

Using the Mail Merge facilities in Microsoft Word 2003

The Mail Merge facility of Word 2003 is used to combine information contained in two different files. For example, it can be used to insert items such as names, addresses or dates into a form letter to be sent to a number of people. It can also be used to create mailing labels.

This document provides instructions for using Mail Merge in this way. Previous familiarity with Word is assumed and some experience of creating and editing tables would be helpful.



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Conventions:

In this document, the following conventions are used:

- A **bold typewriter font** is used to represent the actual characters you type at the keyboard.
- A *slanted typewriter font* is used for items such as filenames which you should replace with particular instances.
- A typewriter font is used for what you see on the screen.
- A **bold font** is used to indicate named keys on the keyboard, for example, **Esc** and **Enter**, represent the keys marked Esc and Enter, respectively.
- Where two keys are separated by a forward slash (as in **Ctrl/B**, for example), press and hold down the first key (**Ctrl**), tap the second (**B**), and then release the first key.
- A **bold font** is also used where a technical term or command name is used in the text.

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1 Introduction

This guide describes how you can create personalised letters and mailing labels using the Mail Merge facilities.. It is assumed that you are already familiar with Word and it would be helpful if you know how to create and edit tables.

The Mail Merge facility is probably most often used to create a set of personalised letters, individually addressed to a number of different people, based on a common form letter. An example might be a letter to invite applicants to attend for a job interview. In this case the basic wording would be the same for all letters, but the date, time and place of the interview would be different for each letter, as would the name of the addressee. A set of matching mailing labels could also be produced.

2 Creating personalised letters

When you merge information in Word, you use the Mail Merge Helper to combine the information from two different files. The Mail Merge Helper is similar to a Wizard — it takes you through a three-step process:

- Select or create a Data Source
- Select or create a Main document
- Perform the merge.

The **Data Source** file contains the details required for the individual letters. The **Main document** file contains the text of the form letter with **field codes** indicating where the details from the Data Source file have to be inserted. The Data Source file needs to be attached to the Main document before the two files are merged.

A Data Source file might look something like this:

Title	Initials	Last_Name	Address_1	Address_2	City	Postcode	Date	Time
Mr	A.	Bamber	35 Hill View	The Downs	Dipton	DI5 4EQ	Monday 24 August	11.00am
Miss	C.G.	Clarkson	49 College Road		Durham	DH6 7HG	Monday 24 August	9.30am
Mrs	D.B.	Gates	18 North Crescent		Manston	MA3 8LW	Thursday 27 August	3.30pm

The first row contains **field names**.

Notice that there is one record (or row) of data for each letter you want to produce.

A Main document might look like this:

28 June 2002¶
¶
«Title»·«Initials»·«Last_Name»¶
«Address_Line_1»¶
«Address_Line_2»¶
«City»¶
«Postcode»¶
¶
««GreetingLine»»¶
Following your recent job application, I am writing to invite you to attend an
interview on «Date» at «Time». Please let me know if you cannot attend at this time.
I have enclosed a map to help you to find your way here.¶
¶
Yours sincerely¶
¶

Notice that the **field names** (column headings) in the Data Source file are used as **merge fields** in the Main document.

When merged, these files would produce a set of letters like this:

28 June 2002

Mr A. Bamber
35 Hill View
The Downs
Dipton
DI5 4EQ

Dear Mr Bamber,
Following your recent job application, I am writing to invite you to attend an
interview on Monday 24 August at 11.00am. Please let me know if you cannot attend at this time.
I have enclosed a map to help you to find your way here.

Yours sincerely

28 June 2002

Miss C.G. Clarkson
49 College Road
Durham
DH6 7HG

Dear Miss Clarkson,
Following your recent job application, I am writing to invite you to attend an
interview on Monday 24 August at 9.30am. Please let me know if you cannot attend at this time.
I have enclosed a map to help you to find your way here.

Yours sincerely

and so on.

