



# Microsoft Word Mail Merge

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# Table of Contents

Introduction to Mail Merge.....	1
Mail Merge Wizard.....	1
Mail Merge Toolbar.....	2
Mail Merge Terms.....	3
Create a Label Mail Merge.....	3
Envelopes.....	11
Directory.....	12
Letters.....	12
E-Mail Message Merge.....	15
Advanced Mail Merge.....	16
Mail Merge Toolbar.....	16
Create Labels from Excel Spreadsheet with Conditions.....	18
Insert Word Field.....	22
Ask.....	22
Merge Record #.....	24
Merge Sequence #.....	25
Next Record.....	25
Next Record If.....	25
Set.....	25
Skip Record If.....	25
Comparison Operators.....	26
Data Source.....	28
Access Table.....	28
Excel Spreadsheet.....	29
Word Table.....	30
Text Document.....	30
Outlook Contact List.....	30
Toolbar Conclusion.....	30
Troubleshooting Mail Merge.....	32

## **Introduction to Mail Merge**

Mail Merge is the process you use when you want to create a custom mailing. The most common mail merge documents are letters, labels, envelopes and e-mails. The Mail Merge feature allows you to create documents for a few people or a large group all at the same time. In Word 2003 this process is accomplished through the use of a Mail Merge Wizard that is displayed in a side task pane.

Mail Merge consists of two parts, a main document and a data source. The data source can be contained within Word or can come from alternative data sources like an Access Database Table, an Excel Worksheet or an Outlook Contacts List. The main document contains the text you want to remain constant. It can contain any formatting available in Word. The data source contains the data you want to change for each document.

The steps to complete a mail merge are as follows:

- Select a document type.
- Select the starting document format (such as a label or envelope template).
- Format the starting document (if you are not using a template)
- Select the recipients through selecting a data source.
- Write your letter or e-mail if you have chosen a letter or e-mail as your source document.
- Preview
- Perform a Mail Merge
- Print or send your documents

### ***Mail Merge Wizard***

To open the Wizard, go to Tools→Letters and Mailings→Mail Merge. This will open the Task Pane on your desktop. The default is for the task pane to open to the right of your document. If you would rather have the Task Pane positioned elsewhere on your desktop, click on the four vertical dots to the left of the words “Mail Merge” and drag the task pane to a new location. If you want it to be on the left side of your desktop, drag it to the left until it docks itself to the left of the Word work pane. Word will remember the position of the task pane and open it the next time in the last position you had placed it. You can also float the Task Pane on top of a document, but that generally is not a good idea because it blocks your view. You can change the size of the Task Pane by placing the cursor over the left ruler on the Word pane until it turns into a two way cursor, then drag the pane in the direction you want to increase or decrease.

With the Task Pane open on the left side, your workspace should look something like this:




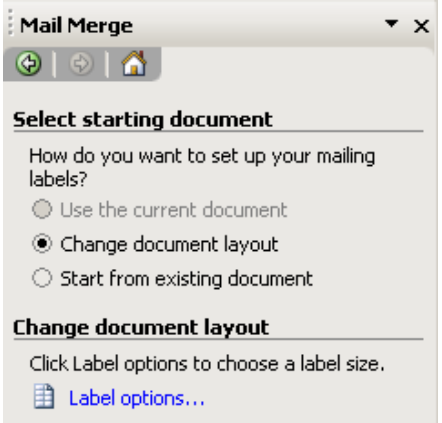

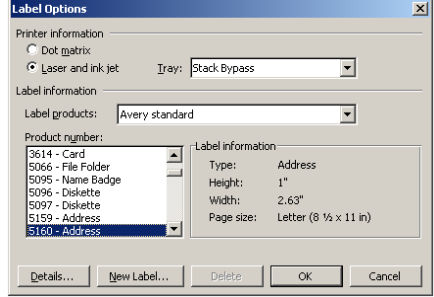
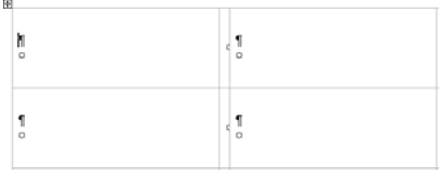
## Mail Merge Terms

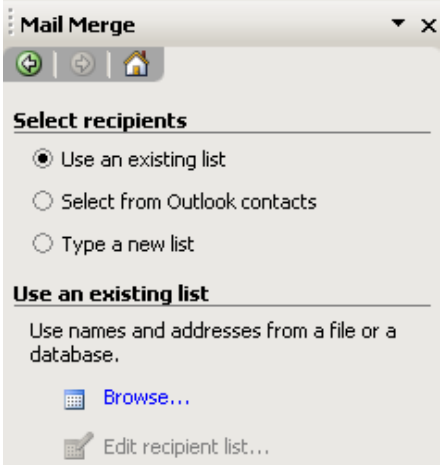

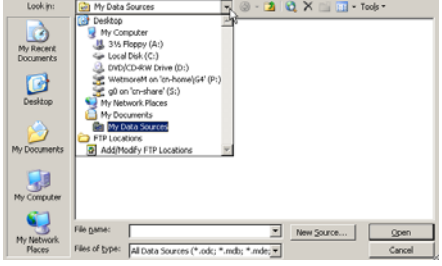
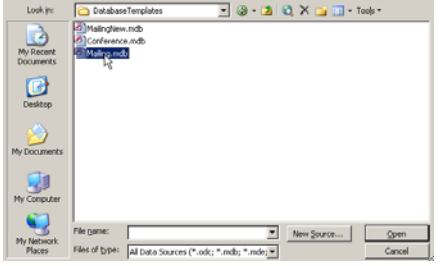
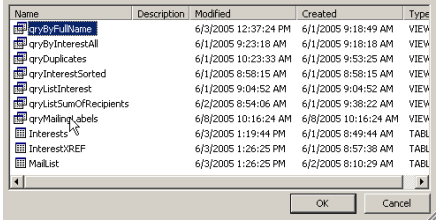
Term	Definition
Address Block	The area of the main document that contains the name, address, title, etc.
Data Source	Common Data Sources are Access tables, Excel spreadsheets, Word tables, or e-mail lists. Data Sources provide the recipient information used in a mail merge.
Filter Records Sort Records	Allows specific records to merge from the data source to the merged document. Sorting allows for detailed filters up to three levels.
Main Document	Main documents contain the information that will appear in the completed mail merge.
Mail Merge Wizard	A built-in assistant to help create mail merge documents, organize data and print merges.
Merge Field	Placeholders used in the main document to let Word know where to insert data source information.
Task Pane	A side pane in Word that allows options for performing specific tasks.

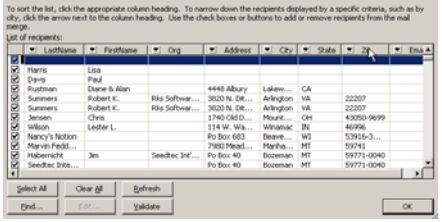

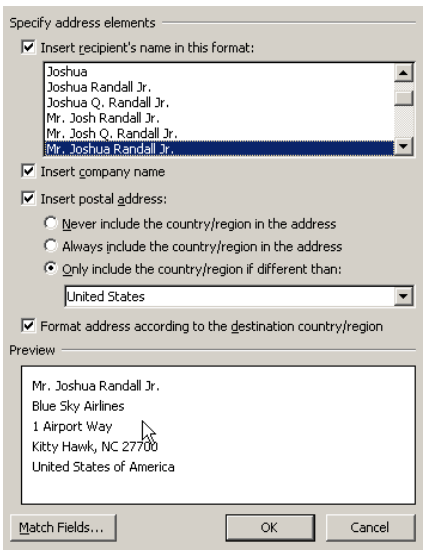
## Create a Label Mail Merge



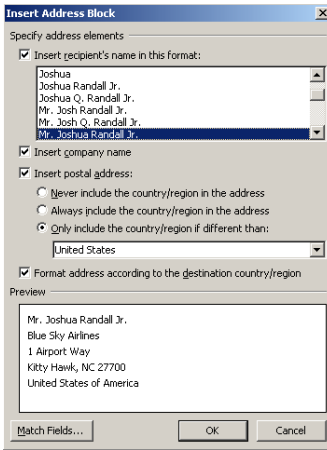
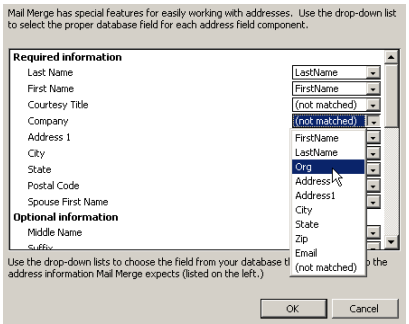
Open a new blank document. Open the Mail Merge Task Pane. Since Mail Merge is very intensive as to formatting, it will be helpful to **Click** on the Show/Hide ¶ icon to turn on **Show Formatting**.


