

How to create a mail merge

About: This guide explains how to create a mail merge in Word 2000 and 2003.

Who is this guide intended for: Sports Development Teams, County Sports Partnerships and sports clubs

What is a mail merge: A mail merge is a useful tool to use with direct mail campaigns. It allows you to take information from a data source such as an Access Database or Excel Spreadsheet, and puts it into a personalised letter. To get the most out of mail merge, it is essential to have a good database of contact's details.

1. Creating the main document

On the menu bar, click on **Tools**. From the pull down menu, select **Letters & Mailings**, then select **Mail Merge**. A task pane will appear on the right of the word document. Under **Select document type**, choose one of the following types of documents:

- Letters
- Envelopes
- Labels
- Directory

Click on **Next: Starting document** at the bottom of the task pane.

2. Selecting the starting document

Under **Select starting document**, select one of the following options:

- **Use the current document** will allow you to start from the current document shown on the screen.
- **Start from a template** will allow you to start from a ready-to-use form that can be modified.
 1. Click **Start from a template**.
 2. Click **Select template**.
 3. On the **Mail Merge** tab in the **Select Template** dialog box, select the template you want, and then click **OK**.

2. Selecting the starting document continued...

- **Start from existing document** will allow you to work on an existing mail merge document:
 1. Click **Start** from the existing document.
 2. In the **Start from existing** box, select the document you want, and then click **Open**. If you do not see the document, click **More files**, and then click **Open**.
 3. In the **Open** dialog box, locate the document you want, and then click **Open**:

Click on **Next: Select recipients** at the bottom of the task pane

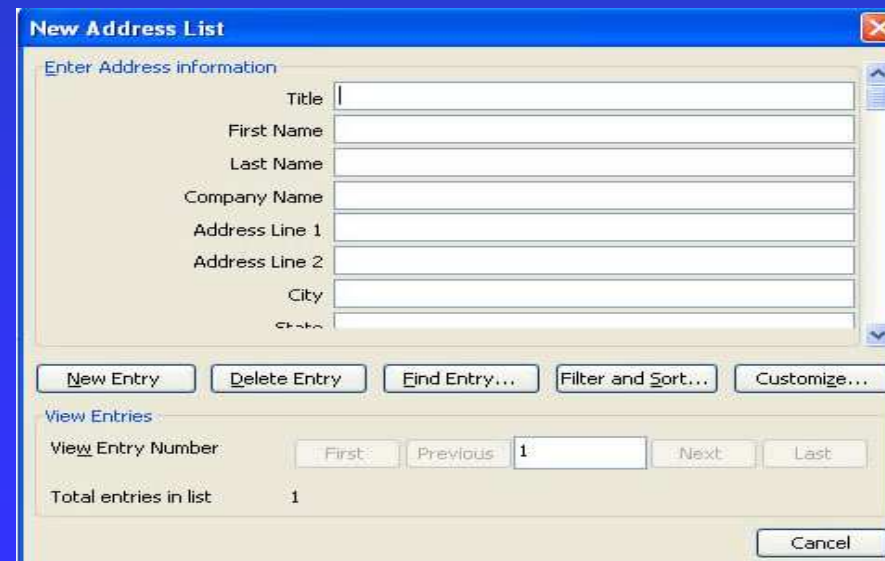
3. Select recipients

Under **Select recipients**, select one of the three options:

- **Use an existing list** will allow you to use files and addresses from a file or database.
 1. To find an already existing file, select **Browse** and navigate your way to the file.
 2. If your data source is an Excel worksheet that has data on multiple tabs, select the tab containing the data you want. Click **OK**.
 3. All the entries in the data source will now appear in the **Mail Merge Recipients** window, where you can edit the list of recipients. Click **OK** when finished.
 4. To change the file click on **Select a different list**.
 5. To edit the list click on **Edit recipient list**.