2.1 Data Source files

You can use any of the following as Data Source files:

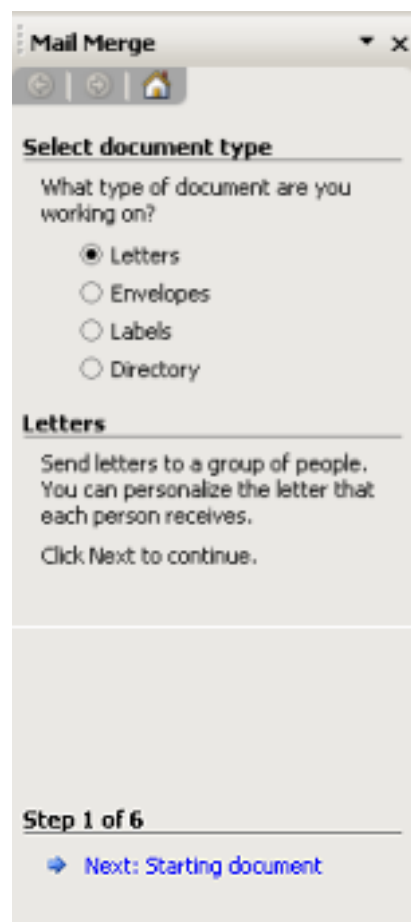
- Access databases
- Excel spreadsheets
- Word tables
- HTML files
- Other database files
- Text files
- Outlook Contact Lists
- Office Address Lists

Alternatively you can use the Mail Merge Wizard to create a new Data Source file. You will learn to do this now. Later you will see how to use existing data.

2.2 The Mail Merge Wizard

- 1 Start up **Word**.
- 2 From the **Tools** menu, select **Letters and Mailings**.
- 3 Select **Mail Merge Wizard**.

This will open up the **Mail Merge** Pane on the right on the screen.



There are 6 steps in the Wizard.

2.2.1 Step 1: Select document type

- 1 Select **Letters**.
- 2 Click on **Next: Starting document** — at the bottom of the Pane.

2.2.2 Step 2: Select starting document.

- 3 As you are going to create the form letter from scratch, select **Use current document**.
- 4 Click on **Next: Select recipients**.

2 Step 3: Select recipients.



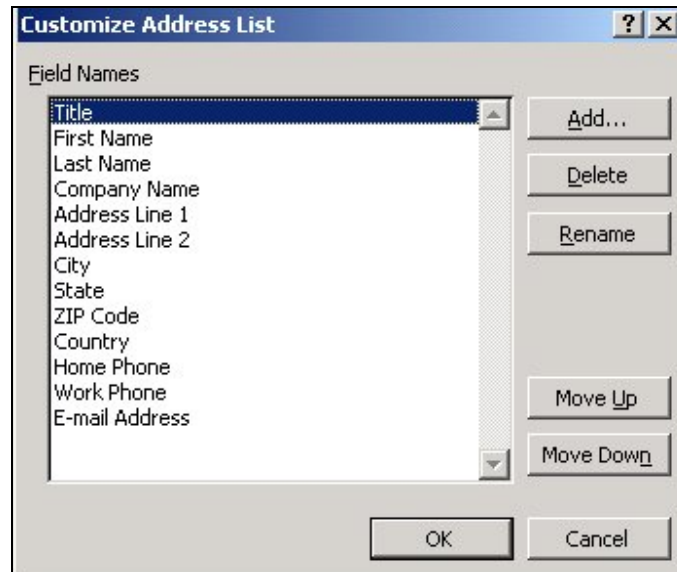
- 5 Select **Type a new list**.
- 6 Click on the **Create** link that appears below.

The **New Address List** dialog box appears.

The screenshot shows the 'New Address List' dialog box. It features a title bar with a question mark and a close button. The main area is divided into two sections. The top section, 'Enter Address information', contains several text input fields for personal and company details. The bottom section, 'View Entries', includes navigation buttons and a 'Total entries in list' indicator.

It already has some suggested fields. In this instance we want to have different ones so the list needs to be changed

- 7 Click on the **Customize** button.



First, remove the field names that you don't want.

- 1 Select **First Name** in the **Field names:** box.
- 2 Click on **Delete**.
- 3 Click **Yes** to confirm.
- 4 Repeat for all the other field names that are not required:
Company Name, State, ZIP Code, Country, HomePhone, WorkPhone and **E-mail Address**.

Now add the new field names that you require.

- 1 Click on the **Add** button
- 2 In the **Add Field:** box type
Initials
- 3 Click **OK**.
- 4 Enter the remaining field names, **Postcode, Date** and **Time** (as shown on page 1) in the same way.

Note that the field names must all be different, they are not case sensitive (Title would be regarded the same as title), they can be up to 40 characters long but may not include spaces. So long as the **Add Field Name** button remains black (rather than grey) you will know that what you have typed in the **Field name:** box is an acceptable field name.

