



Mail Merge

For the PC Using Word 2000

Brian Frederick

Introduction	1
Other Versions of MS Word	1
Overview of the process	1
Advanced Material: Envelopes and Mailing Labels	7
Online References	9
Getting Help	9

Introduction

The mail merge feature of Word 2000 offers a convenient way to send “personalized” form letters to multiple recipients. The letters are personalized by including information such as the name or address of the recipient. The mail merge feature can also be used to generate mailing labels or to address envelopes.

Other Versions of MS Word

Each succeeding version of MS Word handles mail merges a little differently. The instructions in this document are specific to MS Word 2000. Generally, with each new version, the process is shorter, easier and more intuitive.

Overview of the process

There are three steps to performing a mail merge:

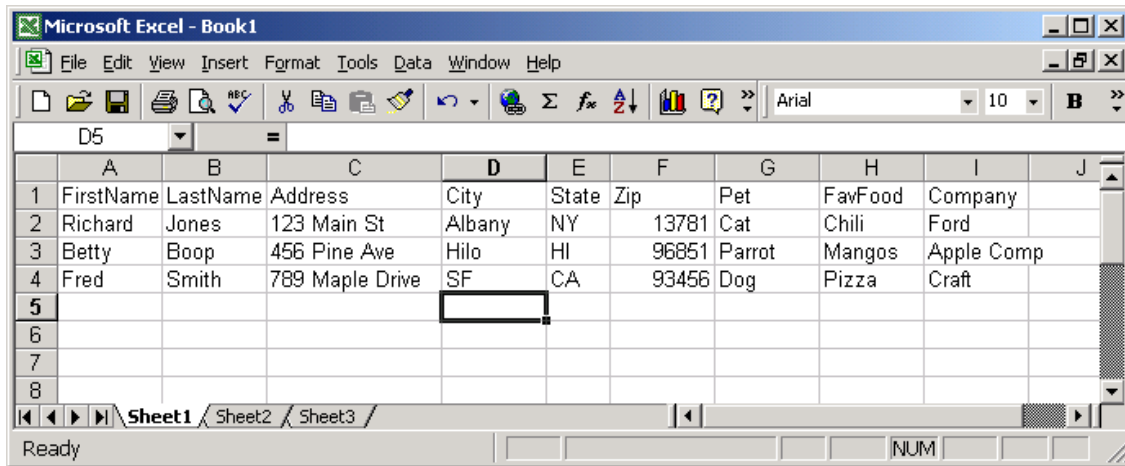
1. Create the data source – the database of information on the individual recipients.
2. Create the template document – a generic document into which the above database will be merged.
3. Merge the two files together – create one large document with many “personalized” letters.

CREATE THE DATA SOURCE

The data source could be in Access, dBase, FoxPro or many other formats. We are using Excel in this example, but the process is the same.

Open Excel and create a table with the data you want to use in the mail merge. In row one, include unique column titles to identify each column of data. The header row contains field names for the merge fields.

A sample table is provided below.