3. Select recipients continued...

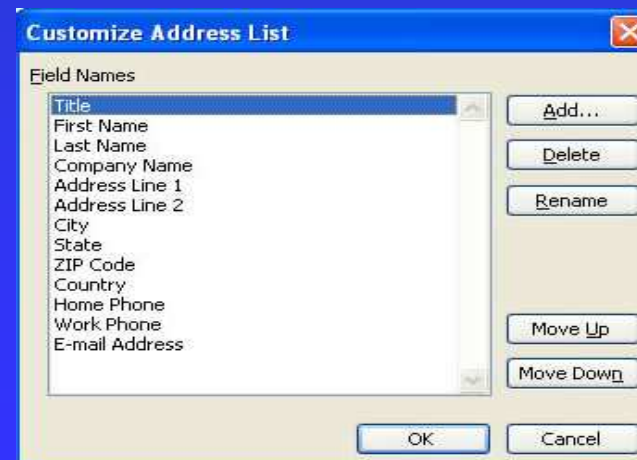
- **Create a simple new address list** will allow you to create a new contact list.
 1. Under **Select recipients**, click **Type a new list**.
 2. Click **Create**, the following window will appear.

A screenshot of a software dialog box titled "New Address List". The dialog has a blue title bar with a close button (X) in the top right corner. The main area is titled "Enter Address information" and contains several text input fields: "Title", "First Name", "Last Name", "Company Name", "Address Line 1", "Address Line 2", "City", and "Postcode". Below the input fields is a row of five buttons: "New Entry", "Delete Entry", "Find Entry...", "Filter and Sort...", and "Customize...". Underneath these buttons is a section labeled "View Entries" which includes a "View Entry Number" field with a dropdown menu showing "1", and "First:", "Previous", "Next", and "Last" buttons. At the bottom left, it says "Total entries in list" followed by the number "1". A "Cancel" button is located at the bottom right of the dialog.

Next: Step 3 – Select recipients continued...

3. Select recipients continued...

3. In the **New Address List** window, type the data you want to include under **Enter Address information**; for example, title, names, and address information. You do not have to fill in every field. If you want to edit the field names, click on **Customise** button, and the **Customise Address List** window will appear. Add, delete or rename any field name as you want.



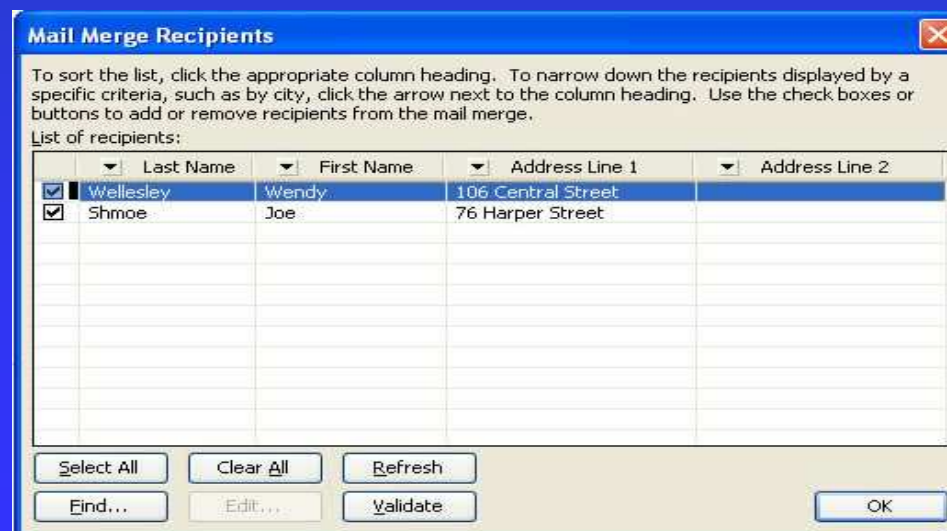
Next: Step 3 – Select recipients continued...

3. Select recipients continued...

4. To make another entry, click **New Entry**.
5. Repeat steps 3 and 4 until you've added all the entries you want, and then click **Close**.
6. In the **Save Address List** window, type a name for the data list in the **File name** field, and select a folder to save the list in. By default, the address list is saved in the **My Data Sources** folder. It is best to keep the file there since Microsoft Word by default looks for data in that folder, so you won't have to navigate through files and folders to locate it.
7. Click **Save**.
8. The contacts in the new list will appear in the **Mail Merge Recipients** window where you can edit the list.

3. Select recipients continued...

In the **Mail Merge Recipients** window, select the recipients you want by checking the boxes next to the recipients. To sort the list, click the column heading of the item you want to sort by. To filter items in the list click the arrow next to the column heading of the item you want to filter.



