

Mail Merge in Microsoft Word 2003

With Microsoft Word's mail merge feature, you can mass-produce a set of personalized documents, such as form letters, mailing labels, or envelopes. This handout explains the mail merge process in Word 2003.

Parts of a mail merge

Starting document

The *starting document* is the form letter, label setup, or envelope setup containing the text and graphics that stay the same for each version of the merged document. (This was called the "main document" in Word 97.)

Recipient list

The *recipient list* contains the variable data – usually a list of names and addresses – which will be inserted into the letters, labels, or envelopes. (This was called the "data source" in Word 97.) This data is stored in a tabular format, with a column for each *field* (first name, last name, city, etc.) and a row for each *record*. The first row of cells should contain the field names; this is called the *header row*.

Programs you can use to make a recipient list

For a mail merge recipient list, you can use a list created as a table in Word, an Excel spreadsheet, or a comma- or tab-delimited text file exported from Access, Banner, or another source. Before you create your list, determine which program is best suited to your task:

- For a small- or medium-size list of names and addresses, which you don't expect to change often or will only use once, use the "Type a new list" option in the mail merge process.
- For a longer list, which you expect to reuse by adding, deleting, and changing entries, use Excel or Access.
- For advanced sorting and searching capabilities, or full relational database capabilities, use Access.

Tips/rules for planning data sources/recipient lists

- Organize the data so that you can use it in different ways, for example, for both form letters and mailing labels or envelopes. Any data by which you may want to sort (e.g., postal code or last name) or use separately (e.g., using the first names for the salutation, as in "Dear John") must be in its own field. In general, it's best to separate the fields as much as possible. Place the title, first name, and last name in separate fields, and also place city, state, and zip code in separate fields.
- Use simple, commonsense names for your fields. For example, use FirstName and LastName, instead of something like NAME_1 and NAME_2.
- When creating a new list, include as many fields as are needed for the records with the most information. Some people on a mailing list might have more address information than others (e.g., business name, department, suite number, etc.). In a data source, however, each record must have the same number of fields. If some records don't have data for a given field, just leave the fields blank for those records.
- The order of the fields in the data source is not important when doing the mail merge.
- The data should have no blank lines or merged cells, just a header row followed by the records.
- When using data from Excel, keep all of the data on one sheet. Excel files with data on multiple sheets sometimes cause problems when merging. If necessary, copy & paste the data into a new workbook/file.

Overview of the mail merge process

To start a mail merge, go to Tools – Letters and Mailings – Mail Merge. A Mail Merge pane will open (usually on the right) with step-by-step instructions that will walk you through the entire process. Several of the steps should be self-explanatory; just read and answer the questions. After completing each step, click the "Next" link at the bottom of the pane to go to the next step. The basic steps are (detailed instructions for each step follow):

1. Select document type: Choose letters, envelopes, or labels.
2. Select Starting Document: Choose the form letter document or label/envelope layout.
3. Select Recipients: Type a new list or select an existing list; also allows you to edit, sort, & filter the list.

4. Write your letter, Arrange your labels, or Arrange your envelopes: Insert the merge fields.
5. Preview your letters: Review your merged documents.
6. Complete the merge: Print the letters, labels, or envelopes.

Creating form letters

1. If you've already created the form letter, open it. If not, type the letter and save it.
2. Go to Tools – Letters and Mailings – Mail Merge. The Mail Merge pane will open (usually on the right).
3. In the Mail Merge pane under “Select document type,” “Letters” should already be selected.
4. Click the Next link at the bottom of the Mail Merge pane to go to step 2. (Note that once you click Next, you'll also have a Previous link which you can use at any point in the process to go back through the previous steps and make changes.)
5. In the Mail Merge pane under “Select starting document,” “Use the current document” should already be selected. As long as you already have your letter open, this is the option you want. (If you did not have the letter open, you would choose “Start from existing document” and open the file.)
6. Click the “Next” link at the bottom of the pane to go to step 3.
7. In the Mail Merge pane under “Select recipients,” “Use an existing list” should already be selected. If you already have your data file created/exported, this is the option you want. (If not, choose “Type a new list.”) Click the “Browse” link below, locate and select your data file, and click Open. If you choose an Excel file, it will ask you to “Select Table” – basically, to choose which sheet in the workbook contains your data. Click OK to choose Sheet 1. Again, to avoid problems, keep all of the data for your merge on one sheet, or copy & paste the data you need onto sheet 1 of a new workbook/file.
8. A Mail Merge Recipients window (shown below) will open. The fields may be listed here in a random order. Note that although you can resize and rearrange the fields in this window, once you click OK, they revert back to their original order. If you don't need to edit, sort, or filter the list, just click OK to close this window.

