

# Word 2003: Mail Merge Learning Guide

## Getting started

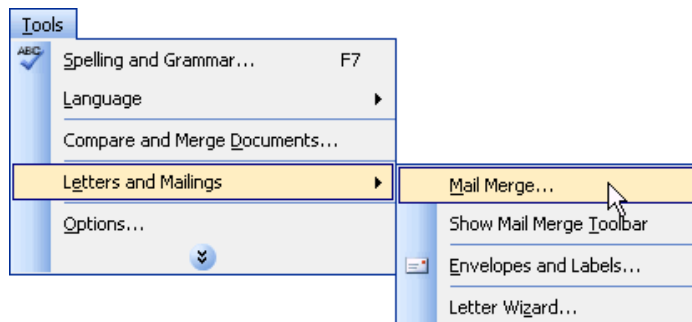
Mail merge techniques allow you to create a document which combines repetitive text elements with data drawn from an external data document. To perform a mail merge, you'll need the following:

- a template document (previously created, or generated during the merge)
- a data source (created during the merge, or an already existing file)

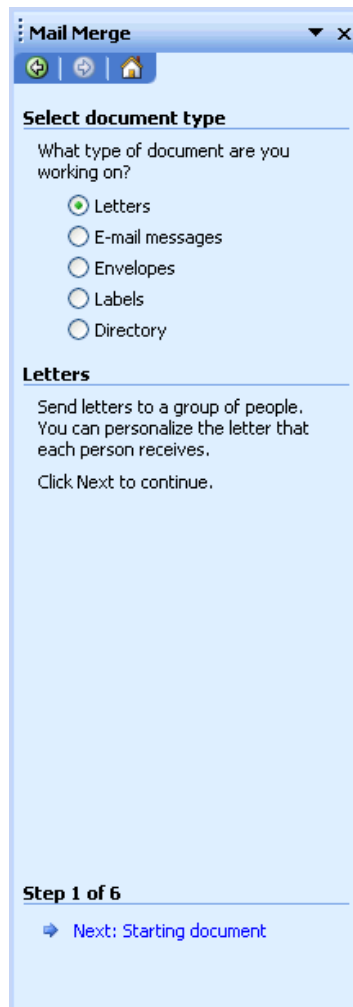
Word will then create a new document by inserting the data from your data source into the structure of your template document.

## Opening the mail merge wizard

- To begin, open the document you want to use as the template document for your form letters.
- From the **Tools** menu, select **Letters and Mailings**, and click on **Mail Merge Wizard**.



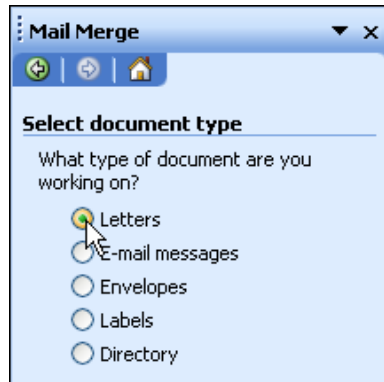
- Word's task pane will open to the right of your document. In Word 2003, the task pane serves as the main interface for all your mail merge projects.



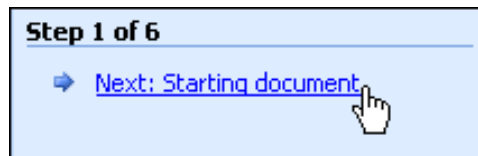
## Choosing the type of mail merge you want to perform

You can create form letters, e-mail messages, envelopes, labels, and directories using Word's mail merge capabilities.

- In the task pane's **Select document type** area, click on one of the option buttons to select the kind of mail merge you would like to perform. *For example, if you are creating form letters, click on the option button labeled **Letters**.*



- At the bottom of the task pane, click on the link labeled **Next: Starting document**.



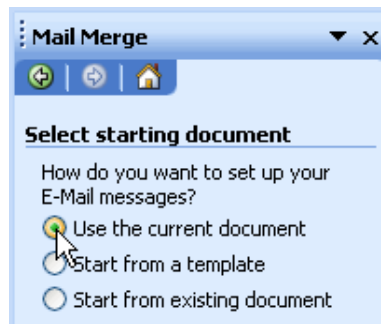
**Tip:** Buttons are often replaced in Word 2003 by blue text links that act as a buttons. When you place your cursor over a link, it becomes underlined. Clicking on the link brings you to the next step in the process.