What you do	What you see
<p>1. <b>Select Document Type</b></p> <p>The document types available in Mail Merge are:</p> <ul style="list-style-type: none"> <li>• <b>Letters:</b> Letters are something you may send to a large list of people. You can set up the letter so it is personalized to each recipient.</li> <li>• <b>E-mail Messages:</b> E-mail messages work like letters except that they are formatted in an e-mail style.</li> <li>• <b>Envelopes:</b> You will print Envelopes to use to send letters to the recipients</li> <li>• <b>Labels:</b> Labels will allow you to select from numerous pre-formatted label templates.</li> <li>• <b>Directory:</b> Directory allows you to use Mail Merge to</li> </ul>	


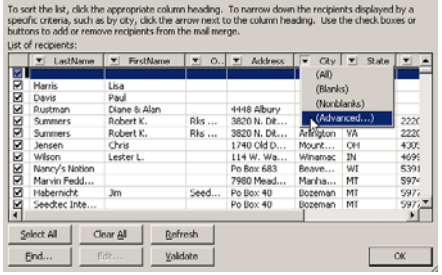
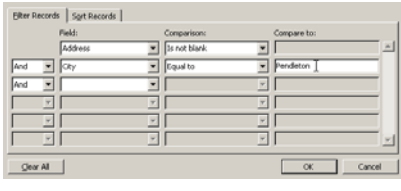
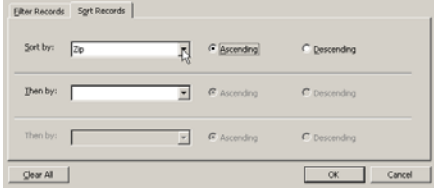
What you do	What you see
<p>create a catalog document containing your list</p> <p>For this tutorial, we will start with Labels. To start, select Labels and then <b>Click</b> on the <b>Next: Starting document</b> link at the bottom of the <b>Merge task pane</b>.</p>	
<p>2. <b>Select Starting Document</b></p> <ul style="list-style-type: none"> <li>• <b>Use the current document:</b> Allows you to use the current document in the editing window as your letter. It is not an available option for labels. This is not an available option for Labels.</li> <li>• <b>Change document layout:</b> Allows you to choose a standardized label layout to use for your labels.</li> </ul> <p><b>Start from existing document:</b> Allows you to select an existing document to work with. If you select this option, Word displays a list of merge documents that you have worked with recently or you can highlight <b>More Files</b> and then choose <b>Open</b> to search for a file. <b>Click</b> the <b>Select Recipients</b> link.</p>	
<p>3. <b>Change document Layout.</b></p> <p>Click on the  <b>Label Options</b> link.</p>	
<p>4. Choose 5160 – Address for three across labels and <b>Click</b> the <b>OK</b> button. <b>Note:</b> This is the most standard label format. It prints 3 across and 10 down.</p>	


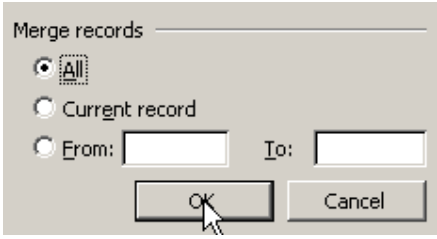
What you do	What you see																																																							
<p>5. <b>Select Recipients</b></p> <p>The Wizard asks you how you want to get your data. Your choices will be:</p> <ul style="list-style-type: none"> <li>• <b>Use an existing list</b> Use names and addresses from a Word document, Excel spreadsheet or Access database. This is the option you will most likely use.</li> <li>• <b>Select from Outlook contacts</b> Select names and addresses from an Outlook contacts folder</li> <li>• <b>Type a new list</b> Type the names and addresses of recipients</li> </ul> <p>For the purposes of this tutorial, choose <b>Use an Existing List</b>.</p>																																																								
<p>6. <b>Click on the  Browse... link.</b> This will bring up the standard Microsoft Browse utility.</p>																																																								
<p>7. Find your data source and highlight it. In this case we are using an Access database calling Mailing.mdb.</p>																																																								
<p>8. When you click on the database, you will be presented with a list of all the queries and tables that can be used by Word for a data source. If you have created a query that doesn't show up on the list, look at the query in Access to see if something is wrong with the query. I chose a query I had created called "qryMailingLabels". This query contains all the information I will need to create a label.</p>	 <table border="1"> <thead> <tr> <th>Name</th> <th>Description</th> <th>Modified</th> <th>Created</th> <th>Type</th> </tr> </thead> <tbody> <tr> <td>qryByFullName</td> <td></td> <td>6/3/2005 12:37:24 PM</td> <td>6/1/2005 9:18:49 AM</td> <td>VIEW</td> </tr> <tr> <td>qryByInterestAll</td> <td></td> <td>6/1/2005 9:23:18 AM</td> <td>6/1/2005 9:18:18 AM</td> <td>VIEW</td> </tr> <tr> <td>qryDuplicales</td> <td></td> <td>6/1/2005 10:23:33 AM</td> <td>6/1/2005 9:53:25 AM</td> <td>VIEW</td> </tr> <tr> <td>qryInterestSorted</td> <td></td> <td>6/1/2005 8:58:15 AM</td> <td>6/1/2005 8:58:15 AM</td> <td>VIEW</td> </tr> <tr> <td>qryListInterest</td> <td></td> <td>6/1/2005 9:04:52 AM</td> <td>6/1/2005 9:04:52 AM</td> <td>VIEW</td> </tr> <tr> <td>qryListSumOfRecipients</td> <td></td> <td>6/2/2005 8:54:06 AM</td> <td>6/1/2005 9:38:22 AM</td> <td>VIEW</td> </tr> <tr> <td>qryMailingLabels</td> <td></td> <td>6/8/2005 10:16:24 AM</td> <td>6/8/2005 10:16:24 AM</td> <td>VIEW</td> </tr> <tr> <td>Interests</td> <td></td> <td>6/3/2005 1:19:44 PM</td> <td>6/1/2005 8:49:44 AM</td> <td>TABL</td> </tr> <tr> <td>InterestsREF</td> <td></td> <td>6/3/2005 1:26:25 PM</td> <td>6/1/2005 8:57:38 AM</td> <td>TABL</td> </tr> <tr> <td>MailList</td> <td></td> <td>6/3/2005 1:26:25 PM</td> <td>6/2/2005 8:10:29 AM</td> <td>TABL</td> </tr> </tbody> </table>	Name	Description	Modified	Created	Type	qryByFullName		6/3/2005 12:37:24 PM	6/1/2005 9:18:49 AM	VIEW	qryByInterestAll		6/1/2005 9:23:18 AM	6/1/2005 9:18:18 AM	VIEW	qryDuplicales		6/1/2005 10:23:33 AM	6/1/2005 9:53:25 AM	VIEW	qryInterestSorted		6/1/2005 8:58:15 AM	6/1/2005 8:58:15 AM	VIEW	qryListInterest		6/1/2005 9:04:52 AM	6/1/2005 9:04:52 AM	VIEW	qryListSumOfRecipients		6/2/2005 8:54:06 AM	6/1/2005 9:38:22 AM	VIEW	qryMailingLabels		6/8/2005 10:16:24 AM	6/8/2005 10:16:24 AM	VIEW	Interests		6/3/2005 1:19:44 PM	6/1/2005 8:49:44 AM	TABL	InterestsREF		6/3/2005 1:26:25 PM	6/1/2005 8:57:38 AM	TABL	MailList		6/3/2005 1:26:25 PM	6/2/2005 8:10:29 AM	TABL
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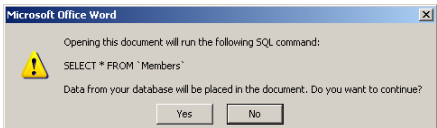
What you do	What you see
<p>9. When you choose your data source, you will be presented with a screen displaying a list of records from your source. The fields will be in an order Word picks, not in the order you placed them in your query or table. You can move a field by clicking on its title and dragging it where you want it. I dragged Org over next to FirstName.</p> <p>The list will appear with all recipients already selected. If you want to exclude a recipient from the list, uncheck their name. At this point you can do some advanced functions on your list like setting a filter and sorting the record. But, my research has found that if you do these things at this point, it will change before you create your labels. So, we will filter the list and sort the list at a later point in this process. For now, let's move on to the next step. Click <b>Next: Arrange your Labels</b> on the Merge Wizard.</p>	
<p>10. <b>.Arrange your Labels</b> – For this portion of the tutorial, choose <b>Address Block</b>.</p>	
<p>11. When you <b>Click</b> the down arrow to choose a field to filter, you can select <b>Advanced</b>. <b>Advanced</b> offers two more opportunities to further enhance your mailing list, but they will not be covered here. They will be covered in the Advanced Mail Merge part of this manual.</p>	

What you do	What you see
<p>12. Your document should now look like this:</p>	
<p>13. <b>Arrange your Labels</b></p> <p>You now need to arrange your labels in the document you have created.</p> <p>Place the cursor in the empty label box at the top of the document. Choose <b>Address Block</b> from the list.</p>	
<p>14. An address block typically looks like this:</p> <p>Jane Doe 123 Anywhere St. Nowhereville, OR 97333</p> <p>This is where you format how you want the recipient information to appear. You can choose how the name is formatted, whether to use the Company name and/or postal address, etc.</p>	
<p>15. Click on the <b>Match Fields</b> button at the bottom to match the data source fields to the <b>Address Block</b> template.</p> <p>It is very important that you match all the fields that will be used in the <b>Address Block</b>. Word makes its best guess what field in your table relates to the information in the <b>Address Block</b>. If it finds something like “Address1”, it will match that field with Address 1. If you name the field something different like “A1”, then Word probably won’t make the match and matching the fields will be up to you. Word defaults to a field called Address 1 for the address field. If the address field in your Data Source is called “Address” you will need to change it like I did. I also changed “Company” to “Org” since my data source does</p>	