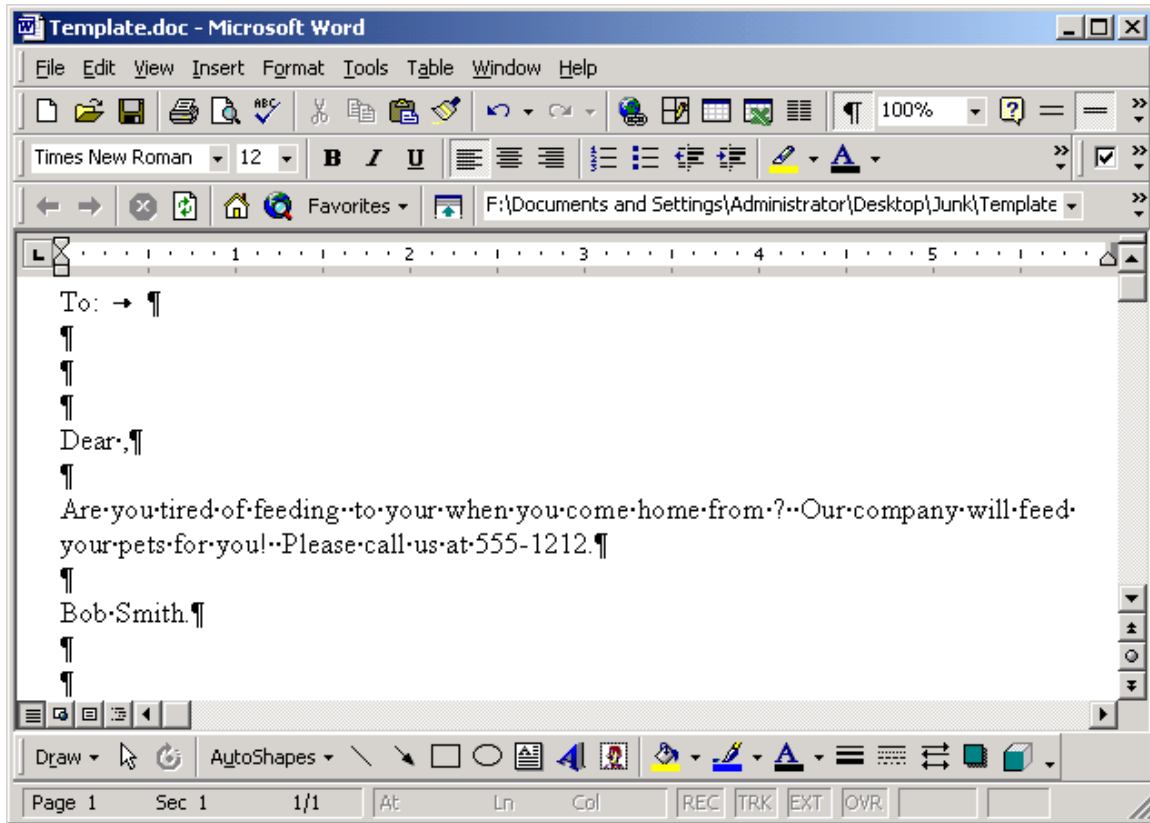
The screenshot shows a Microsoft Excel window titled "Microsoft Excel - Book1". The menu bar includes File, Edit, View, Insert, Format, Tools, Data, Window, and Help. The toolbar contains various icons for file operations and editing. The active cell is D5. The data table is as follows:

	A	B	C	D	E	F	G	H	I	J
1	FirstName	LastName	Address	City	State	Zip	Pet	FavFood	Company	
2	Richard	Jones	123 Main St	Albany	NY	13781	Cat	Chili	Ford	
3	Betty	Boop	456 Pine Ave	Hilo	HI	96851	Parrot	Mangos	Apple Comp	
4	Fred	Smith	789 Maple Drive	SF	CA	93456	Dog	Pizza	Craft	
5										
6										
7										
8										

CREATE THE TEMPLATE DOCUMENT

Open Word and create a template document. This is the skeleton of a document that will be sent to each person in the database. The template document may contain personalized information about the *sender*, but not about the recipient. Information about the recipient will be supplied from the database. Remember to leave places where you can later insert information specific to the recipient.

A sample template document is provided for you below:



We have left spaces in this document for individualized information on each recipient. For this reason, some of the sentences don't make sense.

Later on, the text in this template document will be personalized with information from the database above to create a new, unique, individualized document for each person in the database.

MERGE THE TWO FILES TOGETHER

We must first select the template document and then the data source file and then insert the data fields into the document.

