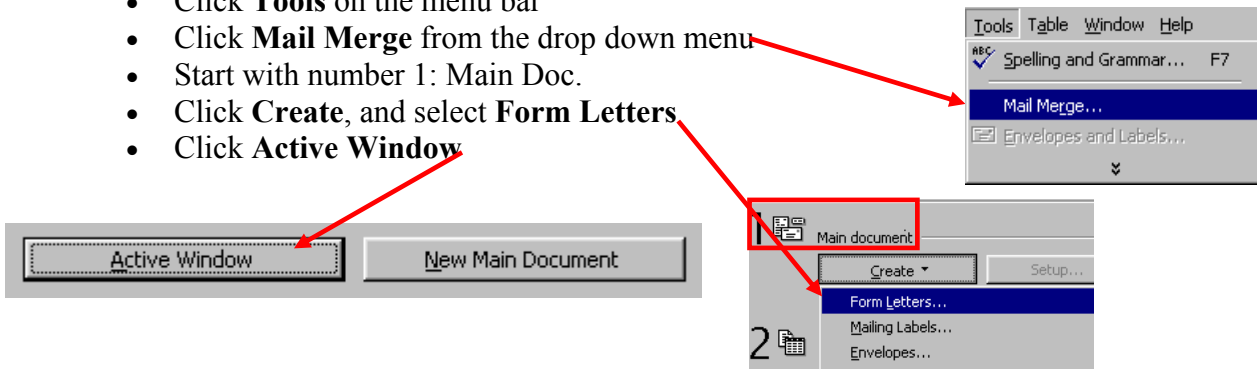


Mail Merge using Microsoft Word

I. Creating a New Main & Data Document:

Create the Main Document:

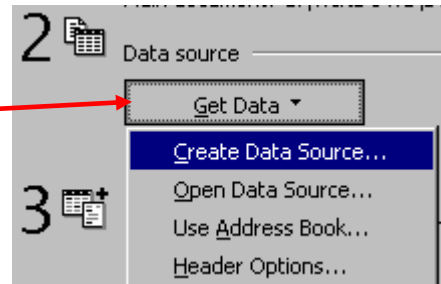
- Open Microsoft Word
- **Enter the text** of the document. Type in --- in places where you want to include the merged field data.
- Save the main document - click **File** from the menu bar, then click **Save As**).
- Click **Tools** on the menu bar
- Click **Mail Merge** from the drop down menu
- Start with number 1: Main Doc.
- Click **Create**, and select **Form Letters**
- Click **Active Window**



Create Data Source Document:

** The data source document is a table that contains the information to be merged and the first row (header row) contains field data names.

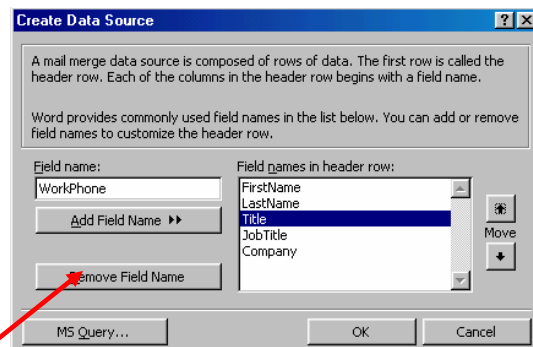
- Click the **Get Data** button to select a data source
- Select **Create Data Source**



Data Source Dialogue box:

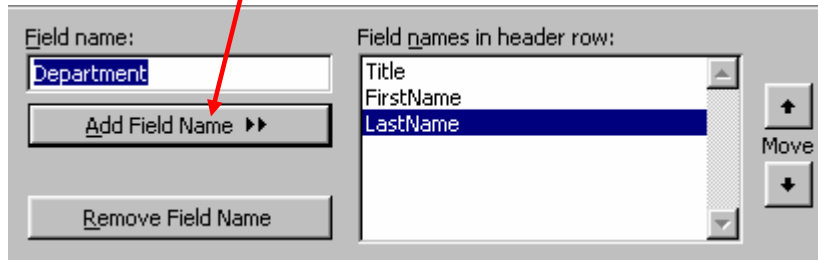
- Scroll through the list of field names
- **Remove a field** – remove all fields you do not want in the Main Doc.

1. Click on the field name
2. Click **Remove Field Name** button



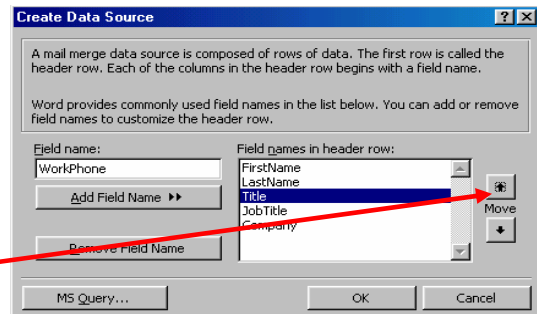
- **Add a field** – create your own fields to insert into the Main Doc.; field names must be unique and can be up to 40 characters (*it must start with a letter and cannot contain spaces)