What you do	What you see
<p>not have a company name.</p> <p>One disadvantage of using the <b>Address Block</b> feature is that it only gives you one line for an address. If you have two lines for your address, you will have to use the <b>More Items</b> option as follows.</p>	
<p>16. <b>More Items.</b> You can use this option whenever you want to control the fields that are placed on a merge document. When you click on the link, you will see a list of all the fields that are available to you. To use this option, place your cursor in the first label and then <b>Double click</b> on each field you want on the label. Your label should now look like the first example. Now all you need to do is to format the label. Put a space between First and Last Name fields, put a paragraph mark next to both address fields, etc.</p> <p>When you are done, your label should look like the second example. Formatting can be a little disconcerting because when you click in the space between two fields, the field to the right is highlighted. Don't worry about it, must put the formatting where it belongs. If you put a space between two fields and the next field jumps to the next line, it will jump back up when you put the appropriate paragraph mark in.</p>	<pre>«FirstName»«LastName»«Address» «Address1»«City»«State»«Zip Code»¶ ¶  «FirstName»·«LastName»¶ «Address»¶ «Address1»¶ «City»,·«State»·«ZipCode»¶ ¶</pre>
<p>17. When you use the <b>Address Block</b>, the page format changes to show the beginning <b>Address Block</b>. No matter how you format the fields, you then need to add the formatted fields to all the labels in the document.</p> <p><b>Click</b> once on the <b>Update All labels</b> Icon. This function takes all the information contained in the first label and copies it to all the labels on the page. So, let's say you want to make badges with a Mail Merge. You can type "OSU Fellowship" centered and then put merge code for the recipient's first and last name under the first line of text and when you click <b>Update all labels</b> the text and all formatting will be placed in each label space.</p>	<div data-bbox="998 1115 1432 1297"> <p><b>Replicate labels</b></p> <p>You can copy the layout of the first label to the other labels on the page by clicking the button below.</p> <p><input type="button" value="Update all labels"/></p> </div> <pre>«AddressBlock»¶           «Next-Record»«AddressBlock»¶ □                           □  «Next-Record»«AddressBlock»¶  «Next-Record»«AddressBlock»¶ □                               □</pre>
<p>18. Preview your Labels</p> <p><b>Click Next: Preview your Labels.</b> You can view how your labels will look by scrolling through your labels by <b>Clicking</b> the left or right arrow. You can <b>Find</b> a recipient by using the Find option.</p>	<div data-bbox="998 1604 1416 1814"> <p><b>Preview your labels</b></p> <p>Some of the merged labels are previewed here. To preview another label, click one of the following:</p> <p><input type="button" value="&lt;&lt;"/> Recipient: 1 <input type="button" value="&gt;&gt;"/></p> <p> <a href="#">Find a recipient...</a></p> </div>

What you do	What you see																																																																																				
<p>19. Here is where we want to <b>Edit</b> the recipients list by applying a filter and sorting the labels. Click on the <b>Edit Recipient List</b> link.</p>	<p><b>Make changes</b></p> <p>You can also change your recipient list:</p> <p> <a href="#">Edit recipient list...</a></p> <p>When you have finished previewing your labels, click Next. Then you can print the merged labels or edit individual labels to add personal comments.</p>																																																																																				
<p>20. For this part of the tutorial, we will Filter the recipients list so that blank records will not be printed and then filter only labels for one city. We will sort the labels in zip order.</p> <p>Click on the down arrow next to the City field and choose <b>Advanced</b>.</p>	 <p>To sort the list, click the appropriate column heading. To narrow down the recipients displayed by a specific criteria, such as by city, click the arrow next to the column heading. Use the check boxes or buttons to add or remove recipients from the mail merge.</p> <table border="1"> <thead> <tr> <th>Last Name</th> <th>First Name</th> <th>O.</th> <th>Address</th> <th>City</th> <th>State</th> <th>Zip</th> </tr> </thead> <tbody> <tr><td><input checked="" type="checkbox"/></td><td>Harris</td><td>Lisa</td><td></td><td>(All)</td><td></td><td></td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Davis</td><td>Paul</td><td></td><td>(Blanks)</td><td></td><td></td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Rustman</td><td>Diane &amp; Alan</td><td>4448 Albany</td><td>(Blanks)</td><td></td><td></td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Summers</td><td>Robert K.</td><td>Rls ...</td><td>Advanced...</td><td></td><td>2220</td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Summers</td><td>Robert K.</td><td>Rls ...</td><td>3820 N. Dr...</td><td>Arlington</td><td>VA 2220</td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Jensen</td><td>Chris</td><td>1740 Old D...</td><td>Mount...</td><td>OH</td><td>4300</td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Wilson</td><td>Lester L.</td><td>114 W. Wa...</td><td>Winamac</td><td>IN</td><td>4699</td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Nancy's Notion</td><td></td><td>Po Box 683</td><td>Beavere...</td><td>WI</td><td>5391</td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Marvin Field...</td><td></td><td>7980 Head...</td><td>Marble...</td><td>MT</td><td>5974</td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Habermacht...</td><td>Jim</td><td>Seed...</td><td>Po Box 40</td><td>Bozeman</td><td>MT 5972</td></tr> <tr><td><input checked="" type="checkbox"/></td><td>SeedRec Inte...</td><td></td><td>Po Box 40</td><td>Bozeman</td><td>MT</td><td>5972</td></tr> </tbody> </table>	Last Name	First Name	O.	Address	City	State	Zip	<input checked="" type="checkbox"/>	Harris	Lisa		(All)			<input checked="" type="checkbox"/>	Davis	Paul		(Blanks)			<input checked="" type="checkbox"/>	Rustman	Diane & Alan	4448 Albany	(Blanks)			<input checked="" type="checkbox"/>	Summers	Robert K.	Rls ...	Advanced...		2220	<input checked="" type="checkbox"/>	Summers	Robert K.	Rls ...	3820 N. Dr...	Arlington	VA 2220	<input checked="" type="checkbox"/>	Jensen	Chris	1740 Old D...	Mount...	OH	4300	<input checked="" type="checkbox"/>	Wilson	Lester L.	114 W. Wa...	Winamac	IN	4699	<input checked="" type="checkbox"/>	Nancy's Notion		Po Box 683	Beavere...	WI	5391	<input checked="" type="checkbox"/>	Marvin Field...		7980 Head...	Marble...	MT	5974	<input checked="" type="checkbox"/>	Habermacht...	Jim	Seed...	Po Box 40	Bozeman	MT 5972	<input checked="" type="checkbox"/>	SeedRec Inte...		Po Box 40	Bozeman	MT	5972
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<input checked="" type="checkbox"/>	SeedRec Inte...		Po Box 40	Bozeman	MT	5972																																																																															
<p>21. Set the Address to Is Not Blank and the City Equal to "xxxxx" (choose a city). Then click on the Sort Records tab.</p>																																																																																					
<p>22. Set <b>Sort By</b> to Zip. The program will refresh the labels when you hit OK so that you will have an active filter and the labels will be in a sort order.</p>																																																																																					

What you do	What you see
<p>23. Complete the merge</p> <p>Before you complete the merge by choosing either Print or Edit individual labels, you might want to save your merge document so that you can use it again later. You should assign it a name like “lblMergeXXX” with the XXX being an identifying name. By using the “lblMerge” format, you will know immediately that this is a label merge document when you want to use it again. Word saves the document linked to the <b>Data Source</b>. If you make changes to the <b>Data Source</b>, the change will be reflected the next time you open your labels merge document.</p> <p>Your choices to complete the merge will be <b>Print</b> and <b>Edit individual labels</b>.</p> <p>We highly recommend you choose the Edit individual labels option. This will create a new Word document containing your merged labels. Printing your labels from the new merged document has the added benefit of allowing you to start where you left off if something interrupts printing your labels. If you want to save a copy of the labels you printed, you might want to name it something like “lblxxx05-02-05” with the “xxx” representing something descriptive. That way you will be able to distinguish the document that contains the merged labels from the actual merge document.</p>	
<p>24. Click on the Edit individual labels link. Select the All option and click OK. Word will then create a new document with all your labels in the new document with a filter and or sort if you chose them. When it is done, you will be in the new document, so don't get confused and think you are still in the Merge document.</p>	

What you do	What you see
<p>25. Reusing a Merge Document. If you want to use a merge document again, you have several ways you can do it.</p> <p>When you open a Merge document with a saved link, you will see the prompt shown in the example. At this point if you say “yes”, the document will open still linked to the original Data Source. If you say “no”, the document will open with the merge formatting intact but it will not be linked to a data source.</p> <p>When you open a saved merge document, with the Document Source attached, and then you open the Merge Wizard, the Wizard should open at the Select Recipients page. If it doesn’t open to that item in the Merge Wizard, use the links at the bottom of the Wizard to get to where you can select your data source. This will allow you to change the Data Source if you want to use the Merge formatting for a different set of labels.</p> <p>If you open the document without the Data Source and then open the Wizard, the Wizard will open at the beginning since it will think you want to start over. If you choose to use one Master Merge document to print labels from different label sources, you will have to be careful that you name the various fields exactly the same in the different data sources, otherwise the merge won’t be able to find the appropriate field when it formats the merge. Actually, it is always a good idea to have a standard set of field names you use for all data sources, such as always using “lname” for Last Name.</p>	



**Tip:** If you need to stop working on a mail merge, you can save the merge document and resume the merge later. Word retains the link to the data source and all document information. When you open the saved merge document and then the Merge Wizard, the Wizard will open at the place where you stopped in the merge document.

