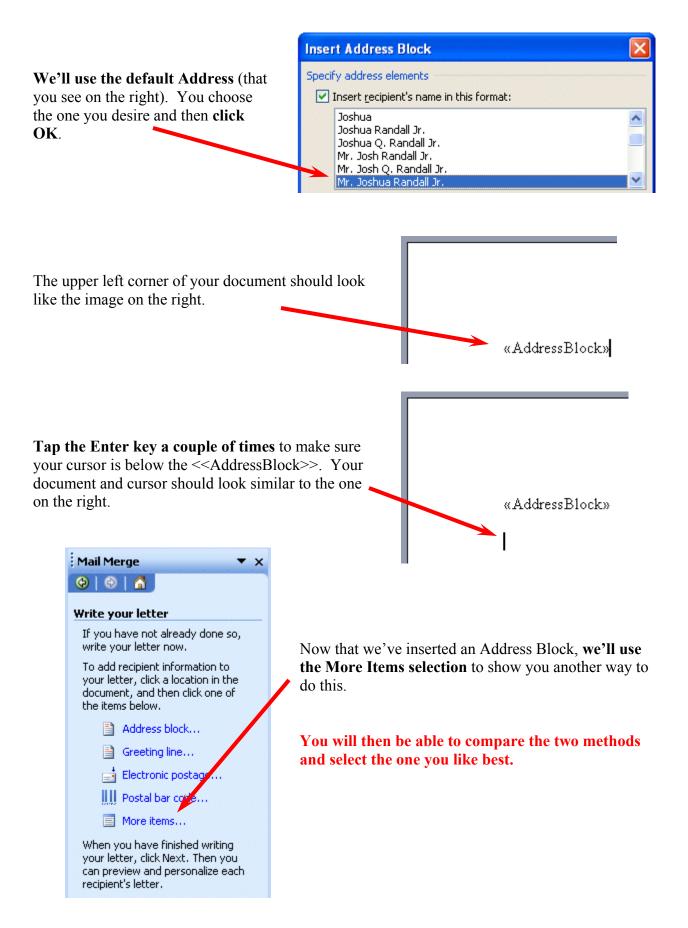
Look at the right side of the Match **Fields menu** screen. Notice that Mail Merge had **no** problem matching Last Name and First Name – since these are the same as our field names. However, also note that it selected our **Street Address to** Match Address 1 and our Zip to match Postal Code

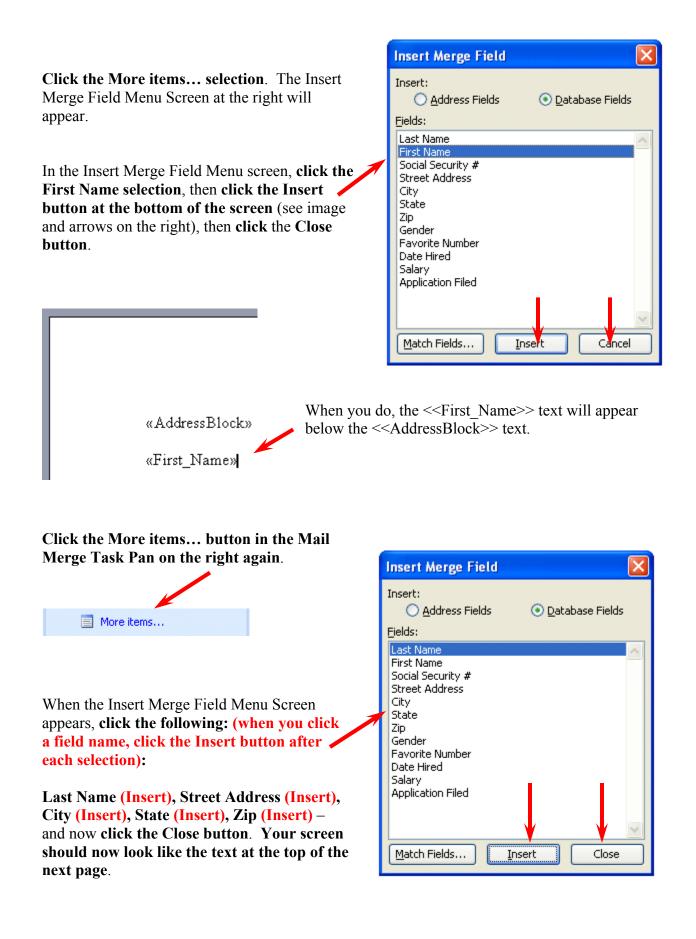
Match Fields Mail Merge has special features for easily working with addresses. Use the drop-down list to select the proper database field for each address field component. **Required information** Last Name Last Name -First Name First Name Courtesy Title (not matched) -(not matched) Company -Street Address Address 1 --City City -State State -Postal Code Zip -Spouse First Name (not matched) -Optional information Middle Name (not matched) -SUFFix (not matched) Use the drop-down lists to choose the field from your database that corresponds to the address information Mail Merge expects (listed on the left.) OK Cancel

If you **desire to** change a match, simply choose one of the fields under Required **Information or Optional** Information and click the down arrow on the box to the right. We chose Last Name. When we **clicked** the arrow fields and our database fields appeared on the right. To replace a field, simply click on your field on the right.

Required information		~
Last Name	Last Name	
First Name	Last Name	-
Courtesy Title	First Name	
Company	Social Security #	
Address 1	Street Address	.
City	City	· •
State	State	-
Postal Code	Zip	-
	Gender	
Spouse First Name	Favorite Number	+
Optional information	Date Hired	
Middle Name	Salary	÷1
Suffix	Application Filed	
Use the drop-down lists to choose the field from your databas address information Mail Merge expects (listed on the left.)	(not matched)	o the

If you change any fields, click the OK button and they will be replaced. You will return to the Insert Address Block menu screen.