It does not matter what order the fields appear in the Data Source file. Word inserts the merge field data wherever you specify it in the Main document regardless of the order in which it appears in the Data Source. If you do want to move a field, highlight it and use the up and down **Move** arrows to adjust its position.

- 5 Highlight the **Initials** field and use the **Move Up** button to position it after **Title**.

- 6 Click on **OK**.
- 7 You are now ready to start adding data.
- 8 Type in the appropriate spaces all the data required for the first letter, pressing **Enter** to move to the next field, then click on **New Entry**.

Title: Mr
Initials: A.
Last Name: Bamber
Address Line 1: 35 Hill View
Address Line 2: The Downs
City: Dipton
Postcode: DI5 4EQ
Date: Monday 24 August
Time: 11.00am

This will form the first record of the Data Source file. There will be one record for each letter required.

- 9 Insert the details for each of the other two letters in a similar way. (See page 1.)

Note that whilst you are editing the data file in this way you can move to any of the records by using the buttons at the bottom of the window.

- 10 Click on the **Close** button.
- 11 In the **Save Address List** dialog box, type a suitable name for your file (e.g. **mmdata**) into the **File name:** box.
- 12 Select the **J: Drive** icon from the selection on the left and click on **Save**.



- 2 Whilst you have this dialog box open, investigate the options shown there, then click on **Cancel**.
- 3 In the Main document , type the date and press **Enter** a few times to make some space under it.
- 4 Click on the **Insert Merge Fields** button on the toolbar, select **Title** from the list and click **Insert**.

Notice that the field name is displayed in the document enclosed by double chevrons (<<Title>>).

- 5 Click **Close**.
- 6 Press the **Spacebar**, insert the **Initials** field in the same way, press the **Spacebar** again and insert the **LastName** field.

Notice that you need to put a space (or any other punctuation needed) between merge fields just like you would between ordinary words.

- 7 Press the **Enter** key to move to the next line.
- 8 Insert the **Address1**, **Address2**, **City** and **Postcode** fields, remembering to press **Enter** after each one to move to the next line.

```
<<Title>> <<Initials>> <<Last_Name>>¶  
<<Address_Line_1>>¶  
<<Address_Line_2>>¶  
<<City>>¶  
<<Postcode>>¶
```

It's important to press **Enter**, rather than **Shift | Enter**, after each line of the address. This prevents addresses appearing with blank lines in them where there are blank fields in the Data Source.

We can use the **Greeting Line** option in the Wizard Pane to insert the first line of the letter.

- 9 Press **Enter** twice to move down the page.
- 10 Click on **Greeting Line**.
- 11 Make sure that the option shown is Dear Mr Randall, and click **OK**.
- 12 Complete the rest of the letter as shown on page 2.
- 13 Click on **Next: Preview your letters**.

2.2.5 Step 5: Preview your letters

One of the merged letters is now displayed on the screen.

- 14 Use the arrow buttons in the Wizard Pane to move through the recipient list and view the other letters.

Notice that you can make changes to the recipient list from this Step.

NOTE: The **View Merged Data**, **Next Record** and **Previous Record** buttons on the Mail Merge Toolbar also let you view and move in this way.

15 Click on **Next: Complete the merge**.

2.2.6 Step 6: Complete the merge

There are 2 options available.

- Merge to the printer
- Edit individual letters — this will produce a new document containing all the merged letters

Merge to printer will give you the choice of printing all the letters, the current record, or a range by record number.

If you want to make changes to individual letters in the list, or if you are not ready to print yet, or if you wish to have the set of letters as a file —perhaps to send to someone else —you should choose the 2nd option.

16 Click on **Edit individual letters**.

17 Choose the **All** option and click **OK**.

A new file called **Letters1** is displayed. This contains all the merged letters — separated by page breaks.

If it is possible that you might need to send out a similar letter in the future, you should save the original document, not the Letters1. To make changes to Letters1 would mean making the same changes to each of the letters within the document. What you should do is amend the text of the original document and then re-run the merge.

18 If you wish to save the Main document to use again, save it now, giving it an appropriate name.

The Wizard is now complete. You can move to any of the Steps within the Wizard to re-do or amend steps if you wish.

3 Some questions answered

3.1 Can I use an existing file as a Data Source?

Yes. You can use just about any type of data source you want for a mail merge. For example:

- Access database
- Excel spreadsheet
- Word document – this must be formatted as a table
- HTML file
- Other database file
- Text file
- Outlook Contact List
- Office Address List

3.1.1 Word files

The document must contain a single table, with the first row containing headings and the other rows containing the records you want to merge.