## Envelopes

Envelopes work the same as labels except that you will choose from Envelope options rather than Label options when you are creating the document layout. When you get to the **Arrange Envelope** option, you need to place the cursor next to the ¶ mark in the center of the envelope rather than the upper left where it defaults. Otherwise all your recipient addresses will be placed in the wrong spot on the envelope. When you **Preview** your envelopes, you can scroll through the recipients by **Clicking** on the double arrow icons. You can **Find** a particular recipient by using the **Find a recipient** option. You can also choose **Exclude this recipient** if you want to skip printing an envelope for a particular recipient. A better option, though, would be to exclude the recipient by editing the list before you create the labels. As with labels,



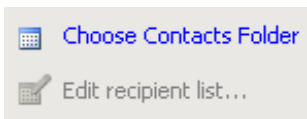
Envelopes allows you to edit individual envelopes before you print them. Word saves envelopes in the same format as labels.

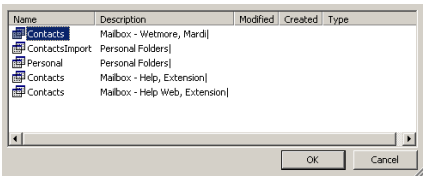

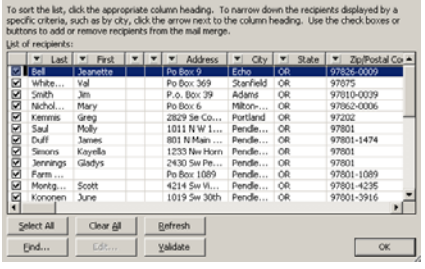
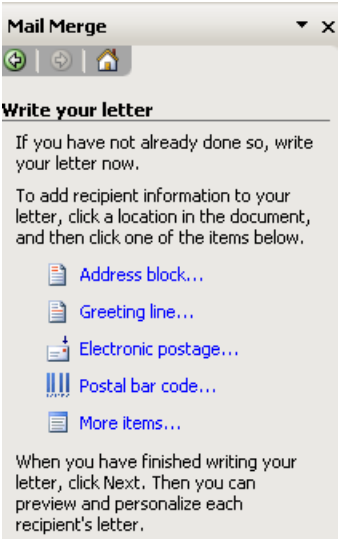

## Directory


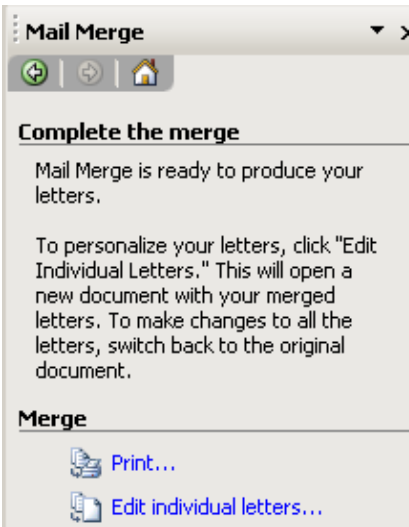
When you create a directory, and place the merge block of data, you need to put two paragraph marks ¶ after you have entered the code for your data fields. When you go to print a directory, it prints any formatting and the data fields you selected. If you don't put any formatting after the code for the data fields, your directory will print in a "run-on" style. If you place one paragraph mark after the data, your directory will print without any separation between each block of data. A tip for printing a directory is to use a label format to print your data.

## Letters

To start, create a new blank document and bring up the Mail Merge Wizard. For this exercise, we will start from scratch.

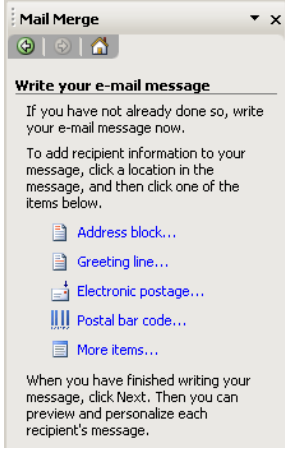
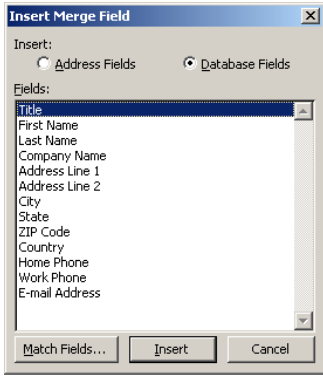


What you do	What you see
<p>1. Select <b>Letters</b>. Click on the <b>Starting a document</b> link</p>	
<p>2. Choose <b>Use the current document</b> instead of choosing a template.</p>	
<p>3. As with Labels and Envelopes, you are asked to choose how you want to create your list of recipients. For the purposes of this exercise, choose <b>Select from Outlook Contacts</b> and <b>Click on the Choose Contacts Folder</b> link.</p>	

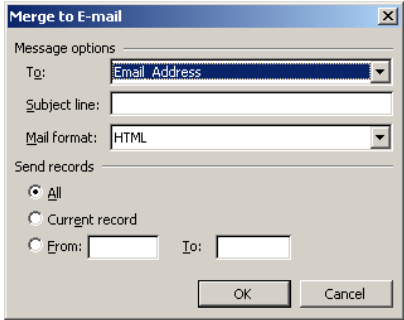
What you do	What you see
<p>4. The program will show you all the Contact lists it can find in Outlook. Highlight the Contact List you want to use and click on the OK button.</p>	
<p>5. The program then opens the recipients dialog box. This dialog box works exactly the same as outlined in the Labels portion of this Manual.</p> <p> <b>Tip:</b> This window defaults to opening with all recipients selected. If you want to include only a few recipients in the list, click <b>Clear All</b>, and then select the records you want.</p> <p><b>Note:</b> It is always a good idea to exclude blank records. To do this, <b>Click</b> on the down arrow by a field you know should not be blank (like the Last Name) and choose (Nonblanks). When you have a filter set on a field, the down arrow will turn to blue.</p>	
<p>6. <b>Click</b> on the <b>Next: Write your letter</b> link at the bottom of the Wizard. Type a sample letter or copy text from an existing document and paste it into the document you are using. Make sure you have a ¶ mark at the top of the document.</p>	
<p>7. Place the cursor to the left of the ¶ mark at the top of the document. <b>Click</b> the <b>Address block</b> link. Format your address block and <b>Click</b> the <b>OK</b> button. Since this is a letter, you will also want to format a greeting. <b>Click</b> the <b>Greeting line</b> link and format your greeting.</p>	

What you do	What you see
<p>8. Click the <b>Next: Preview your letters</b> link. As with Labels and Envelopes, you can scroll through your letters or find a particular recipient. You can also edit a recipient and/or exclude a recipient. Again, when you edit a recipient in the recipient list, the change will be saved to the <b>Data Source</b>.</p>	 <p><b>Mail Merge</b></p> <p><b>Preview your letters</b></p> <p>One of the merged letters is previewed here. To preview another letter, click one of the following:</p> <p>&lt;&lt; Recipient: 1 &gt;&gt;</p> <p><a href="#">Find a recipient...</a></p> <p><b>Make changes</b></p> <p>You can also change your recipient list:</p> <p><a href="#">Edit recipient list...</a></p> <p><input type="button" value="Exclude this recipient"/></p> <p>When you have finished previewing your letters, click Next. Then you can print the merged letters or edit individual letters to add personal comments.</p>
<p>9. Complete the Merge by clicking on <b>Complete the merge</b>. As with labels, choose <b>Edit individual records</b>. This will create a new document with all your merged letters in it. And, you can edit the individual letters at this point. When you save the original merge letter, it will be linked to your data source.</p>	 <p><b>Mail Merge</b></p> <p><b>Complete the merge</b></p> <p>Mail Merge is ready to produce your letters.</p> <p>To personalize your letters, click "Edit Individual Letters." This will open a new document with your merged letters. To make changes to all the letters, switch back to the original document.</p> <p><b>Merge</b></p> <p><a href="#">Print...</a></p> <p><a href="#">Edit individual letters...</a></p>

## E-Mail Message Merge

First, follow steps 1-5 for Letters except that you will be composing an e-mail rather than a letter. Then:

What you do	What you see
<p>1. <b>Click</b> on the <b>More Items</b> link. This link contains all the fields that are available to use as merge fields.</p>	 <p>The screenshot shows the 'Mail Merge' dialog box with the 'Write your e-mail message' section active. It provides instructions on how to add recipient information and lists options: Address block..., Greeting line..., Electronic postage..., Postal bar code..., and More items... The 'More items...' option is highlighted.</p>
<p>2. Choose the field in your <b>Data Source</b> that represents the e-mail address. In this case it is E-mail Address. Highlight the field and <b>Click</b> the <b>Insert</b> button.</p>	 <p>The screenshot shows the 'Insert Merge Field' dialog box. The 'Database Fields' radio button is selected. A list of fields is shown, with 'E-mail Address' highlighted at the bottom. Buttons for 'Match Fields...', 'Insert', and 'Cancel' are visible at the bottom.</p>
<p>3. Preview your e-mail message</p> <p><b>Click</b> on the <b>Next: Preview your e-mail messages</b> link. Your work space should now look like this:</p> <p>As usual, you can scroll through the entire list, Find a recipient, exclude a recipient, and make changes to the <b>Data Source</b> if the Edit option is available.</p>	 <p>The screenshot shows the 'Mail Merge' dialog box in the 'Preview your e-mail messages' step. It displays a list of recipients with a preview of the merged message content, including a name and address. Buttons for navigation and editing are visible.</p>
<p>4. Complete the merge.</p> <p>Now, this is <b>IMPORTANT</b>. Don't click on the <b>Electronic Mail</b> link until you are ready to send the messages. Once you click on the link, Word will fire up Outlook and send your messages. So, if you are practicing on phony data, if you click that link you will send a lot of bad data to the mail server and end up with a bunch of Systems Administrator messages telling you that they can't send your e-mail. And the</p>	 <p>The screenshot shows the 'Mail Merge' dialog box in the 'Complete the merge' step. It states 'Mail Merge is ready to produce your e-mail messages.' and features a prominent 'Electronic Mail...' button with an envelope icon.</p>