«AddressBlock»

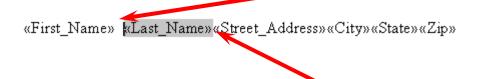
«First_Name»«Last_Name»«Street_Address»«City»«State»«Zip»

Don't worry about this. Since you are already an accomplished Word user, we'll now arrange this text to look like a normal mailing address.

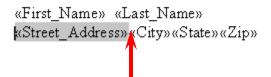
Move your cursor **between the First_Name>> and <<Last_Name arrows** and **click the left mouse button**. When you click, your text should look like the image below.

«First Name»«Last Name»«Street Address»«City»«State»«Zip»

Tap the Space Bar to place a space between these two fields. Your text should now show a space like the image below.



Now, move your cursor between the Last Name and Street Address arrows (>> <<) and click the left mouse button. Then tap the Enter Key. Your text should now look like the image below.



We'll continue this process to create a logical mailing label. Click between the arrows between Street Address and City and tap the Enter Key. Your text should now look like the image on the right. «First_Name» «Last_Name» «Street_Address» «City»«State»«Zip»

L

«First_Name» «Last_Name» «Street_Address» «City», «State» «Zip» Click between the arrows between City and State and tap a comma (,) and then tap the Space Bar. Then click between the arrows between State and Zip and tap the Space Bar. Click to the right of the arrow at the end of Zip and tap the Enter Key twice. Your text should look like the image on the left.

«AddressBlock»

«First_Name» «Last_Name» «Street_Address» «City», «State» «Zip»

Now, we'll insert a greeting. Tap the Enter Key two more times – just to create some space – and type in Dear and then tap the Space Bar. Click the More Items button in the Task Pane on the right and insert the field First Name. Type a comma after the First Name field and tap the Enter Key twice. Your document should now look like the one on the right.

Dear «First_Name»,

Previewing your documents

Step 4 of 6

Wally Sandston

Wally Sandston

22 Eddy Court

Dear Wally,

Lynchburg, va 24501

Lynchburg, va 24501

22 Eddy Court

- Next: Preview your letters
- 🗣 : Previous: Select recipients

We are now ready to preview our efforts. Click the Next: Preview your letters choice at the bottom of the Mail Merge Task Pane on the right of your screen.

You will now move to the **Mail Merge Task Pane screen 5 of 6**. It will look similar to the image on the right.

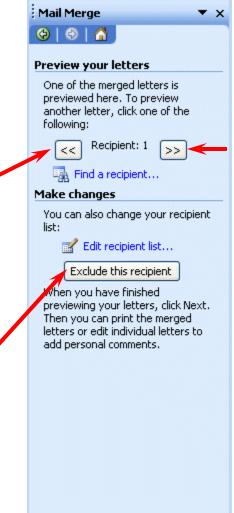
Your document should look similar to the one on the left.

You can browse your addresses and greeting by clicking the arrows on the right and left of Recipient.

Notice two things -

On purpose, we created our State field in Access with a lower case state designation (e.g. va). This happens frequently and we'll show you how to correct this.

As you browse through your documents, if you see one you wish to remove, you can click the Exclude this recipient button. We'll explain this more on Page 14.

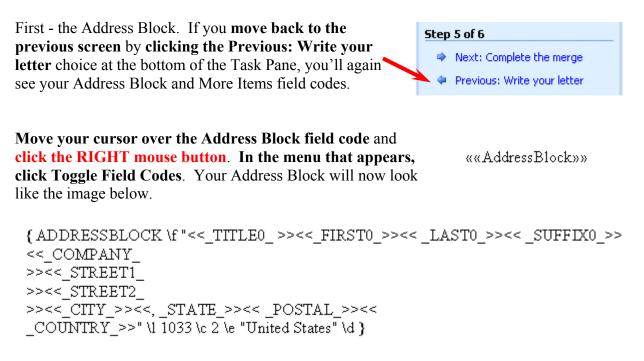


Step 5 of 6

- Next: Complete the merge
- 🗢 Previous: Write your letter

We'll now look at problems with lower case States - mentioned on the last page.

Lower case states – this is the reason we used both the Address Block and More Items choices in our information above.



Click and drag your left mouse button over the <<,_**STATE**_>> field to highlight the field. It should look like the image on the right.

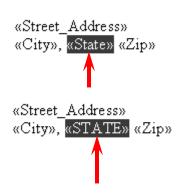


Move your cursor over the highlight and click the RIGHT mouse button. In the menu that appears, click the Font choice. In the Font Menu screen click in the small box to the left of ALL CAPS and then click OK. This "should" mark your states to be all capitals. Note: sometimes this works, and sometimes it doesn't – that's why we're showing you both the Address Block and More Items techniques.

RIGHT click again on the **Address Block (you see above)** and **select Toggle Field Codes** again and you will see only the <<AddressBlock>> again.

Now we'll do the same thing for More Items. Highlight the <<State>> field – like them image on the right. RIGHT click on the highlighted field and choose Font again. Then choose ALL CAPS again, and click OK.

Notice that your **<<STATE>> field** now is shown in all capital letters. THIS ALWAYS WORKS.



Step 4 of 6

- Next: Preview your letters
- 🗣 Previous: Select recipients 👘

Now we'll return to "re-preview" our letters – after these two changes. Click the Next: Preview your letters choice at the bottom of the Step 4 of 6 Task Pane.

We are now back on **Task Pane Step 5 of 6** screen – Preview your letters and you will **notice**, as we suggested, that **the Address Block state did not "take" the ALL CAPS selection**.

But, the More Items choice did accept the ALL CAPS.