- 1 Start a new document.
- 2 Select **Tools | Letters and Mailings | Mail Merge Wizard**.
- 3 Complete Steps 1 & 2 as you did previously.
- 4 In Step 3 of the Wizard choose the option **Use an existing list** and Click on **Browse**.
- 5 Open the file **T:\its\Word\Merge\club members.doc**.
- 6 Click **OK**.
- 7 The mail merge could now be continued. For now, close the document without saving the changes.

If you wish you could open the file T:\its\Word\Merge\club members.doc to see how it looks as a Word document.

3.1.2 Excel Files

An Excel file can be opened as a data source in the same way as shown above. When you select the file, you will be asked to specify the Worksheet you wish to use. The first row of the worksheet must contain the headings and the other rows the records you want to merge.

3.2 Can I change the Data Source file attached to the Main document?

Yes.

- 1 Open the Main document file.

Either

- 2 Open the Mail Merge Wizard using **Tools | Letters and Mailings | Mail Merge Wizard**.
- 3 Use the arrows at the bottom of the Pane to move to Step3 and click on **Select a different list**.
- 4 Select the required file.

Or

- 2 Click on the **Open Data Source** button on the Mail Merge Toolbar.
- 3 Select the required file

Note that the field names in the new Data Source should be the same as those in the old one. If this is not the case you will be asked, for every field name not found, to specify whether you wish to delete it from the main document or replace it with a field name from the data source.

3.3 Can I view more than one record of the Data Source at the same time?

Yes, you can. In fact there are two ways you can do this.

One is simply to open the file that contains the data, within the appropriate application.



Alternatively, if you have the Main document file open, click on the **Mail Merge Recipients** button.

3.4 Can I choose to merge only selected records?

Yes, there are a number of ways to select the records you wish to merge.

3.4.1 Specifying a range of records

You can specify a range of records in the final printing or merging stage. See section 2.2.6.

3.4.2 Selecting records based on data values

You can use the **Mail Merge Recipients** dialog box to select records according to their data values. For example, you might want to merge only those records for which the **Title** field has the value **Mr**.

- 1 Return to the mail merge document you created in section 2.
- 2 Click on the **Mail Merge Recipients** button.
- 3 Click on the down arrow at the top of the **Title** column.
- 4 Chose **Mr** from the drop-down list.
- 5 Click **OK**.

- 6 Now only 1 letter is included in the merge —verify this by going to Step 5 and previewing the letters.

More complicated conditions can be used for selection. For example only those whose last names started with letter G.

- 7 Click on the **Mail Merge Recipients** button.

Note that once you have specified one or more conditions for selecting records, these remain in force until cancelled. The settings are still for Title to be Mr. You must remove this to return to the full list, before setting any new conditions:

- 8 Click on the arrow next to **Title** (this will be showing blue) and choose **(All)**.
- 9 Click on the arrow next to **Last Name** and choose **(Advanced)**.
- 10 From the **Field** list choose **Last Name**.
- 11 From the **Comparison** list choose **Equal to**.
- 12 In the **Compare to** box type **G**

NOTE: Notice that you can set up more complicated conditions in this dialog box by combining conditions using And and OR.

- 13 Click OK.
- 14 Preview the letters again.

3.4.3 Removing Merge Conditions

Once you have specified one or more conditions for selecting records, these remain in force until cancelled. To remove selection conditions:

- 1 Select **Clear All** from the **Filter and sort** dialog box.

If you find that you are not getting the records you expect from a selection, make sure that you are not selecting records by number *and* by query options at the same time!

3.5 Can I include extra text in some letters depending on values in the Data Source?

Yes.

This is done using Word fields. For instance, in the example used so far, you may wish to insert extra text offering overnight accommodation to those applicants not living locally i.e. those whose postcodes do not start with DH.

- 1 Make sure that all the letters are included in the merge — with no conditions set.
- 2 Position the insertion point at the place in the **Main document** where you want the extra text to appear (at the end of the letter).
- 3 Click on the **Insert Word Field** button.

4 Select **If...Then...Else...**

The screenshot shows the 'Insert Word Field: IF' dialog box. The 'Field name' is set to 'Postcode', the 'Comparison' is 'Not equal to', and the 'Compare to' field contains 'DH*'. The 'Insert this text' area contains the text: 'If you wish I can arrange overnight accommodation for you either before or after the day of your interview.' The 'Otherwise insert this text' area is empty. The 'OK' and 'Cancel' buttons are at the bottom right.