What you do	What you see
Administrator will keep trying, so your only option, if you do that, is to cancel all the messages.	
<p>5. When you <b>Click</b> on the <b>Electronic Mail</b> link, you will be asked to provide the information contained in the dialog box to the right. If you don't designate a Subject line, the E-mail will go out with a blank subject line. If this option can't find a field it can relate to as an e-mail address, the "To:" in the dialog box will be blank. You will need to go to the drop-down list and chose the field that contains a valid e-mail address. Once you hit <b>OK</b> here, there is no turning back. Outlook will send all the e-mail messages in your merge. There is no way to stop it!</p>	

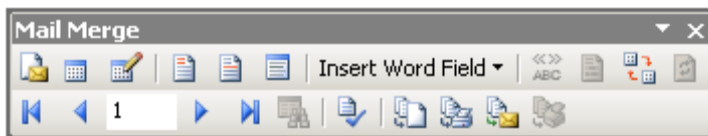
If you would like to learn more about the Mail Merge toolbar and data sources, continue on with the Advanced Mail Merge section of this manual..



## Advanced Mail Merge











### *Mail Merge Toolbar*







To perform this tutorial you will need to retrieve a document called "members.zip". You can find it [here](#). Unzip the documents in a place where it is convenient to get to because you will be retrieving data from this directory.

Since you are now familiar with Mail Merge using the Wizard, we are going to do a merge using the Toolbar. We are also going to explore some advanced concepts such as Data Sources.



Icon	Purpose
	<p><b>Main Document Type</b></p> <p>Brings up a Main Document Type window. This is where you choose what kind of a Merge document you want to create. If you choose either Labels for Envelopes, you will be asked to choose the format for the merge.</p>
	<p><b>Open Data Source</b></p> <p>Brings up the standard Windows find a file window.</p>

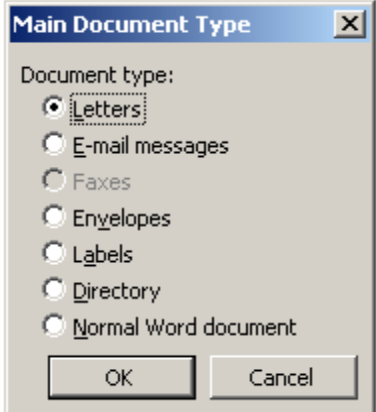
Icon	Purpose
	<p><b>Mail Merge Recipients</b></p> <p>Brings up a new window with all the merge recipient information. Allows you to sort, filter, etc. You can also edit the Data Source if the <b>Edit</b> button is available.</p>
	<p><b>Insert Address Block</b></p> <p>Brings up the window where you format the Address Block. Inserts code for Address Block in document.</p>
	<p><b>Insert Greeting Line</b></p> <p>Brings up the window where you can format the Greeting Line. Inserts code for Greeting Line in document.</p>
	<p><b>Insert Merge Field</b></p> <p>Brings up a window that contains a complete list of all fields in data source. Inserts code for any merge field you choose.</p>
	<p><b>Insert Word Field</b></p> <p>Inserts a special merge code to control how the merge will continue (e.g., next record, If, Then, Else). These are called “condition statements”</p>
	<p><b>View Merged Data.</b></p> <p>Switches to “view mode” so that you can see what your merge document looks like with data inserted..</p>
	<p><b>Highlight Merge Field.</b></p> <p>Highlights all the merge fields in your document.</p>
	<p><b>Match Fields.</b></p> <p>Matches fields in your data source to merge fields in Word so as to avoid renaming them.</p>
	<p><b>Propagate Labels.</b></p> <p>Creates all the merge fields from the initial merge field.</p>
	<p><b>Scroll Records.</b></p> <p>Allows you to scroll through your recipient data.</p> <ul style="list-style-type: none"> <li>• The end buttons will move to the first or last record in the data document.</li> <li>• The middle buttons will move to the previous or next record in the data document.</li> <li>• The number in the center identifies the current record.</li> </ul>

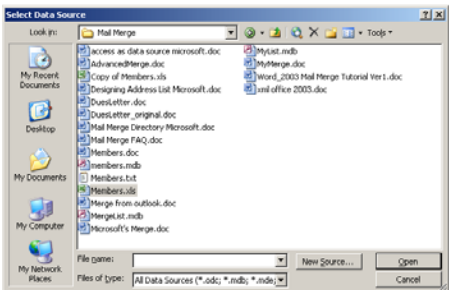
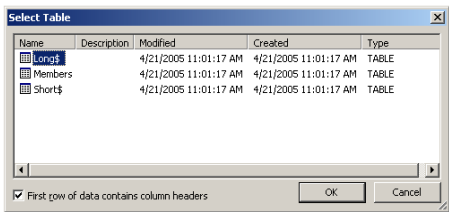
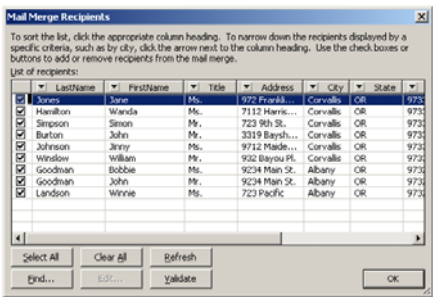
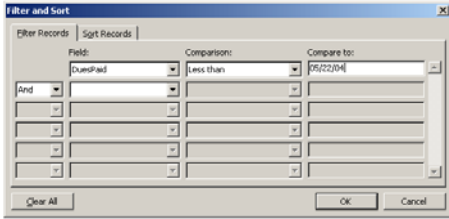
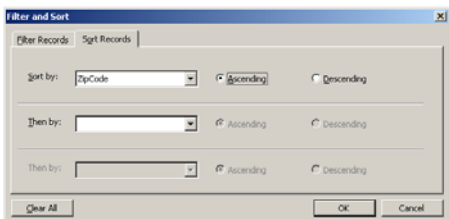
Icon	Purpose
	<b>Find Entry.</b> Allows you to find a specific recipient merge record.
	<b>Check for Errors.</b> Reviews the current document for errors in the merge commands.
	<b>Merge to New Document.</b> Merges the document into a new word file.
	<b>Merge to Printer.</b> Prints your merge document.
	<b>Merge to E-Mail.</b> Processes e-mails through Outlook. Be careful to have all data correct or you will end up with lots of return mail!
	<b>Merge to Fax.</b> If you have Fax software installed on your computer, you can perform a merge to fax the documents.

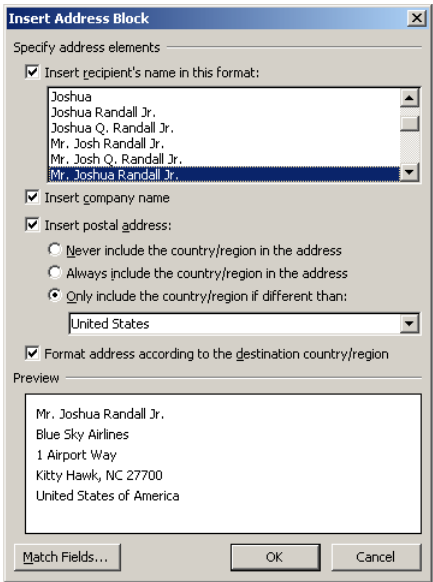
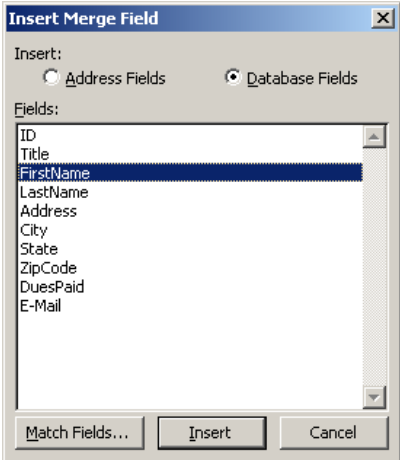
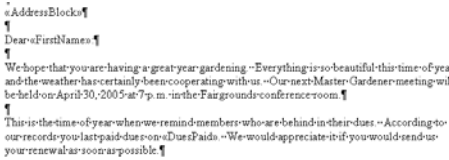
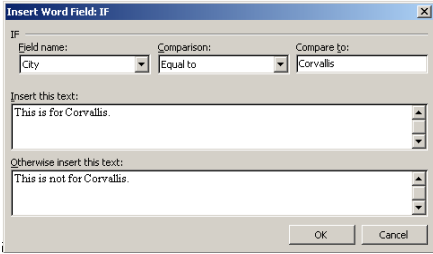
To explore the toolbar, we will create new labels from the data files you downloaded.