We could go into how to do this with other coding, but we're trying to keep this simple.

We suggest you use the More Items selection for all of your fields rather than trying to make the Address Block and Greetings Line selections work. It may take a minute or so more, but as just shown, you have more control.

Printing your merged documents

Let's move on to printing our letters. In the Step 5 of 6 selection, at the bottom of the Mail Merge Task Pane, select Next: Complete the merge.



The Mail Merge Step 6 of 6 Task Pane – like the one on the right will appear.

First, before we print our merged documents, there is a really IMPORTANT choice – Edit individual letters....

Remember, in the Step 5 Task Pane, that if you did not desire to include a specific letter – because of some minor editing requirement – you could click the **Exclude this recipient** button. That would have removed that letter from the printing group. You would then have had to return to that letter and work on it individually. However, if you desire to make minor changes to a letter, you do not have to exclude it. You can proceed to this screen and print that letter individually. To do this you would **click the Edit individual letters... selection**. The **menu screen at the top of the next page would appear**. Wally Sandston 22 Eddy Court Lynchburg, va 24501

Wally Sandston 22 Eddy Court Lynchburg, VA 24501

Dear Wally,

Mail Merge

Complete the merge

Mail Merge is ready to produce your letters.

▼ X

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

Notice you have **several choices**. We find most users make a note of the Recipient number(s) - (e.g. Recipient 6) and then enter them in the From: area in the Merge to New Document menu on the right. When you click OK, a Word document – of that letter – will open. You would make your changes and then only print the revised letter(s) by selecting Print current page.

Merge to New Document
Merge records
O All
O Curr <u>e</u> nt record
OK Cancel

After printing, when you close the revised letter, you would return to your Mail Merge screen and Task Pane.

Now we're ready to print the letters (that did not need editing). Click the Print... selection in the Task Pane as shown in the image on the right.

	Merge		
-	🔶 🎥 Print		
	Edit individual letters		

Merge to P	rinter		
Print records			
<u> ● All</u> -	<		
O Curr <u>e</u> ni	record		
O Erom:		<u>T</u> o:	
	ОК		Cancel

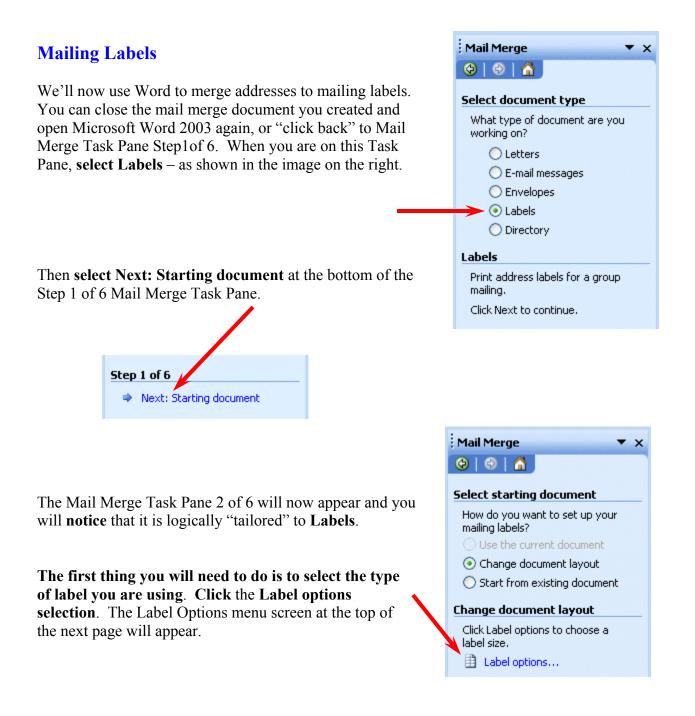
You will be taken to the Merge to New Document menu screen. Since you are now printing all of the letters that were not excluded, **make sure that All is selected**. Then **click** the **OK button**.

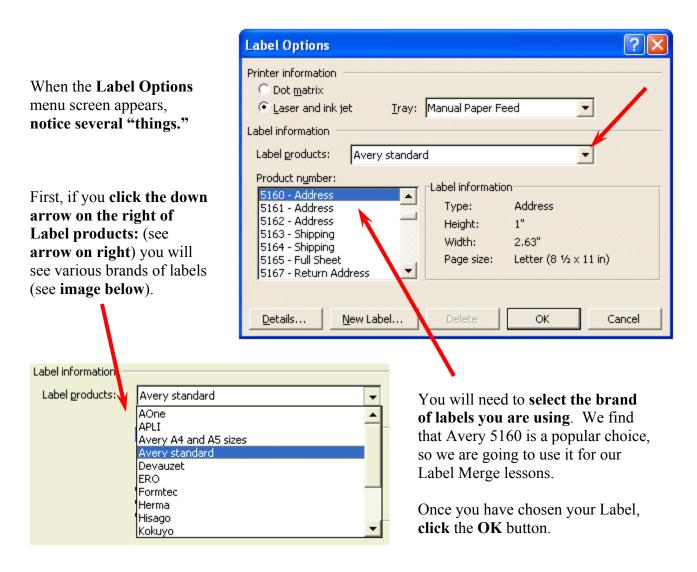
The Print menu screen (below) will appear.