1. Click inside the Field Name box and type your own field name
2. Click **Add Field Name>> button** – under Field Name in Header Row you should see your newly created Field Name



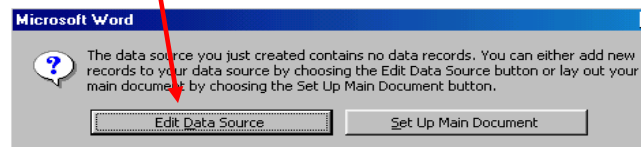
- **Rearrange Field Names**

1. Click on the field name to be moved
2. Click the **Move (up or down) button**



- Click **OK** to save the Data Source document (which contains no data yet)
- The Save As dialogue box will appear – in the File Name, **type the name of the Data Source file** (EX: Secretaries, Principals, Curriculum Dept., Second Grade)

- Click the **Edit Data Source button** to add records



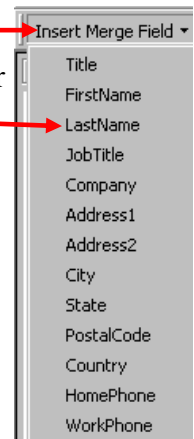
- **Enter the data** in each field

- To add another record – click the **Add New button**, continue until all records have been added
- When finished – click **OK** to save the data and close the file

Merge the Documents (Main & Data Source):

Insert the merge fields:

- The Main Document should be the active document – Don't know? Check the title bar...it should be blue. The mail merge toolbar is now visible.
- Go to one of the --- in your document and **delete it** (remember, this is where you will insert your merge fields)
- Click on **Insert Merge Fields** from the toolbar above
- **Click on the field to insert**, continue to insert merge fields throughout your document until you are finished
- Save the document – click **File** on the menu bar, then click **Save**



Merge:

- Click the **Merge button** **Merge...** from the toolbar above
- Under Records to be Merged in the Merge dialogue box, **select All or a specific range of records to merge** (EX: 11-23)
- Click **Merge** on the upper right hand side of the Merge dialogue box

- Notice that all of the merged documents have been sent to your desktop, make sure the document is correct before printing
- Print documents – click **File** on the menu bar, click on **Print**

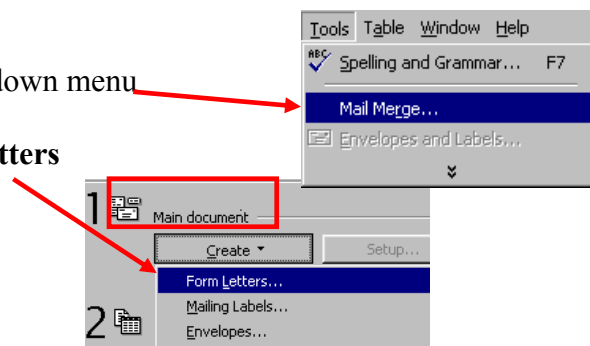
II. Use an Existing Data Source:


Locate the Data Source:

- Locate, select and open the Data Source Document you want to use – Word doc. (table); Database (Access); Worksheet (Excel)
- Create a **Header Row with Field Names** if there isn't one – the Header Row is what names the fields to be merged; it needs to be above the merge data
- Click **File** on the menu bar – Click **Save**
- Close the Data Source document

Create the Main Document:

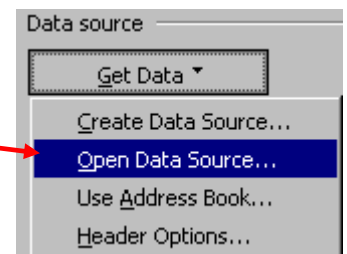
- Click **Tools** on the menu bar
- Click **Mail Merge** from the drop down menu
- Start with number 1: Main Doc.
- Click **Create**, and select **Form Letters**



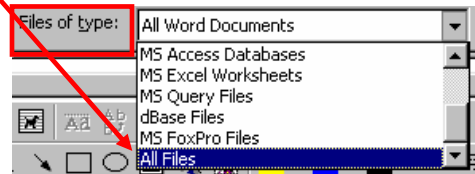
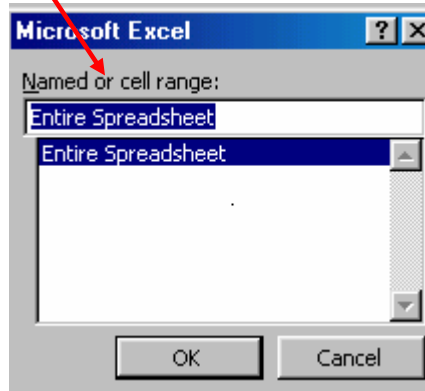
- Click on  (This is your main document.)