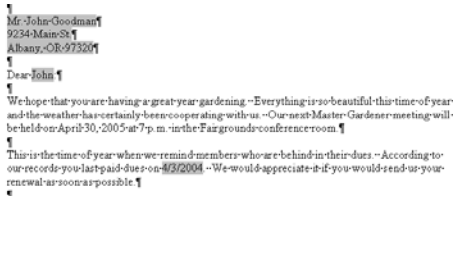
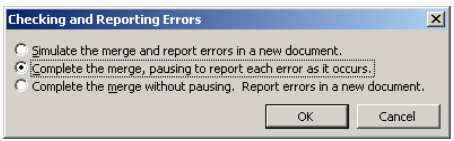
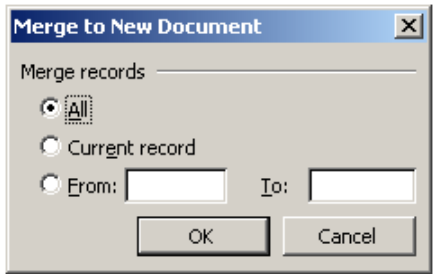
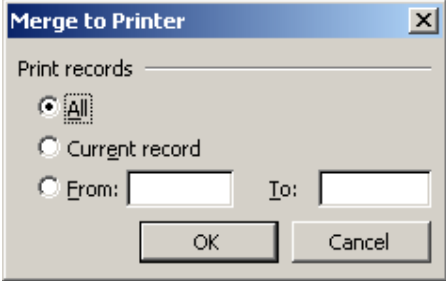
### ***Create Labels from Excel Spreadsheet with Conditions***

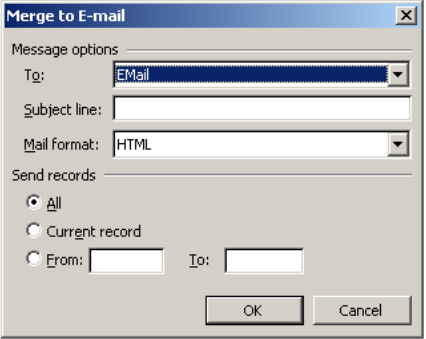
Open the DuesLetter.doc you downloaded. Also open the Mail Merge toolbar (View→Toolbars→Mail Merge).

What you do	What you see
1. Click on the <i>Main Document Type</i> Icon. Choose Letters.	

What you do	What you see
<p>2. Click on the <b>Open Data Source</b> icon. Find the members.xls document you downloaded and Click on the <b>Open</b> button</p>	
<p>3. From the <b>Select Table</b> dialog box, highlight Long\$. Also make sure that <b>First row of data contains column headers</b> is checked. The items in the list with a \$ after are Worksheets within the Members Spreadsheet. If there is only one worksheet in the Excel Spreadsheet, all you will see is the name of the one Worksheet. <b>Click OK.</b></p>	
<p>4. Click on the <b>Mail Merge Recipients</b> icon. All the records should be selected. If not, <b>Click Select All</b>. Since the <b>Data Source</b> is an Excel worksheet, the <b>Edit</b> option will not be available.</p>	
<p>5. <b>Filter Records</b></p> <p>Click on a down arrow next a field name and choose <b>Advanced Options</b>. We are going to filter out members who are current on their dues. To do this, choose “DuesPaid” as the <b>Field</b>. Set <b>Comparison</b> to <b>Less Than</b>. Then put “04/19/04” as the <b>Compare to</b>. This will filter out members who are current and only leave those who are past due.</p>	
<p>6. <b>Sort Records</b></p> <p><b>Sort records</b> allows you to set a sort order for your letters/labels to print. It is often a good idea to set labels to sort in zip code order for a mass mailing, as the Post Office frequently requires that they be in this order.</p>	

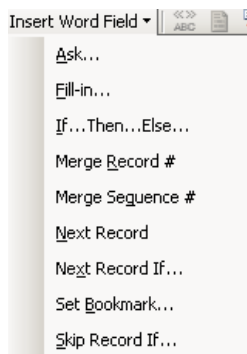
What you do	What you see
<p>7. <b>Insert Address Block</b></p> <p>Click the <b>Insert Address</b> icon. Insert the Address Block and <b>Click OK</b>. While you are here, <b>Click the Match Fields</b> button and make sure your fields match up.</p>	
<p>8. Highlight the &lt;First Name&gt; block of text. <b>Click the Insert Merge Fields</b> icon. Select “First” and then <b>Click Insert</b>. This will replace &lt;First Name&gt; with the code &lt;&lt;First&gt;&gt;. <b>Insert Merge Fields</b> gives you access to all the fields in the Data Source. You could use the <b>Insert Merge Fields</b> option to enter the address information. Just keep selecting the fields you want. Once you have all the address fields inserted in your document, you will need to format them by entering paragraph marks, spaces and commas.</p>	
<p>9. Highlight &lt;Dues Paid&gt;. <b>Click the Insert New Field</b> icon. Select “DuesPaid” and then <b>Click Insert</b>. This will replace &lt;Dues Paid&gt; with the code for the “DuesPaid” from the <b>Data Source</b>. Your document should now look like this:</p>	
<p>10. You can also set a filter by <b>Clicking</b> on the drop-down list next to <b>Insert Word Field</b>. This option is fairly complex, so it will be covered as a separate item later in this manual.</p>	

What you do	What you see
<p>11. Now that we have set all our merge fields, click on the <b>View Merged Data</b> icon. This will show you the first record with all the appropriate merged data. You can scroll through the members by clicking on the <b>Next Record</b> or <b>Previous Record</b> icons. If you want to view the merged data when you scroll, <b>Click</b> on the Highlight merge fields icon.</p>	 <p>The screenshot shows a merged email document. At the top, it displays the recipient's name and address: "Mr. John Goodman", "9234 Main St", "Albany, OR 97321". Below this is a salutation "Dear John". The main body of the email contains a personalized message: "We hope that you are having a great year gardening. Everything is so beautiful this time of year and the weather has certainly been cooperating with us. Our next Master Gardener meeting will be held on April 30, 2005 at 7 p.m. in the Fairgrounds conference room." At the bottom, there is a reminder: "This is the time of year when we remind members who are behind in their dues. According to our records you last paid dues on 4/3/2004. We would appreciate it if you would send us your renewal as soon as possible."</p>
<p>12. <b>Click</b> on the <b>Check for Errors</b> icon. This utility runs the merge and creates a new document containing the merge data. If there were any errors in the merge, Word will let you know. This is an important step if you are doing an E-mail merge. If there are errors in an E-mail merge and you don't catch the error, you may end up sending some very weird e-mails!</p>	 <p>The screenshot shows the "Checking and Reporting Errors" dialog box. It has three radio button options: "Simulate the merge and report errors in a new document.", "Complete the merge, pausing to report each error as it occurs." (which is selected), and "Complete the merge without pausing. Report errors in a new document." There are "OK" and "Cancel" buttons at the bottom right.</p>
<p>13. <b>Merge to new Document</b></p> <p>Until you become very familiar with the merge process, it is always a good idea to choose to merge to a new document when you are done with the merge process. You can choose to merge <b>All</b>, <b>Current Record</b> and <b>From: To:</b>. For the most part you will merge all the records. The other two options are very handy when something goes wrong with your printing. If the printer jams and you have only printed 6 letters, and you did not merge them to a new document already, you can then merge records 7 to the end into a new merge document and resume printing.</p>	 <p>The screenshot shows the "Merge to New Document" dialog box. It has a "Merge records" section with three radio button options: "All" (selected), "Current record", and "From: To:". The "From:" and "To:" options have empty text boxes next to them. There are "OK" and "Cancel" buttons at the bottom right.</p>
<p>14. <b>Merge to Printer</b></p> <p>If you choose this option, Word will start the merge process from the original merge document. This dialog box also has the option to print <b>All</b>, <b>Current Record</b> and <b>From: To:</b>. Again, this is handy if something happens during your printing process. You can then start printing again at the record number where the printing stopped.</p>	 <p>The screenshot shows the "Merge to Printer" dialog box. It has a "Print records" section with three radio button options: "All" (selected), "Current record", and "From: To:". The "From:" and "To:" options have empty text boxes next to them. There are "OK" and "Cancel" buttons at the bottom right.</p>

What you do	What you see
<p>15. <b>Merge to E-mail</b></p> <p>When you create a Mail Merge using the toolbar, if you choose to <b>Merge to E-mail</b>, Word will ask you what field to use for the “To”, even if you have it in your document. Word tries to find a logical e-mail address in your list of fields. If it can’t find one, the “To:” box will be blank. You will then have to choose an e-mail field from the drop-down list.</p>	
<p>16. <b>Merge to Fax</b></p> <p>This option will only be available if you have a fax program installed on your computer that Microsoft recognizes.</p>	

The Insert Word option on the Mail Merge toolbar is rather complicated, so it will be covered here.

### ***Insert Word Field***


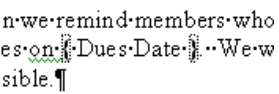
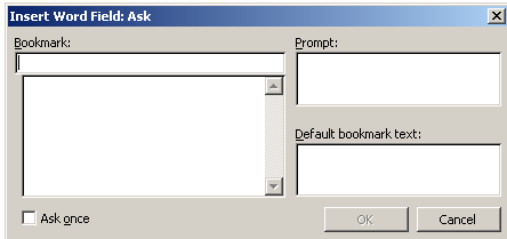
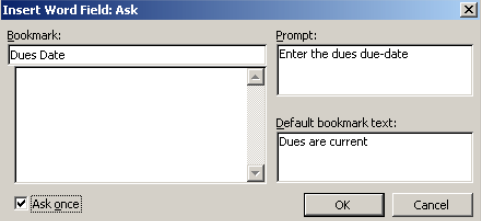


### **Ask**

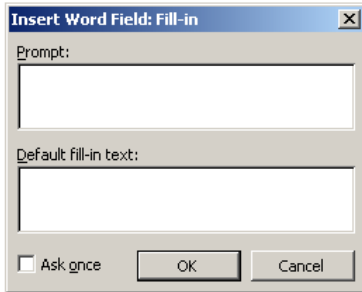
An **Ask** field is a field you place in a merge document when you want to add information that isn't contained in your data source. Ask fields are used in conjunction with Bookmarks.