Printer <u>N</u> ame:	🐲 \\murray-train3\HP DeskJet 87	'0Cxi	▼ Propert
Status: Id Type: H	lle P DeskJet 870Cxi PT1:		Fin <u>d</u> Print
Page range		Copies	
	e C Selection bers and/or page ranges mmas. For example, 1,3,5–12	Number of <u>c</u> opies:	Colla <u>t</u>
	pages in range	Zoom Pages per s <u>h</u> eet:	1 page

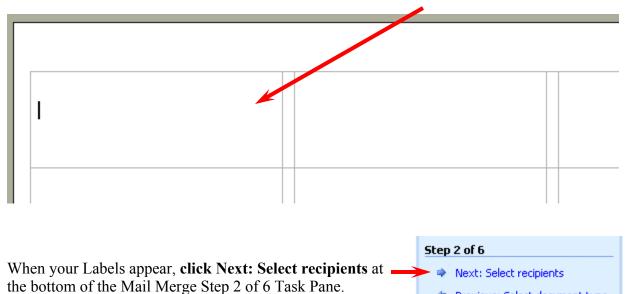
Once the Print menu screen appears, **choose the printer on which you desire to print** your merged documents. Then, **make sure** the **All Page range (above) is selected** and **click** the **OK** button.

If you are using letterhead paper – don't forget to leave room at the top of your document for this.



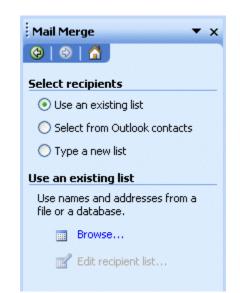


As soon as you click OK, you will see a "page" of your Labels appear to the left.



You will now be taken to the Mail Merge Step 3 of 6 Task Pane. What you do here is exactly what you did on this Task Pane on Pages 2 through 5 above. You can review these pages as you desire.



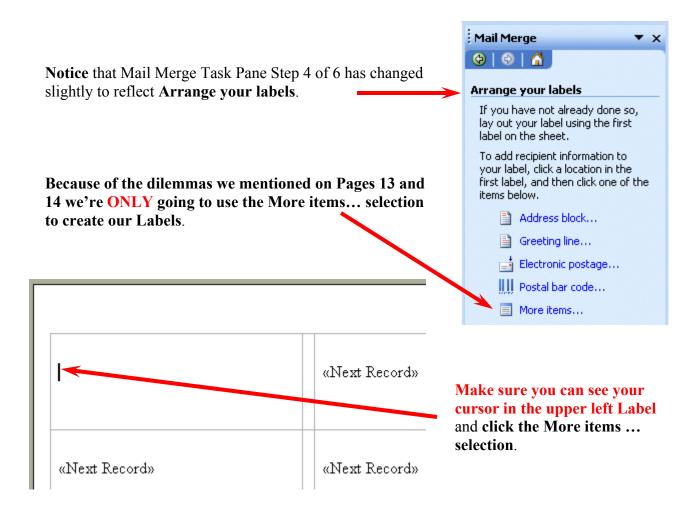


When we have finished selecting your recipients, your Task Pane will change to look like the one on the left.

And, your Labels will look like the image below.

I	«Next Record»	«Next Record»
«Next Record»	«Next Record»	«Next Record»

We'll now select Next: Arrange your labels from the bottom	Step 3 of 6	
of the Task Pane.	🔸 🌩 Next: Arrange your labels	
	🗢 Previous: Starting document	



When the Insert Merge Field menu screen appears (as shown below) follow the instructions on Pages 10 and 11 above. Select First Name, Last Name, etc. When your Label looks like the image below, click the Close Button. We'll edit the Labels, like we did on Pages 10 and 11.

Đ	Insert Merge Field 🔹 💽
«First_Name»«Last_Name»«Street_ Address»«City»«State»«Zip»	Insert: C <u>A</u> ddress Fields Fields:
«Next Record»	Last Name First Name Social Security # Street Address City State
	Zip Gender Favorite Number
«Next Record»	Date Hired Salary Application Filed

When your top left Label looks like you desire (ours is seen in the image on the right - we followed the steps on Pages 10 and 11 again) click the Update all labels button in the	«First_Name» «Last_Nan «Street_Address» «City», «STATE» «Zip» 		«Next Record»
Replicate labels area of the Task Pane.		Replicate labe	ls
THIS IS A HUGE CLICK - We have found that this is the most f producing merged labels.	requent error in	label to the page by cli	py the layout of the firs! e other labels on the cking the button below. <mark>te all labels</mark>

Notice that we once again changed the Font for STATE to ALL CAPS so that our states would be capitalized.

Your Labels will look something like the image below. **Don't worry if they don't look** "**perfect**" in this view. In the next Task Pane we'll see what they will really look like.

«First_Name» «Last_Name» «Street_Address» «City», «STATE» «Zip»	«Next Record»«First_Name» «Last_Name» «Street_Address» «City», «STATE» «Zip»	«Next Record»«First_Name» «Last_Name» «Street_Address» «City», «STATE» «Zip»
«Next Record»«First_Name» «Last_Name» «Street_Address» «City», «STATE» «Zip»	«Next Record»«First_Name» «Last_Name» «Street_Address» «City», «STATE» «Zip»	«Next Record»«First_Name» «Last_Name» «Street_Address» «City», «STATE» «Zip»
So, let's move to the next Task P		Step 4 of 6 Next: Preview your labels

Preview your labels in the Step 4 of 6 Task Pane.



Your Labels should now look similar to the image below. Notice that all the States are capitalized. To review your labels you can move from label page to label page.

₩ally Sandston	Virginia Kern	Charles Warren
22 Eddy Court	1060 Whistling Swan Dirve	100 Faculty Drive
Lynchburg, VA 24501	Forest, VA 24551	Lynchburg, VA 24501
Ed Smith	Freda Warren	Wanda Smith
23 Main Street	2233 South Road	1 Only Way
Albany, NY 45126	Lynchburg, VA 24501	Bartow, WV 71400

If you have more than one sheet of labels, use the Page Up and Page Down movement arrows in the lower right corner of the vertical elevator bar on the right of your screen to move from page to page.