Sorting & selecting recipients

Mail Merge Recipients

To sort the list, click the appropriate column heading. To narrow down the recipients displayed 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.

List of recipients:

<input checked="" type="checkbox"/>	Title	First...	Last...	Address1	City	St...	Postal
<input checked="" type="checkbox"/>	Mr.	Andy	K. Capp	8737 3rd Ave.	Niagara Falls	NY	14304-1889
<input checked="" type="checkbox"/>	Ms.	Mary Mary	Q. Contrary	1001 Yes No St.	Appleton	WI	54304
<input checked="" type="checkbox"/>	Mr.	John	J. Doe	414 S. Wisconsin	De Pere	WI	54115
<input checked="" type="checkbox"/>	Mr.	Kermit	T. Frog	822 Sherman Blvd.	McHenry	IL	60036
<input checked="" type="checkbox"/>	Mr.	Jim	Johnson	5566 Superior Ave.	Upnorth	WI	55051
<input checked="" type="checkbox"/>	Mrs.	Jane	M. Jones	222 S. Erie St.	De Pere	WI	54115
<input checked="" type="checkbox"/>	Mrs.	Gertrude	A. Leipzig	2447 N. 70th St.	Wauwatosa	WI	53213
<input checked="" type="checkbox"/>	Ms.	Minnie	M. Mouse	202 Squeaky Ln.	Rodenttown	TX	78905
<input checked="" type="checkbox"/>	Mr.	Mike	S. Schmoie	2842 N. 92nd St.	Milwaukee	WI	53213
<input checked="" type="checkbox"/>	Mr.	Ardelbert	Smart	6233 S King Dr.	Chicago	IL	60637-2394
<input checked="" type="checkbox"/>	Mr.	Jerry	R. Smith	W131N8020 Cou...	Menomon...	WI	53051
<input checked="" type="checkbox"/>	Mr.	Ronnie	A. Spam	450 E 184th St.	Bronx	NY	10458-7716
<input checked="" type="checkbox"/>	Mr.	Frank	N. Stein	100 Boo St.	Monsterville	KY	77550
<input checked="" type="checkbox"/>	Mr.	Tony	T. Tiger	917 Fourth St.	De Pere	WI	54115

Buttons: Select All, Clear All, Refresh, Find..., Edit..., Validate, OK

Callouts:

- To sort the list, click on the column heading.
- To filter the list, or for advanced sorting and filtering options, click on the arrow next to the field by which you wish to filter.
- To make the window larger, click & drag here.

- To deselect specific recipients, uncheck them in the column on the left. To filter the recipients (e.g., to choose only those from WI), click on the arrow next to the field by which you wish to filter.
- To sort the list, simply click on the column heading of the field by which you wish to sort. For advanced sorting and filtering options, click on one of the arrows next to a field label and choose (Advanced...).

- To edit one of the recipients, click on it and click the Edit button.
 - To add a new recipient, click the Edit button, then click the Add New button.
 - To make this window bigger, click and drag the lower right corner of the window.
9. Click the “Next” link at the bottom of the pane to go to step 4.
 10. The “Write your letter” step is where you set up the document and insert the merge fields (names, addresses, etc.) into the form letter. (This part is *very* different from Word 97.)

Inserting fields

If you need to insert an address block or greeting line, it’s easiest to use the “Address block” and “Greeting line” links (in the Mail Merge pane) to insert them. These may seem foreign at first, but they’re actually very convenient. To see a list of all your fields, click on the “More items” link, which will open the Insert Merge Fields box. Unfortunately, this box can be quite annoying to use because it doesn’t allow you to add spaces, new lines, etc. between the fields. You have to either insert all of the fields in one big line, then go back and add the spaces & punctuation afterwards, or close & reopen the box after inserting each field, which is very tedious. (For example, to create an address block manually, you would have to: click More items, click on your Title field, click Insert, click Close, type a space, click More items, click on your FirstName field, click Insert, click Close, type a space, click More items, click on your LastName field, click Insert, click Close, press Enter, click More items, click on your Address1 field, click Insert, click Close, press Enter, etc., etc.)

11. Once you’ve inserted all of your fields, click the “Next” link at the bottom of the pane to go to step 5.
12. In the “Preview your letters” step, you will see how your finished letters look. Use the arrow buttons at the top of the Mail Merge pane to review as many of the letters as you wish. At this point, you can also make changes to your recipient list if necessary (click the “Edit recipient list” link in the Mail Merge pane).