You place the Ask field near the beginning of your merge document. When you perform the merge the Ask field prompts you to enter text. That text is then inserted into each merge document in the place (or places) where you have created Bookmarks.

What you do	What you see
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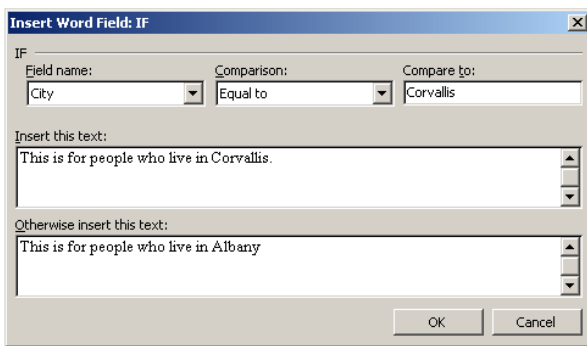
What you do	What you see
<p>1. Before you insert an <b>Ask</b> field you need to insert a bookmark where you want the <b>Ask</b> field to be entered. To create a <b>Bookmark</b>, place your cursor in the space where you want to insert the information you will designate in the <b>Ask</b>. There are two stages to creating a bookmark. First press <b>Ctrl+F9</b> to insert a pair of field characters (curly brackets) at the location of the cursor. Then you type a name for the bookmark so that it appears between the field characters. Use this method to create as many bookmarks as you need, giving each the same name.</p> <p> <b>Tip:</b> Keep your bookmark names short and meaningful. This helps avoid errors and confusion if you have several different bookmarks in a document. A bookmark name can be up to 40 characters long with letters, numbers and the underscore (_), but no spaces.</p>	
<p>2. Now you are ready to insert the <b>Ask</b> Field. When Word encounters the <b>Ask</b> field during the merge process, it stops and prompts the user for some information. This information is then inserted into the document at one or more points denoted by the bookmarks you have just created. The location of the <b>Ask</b> field itself is not important (you will not see it in the finished document), but it should be placed before the first of the bookmarks to which it refers.</p> <p>The <b>Ask</b> field will be inserted wherever your cursor is located. From the Mail Merge toolbar from the <b>Insert Word Field</b> drop down list, choose <b>Ask</b>. This will open the <b>Insert Word Field: Ask Field</b> dialog box:</p>	
<p>3. Place the text you designated as the bookmark in the <b>Bookmark field</b>. Enter a prompt you want to ask the user in the <b>Prompt</b> field. Enter default text in the <b>Default bookmark text</b> field. This will be text that is printed if the user doesn't type anything. The <b>Ask once</b> check box gives you the choice of inserting the same text into all the documents at one go. The user is prompted for some text when the merge starts and that text is used for all the documents. That is usually what you want to do.</p>	

## Fill-In



Fill-in field displays prompts so that you can add personal notes to clients or add other information that is not suitable to store in a data source. The prompt can be displayed each time a new data record is merged with the main document so that you can enter unique information for each resulting form letter or other merged document. It really only works if you select “Ask Once”. If you have it stop on each letter, you won’t know which letter you are on because the Merge does not display the letter contents, only the prompt box. **Why would I want to use this feature?** You might want to use it to send out a monthly letter that says something different each month, such as a current due date. If you use the Fill-In feature, you won’t have to edit the text of the merge letter each month.

## If...Then...Else



This option has the added benefit of being able to insert text when it meets a certain condition. But, it is a little disconcerting because you don’t see the code in your document. It immediately places the value that would be selected for the first recipient in the Merge. As you scroll through the recipients, the text will change according to the comparison operator. The example here is set to insert text based on whether the recipient lives in Corvallis or Albany. If you are inserting a paragraph, make sure there are correctly placed paragraph marks in the document. If you chose to have text entered if a condition is met and no text entered if not, then you need to put your paragraph marks in the if statement, otherwise the formatting will not be right if the condition is not met.

## Merge Record #

Prints the number of the merged data record in the merged document. This option inserts the code <<Merge Record #>> in the document so it is visible.

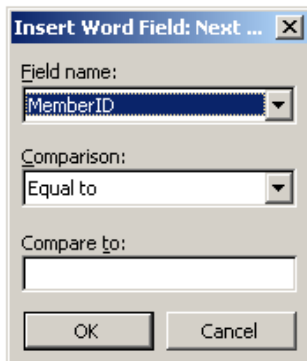
## Merge Sequence #

Counts the number of data records that were successfully merged with the main document. This option inserts the code <<Merge Sequence #>> in the document so it is visible.

## Next Record

This code instructs Word to merge the next data record into the current resulting merged document, rather than starting a new merged document. Often used with labels and catalogs. This option inserts the code <<Next Record>> in your document so it is visible.

## Next Record If



The dialog box titled "Insert Word Field: Next ..." contains the following fields:

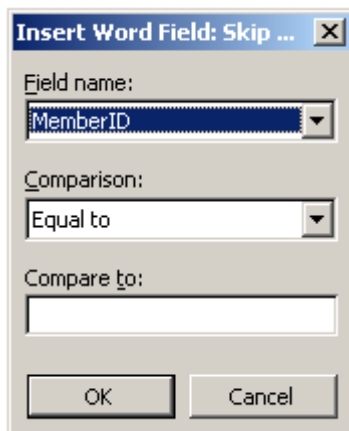
- Field name: MemberID
- Comparison: Equal to
- Compare to: (empty text box)
- Buttons: OK, Cancel

This code compares two expressions. If the comparison is true, Word merges the next data record into the current merge document. This option inserts the code <<Next Record If>> in your document so it is visible.

## Set

This works the same as Ask, where it inserts text where a bookmark is found. The only difference is that it doesn't stop to ask, it just inserts the text where it finds the bookmark.

## Skip Record If



The dialog box titled "Insert Word Field: Skip ..." contains the following fields:

- Field name: MemberID
- Comparison: Equal to
- Compare to: (empty text box)
- Buttons: OK, Cancel

This works the same as **Next Record if**, except that it skips the record rather than inserts the next record.

### ***Comparison Operators***

Comparison operators are very powerful. Therefore here is a brief explanation of what each operator does.

<b>Operator</b>	<b>Field</b>	<b>Operator</b>	<b>Compare to:</b>
<p><b>Equal to</b></p> <p>This is an “exact” operator. What you enter as the operator has to be an exact match. If the <b>Compare to</b> is not an exact match, the filter will fail. As an example, if “Corvallis” was spelled “Corvalis”, you would not get a match.</p>	City State	Equal to Equal to	Corvallis Oregon
<p><b>Not Equal to</b></p> <p>Again, this is an “exact” operator. It works the same as Equal to except it includes records that don’t match</p>	City State	Not Equal to Not Equal to	Corvallis Oregon
<p><b>Less Than</b></p> <p>This one is rather tricky. It works best with numeric equations (including dates). It will work on alpha equations in a limited manner. If you entered State Less Than MI, you would eliminate all records. But, since using Less Than on an alpha equation is not reliable, we discourage it’s use.</p>	Paid State	Less Than Less Than	04/19/04 MI
<p><b>Greater Than</b></p> <p>Works the same as Less than but in the other direction.</p>	Paid	Greater Than	04/19/04
<p><b>Less Than or Equal</b></p> <p>Works the same as Less than except that it includes the Compare to in the equation.</p>	Paid	Less than or Equal	04/19/04
<p><b>Greater Than or Equal</b></p> <p>Works the same as Greater than except that it includes the Compare to in the equation.</p>	Paid	Greater than or Equal	04/19/04
<p><b>Is blank</b></p> <p>This means that the field contains no data. The Compare to field will not be available when you choose this option</p>	Paid	Is blank	
<p><b>Is not blank</b></p> <p>This means that the field contains some data. The Compare to field will not be available when you choose this option</p>	Paid	Is not blank	
<p><b>Contains</b></p> <p>This means that the data you enter in the <b>Compare to</b> box will be present somewhere in the data entered in the field. This filter will result in only recipients who</p>	Address	Contains	St

have “St” in their address will be used.			
<p><b>Does not Contain</b></p> <p>This means that the data you enter in the <b>Compare to</b> box will not be present anywhere in the data entered in the field. This filter will result in only recipients who do not have “St” in their address will be used</p>	Address	Does not contain	St

## Data Source

The following is an in depth review of the data sources you are likely to use in a Mail Merge.

When you open a saved Merge Document that is linked to a data source, you will receive a message like this when you open the document:

“Opening your document will run the following SQL command:

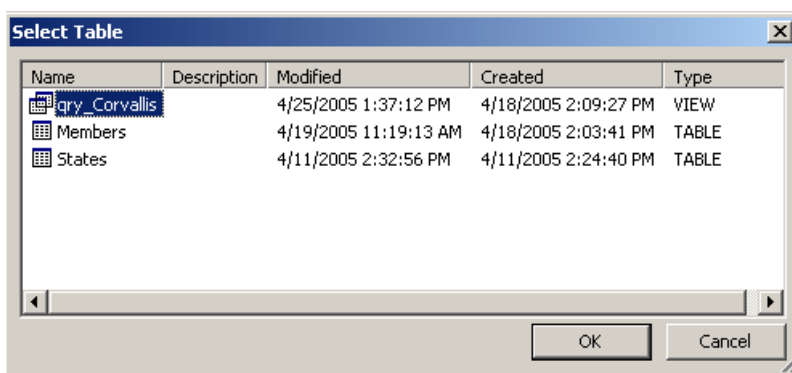
“Select \* from Corvallis”

Data from your database will be placed in the document. Do you want to continue?.”