- 5 Fill in the boxes in the **Insert Word Field: IF** dialog box as shown above and click **OK**.

DH* indicates any entry beginning with the letters DH. A **Word Field Code** will be inserted into the Main document. This will cause the extra text to appear in all letters with postcodes that do not start with DH.

What you see in the Main document will depend on whether or not the **View Merged Data** button is selected (ie showing the data or showing only the merge fields), whether or not the current record (check the **Go to Record** box on the Toolbar) satisfies the condition, and whether Word is set to display field codes or not (the default is not).

If the current record *does* satisfy the condition, you should see the extra text. If the current record *does not* satisfy the condition then you will not see it (unless Word is displaying field codes).

If you want to display the field code you have just entered, point at the paragraph that contains the conditional text (it doesn't matter if you can't see the text), **right-click** and select **Toggle Field Codes**. You should then see something similar to:

```
{ IF DI5 4EQ <> "DH*" "If you wish I ..... " "" }
```

To turn off the display, point, at the paragraph, right-click and select **Toggle Field Codes**.

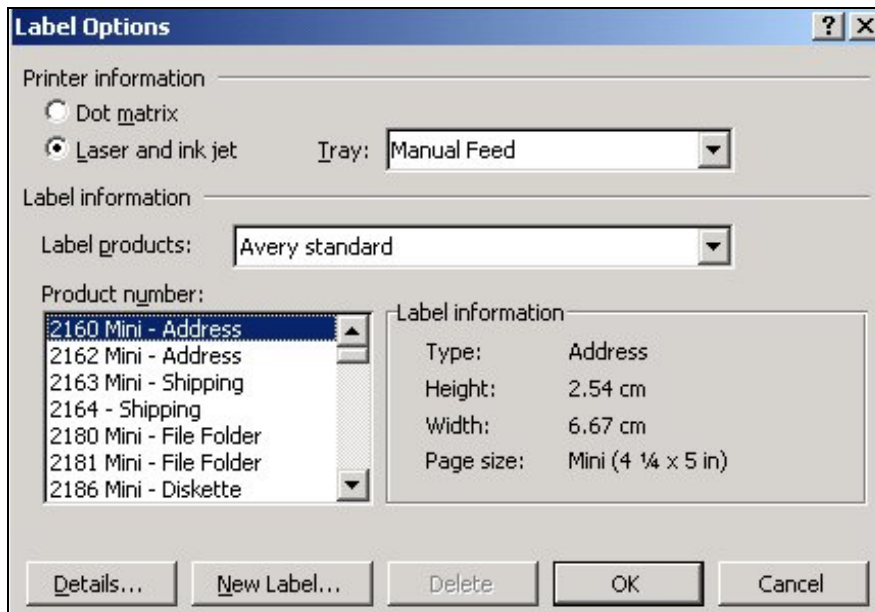
4 Producing a set of mailing labels

You can use the Data Source file that you have just created for the personalised letters to create a set of matching address labels.

- 1 With a blank document open, select **Tools | Letters and Mailings | Mail Merge**.
- 2 In Step 1 choose **Labels**.

- 3 In Step 2 choose **Change document layout** and click on **Label options**.

The **Label Options** dialog box will appear.



The details in the dialog box are probably different from the one you are looking at. This is because you may be using a different printer or have some different option settings.

Now you can specify the type of labels you are using. You choose the make and type of label from the **Label products**: drop-down list. Note that as you select each different **Product number**: the **Label information** box gives details of the sizes of the corresponding labels.

It is by far the easiest option to select one of the commercial label templates from the lists. Avery labels are probably the most well known brand, but they are rather expensive. However, there are cheaper clones available that are identical in label size and layout and can therefore be used successfully with the corresponding Avery template.

If you cannot find the template you want, or you don't know the name, you can define a custom template. See Section 4.1.

- 4 When you have selected the appropriate label, click **OK**.