3. Select recipients continued...

If the arrow next to any column heading is blue, that category is screening out names. To display all the recipients again, click blue arrows and select **All**.

To check all names in your recipients list, click **Select All**. To uncheck all names, click **Clear All**.

Click **OK** to return to the **Mail Merge Wizard**.

If you are creating a form letter, click on **Next: Write your letter**.

If you are creating a label, click on **Next: Arrange your labels**.

4. Format letter

If you are creating a form letter, type the text that you want to appear in every form letter. Insert merge fields where you want to merge names, addresses, and other data from the data source (i.e. recipient list) by clicking anywhere you want in the main document to insert the field.

Then click on **More Items** and insert individual field. You may also use **Address block** and **Greeting line**.

If you are creating a label, you may use **Address block** or **More Items** to edit the label. If you want every label to appear in the same format, click **Updating all labels** under **Replicate Labels**.

4. Format letter continued...

- **Address block**

1. Click **Address block**.
2. In the **Insert Address Block** window, select the address elements you want to include and the formats you want, and then click **OK**.
3. If the **Match Fields** dialog box appears, Microsoft Word may have been unable to find some of the information it needs for the address block. Click the arrow next to **not matched**, and then select the field from your data source that corresponds to the field required for the mail merge.

4. Format letter continued...

- **Greeting line**

1. Click **Greeting line**.
2. Select the greeting line format (salutation, name format, and following punctuation.)
3. Select the text you want to appear in cases where Microsoft Word can't interpret the recipient's name.
4. Click **OK**.
5. If the **Match Fields** window appears, Word may have been unable to find some of the information it needs for the greeting line. Click the arrow next to **not matched**, and then select the field from your data source that corresponds to the field required for the mail merge.

4. Format letter continued...

- Click **More items**.
- Select one of the following:
 - (a) **Address Fields** will allow you to select from address fields that will automatically map to corresponding fields in your data source, even if the data source's fields don't have the same name as your fields.
 - (b) **Database Fields** will allow you to select from fields that always take data directly from a column in a database.
- In the **Fields** window, click the field you want.
- Click **Insert**, and then click **Close**.
- If the **Match Fields** window appears, Microsoft Word may have been unable to find some of the information it needs to insert the field. Click the arrow next to **not matched**, and then select the field from your data source that corresponds to the field required for the mail merge.

5. Preview letter

Click **Next: Preview your letters**.

- To preview the items in order, click the arrows under the **Preview your letters/labels** heading.
- To locate a specific item, click **Find a recipient**, and then enter the criteria in the **Find** field.
- To change the list of recipients, click **Edit recipient list**, and make your changes in the Mail Merge Recipients window.

Click on **Next: Complete the Merge** at the bottom of the task pane.

6. Complete the merge

Edit Individual letters/labels

- Click **Edit individual letters/labels...**
- In the **Merge to New Document** window, select the records you want to merge.
- Click **OK**.
- Microsoft Word will create new merged document.
- To personalise individual documents, scroll to the information you want to edit, and make your changes.
- Print or save the document just as you would any regular document.

6. Complete the merge continued...

Print the letters/labels

- If you personalised the items and the merged document is active on the **File** menu, click **Print**.
- If you want to print directly from the mail merge task pane, click **Print** under the **Merge** heading. In the **Merge to Printer** window, select the options you want, and print.

6. Complete the merge continued...

Save the merged letters/labels

Under most circumstances, you do not need to save the merged document. It is simpler and more useful to save the main document and merge it again if you need another copy. Below are examples of times when you might wish to save the merged document:

- You wish to keep an archived copy of mailings, including to whom they were sent.
- You have personalised individual letters or labels within the merge, and want to save those changes.

6. Complete the merge continued...

If you do wish to save the merged document, collect the merged files into a single document by clicking **Edit individual letters/labels**. In the **Merge to New Document** window, select one of the following:

- To merge all the documents, click **All**.
- To merge only the document that you see in the document window, click **Current record**.
- To merge a range of documents, click **From**, and then type the record numbers in the **From** and **To** boxes.

Click **OK**.

Microsoft Word will open one new document that contains all the individual letters. Save the document just as you would any regular document.