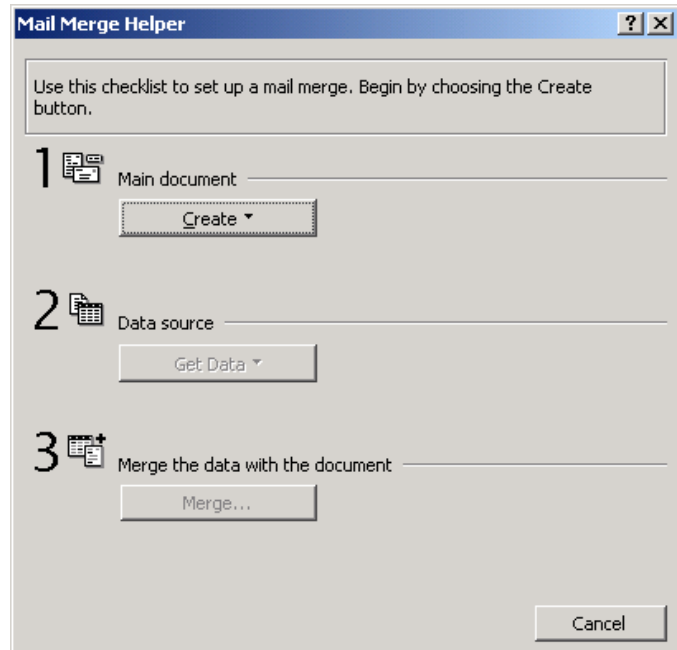
Open the template document in MS Word, and then select **Tools** → **Mail Merge**. The *Mail Merge Helper* window will appear.

To select the template document for the merge, click on **Create** → **Form Letters** → **Active Window**. You have the option to use the template document you currently have open, or you could select a different document.

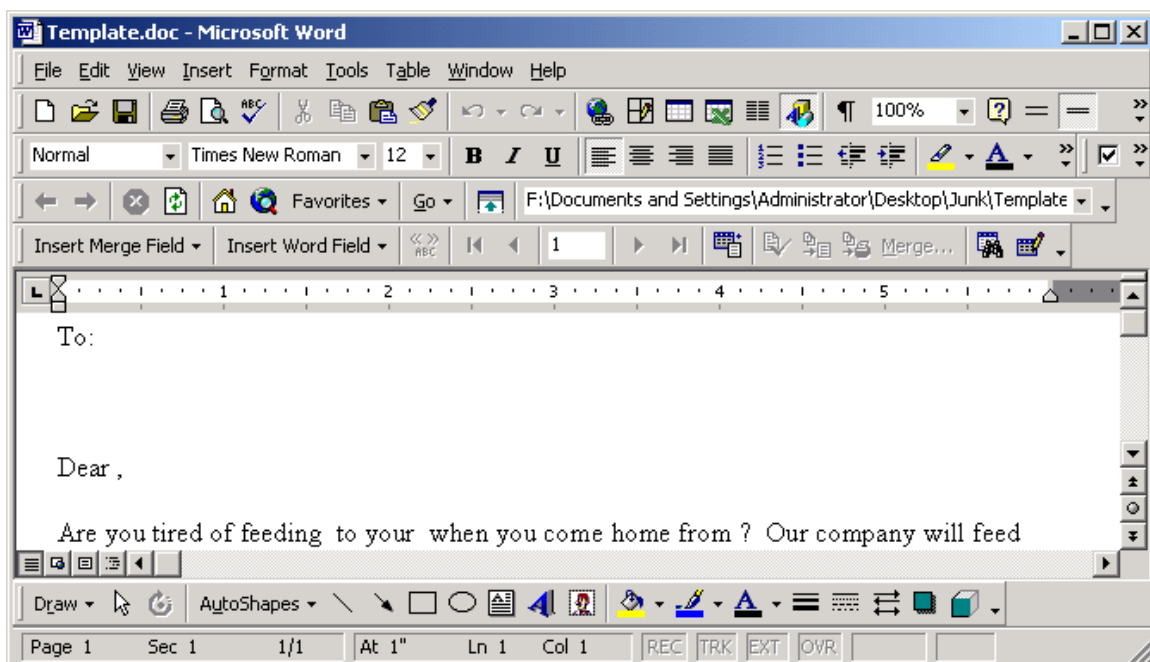
To select the data source for the merge, select **Get Data** → **Open Data Source** and select the correct data source file. *Using our example Excel data file, we would first specify the file type of (MS Excel Spreadsheet), then point to the correct folder, and highlight the correct file (book1.xls). Click **Open**.*

Click **OK** to import the entire range of values (all the records from the spreadsheet).

To begin adding the data fields, click **Edit Main Document**.



