Mail Merge
for Microsoft Word 97/98

Creating Data Documents and Main Documents
When you create a form letter, the main document contains the text, punctuation, spaces, graphics, and other information you want to be the same in each form letter. You then insert into the main document special instructions, called merge fields, that tell Word where to print the variable information from the data source. When you merge the main document with the data source, Word replaces the merge fields with the appropriate information from the data source. The Letter Wizard can help you create a form letter.

Creating Main Documents
To create form letters, envelopes, or mailing labels, you merge a main document with a data source. The main document contains the text and other items that remain the same in each version of the form letter, envelopes, or mailing labels. You can use a new or existing document as a main document.

1. To use an existing letter as a form letter, open the letter.
   To create a new letter, click New on the File menu, and then select a letter template.
2. On the Tools menu, click Mail Merge.
3. Click Create, click Form Letters, and then click Active Window.
   The active document becomes the mail-merge main document.
4. Click Get Data.
   To create a new list of names and addresses in Word, click Create Data Source, and then set up the data records.
   To use an existing list of names and addresses in a Word document or in a worksheet, database, or other list, click Open Data Source.
5. After you designate the data source and Word displays a message, click Edit Main Document.
6. In the main document, type the text you want to appear in every form letter.
7. Click where you want to insert a name, address, or other information that changes in each letter. On the Mail Merge toolbar, click Insert Merge Field, and then click the field name that you want.
8. After you insert all of the merge fields and complete the main document, click Mail Merge Helper on the Mail Merge toolbar.
9. Click Merge.
10. In the Merge to box, click New Document.
    To send the form letter only to selected addressees, click Query Options, and then specify criteria for selecting the data records.
11. Click Merge.
    Word places each resulting merged document in a separate section of the new document.

Tip  You can view the resulting form letters before you print them.

Note  To print the document, click Print.
Creating Data Documents

To create form letters, envelopes, or mailing labels, you merge a main document with a data source. The data source contains the information that varies in each version of a merged document, such as the names and addresses of the recipients of a form letter.

1. If the Create Data Source dialog box is not displayed, click anywhere in the main document, and then click Mail Merge Helper on the Mail Merge toolbar. In the Mail Merge Helper dialog box, click Get Data and then click Create Data Source.

2. In the Field names in header row box, review the data fields. Word will include in the data source all data fields in the Field names in header row box unless you delete or change them.

To delete a field, click the field name in the Field names in header row box, and then click Remove Field Name.

To add a field, type a new field name in the Field name box, and then click Add Field Name.

To change the order of the fields, click a field name in the Field names in header row box, and then click one of the arrow buttons.

3. When the Field names in header row box contains all of the fields you need, click OK, and then save the data source.

4. When Word displays a message, click Edit Data Source.

5. In the Data Form dialog box, type the information for each field, and then press ENTER.

If no information exists for a particular field, press ENTER to skip the field. Do not type spaces in the box.

To start a new record, click Add New.

6. To return to the main document after you’ve entered the information, click OK.

Note When prompted, always Save changes to the Data Source or the Main Document.

Viewing Merged Data Records

Display merged data in the main document

1. With the main document in the active window, click View Merged Data on the Mail Merge toolbar.

Word displays information from the first data record in place of the merge fields.
2. To view information from other data records, click the arrow buttons on the Mail Merge toolbar, or type a record number in the Go To Record box.

Tip To print the main document merged with the currently displayed data, click Print.

Sorting and Merging Records
By sorting data records, you can determine the order in which Word merges the data with the main document.

1. With the main document in the active window, click Mail Merge on the Tools menu, and then click Query Options.
2. On the Sort Records tab, click at least one data field, and then click a sort order.

Creating Mailing Labels
You can set up and print mailing labels by using the Mail Merge command. After you set up the main document and the data source, you merge the two documents to create mailing labels, name tags, and other labels. You can use existing label sizes or create custom labels. The Label Wizard can help you create mailing labels. To open the wizard, click New on the File menu, and then click the Letters & Faxes tab.

1. Click New to start a new document.
2. On the Tools menu, click Mail Merge.
3. Click Create, click Mailing Labels, and then click Active Window.
   The active document becomes the mail-merge main document.
4. Click Get Data.
   To create a new list of names and addresses in Word, click Create Data Source, and then set up the data records.
   To use an existing list of names and addresses in a Word document or in a worksheet, database, or other list, click Open Data Source.
   To use addresses from an electronic address book or an Outlook contact list, click Use Address Book.
5. After you designate the data source and Word displays a message, click Set Up Main Document.
6. In the Label Options dialog box, select the type of printer and the type of labels you want to use.
7. In the Create Labels dialog box, insert the merge fields for the address information.
8. In the Mail Merge Helper dialog box, click Merge.
9. In the Merge to box, click New Document.
   To print labels for only selected addressees, click Query Options, and then specify criteria for selecting the data records.
10. Click Merge.

Creating Catalogs
If you select Catalog as the type of main document, all of the merged data is placed in one resulting merged document. Any standard text you add to the main document is repeated for each set of data.

1. Click New to create a new document.
2. On the Tools menu, click Mail Merge.
3. Click **Create**, click **Catalog**, and then click **Active Window**.
   The active document becomes the mail-merge main document.

4. Click **Get Data**.
   To create a new list of names, addresses, or other data in Word, click **Create Data Source**, and then set up the data records.
   To use an existing list of data in a Word document or in a worksheet, database, or other list, click **Open Data Source**.

5. After you designate the data source and Word displays a message, click **Edit Main Document**.

6. In the main document, type any text you want to be repeated with each set of information merged from the data source.
   Do not include text you want to be printed only once in the resulting catalog document, such as headers, footers, and table column headings.

7. Click where you want to insert a name, address, or other information. Then click **Insert Merge Field** on the **Mail Merge** toolbar, and click the field name that you want.

8. After you complete the main document and insert all of the merge fields, click **Mail Merge Helper** on the **Mail Merge** toolbar.

9. Click **Merge**.

10. In the **Merge to** box, click **New document**.
    To merge only selected records from the data source, click **Query Options**, and then specify criteria for selecting the data records.

11. Click **Merge**.
    In the resulting catalog document, add headers, footers, and any other text that you want. For example, if the merged data is formatted as a table, add column headings to the table after the data is merged.

12. To print the catalog document, click **Print**.

**Additional resources:**
Press F1 to activate the **Office Assistant**, then type **form letter** and follow the link to Form letters, envelopes, labels. Click on one of the links shown to get more detailed information.

Or
Select the **Help** menu and choose **Contents and Index**. In the Contents tab, select **Assembling Documents with Mail Merge**.

Or
Other keywords to search on the in **Online Help**:
*Mail merge, data sources, main documents, labels, envelopes*