Matching fields

If your address blocks or greeting lines do not look right (if the data are not in the right places), then your recipient list is probably not set up in such a way that Word can recognize the fields. In this case, you need to use the Match Fields feature to tell Word what’s what in your data. Use the “Previous” links at the bottom of the Mail Merge pane to go back to the “Write your letter” step and click on the “Address block” link. Click the Match Fields button in the lower left. For each field that appears in your data, use the drop-down boxes to match Word’s field names with yours. When finished, click OK, and click OK again.

If you cannot match your fields to Word’s because, for instance, you have the first and last names in a single field, then you may not be able to use the preconfigured address block insertion. Instead, you will have to build your address block manually by inserting each field, as described above under “Inserting fields.”

13. Click the “Next” link at the bottom of the pane to go to step 6.
14. The final step is “Complete the merge.” At this point, it’s okay to go ahead and click the “Print” link to print the letters, since you already previewed them in the previous step. If necessary, you can choose “Edit individual letters” to merge all of the letters into a single document and view, edit, or format them further.

Creating mailing labels

1. Go to Tools – Letters and Mailings – Mail Merge. The Mail Merge pane will open (usually on the right).
2. In the Mail Merge pane under “Select document type,” choose “Labels.”
3. Click the “Next” link at the bottom of the Mail Merge pane to go to step 2. (Note that once you click Next, you’ll also have a Previous link which you can use at any point in the process to go back through the previous steps and make changes.)
4. In the Mail Merge pane under “Select starting document,” “Change document layout” should already be selected. As long as you already have a blank document open, this is the option you want. Click the “Label options” link, choose the type of labels you’re using (e.g., 5160), then click OK. You should see a blank sheet of labels. If you can’t see the lines defining the labels, and you wish to, go to Table – Show Gridlines.
5. Click the “Next” link at the bottom of the pane to go to step 3.

6. In the Mail Merge pane under “Select recipients,” “Use an existing list” should already be selected. If you already have your data file created/exported, this is the option you want. (If not, choose “Type a new list.”) Click the “Browse” link below, locate and select your data file, and click Open. If you choose an Excel file, it will ask you to “Select Table” – basically, to choose which sheet in the workbook contains your data. Click OK to choose Sheet 1. Again, to avoid problems, keep all of the data for your merge on one sheet, or copy & paste the data you need onto sheet 1 of a new workbook/file.
7. A Mail Merge Recipients window will open. The fields may be listed here in a random order. If you don’t need to edit, sort, or filter the list, just click OK to close this window. If you do need to edit, sort, or filter/select recipients, see the section **Sorting & selecting recipients** on page 2 under step 8.
8. Click the “Next” link at the bottom of the pane to go to step 4.
9. The “Arrange your labels” step is where you insert the merge fields (names, addresses, etc.) on the labels. You **only** need to set up **the first label**, then click the Update all labels button to replicate it for the entire sheet. Do not type in or delete anything from any of the other labels (those that say «Next Record»). For details on inserting fields, see the section **Inserting Fields** on page 3 under step 10.
10. Click the “Next” link at the bottom of the pane to go to step 5.
11. In the “Preview your labels” step, you will see how your finished labels look. Use the arrow buttons at the top of the Mail Merge pane to review the labels if you wish*. At this point, you can also make changes to your recipient list if necessary (click the “Edit recipient list” link in the Mail Merge pane).

***Note:** If you have more than one sheet of labels, it may look like there’s something wrong when you preview them, because Word displays the label previews oddly. When you use the arrow buttons to click through the labels, it will look like the same data is repeated over & over on each sheet of labels. This is because Word is previewing only *one* label at a time in the *first cell* (upper left corner), rather than whole sheets of labels. Basically, it wants you to focus on only first label and ignore the rest of the sheet. You can get a more accurate multi-sheet preview in the final step when you “Complete the merge” (below).

If your address blocks don’t look right (if the data are not in the right places), then your data is probably not set up in such a way that Word can recognize the fields. For details on fixing this problem, see the section **Matching Fields** on page 3 under step 12.

12. Click the “Next” link at the bottom of the pane to go to step 6.
13. The final step is “Complete the merge.” Although it’s okay to go ahead & print the labels, due to the label preview glitch mentioned above, you may want to use the “Edit individual labels” link to get a more accurate preview first. If you do this, Word will open a new document containing all of the labels. You would then print that just like you would any other document, by choosing Print from the File menu (after loading the labels in your printer, of course).

Assistance and questions

If you have any questions or need more information, please call the Help Desk at (920) 403-HELP (4357), contact us via e-mail at helpdesk@snc.edu, or stop by the Help Desk in Cofrin 101. The Help Desk is for St. Norbert College students and employees only.