## Opening your existing document

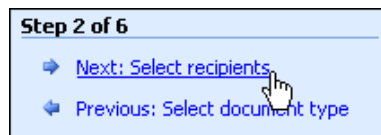
Word gives you three options for choosing the main template for your mail merge letters:

To use....	Click on the option button labeled...
The document currently open in the document window.	Use the current document
A word template (for example, a fax template) as the main document for your mail merge.	Start from a template
A document already saved on your computer.	Start from existing document

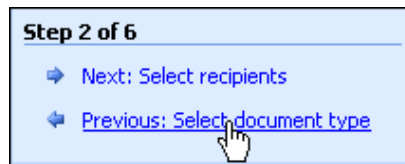
- Since your starting document is already open, click on the option button labeled **Use the current document**.



- At the bottom of the task pane, click on the blue text labeled **Next: Select Recipients**.



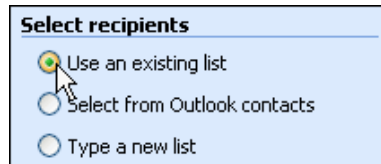
**Tip:** If you need to go back at any time and change a previous selection that you made, click on the blue text labeled **Previous** at the bottom of the task pane.



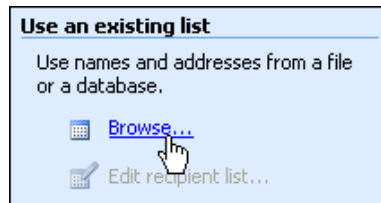
## Choosing a Data Source

Now that you have selected the type of mail merge you would like to perform and opened the starting document for the merge, you will need to choose your data document. In most cases you will use a data document you have already created.

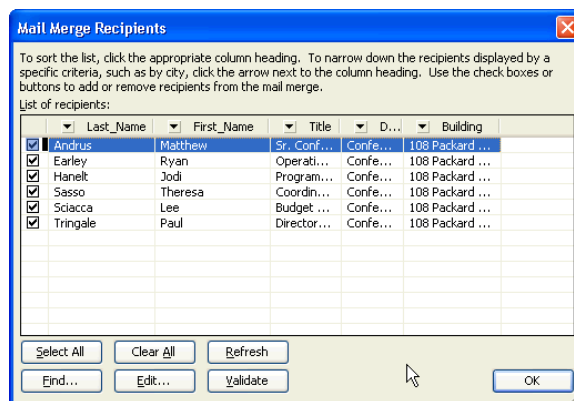
- In the **Select recipients** area, click on the option button labeled **Use an existing list**.



- In the **Use an existing list** area, click on **Browse**.

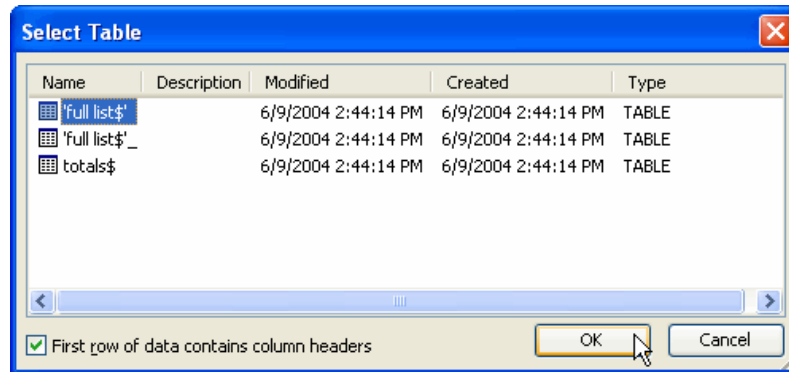


- A **Select Data Source** window will appear. Navigate to the file you would like to use as your data source, click on its file name, and click **Open**.
- Next, a **Mail Merge Recipients** window will appear.



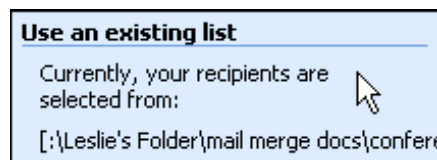
**Tip: Using an Excel spreadsheet**

If you are using an Excel spreadsheet or Access database as your data source, Word will not automatically display a Mail Merge Recipients window. Instead, Word will ask you to choose the spreadsheet or Access table that you want to use as your data source. From the **Select Table** window you can select the data you would like to use for the mail merge. Once you have selected the data table you'd like to use, click **OK** to continue.