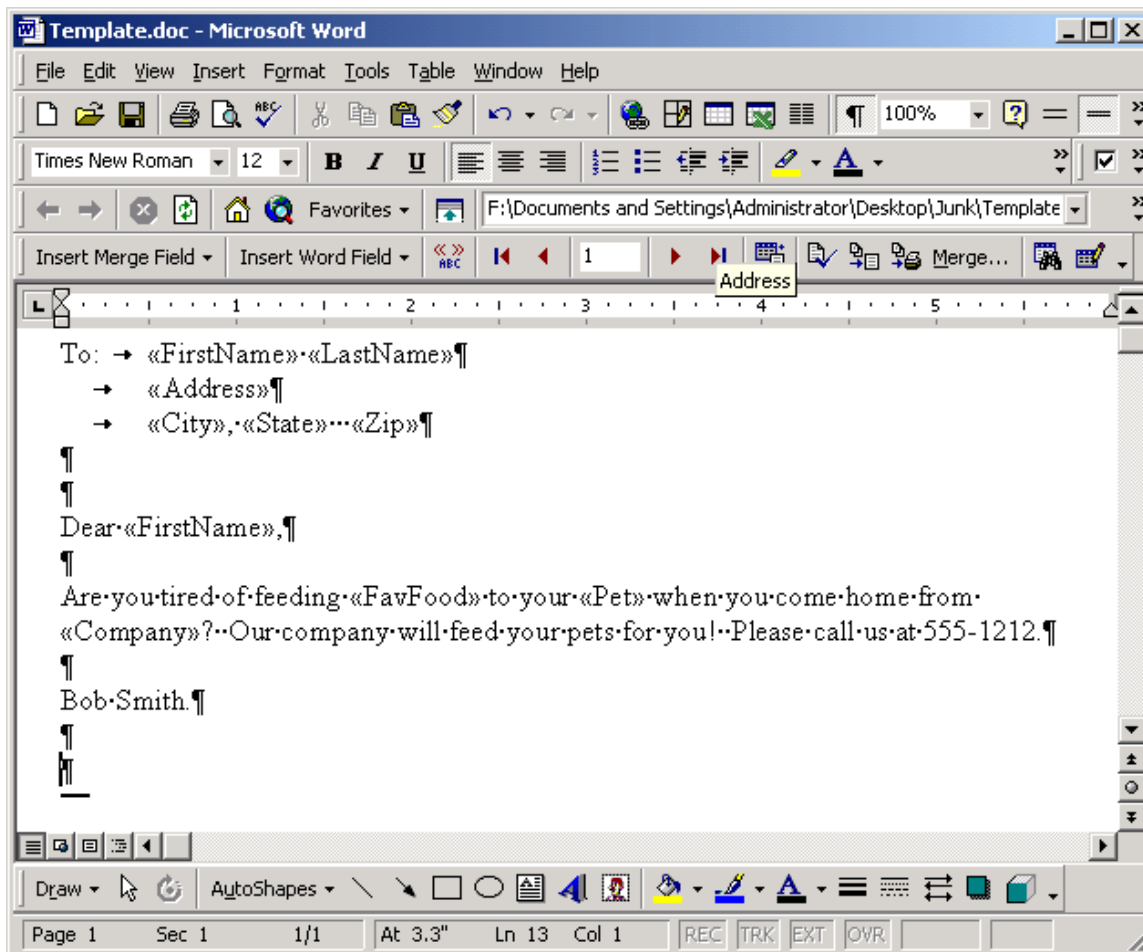
You may notice that there is now a new toolbar in Word. This is the *Mail Merge toolbar*.



We want to copy information fields from our data source into the document in several places. For example, we want the document to contain a greeting, something like “Dear Betty,” or “Dear Fred,”.

To insert data fields into our document, first move the cursor to the correct position (after the word “Dear” and before the comma), then click the **Insert Merge Fields** button on the Mail Merge toolbar and select the correct data field, in this case “FirstName”.