- Open the Data Source document:

1. Click the **Get Data** button
2. Select **Open Data Source** from the drop down menu




3. **Locate, select, and open** the document
– you may need to **change the Files of Type to All Files**
4. Select the following –
Database file – select table or query to use
Worksheet – select entire spreadsheet or cell range




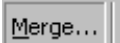
5. Click **OK**
6. Click the **Edit Main Document** button



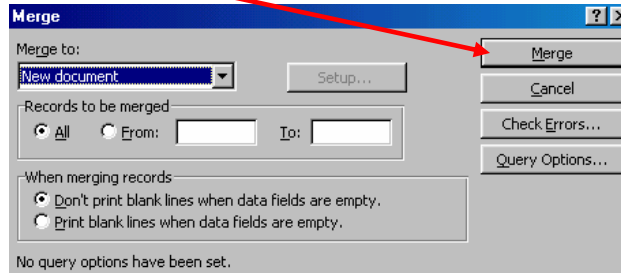
- Type the Form Letter:

1. Click on the **Insert Merge Fields** button  , from the mail merge toolbar above, to mark the place where text from the data source will be inserted
2. Save the document – click **File** on the menu bar, click **Save As**

Merge the Documents:

- Click **Tools** from the menu above, or click the **Mail Merge Helper icon**  on the toolbar
- Click **Mail Merge**
- Click the **Merge... button**  to display the Merge dialogue box
- **Set the Merge options -**
 - *Leave Merge to: defaulted to New document
 - *Records to be merged: All (display all merged records) or From: (displays a range of documents to merge)

- Click the **Merge button** on the upper right hand side of the dialogue box



- Print documents – click **File** on the menu bar, click on **Print**

III. Create Mailing Labels by Merging an Address Book:

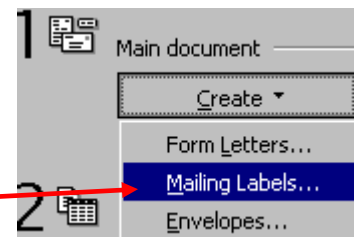
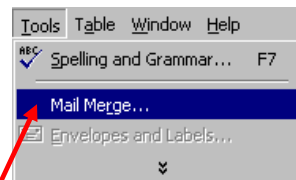
**Address Books – Outlook or Groupwise

Set up the Address Book:

- Open the Address Book
- Click on **File**
- Click on **Export**
- Select **Entire Address Book**
- Save Data Source – click **File** on the menu bar, click **Save As** (save to Desktop)
- Close Address Book and mailbox
- Double-click the desktop icon
- Select the **Target Address Book** – (the one with your name)
- Click **OK**

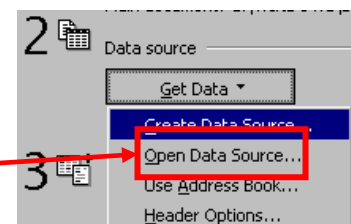
Create the Main Document:

- Click **Tools** on the menu bar
- Click **Mail Merge** from the drop down menu
- Start with number 1: Main Doc.
- Click **Create**, and select **Mailing Labels**
- Click **Active Window**

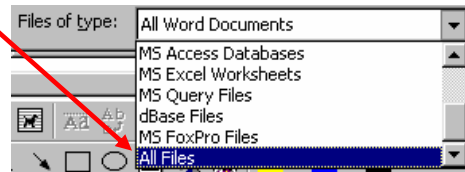


Open or Create the Data Source:

- Click the **Get Data** button
- Select **Open Data Source**



- **Locate, select, and open the document**
– you may need to **change the Files of Type to All Files**
- Click **OK**
- Click **Set Up Main Document**



Select Label Type:

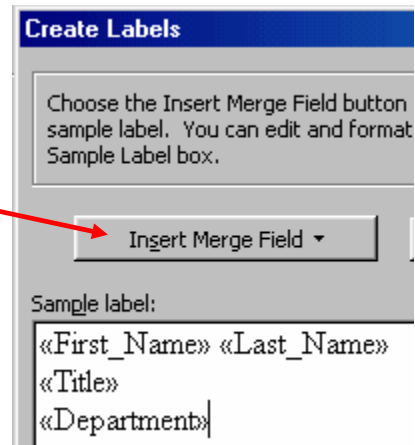
- **Select the type of printer and labels you want to use**
- Click **OK**
- You will be asked to set up the labels, including inserting the merge fields

Insert Merge Fields:


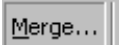
- In the Create Labels dialogue box, insert Merge Fields where you want to merge information

- To insert a merge field:

1. Click **Insert Merge Field**
2. Click the **Field Name you want to insert**
3. Click **OK**



Merge the Data:

- Click **Tools** from the menu above, or click the **Mail Merge Helper icon**  on the toolbar
- Click **Mail Merge**
- Click the **Merge... button**  to display the Merge dialogue box
- **Set the Merge options -**
 - *Leave Merge to: defaulted to New document
 - *Records to be merged: All (display all merged records) or From: (displays a range of documents to merge...good for testing before merging all)
 - *Click the Query button (on the right) – sort and select data records to merge
- Click the **Merge button** on the upper right hand side of the dialogue box
- Print labels – click on **File** from the menu bar above, click on **Print**