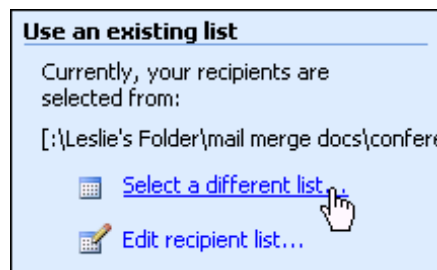


**Tip: Switching your data source**

If you are using a document that is already been used in a mail merge, Word 2003 will retain your document's link to its data source. In this situation, the **Use an existing list** area will display the text **Currently your recipients are selected from** and the name of the file that is being used as the data source.



However, if you would like to switch the data source to another data source, you can click on **Select a different list**.



## Editing the recipient list

Word 2003's powerful **Mail Merge Recipients** window allows you to control your data from within Word. From this window you can:

- Select and deselect individual recipients in the list
- Sort items in the list
- Filter items in the list
- Edit individual records

### Selecting recipients from your data source

The ability to include and exclude specific records in your data source can be helpful when you want to select only a few recipients from your data source.

- When the **Mail Merge Recipients** window is open for the first time, all the recipients will appear with a checkmark next to their name.

	Last_Name	First_Name	Title	D...	Building
<input checked="" type="checkbox"/>	Andrus	Matthew	Sr. Conf...	Confe...	108 Packard ...
<input checked="" type="checkbox"/>	Earley	Ryan	Operati...	Confe...	108 Packard ...
<input checked="" type="checkbox"/>	Hanelt	Jodi	Program...	Confe...	108 Packard ...
<input checked="" type="checkbox"/>	Sasso	Theresa	Coordin...	Confe...	108 Packard ...
<input checked="" type="checkbox"/>	Sciacca	Lee	Budget ...	Confe...	108 Packard ...
<input checked="" type="checkbox"/>	Tringale	Paul	Director...	Confe...	108 Packard ...

- To exclude a recipient from the list, click on the box to the left of the recipient's name to remove its checkmark. Without the checkmark, the recipient you chose will not be included in the data to be merged.

	Last_Name	First_Name	Title	D...	Building
<input checked="" type="checkbox"/>	Andrus	Matthew	Sr. Conf...	Confe...	108 Packard ...
<input checked="" type="checkbox"/>	Earley	Ryan	Operati...	Confe...	108 Packard ...
<input type="checkbox"/>	Hanelt	Jodi	Program...	Confe...	108 Packard ...
<input checked="" type="checkbox"/>	Sasso	Theresa	Coordin...	Confe...	108 Packard ...
<input checked="" type="checkbox"/>	Sciacca	Lee	Budget ...	Confe...	108 Packard ...
<input checked="" type="checkbox"/>	Tringale	Paul	Director...	Confe...	108 Packard ...

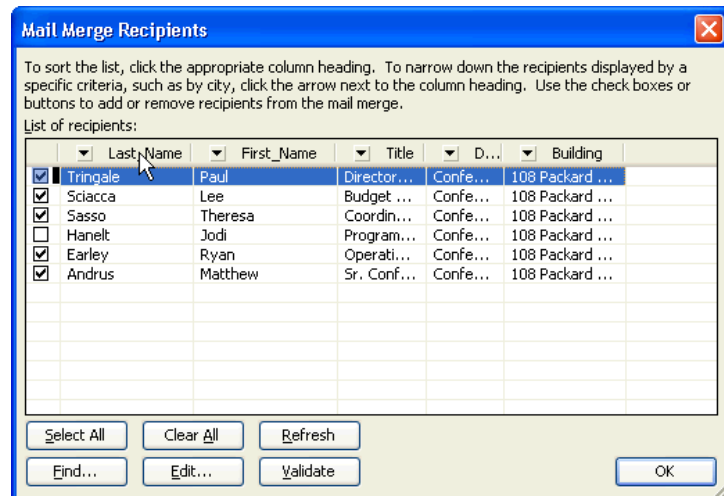
- To reselect that recipient, click to replace the check mark in the box.

**Tip:** If you know you want to include most of the list in your merge, click on the checkboxes next to the names you want to deselect. Alternatively, if you want to include only a few records from the data source, click **Clear All**, and then click the checkboxes next to the names you want to include.

