

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.

Tips on planning a data source

- Allow enough data fields for the data records with the most information.

Some clients on a mailing list might have more address information than others - for example, a business name, a department title, and up to three lines for the address. In a data source, however, all the data records must have the same number of data fields. If a data record doesn't have a particular category of information, leave the field blank for that record.

- Information you want to sort by - for example, city, state, postal code, or addressee's last name - must be in a separate data field.

- To speed mail delivery in the United States, set up addresses to display postal bar codes.

The addressee's ZIP Code and delivery address -- such as a street name and number or a post office box - must be in separate data fields.

- Organize data so that you can use it in different ways.

For example, when you set up a data source to print form letters, plan the address information so that you can use the same data source to print either mailing labels or envelopes. By placing the title, first name, and last name in separate fields, you can use the same field to print the last name in both the address (Mr. Gerard LaSalle) and the salutation (Dear Mr. LaSalle).

- Data sources are best placed in a Word table. The first row must contain the column headings or field names. There must be no blank rows in the table.
- Excel or Access can be used as external data sources.
- In Excel, the same rules apply as in Word; the first row contains the column headings or field names. There must be no blank rows following the first row on within the data area.

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, lables. 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