Step 5 of 6 Next: Complete the merge Previous: Arrange your labels

Now we're ready to print our labels. Click Next: Complete the merge in the Step 5 of 6 Mail Merge Task Pane.

The Mail Merge Task Pane 6 of 6 will now appear and you are ready to print your labels the same way we printed documents on Pages 14 and 15 above.

If you use these Labels often, you should save your file, just as we did with Documents, for the file will automatically link with your database or spreadsheet and update with any new entries.

Mail Merge 🔹 🗙	
😌 😌 🚹	
Complete the merge	
Mail Merge is ready to produce your mailing labels.	
To personalize your labels, click "Edit Individual Labels." This will open a new document with your merged labels. To make changes to all the labels, switch back to the original document.	
Merge	
🔄 Print	
Edit individual labels	

Envelopes

i Mail Merge ▼ ×	
🐵 🗇 🐴]	
Select document type	
What type of document are you working on?	
🔘 Letters	
E-mail messages	
💿 Envelopes	
🔘 Labels	
 Directory 	
Envelopes	
Print addressed envelopes for a group mailing.	
Click Next to continue.	

Note -we closed and saved the Label Mail Merge document, just as we did the Letter Mail Merge document. When we open either of these again, they will already be linked to the database, spreadsheet, etc. and ready to use. They will also grow in size as additional names are added to the data source.

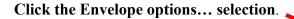
We'll now open a new blank document and follow the steps on Page 1. But this time, we'll choose Envelopes.

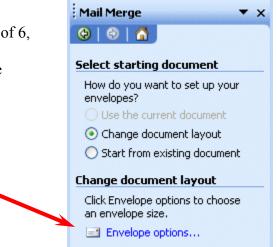
At the bottom of the Mail Merge Envelopes Task Pane 1 of 6, click the Next: Starting document selection.

Step 1 of 6

Next: Starting document.

At the top of the Mail Merge Envelopes Task Pane 2 of 6, you will, once again, notice that the Task Pane is "tailored" to your selection – Envelopes. Word, once again, furnishes you a logical choice.





Envelope Options		? 🛛
Envelope Options	Printing Options	
Envelope <u>s</u> ize:		
Size 10	(4 1/8 × 9 1/2 in)	_
If mailed in the USA		
Delivery address	_	
Eont	From left: A	Jto 🛨
	From top: A	Jto 🛨
Return address	From left: A	Jto 🌩
F <u>o</u> nt	From top: A	
Preview	i four cobi. I w	
	ОК	Cancel

The Envelope Options menu screen (at the left) will appear.

Notice: that you can select the Font you desire to print on your envelope for both the Delivery and Return Addresses (see arrows on left of the Envelope Options image).

Click the small down arrow to the right of Envelope size: The Envelope size: image (you see below) will appear. Select the size for your envelope from the selections on the screen. If none of the selections "fit," the last selection is Custom. You can choose it and define your envelope dimensions.

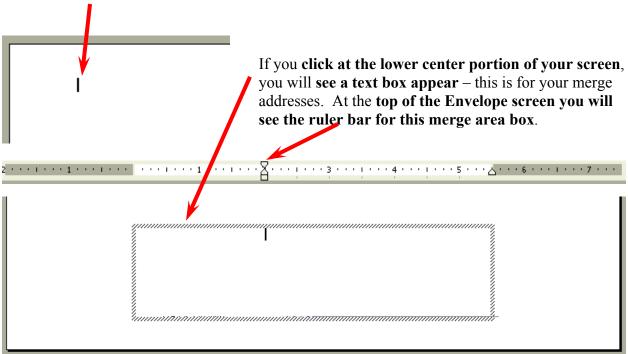
En	velope Options	5 NASA NASA NA MANA	? 🗙
Ē	nvelope Options	Printing Options	
Er	nvelope <u>s</u> ize:		
	Size 10	(4 1/8 x 9 1/2 in)	-
If	Size 6 3/4 Size 9	(3 5/8 × 6 1/2 in) (3 7/8 × 8 7/8 in)	-
	Size 10	(4 1/8 × 9 1/2 in)	
	Size 11	(4 1/2 x 10 3/8 in)	
D	Size 12 Size 14	(4 3/4 × 11 in) (5 × 11 1/2 in)	
	B4	(250 x 353 mm)	
	B5	(176 × 250 mm)	
	B6 C3	(125 × 176 mm) (324 × 458 mm)	
R	C3	(324 x 456 mm) (229 x 324 mm)	
	C5	(162 × 229 mm)	

Envelope Option	s ? 🔀
Envelope Options	Printing Options
Printer: \\murray	train3\HP DeskJet 870Cxi
Feed method	
PP	
C Face yp	• Face <u>d</u> own

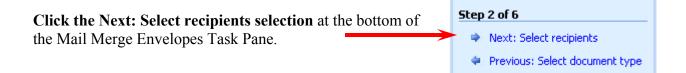
After you have selected a size for your envelope, **click** the **Printing Options tab** (as indicated in the image on the left). You will see how to insert envelopes into your printer. **This varies by printer**. For our HP DeskJet, you see the appropriate Feed method.

When you have made all of your selections, **click** the **OK button**.

As soon as you click the OK button, the image in your Word screen will change to a blank envelope. Look closely at your screen. In the upper left corner of the envelope you will see a flashing cursor. This allows you to type your return address - that will print on each envelope. If you are using envelopes with your institution or business logo/address, you don't have to do anything here.



This text box is where we'll create our merge envelope addresses.



You will now, once again, be on the Select Recipients Task Pane. Follow the instructions on Pages 2 through 5 above.

When you finish selecting your data source, your Mail Merge Envelopes Task Pane will look like the image below.