### Sorting items in the list

Sorting your data can be helpful if you want your merged document to be organized in alphabetical or numeric order. When you sort using the **Mail Merge Recipients** window, you'll immediately see the results of your sort in your recipient list.

- To sort data from the **Mail Merge Recipients** window, click the column heading of the item by which you want to sort.  
For example, if you want to display the list alphabetically by last name, click the column heading **Last Name**.



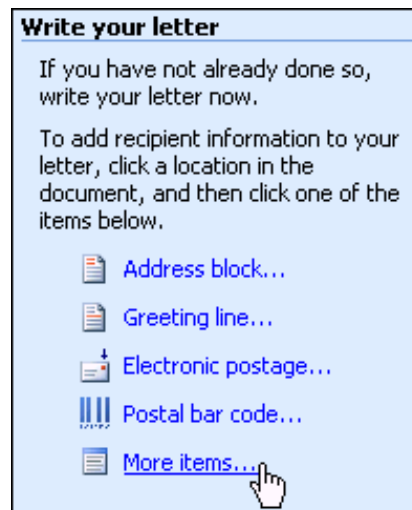
- After sorting the list, you may opt to click on the checkboxes to the left of the recipients' names to continue eliminating records from the list.
- Click **OK** and Word will use only those recipients that have checkmarks next to their names.
- At the bottom of the task pane, click on the blue text **Next: Write your letter**.

## Inserting Merge Fields

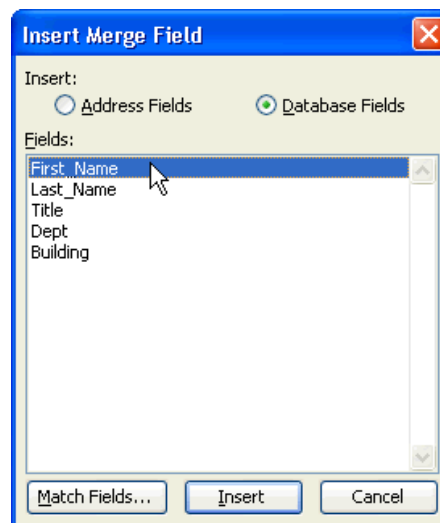
Although Word offers you a variety of generic options for adding merge field data to your form letter, in most cases you'll have more success directly inserting fields from your data document.

To insert data from your data document:

- Click on your document to place the insertion point in the location where you wish to insert the field.
- Next, in the task pane's **Write your letter** area, click on **More items**.



- An **Insert Merge Fields** window will appear with a list of the merge field names from your data source.



- From the **Fields** list, click to highlight the field whose data you would like to insert into the merged document.
- Click **Insert** to place a marker for that field into your document at the insertion point.
- Click **Close** when you are finished inserting merge fields at this location in your document.
- To add more merge fields elsewhere your document, click to place the new insertion point at a new location in your document.
- Repeat the process of selecting and inserting merge fields.
- At the bottom of the task pane, click on **Next: Preview letters**.

***Tip: Adding multiple fields***

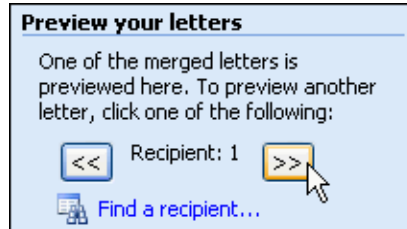
*Adding one field at a time can be tedious when you are trying to add address data at the top of a letter. In this case, you may want to add all the address fields at once. To add multiple fields in quick succession, add each field after the other without moving the insertion point. Once you have finished inserting your field markers, click the **Close** button. Then, move each field marker to an appropriate spot in your document.*



*For example, if you need to create an address header, you can add the street address field, city field, state field and zip code field all at the same insertion point. Then, once they are all inserted into the document, you can add the spaces, punctuation and line breaks between each address field.*

## Previewing your merge document

### Navigating through your data

- From the **Preview your letters** task pane area, click on the arrow buttons to navigate through the data from your data source.



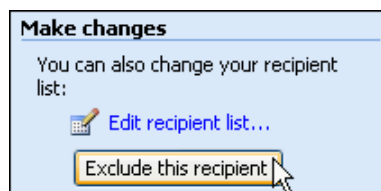
-  Displays the previous record
-  Displays the next record

- When you are ready to proceed, click on the text **Next: Complete the merge** at the bottom of the task pane.