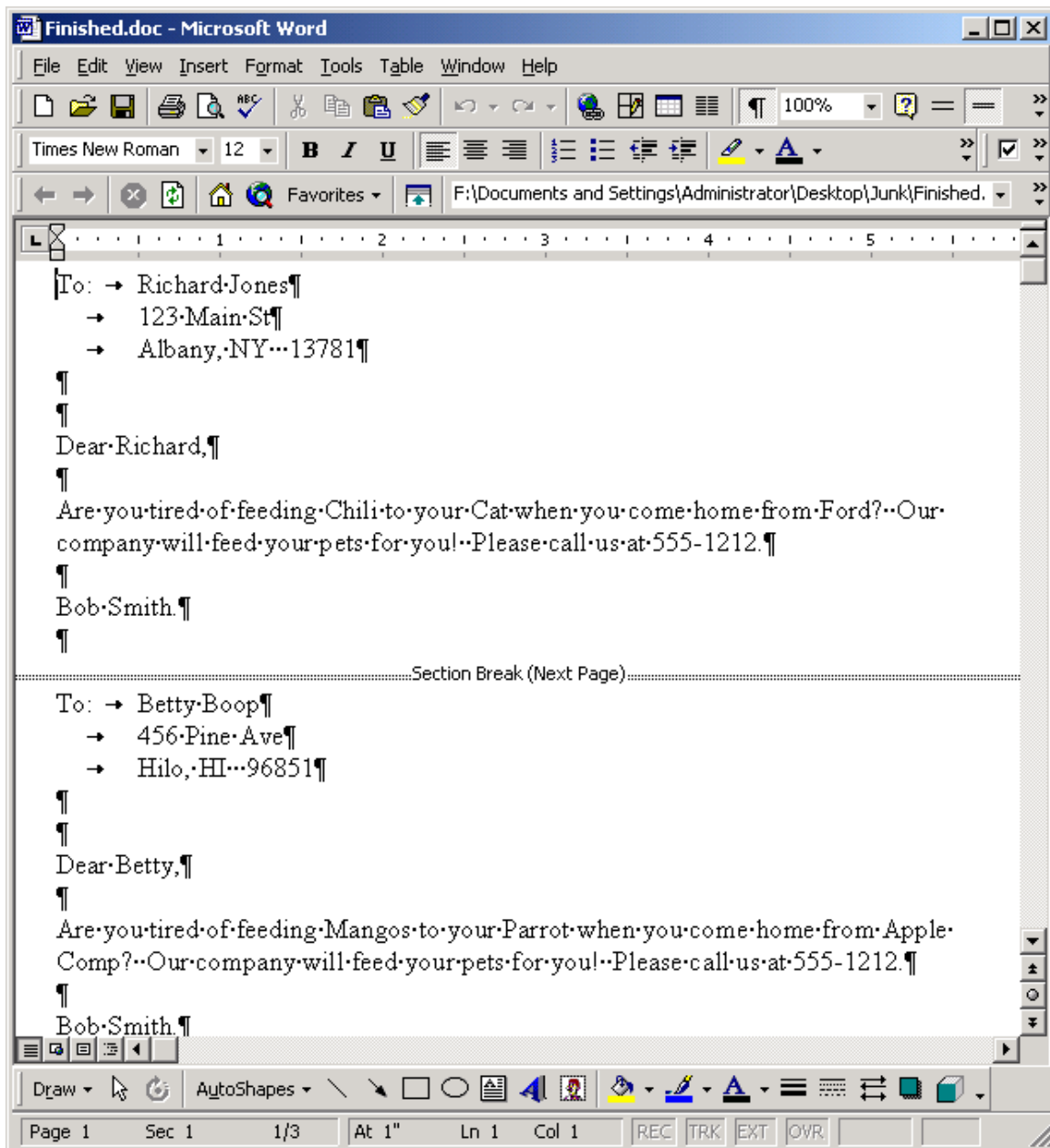
Add all the appropriate fields in the appropriate places so that the finished document looks something like this:



Carefully note where the fields are placed, the spaces and commas between them, etc.

Finally, to perform the actual merge, simply press the **Merge** button on the Mail Merge toolbar. If everything was done correctly, you will now have a new document that contains one unique page for each person in the database. Save this new file under a new name.

This new, merged file is below.