Always say “Yes” if you want to run the merge again with the same data. If you say “No”, Word will take out the link and you will open the Merge Document without it being linked to a data source.

## Access Table

Using an Access table as your data source is pretty straight forward. One of the advantages of using a Database as your data source is that you will have both queries and tables available to you as your data source. When you choose an Access database as your data source, you will be asked to choose what source within the database you want to use like this:



This database called “GardenClub” has a table called “Members”, a table called “State” and a query called “qry\_Corvallis”. Both tables and the query can be used as a data source.

If you use an access table as your data source and the data in the table is changed, the next time you use the Mail Merge document linked to the table, you will have updated information. If you use an Access

View as a data source and then you change the structure of the view (such as removing a field you were using in a merge), you will receive an error when you try to run the Merge if you remove a field that the merge needs. You will be told the name of the merge field that is missing and given the opportunity to remove it from the Merge document or substitute the field with a different field in the data source. If you try to view the merge document, the field you took out will say **“Error! MergeField was not found in header record of data source.”** If you remove a field that is not used by the Merge document, you will not get an error.

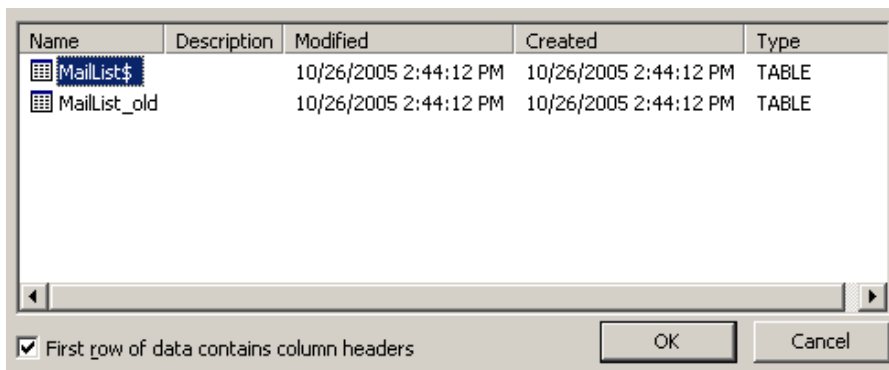


**Tip:** Do not give Access Databases/Tables names with spaces in them. This may cause the mail merge to fail. Mail merge seems to have a problem reading long names with spaces in them.

## Excel Spreadsheet

	A	B	C	D	E	F
1	<b>Last</b>	<b>First</b>	<b>Address</b>	<b>City</b>	<b>St</b>	<b>Zip</b>
2	Bell	Jeanette	Po Box 9	Echo	OR	97826
3	Whitehead	Val	Po Box 369	Stanfield	OR	97875
4	Smith	Jim	P. o. Box 39	Adams	OR	97810
5	Nicholson	Mary	Po Box 6	Milton-freewater	OR	97862

You can use an Excel Spreadsheet as a data source. In order to do this, your first line of data needs to be the field names. These are the field names the Merge program will reference. If your spreadsheet has more than one worksheet, when you hit **Open**, after highlighting the name of the Spreadsheet, the program will ask you to “Select Table” as follows:



This spreadsheet is called “Members” and has two worksheets called “Long” and “Short”. Do not select the spreadsheet name, rather select the name of the worksheet you want to use. From this point on, Word treats the data source the same as if it were an Access table. You can filter the data, sort the data, etc.

## Word Table

Last	First	Address	City	St	Zip
Bell	Jeanette	Po-Box-9	Echo	OR	97826
Whitehead	Val	Po-Box-369	Stanfield	OR	97875
Smith	Jim	P.O.-Box-39	Adams	OR	97810
Saul	Molly	1011-N-W-12th	Pendleton	OR	97801
Duff	James	801-N-Main-St.	Pendleton	OR	97801

You can use a Word Table as a data source. As with an Excel Spreadsheet, the first line in the table needs to be the field names. If you choose this option, make the table the only thing in the document. If you try to use a word document that has a table embedded in text, Word will get confused and will not be able to use the document as a data source. As with Access and Excel, once the data is loaded into the Merge data source, you can filter it or sort it.

## Text Document

ID	Title	FirstName	LastName	Address	City	State	ZipCode	DuesPaid	E-Mail
140	Ms.	Jane Ann	Jones	972 Franklin St.	Corvallis	OR	97331	3/1/2004	jane.jones@hotmail.com
15	Ms.	Wanda	Hamilton	7112 Harrison St.	Corvallis	OR	97331	1/1/2004	wanda.hamilton@earthlink.com
16	Mr.	Simon	Simpson	723 9th St.	Corvallis	OR	97333	5/1/2004	simpson@hotmail.com
17	Mr.	John	Burton	3319 Bayshore Dr.	Corvallis	OR	97333	6/1/2004	jburton@earthlink.com
18	Ms.	Jinny	Johnson	9712 Maiden Lane	Corvallis	OR	97330	7/2/2004	jinny@hotmail.com
19	Mr.	William	Winslow	932 Bayou Pl.	Corvallis	OR	97331	9/2/2004	billwinslow@earthlink.com
20	Ms.	Bobbie	Goodman	9234 Main St.	Albany	OR	97320	4/3/2004	bgood@aol.com
21	Mr.	John	Goodman	9234 Main St.	Albany	OR	97320	4/3/2004	jgood@aol.com
22	Ms.	Winnie	Landson	723 Pacific	Albany	OR	97320	10/2/2004	winnie@earthlink.com

You can use a text document as your data source. In order for this to work correctly, you need to have the first line of text be the field names separated by tabs (called Tab Delimited). Then the remaining lines of data need to be separated by tabs also. Think of it as a table without the “walls”. The Open Data Source command will default to viewing the first line of data as column names. Word will also recognize a comma as the delimiter (called Comma Delimited). But, it is not advised to use a comma as a delimiter since the program may get confused if you have commas in the text contained in fields (such as a comma in an address). If someone is going to send you a text file of names, ask for it to be “Tab Delimited”. That is the safest bet.

## Outlook Contact List

Creating a Mail Merge using Outlook as your data source is best done through the Mail Merge Wizard. When you choose Outlook as your data source, Word knows where to go to find your contact list. You can also start your Mail Merge from Outlook. To do this, highlight the Contacts folder that contains the names you want to use. **Then choose Tools→Mail Merge.** This will link you to the Outlook contacts data source and open a Word document linked to the data source. At that point you can either proceed by using the toolbar or open the Wizard and continue.

**Note:** Personal distribution lists in the **Contacts** folder cannot be included in a mail merge. You do not have to remove the personal distribution lists from **Contacts**, however. Outlook will ignore them.

## Toolbar Conclusion

As you have learned, there are options on the Mail Merge toolbar that are not contained within the Mail Merge Wizard. So, use both! You can use the Wizard and have access to the Toolbar at the same time. If you use the toolbar, it will pick up where you are in the Wizard process. You might want to create your

Mail Merge and then use the **Merge to new document** option on the Toolbar to test your work and make sure everything is correctly formatted. Just keep in mind that the new document will not contain the link to the data source, so don't get confused as to which document you will save if you want to use the Merge again.

## Troubleshooting Mail Merge

Problem	Solution
Your labels are missing data	Check your data code to make sure that you didn't accidentally delete part of the code. To do this, <b>Click</b> on the <b>Highlight Merge Field</b> icon on the Merge toolbar. That will isolate your merge code from the surrounding text and help you see if there is a mistake.
Data source is not reflecting recent changes	Make sure that you are linked to the current copy of a data source.
You are missing names from your recipient list.	Look to see if you are filtering the data source and didn't realize you were doing it. To see if you have an active filter, <b>Click</b> on the <b>Mail Merge Recipients</b> icon on the Toolbar. <b>Click</b> on one of the down arrows next to a field name and then choose <b>Advanced</b> . If you have any filters or sorts active, you will see them in the dialog boxes that will pop up when you select Advanced. Also check to see if you are working from a View (Query) in Access that is filtering the data.
Your list of names is not in the right order when it prints.	As outlined above, look to see if you have a sort order set up. Also as mentioned above, check to see if the problem is in Access. Something to be aware of. If you set a sort order in the data source you have set in the Mail Merge, that sort order will trump any sort order you have in a Query in Access, a Spreadsheet in Excel or a Table in Word.
You are printing blanks for recipient data such as printing a blank label.	Set Mail Merge to NonBlanks by <b>Clicking</b> on the <b>Mail Merge Recipients</b> icon on the Toolbar. <b>Click</b> on <b>Nonblanks</b> .
You are printing labels and the printer jams. You clear the jam but want to start printing again where the labels left off.	Create a new document with the merged labels by <b>Clicking</b> on the <b>Merge to new document</b> icon on the Toolbar. Then you can delete the labels you have already printed, or start printing on the page after your last page of printed labels.
You used Excel as your data source and zip codes that start with a zero were printed without the zero.	Make sure that the Zip field in Excel is formatted as text. If it is formatted as a number or "general", the leading zero will be dropped.