### Excluding data from the merge

You can also exclude recipients as you preview the merged data. To exclude a recipient:

- Use the left and right arrow buttons at the top of the task pane to navigate through the data until you find the recipient you would like to exclude.
- Click on the button labeled **Exclude this recipient**. The recipient's data will be excluded from the final merged document.



## Editing your merge data

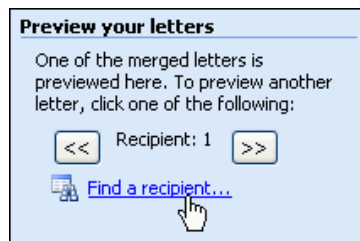
While you preview your merged data, you can also edit the list of recipients that will be used in the final merge. To edit the recipient list:

- Click on the blue text **Edit recipient list** on the task pane.
- The **Mail Merge Recipients** window will appear.
- From this window you can sort, filter and select recipients for your final merge.

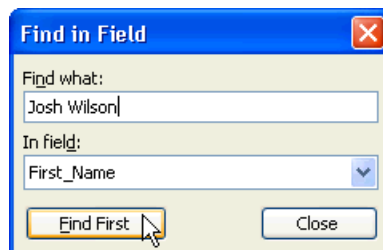
## Searching for a record in your merge data

You can also search for a specific recipient whose letter you would like to preview. To find a recipient:

- Click on **Find a recipient** below the navigation buttons on the task pane.



- From the **Find in Field** window, type some text from the record you would like to find in the box labeled **Find what**.
- Click on the down-facing arrow next to the **In field** box.
- From the drop-down menu that appears, choose the field in which you would like to search.
- Click **Find First** to search your data source for the text you specified.



- The first record that matches the search criteria will be displayed in the document window.

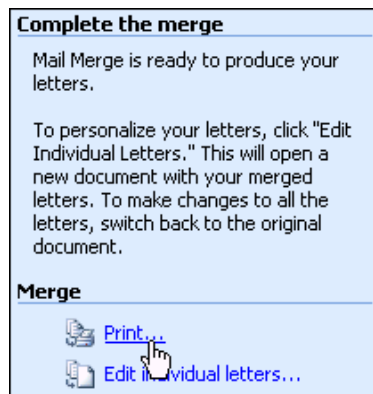
## Completing your merge

On the **Complete the merge** task pane you are given two options:

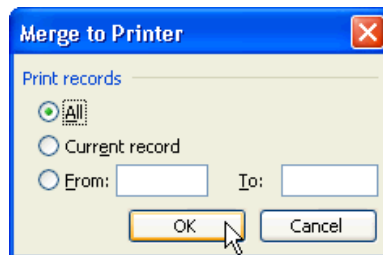
If you want to ...	Click on ...
Merge the documents directly to the printer	Print.
Create and open a new merged document, which allows you to edit the merged documents individually and save them for later use	Edit individual letters...

## Printing your document

- To print, click on the blue text labeled **Print** in the **Merge** area.



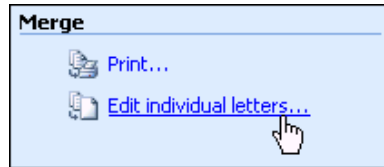
- Next, a **Merge to Printer** window will appear.



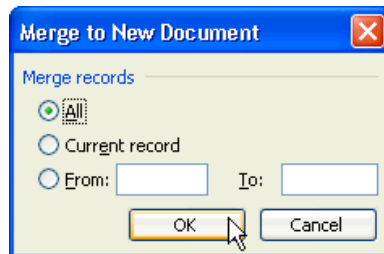
- Click on the option button next to the print option you would like to choose. You can print all of the records you've selected in the **Mail Merge Recipients** window, the current record or a range of records.
- Click **OK**. to print your merged document.

### Editing individual letters

- Click on the blue text **Edit individual letters** in the task pane's **Merge** area.



- Next, a **Merge to new document** window will appear.



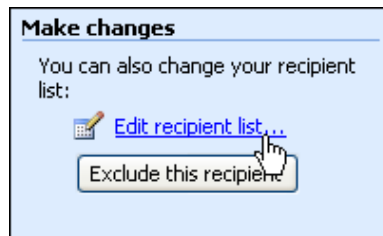
- Click on the option button next to merge option you wish to select.
- Click **OK** to create a new document will containing your merged letters.
- You can edit each letter individually, print the letters, or save the merged document as a regular Word document.