Use an existing list
Currently, your recipients are selected from:
[Personnel] in "Person 2003.mdb"
Select a different list
📝 Edit recipient list



When you have selected your recipients, **click the Next: Arrange your envelope selection** at the bottom of the Mail Merge Envelope Step 3 of 6 Task Pane.



Your Mail Merge Envelopes Step 4 of 6 Task Pane will appear. We'll use this Task Pane to set the merge fields for our envelopes.

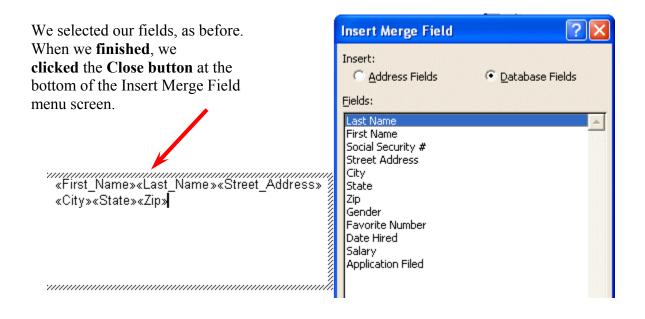
As we have indicated before, it is probably best to choose the More items... selection than Address block..., unless your addresses exactly match the Address block fields.

We'll choose More items...

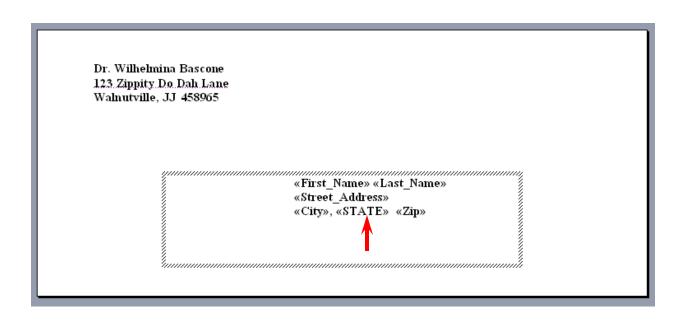
After we chose More items..., we followed the instructions on Pages 9 through 12 above.

When we entered our fields in the Envelope Address area, our screen looked like the image below.





We then edited, as we did on Page 11, our Envelope address area so that it looked like the image below.



We're now ready to preview our envelopes. At the bottom of the Mail Merge Envelopes Task Pane 4 of 6, click the Next: Preview your envelopes selection.

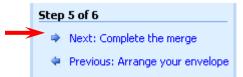


- Next: Preview your envelopes
- 🗢 Previous: Select recipients

Mail Merge **•** × 😔 I 😔 I 🐴 When you move to the Mail Merge Envelopes Task Pane 5 Preview your envelopes of 6, the Task Pane image will look like the one on the right. One of the merged envelopes is previewed here. To preview another envelope, click one of the You can browse through your envelopes, as you did with following: your documents and labels, by clicking the << and >> to Recipient: 1 << >> move through the various recipients. 🖳 Find a recipient... If you need to exclude an envelope you can do this as well by Make changes choosing the Exclude this recipient button. You can also change your recipient list: Your envelope should look similar to the image below. 📝 Edit recipient list... We made the text bold and used a larger font so that you Exclude this recipient could see it more easily. We also capitalized STATE as When you have finished you can see in the envelope image on the last page and previewing your envelopes, click Next. Then you can print the below. merged envelopes or edit individual envelopes to add personal comments.

123 Zippity	nina Bascone Do Dah Lane , JJ 458965
	Wally Sandston 22 Eddy Court Lynchburg, VA 24501

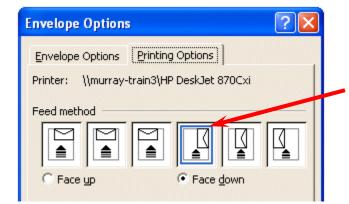
When you have finished reviewing your envelopes, **click the Next: Complete the merge selection** at the bottom of the Mail Merge Envelops Step 5 of 6 Task Pane.

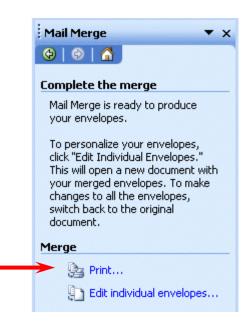


You are now ready to print your envelopes (same as on Page 15).

This can be a bit tricky, depending on your printer.

Very few folks have "envelope feeder" printers. If you have an envelope feeder, load your envelopes in the feeder as indicated for your printer.





On the left is the same image as Page 23 (for our printer). It is an ink jet that requires us to "feed" envelopes individually into the feeder tray as indicated. You may want to "experiment" a bit with this before you print a lot of envelopes.

E-Mail Merge

You may desire to check with your e-mail provider before you attempt the below. This is explained at the bottom of Page 29.

E-mail merge is exactly like Document Mail Merge on Pages 1 through 15 above – except for the first and last Mail Merge E-mail Task Panes.

You **must** have an e-mail address as a field in your database, spreadsheet or address file.

On the Mail Merge E-Mail Task Pane 1 of 6 select E-mail messages.

Proceed through Mail Merge E-mail Task Panes 2 through 5 as you did for Mail Merge Documents.



	Mail Merge ▼ ×
When you move to Mail Merge E-mail Task Pane 6 it will look like the image on the right. Click the Electronic Mail selection	Complete the merge Mail Merge is ready to produce your e-mail messages. Merge Electronic Mail

Merge to E-r	nail	? 🛛
Message option	15	
T <u>o</u> :	email_address	<u> </u>
<u>S</u> ubject line:		
<u>M</u> ail format:	HTML	-
Send records		
⊙ <u>A</u> ll		
C Curr <u>e</u> nt r	ecord	
C Erom:	<u>I</u> o:	
	OK	Cancel

The Merge to E-mail menu screen will appear (like the image on the left). Notice that the merge "intelligently" selected the email-address in our Access database. If your recipient source does not do this, click the down arrow on the right of the To: area.