When you print this new file, you will have your mail merge. You can re-use the template with other databases, even databases of different formats.

Advanced Material: Envelopes and Mailing Labels

You can also use *Mail Merge* to address envelopes and print mailing labels. The process is very similar to that outlined above.

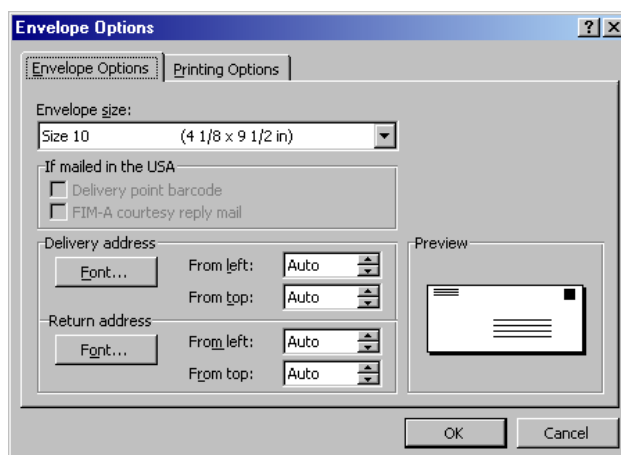
First, you must save your return address in Word. From the main toolbar, select **Tools** → **Options**, then click the **User Information** tab. Enter your return address in the *Mailing Address* field. Click **OK** to save. Word will use this as your default return address when creating envelopes.

ENVELOPES:

Note: Make certain your printer can print envelopes, or them may become jammed and damaged.

1) First, select the template document. Open a new document, **Tools** → **Mail Merge**. (Do not select **Envelopes and Labels**.) As before, the *Mail Merge Helper* will open. Select **Create** → **Envelopes**. Click **Active Window**.

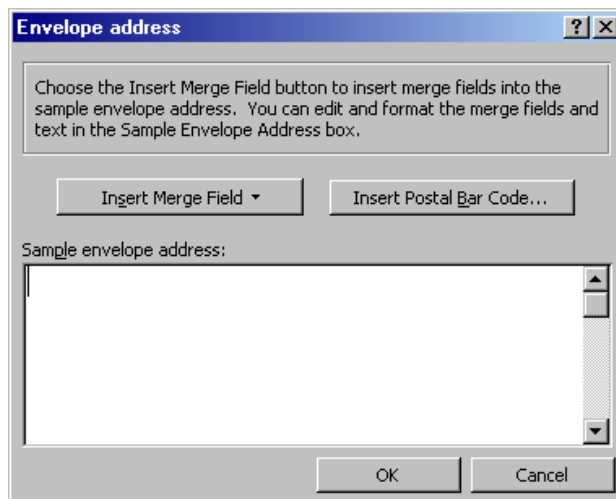
2) Next we select the data source. Select **Get Data** → **Open Data Source** and select the correct data source file. Click **OK** to import the entire range of values (or whatever range is appropriate). Click **Setup Main Document**. The *Envelope Options* window will appear.



3) Select the correct envelope size. You may choose to use different fonts for the return address and delivery address. The *Printing Options* tab allows you to set the method for feeding envelopes to the printer and also the orientation of the envelopes to the printer. When you are satisfied with everything, click **OK**.

4) You are now presented with an *Envelope Address* window. It has an **Insert Merge Field** button, which works just as it did in our previous example. Select the address fields you want to see in the delivery address and position them in the order you would like them on the envelope. When you are done, click **OK**.

5) The last step is to click the **Merge** button in *Mail Merge Helper*. The *Merge* window appears. To place the results of our merge in a new file, click the **Merge** button again.



You will see the results of your merge, formatted as envelopes, complete with your return address. Save this file before you start printing.