## Advanced techniques for filtering your data

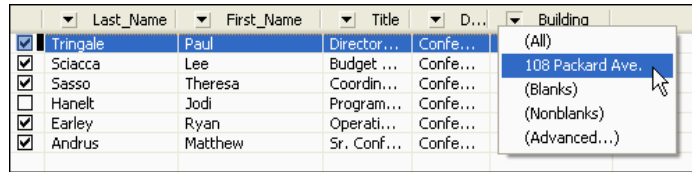
Filtering items in a data source is useful when you want to select and include only a specific set of records in your merge based upon specific criteria. Word 2003 offers two ways to filter data. To filter quickly, Word offers pre-set criteria in the drop-down menus of the **Mail Merge Recipients** window. These pre-set criteria can be used to instantly filter for any record matching those criteria. The more advanced filtering feature allows you to set sophisticated queries for retrieving specific records that match your criteria.

### Using quick filtering criteria

- Click on **Previous** at the bottom of the task pane to navigate back to the **Preview your email messages** task pane view (**Step 5 of 6**).
- Click on **Edit recipient list**.

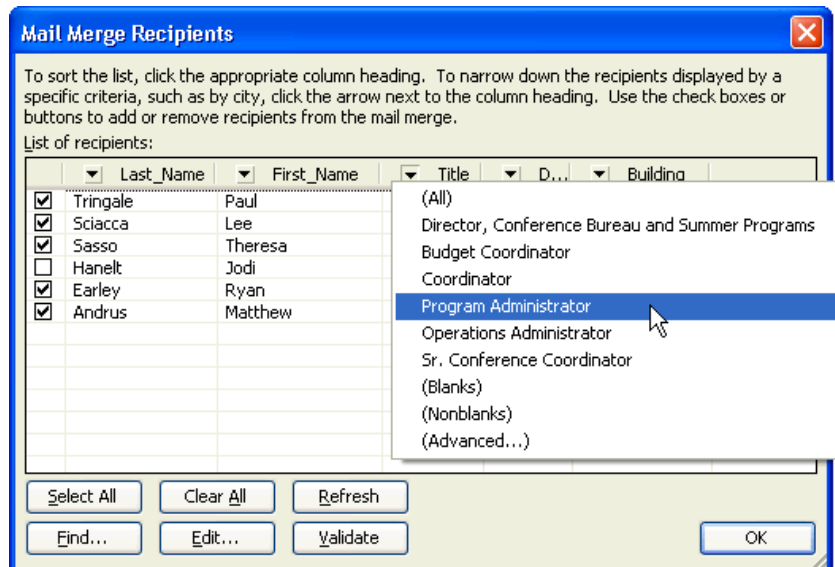


- When the **Mail Merge Recipient** window appears, click on the down-facing arrow next to the heading of the column whose data you want to use in your filter.



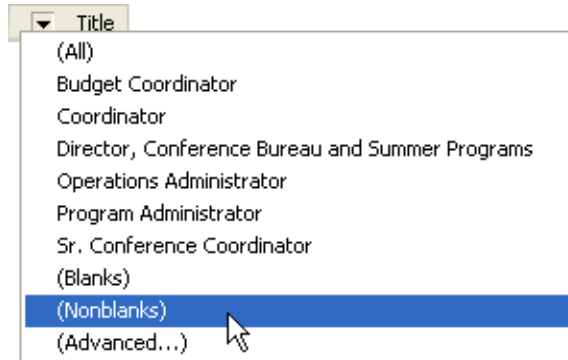
- A drop down menu will appear offering you quick filtering options:

Sorting Option	Description
All	Displays all the records in the data source
Specific field values	Displays records whose data matches a field value appearing in the drop-down menu (shown in the example below)
Blanks	Displays all the records that have this field as blank
Nonblanks	Displays all the records that contain information in this field.
Advanced	Takes you to a new window that will allow you to filter records.