Merge to E-n	nail 🛛 💽 🔀	
Message option	IS	
T <u>o</u> :	email_address 🛛 👻	
<u>S</u> ubject line:	Address_2 Address_3	
<u>M</u> ail format:	Address_4 State	
Send records -	City Zip	
• <u>A</u> ll	Source	
C Curr <u>e</u> nt re	email_address	
C Erom:	Io:	
	OK Cancel	

You will now see all of the fields from your recipient data source. Choose the field that you are using for your e-mail addresses.

Merge to E-mail	
Message options To: email_address	In the Subject line: area, type in a subject for your e-mail message.
Subject line:	subject for your e-mail message.
Mail format: HTML	
Send records	
C Curr <u>e</u> nt record	In the Mail format: area select Plain
C Erom: Io:	Text or HTML.
OK Cancel	

NOW THIS IS HUGE – when you click the OK button all of your messages will be sent to the addresses in your recipient's source (database, spreadsheet, etc.). You will see a momentary "blink" at the bottom left of your Word screen as each message is sent. A COPY OF EACH, INDIVIDUAL, MESSAGE WILL BE PLACED IN the SENT ITEMS FOLDER IN YOU E-MAIL ACCOUNT. So, if you send several hundred messages, you will have several hundred messages in your Sent Items. Some e-mail systems handle this well, others do not. You may want to check with your e-mail provider before you do this.

Microsoft Office Tutorials

In addition to this tutorial, other Office tutorials are available at:

http://www.officetutorials.com

This site is updated frequently with tutorial revisions as well as tutorials from a number of collegiate institutions. Please feel free to visit and download as you desire.

You can download the Access 2003 database file (and tutorial) from this site. Or, we'll send them to you by e-mail.

This has been an introduction to the basics of Microsoft Word 2003 Mail Merge. If you have any questions about Microsoft Word 2003 Mail Merge, comments on this tutorial, or desire the Access database file and tutorial, please contact:

murray.t@lynchburg.edu

Thank you for your patience and good luck.

Mail Merge Recipients Filter Addendum

The Mail Merge Recipients Menu Screen (Page 4) allows you great flexibility in viewing the data that will be merged into your documents, labels, envelopes and e-mail messages. Take a few minutes to read the information at the top of the menu screen.

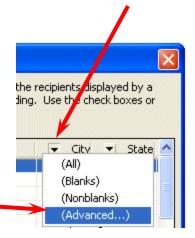
To so speci butto	fic criteria, such as b	appropriate column he	ading. To narrow down the next to the column heading aail merge.		
	 Last Name 	▼ First Name	 Street Address 	City	💌 State 🔦
	Sandston	Wally	22 Eddy Court	Lynch	va
	Kern	Virginia	1060 Whistling Swan Di	Bedford	va 🔤
	Warren	Charles	100 Faculty Drive	Lynch	va
	Smith	Ed	23 Main Street	Albany	NY
	Warren	Freda	2233 South Road	Lynch	va 📃
	Smith	Wanda	1 Only Way	Bartow	WV
	James	Linda	1254 Indian Way	Watonka	WV
	Binswager	Harold	7 East West Drive	Bigfoot	mo
	Ziplowski	Ezod	2798 Old Mink Place	Sheldon	al
	Karpowski	Enid	12 Sagmon Drive	Winetka	il
	Billingsley	Wally	2319 Back Creek Circle	Kapokla	hi 🗖
	Smith	Frieda	1224 Wart Wallo Wao	Lunch	US 🚩
<					>
-	elect All Clea		\exists		ОК

As you can see from the menu screen, you can click on any of the column headings (e.g. Last Name, State, Zip, etc.), and the Recipients will sort by that heading. You can remove someone from your merge by clicking the check mark on the left – to remove the check – and that person will not be included. For a more detailed grouping of your recipients you can use the advanced filter features of the menu screen.

To access the **Advanced Filter**, simply **click** on **any** of the **down arrows** to the **left of a column name**.

Mail Merge Recipients
To sort the list, click the appropriate column heading. To narrow down the recipients asplayed by a specific criteria, such as by city, click the arrow next to the column heading. Use the check boxes or buttons to add or remove recipients from the mail merge. <u>L</u> ist of recipients:
💌 Last Name 💌 First Name 💌 Street Address 🔍 💌 City 💌 State 📩
Sandston Wally 22 Eddy Court Lynch va

We clicked the down arrow to the left of City and the image on the right appeared. Notice the selections. For the City column you can select All - to see all the Cities. If you want to find recipients who do not have a City filled in, you can select Blanks. You can experiment as you desire with the different columns.



We are going to select the Advanced choice.

When we do, the **Filter and Sort Menu Screen** below appears. Let's say that we want to send our mail merge to only recipients in Virginia (VA), West Virginia (WV) and New York (NY). This is where the Filter and Sort menu assists. First we **click** the **down arrow to the right of Field**.

Filter and Sort			X
Filter Records Sort Records			
Field:	2 mparison:	Compare to:	
	×	×	
×	~	~	
×	~	×	
×		Y	
~	~	Y	
~	~	×	~
lear All		ОК	Cancel

When we clicked the down arrow on the lower right of the Field: column a list of the fields in our recipient file appeared. Since we desire to <u>only</u> <u>send</u> our merge <u>to certain states</u>, we clicked on the State choice.