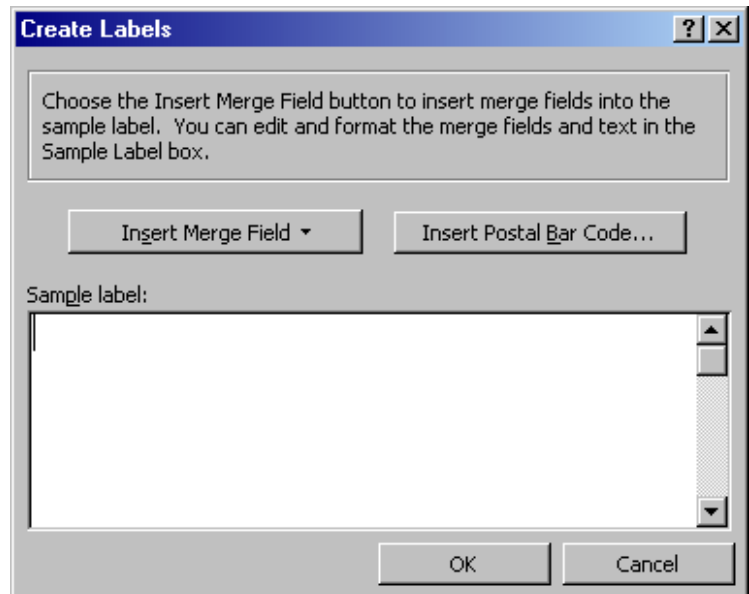
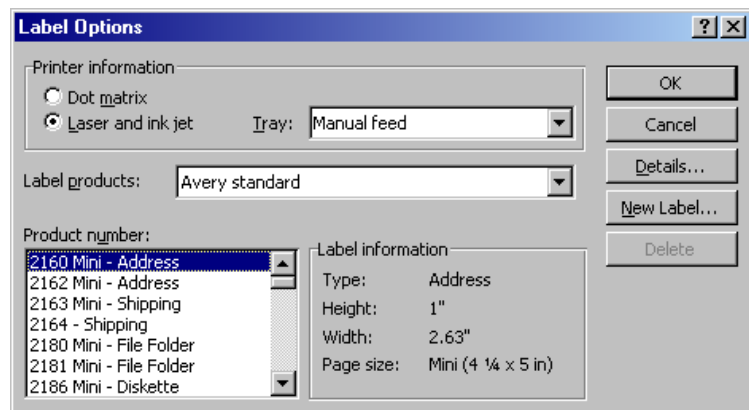
MAILING LABELS:

*Note: **Never** put labels through a laser printer unless they are specifically made for this purpose. Doing so can easily ruin the laser printer.*

The process of creating a mail merge for mailing labels is very similar to the process outlined above for envelopes.

- 1) Set the template document. Open a new document, **Tools** → **Mail Merge**. In the *Mail Merge Helper* window, select **Create** → **Mailing Labels**. Click **Active Window**.
- 2) Select the data source. Select **Get Data** → **Open Data Source** and select the correct data source file. Click **OK** to import the entire range of values, then click **Setup Main Document**.
- 3) The *Label Options* window will appear. All the options on this window are specific to your particular printer, feed method, label stock and label. Word installs with hundreds of popular mailing label formats to choose from. If you are uncertain which to choose, review the documentation that came with the mailing labels. When you are ready, click **OK**.
- 4) The *Create Labels* window will appear. Use the **Insert Merge Field** button to place the fields of the delivery address on the label. Your return address is not automatically included. If you want it, enter it manually. When you are done, click **OK**.
- 5) Click the **Merge** button in *Mail Merge Helper*. Click the **Merge** button again to place the results in a new file.

You will now see the results of your merge, formatted as labels. Save this file before you start printing.



Online References

Good tutorials on Mail Merge for Word 2000 can be found at:

<http://hypatia.math.uri.edu/~lynn/Merging/overview.html>

<http://support.microsoft.com/default.aspx?scid=kb;en-us;Q212329>

Getting Help

For additional assistance, please phone the ITS Help Desk at (808) 956-8883,
send email to **help@hawaii.edu**, or fax (808) 956-2108.
Neighbor islands may call the ITS Help Desk's toll-free phone number at (800) 558-2669.

Or see the ITS Help Desk home page at **www.hawaii.edu/help**

The ITS walk-in Help Desk is located in
Keller 105 and Keller 213 on the UH Mānoa Campus.

The University of Hawai'i is an equal opportunity/affirmative action institution.