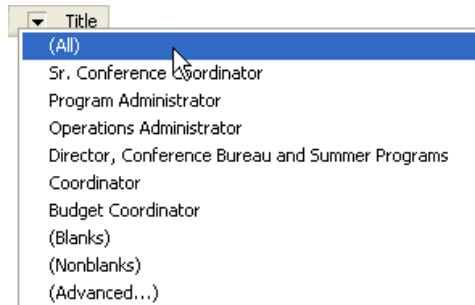
*Filtering for all records whose Title field contains Program Administrator*

- Click on the data you would like to use as your filter. *For example, if you want to display only the records that have data in the Title field, click on **Nonblanks**.*



- Click **OK** to proceed with your merge.

**Tip:** *When you are dissatisfied with the results of a filter and want to display all the records again, go back to the drop-down menu you used to filter the list and select **All**. All of the records from the data source will reappear on the recipient list.*

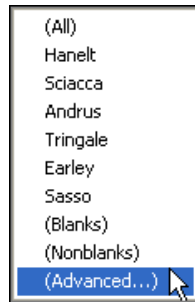


- At the bottom of the task pane, click **Next: Complete the Merge**.

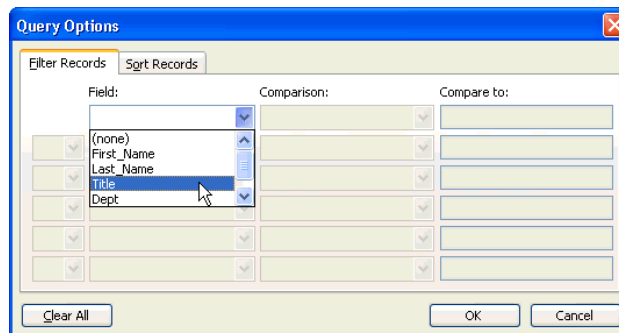
## Advanced Filtering

The Advanced Filtering process in Word 2003 uses queries to allow you to specify the data records to utilize in your merge as well as the order in which your data will be sorted.

- From the **Mail Merge Recipients** window, click on the down-facing arrow next to any column header.
- From the drop-down menu that appears, click on **Advanced**.



- When the Query options window first opens, the **Filter Records** tab will be displayed. Here, you can specify up to five criteria to determine which of the records in your data source will be merged with your main document.
- Select the field to be used for filtering by clicking on the down-facing arrow next to the **Field** box in the window's top row.
- From the drop-down menu that appears, click on the name of the field containing the data that will identify the records to be used in your merge.



- Click on the down-facing arrow next to the box labeled **Comparison**.
- From the drop-down menu that appears, select the comparison operator (equal to, greater than, less than, etc.) that you wish to use in your filter.

- Finally, type in the data value in the **Compare to field**. Only records match this combination of field, comparison operator, and data will be included in the merge.
- In the example below, only records whose **Title** field data is **equal to Budget Coordinator** will be included in the merge. All other records will be filtered out.

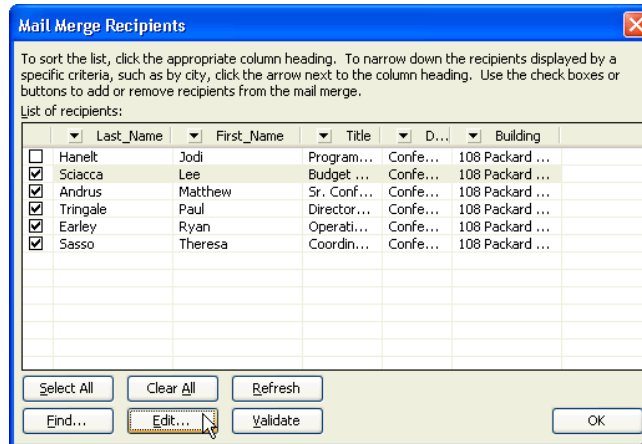
The screenshot shows a 'Query Options' dialog box with two tabs: 'Filter Records' and 'Sort Records'. The 'Filter Records' tab is selected. It contains a table with three columns: 'Field:', 'Comparison:', and 'Compare to:'. The first row is populated with 'Title', 'Equal to', and 'Budget Coordinator'. Below this are four empty rows, each with a dropdown arrow on the left. At the bottom of the dialog are three buttons: 'Clear All', 'OK', and 'Cancel'.

- To filter by more than one criterion, select a field from the **Field** menu in the second row and repeat this process.
- Now, click **OK**.
- The **Mail Merge Recipients** window will display only the data that matches the query you created.
- From this filtered list, you can click on the checkboxes to the left of the recipients name to continue eliminating records.
- When you are finished editing the list, click **OK** to proceed.

