

Microsoft Word 2002-2003 Mail Merge – Letters

Note: These instructions are written to use the Mail Merge Toolbar instead of the Mail Merge Wizard.

Data Source

Before merging, you will need a data source previously created and saved. You can use an existing data source from a Word table or an Excel worksheet.

To create a new data source in Word or Excel, the data must be in a table where the first row of the table contains the field names (column titles) and the additional rows contain the data. This file should be saved and closed before starting the main document.

Firstname	Lastname	Address	City	State	Zip
John	Wills	123 Lane	Holland	MI	49423
Jane	Hartz	456 Road	Holland	MI	49424
Sue	Adams	789 Court	Holland	MI	49423

Using the Mail MergeToolbar

Choose View, Toolbars, Mail Merge. The toolbar looks like the one below. The important buttons are identified.

- 1 - Main Document Setup
- 2 - Open Data Source
- 3 - Mail Merge Recipient
- 4 - Insert Merge Fields
- 5 - Merge to New Document

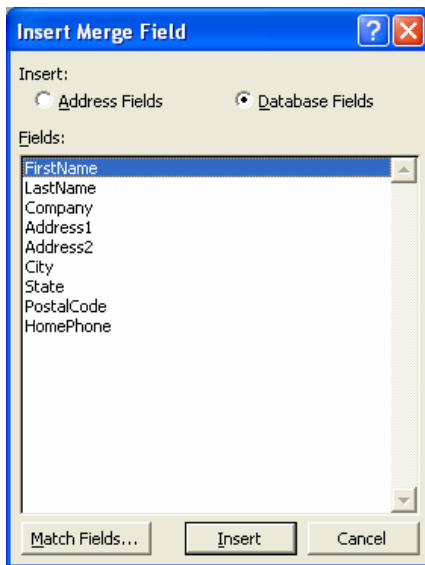


Creating the Main document (Letter)

To use an existing MS Word letter as a merge main document, choose File, Open, and select the letter to open. If you are creating a new letter, type it in Word and save it.

Choose the Main Document Setup button. Choose Letters, OK.

Choose the Open Data Source button. Browse through your directory to find and open the file that contains your data. If the data source is an Excel file, be sure you are browsing through “all files” and not just Word documents



Insert merge fields into your document by placing the cursor where you want your first merge field and choose the Insert Merge Fields button.

Select the fieldname you want in your document and choose the Insert button. You'll have to close the Merge Field window before you move the cursor to another place in the document. Choose the Insert Merge Fields button again to continue adding fields to your document.

If you want to sort, filter, or edit your data the Mail Merge Recipient button will allow you to do that.

If you are going to use this document for a merge at another time, be sure to save it.

When you are ready to merge –choose the Merge to New Document button.