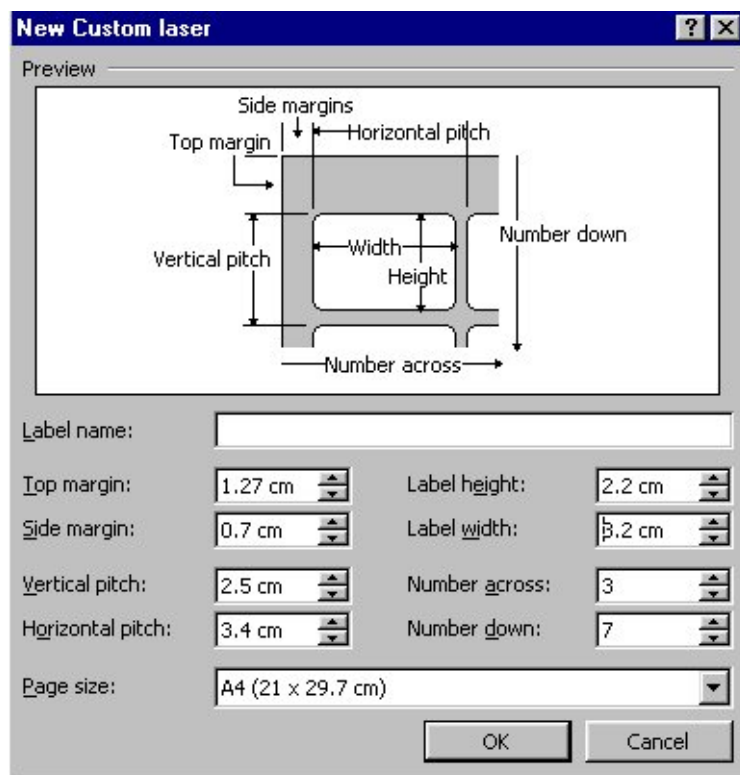
The main document will change to show a table with the same dimensions as the labels.

- 5 Step 3 Select recipients — select **mmdata.mdb** as your data source
- 6 Step 4 Arrange your labels — You design the label using the first label on the page. When you are happy with this you can replicate it to the other labels on the page.

- 7 The insertion point should be flashing in the top left label on the screen. Insert Merge fields as in section 2.2.4 so that the label shows the name and address.
 - 8 Format the text as you wish (ie change the Font and Paragraph formatting). Remember to select the fields before applying the formatting.
 - 9 Click on the **Update all labels** button in the Wizard pane.
- If you want to make further changes, change the top left label and then click **Update all labels** again.
- 10 You can now complete the mail merge as before.

4.1 Creating custom labels

If you *really* can't find the label template that you want in the Label Options dialog box, you can create your own by selecting the **New Label...** button. The **New Custom Laser** box appears, displaying the settings for whichever standard label template is currently selected.



- 1 It is best to complete the Number across and Number down boxes first. Count the number of labels on your sheet.
- 2 Check that the page size is correct.
- 3 Measure the dimensions on your labels carefully and adjust the settings in the dialog box.
- 4 Enter a name for your new label.

- 5 Click **OK**.
- 6 Complete the merge process as described above.

This label will be added to the list of labels and will be available to you for future use.

4.2 Amending labels

You can amend the details in the labels from Step 4 of the Wizard.

It is not possible to change to a different label size and automatically keep the existing label information. If you wish to do this you could either copy the label contents first and then paste it into the top left label of the new size (use Step 2 to change to a new label size and Step 4 to Update all the other labels on the page), or re-design the label information from scratch.

5 Printing from a merged document

A document produced by a mail merge is automatically broken into sections — one for each merged letter.

Each section contains however many pages the form letter consists of. For example if a letter is 3 pages long and the merge creates 10 letters, the merge document will have 10 sections, each of which will have 3 pages.

This will be reflected in the status bar at the bottom left of the window.

For example, if the insertion point is positioned in the 2nd page of the 3rd merged letter the status bar will show:

Page 2 Sec3

There may be times when you may want to print only part of a merged document. (An alternative would be to re-merge the form letter and data, setting the options to only merge selected parts of the data.)

To print a range of pages from the merged document you need to specify the Section as well as the Page. This is done in the **Page range** part of the **Print** dialog box.

Examples

- 1 To print the 4th letter of the merge where each letter is 3 pages long, type:
p1s4-p3s4
in the Page range box of the Print dialog box
- 2 To print the 2nd and 3rd letters of a merge where the letter is 2 pages long, type:
p1s2-p2s3
- 3 To print the 5th letter of a merge where the letter is 1 page long, type:

p1s5

Use the information in the status bar to work out the pages and sections you want.

5.1 Mailing labels

A merged document containing mailing labels is divided into sections — one for each page. So to print the 4th page of labels, you would type **p1s4**.