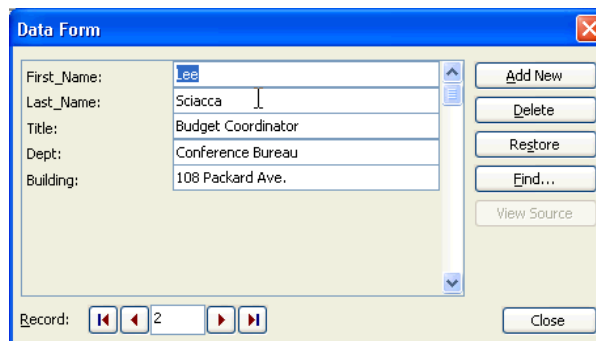
## Editing records

From the **Mail Merge Recipients** window, you can also edit individual records of each of your recipients.

- Click the **Edit** button at the bottom of the window.



- A **Data Form** window will appear that allows you to edit and delete your existing data records, or add new data records.



- When you are finished working with the entries, click **Close**.
- Next, click **OK** on the **Mail merge recipients** window.

## Creating a data document

### Data file formats

Word is able to use many different data file formats to supply data for a merge, including:

- Word tables
- Excel worksheets
- Access tables
- Access queries
- Delimited text files

Of these formats, Word tables are most appropriate as simple data documents, since they are perhaps the easiest to create, maintain, and update.

### Creating a table

- To create a new Word table, first open a blank document.
- Next, choose **Insert...Table** from the **Table** menu.
- Specify the numbers of columns and rows in your table, and click **OK**.



### Editing a table

Data may be added to a Word table by simply typing in each cell.

To move between cells:

- Click on a cell to place the insertion point in that cell.
- Use the **Tab** key to move the insertion point one cell to the right.
- Hold down the **Shift** key and then type the **Tab** key to move one cell to the left.
- Use the vertical arrow keys to move up and down between cells.
- Use the horizontal arrow keys to move within a cell.
- Hold down the **Control** key and use the horizontal arrow keys to move between cells with text in them.
- To select cells, simply drag the mouse over the cells to be selected. Columns can be selected by clicking at the top of the column. Unfortunately, clicking at the left edge of a row will not select the entire row.

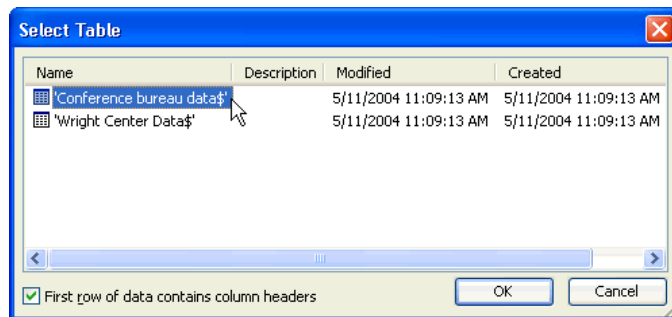
### Adding & Deleting Cells

- To delete a column, select those cells by clicking at the top of the column. Next, from the **Table** menu, choose **Delete**, and then **Columns**.
- **To delete a row, select those cells by dragging across the row.** From the **Table** menu, choose **Delete**, and then **Rows**.
- To insert a row, click in the row **above which** you want to insert the new row. From the **Table** menu, choose **Insert Rows**.
- To insert multiple rows, you must first have at least as many rows in your table as the number of rows that you wish to insert. Drag to select the number of rows you wish to insert, then choose **Insert Rows**.
- To insert a column, click in the column **to the left of which** you wish to insert the new column. From the **Table** menu, choose **Insert Columns**.
- To insert multiple columns, you must first have at least as many columns in your table as the number of columns that you wish to insert. Click to select the number of columns you wish to insert, then choose **Insert Columns**.

## Using data from a spreadsheet

Like Word tables, Excel spreadsheets can also be used as the source of data for a mail merge. Although you can select a spreadsheet as your data source in nearly the same way that you select a Word table, there are a few differences between the two processes.

- As you did when selecting a Word table for your data source, **navigate to step 3 of the mail merge process and click on Browse.**
- Navigate to and select your data source. Click OK.
- In the Select Table window, select the table you want to use and click OK.



- Finish performing the mail merge the way you would normally.