As soon as we click State our menu screen changes to look like the image below. We now have to tell Filter and Sort that we want only recipients in VA, WV and NY. We **click** in the **Compare to** cell and **type the abbreviation** (e.g. VA, WV or NY) for one of our states.

ter and Sort			(
jilter Records Sort Records			
Field:	Comparison:	Compare to:	
State	Equal to	▼	
And 🗸	v		

In our first Filter Sort Menu Screen row we typed VA for Virginia. Then we **clicked** on the **down arrow to the right of And** in the second row (**see lower left arrow above**) and **changed** the **selection to Or**. We desire our recipients to be from Virginia or one of the other states. <u>And (as a choice) will not work</u>. If you think about it for a moment, a recipient could be from West Virginia <u>or</u> New York, but could not be from West Virginia and New York (at the same time). To get the correct filter we need to use Or. We then repeated selecting State in the Field Column and added West Virginia and New York in our Compare to: column. When we finished, our Filter and Sort screen looked like the image below. We then **clicked** the **OK** button.

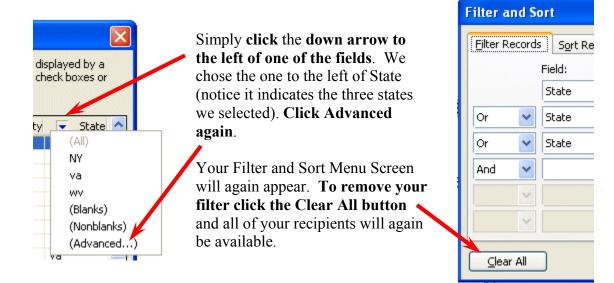
Filter and	Sort		×
Eilter Reco	rds Sort Records		
	Field:	Comparison:	Compare to:
	State	🗸 Equal to	VA 🔼
Or	State	🗸 Equal to	WV
Or	 State 	🗸 Equal to	NY
And	/	v	
	-	Y Y	
	*	Y Y	
<u>⊆</u> lear Al			OK Cancel

We returned to the Mail Merge Recipients Menu Screen. Notice that ours now **only includes recipients from the three states**. We would continue with our merge at this point.

	ns to add or remove f recipients:	e recipients from the n	nail merge.			
	▼ Last Name	▼ First Name	 Street Address 	City	💌 State	
✓	Smith	Ed	23 Main Street	Albany	NY	4
✓	Henderson	Liz	123 Main Street	Bedford	va	2
✓	Warren	Freda	2233 South Road	Lynch	va	2
<	Warren	Charles	100 Faculty Drive	Lynch	va	2
<	Kern	Virginia	1060 Whistling Swan Di	Bedford	va	2
✓	Sandston	Wally	22 Eddy Court	Lynch	va	2
✓	Grayson	Dedrie	12 Court Street	Lynch	va	2
<	Jurkus	Sam	33 Main Street	Lynch	va	2
✓	Hadley	Florence	12 Cliff Avenue	Richm	va	2
✓	Henderson	Roger	123 Main Street	Bedford	va	2
✓	Smith	Frieda	1224 West Wally Way	Lynch	va	2
<u>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>></u>	James	Linda	1254 Indian Way	Watonka	WV	7
✓	Smith	Wanda	1 Only Way	Bartow	WV	7
<						

A BIG THING

Once you have created a filter, you'll need to clear it if you desire to have your entire list available again or to do another filter.



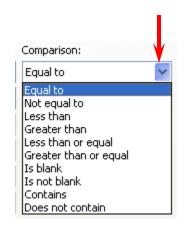
You can now create another filter as you did beginning on Page 1 of this Addendum.

st of	f recipients:				
	 Last Name 	 First Name 	 Street Address 	 City 	T State
~	Sandston	Wally	22 Eddy Court	Lynch	va
✓	Kern	Virginia	1060 Whistling Swan Di	Bedford	va
✓	Warren	Charles	100 Faculty Drive	Lynch	va
<	Smith	Ed	23 Main Street	Albany	NY
<	Warren	Freda	2233 South Road	Lynch	va
• • •	Smith	Wanda	1 Only Way	Bartow	WV
✓	James	Linda	1254 Indian Way	Watonka	WV
✓	Binswager	Harold	7 East West Drive	Bigfoot	mo
✓✓	Ziplowski	Ezod	2798 Old Mink Place	Sheldon	al
✓	Karpowski	Enid	12 Sagmon Drive	Winetka	il
✓	Billingsley	Wally	2319 Back Creek Circle	Kapokla	hi
2	Smith	Frieda	1224 Wart Wallo Wao	Lunch	US
6					>

After you have cleared of your filter settings, and when you return to the Mail Merge Recipients screen, notice there are a number of other buttons you can use to enhance your filter.

Additional Notes:

In the **Filter and Sort Menu Screen** you will see an area titled **Comparison:** We left the selection for our filter set to Equal to. There are many other selections which aid significantly in filtering your data. If you click the down arrow on the right of this area, you'll see the other selections.



In the Filter and Sort Menu Screen you will also see a Sort Records tab. When you click this tab your screen will look similar to the image below. You can also enhance your filter using this feature as well.

Filter and So	rt		X					
Eilter Records	Sort Records							
<u>S</u> ort by:	State	• Ascending	O Descending					
<u>T</u> hen by:	Application Filed	• Ascending	O Descending					
Then <u>b</u> y:	~	Ascending	O Descending					
<u>_</u> lear All			OK Cancel					

Hopefully these notes will assist you as you work with the Mail Merge features in Microsoft Word XP/2002 and 2003. Experiment with all of the filters and buttons to get a better understanding of how they all work together to create precise groups of data.

If you have any questions about Microsoft Word XP/2002 or 2003 Mail Merge, or comments on this addendum, please contact:

murray.t@lynchburg.edu