

Word XP

Mail Merge



The University of Akron

Learning Technologies
Information Technology Services

Contact

Training Services
330.972.6391
pstrain@uakron.edu

Version 2003.09.23

The
University
of Akron

Table of Contents

INTRODUCTION TO MAIL MERGE 2
OVERVIEW OF MAIL MERGE 2
MAIL MERGE TOOLBAR 3
MAIL MERGE WIZARD TASK PANE 4
MAIL MERGE TERMS 5
CREATING LABELS AND ENVELOPES 6
CREATING A LETTER 21

Introduction to Mail Merge

Overview of Mail Merge

Mail merge is the process of creating custom mailings. The most common mail merge documents are letters, labels, envelopes, and emails. This feature allows you to create these documents that are intended for a few people or thousands of people all at the same time. The mail merge process available in Word 2002 (XP) is a step-by-step process that has been significantly revamped from the Office 2000 version. The process still uses the Mail Merge Wizard, but it is now displayed in the side pane. The new process provides more control and it is easier to follow. You cannot move forward in the mail merge process until the previous step is complete.

When you are using the mail merge feature you must have a main document and a data source. It is imperative that you understand what these two concepts are and how they are involved in this process. The main document contains the text that you want to remain constant. This is the document that you create and you tell Word how to format. The main document is somewhat of a template in that it does not show the result, it just shows the instructions as to what the final product will look like once the information from the data source is identified. The data source contains the text that you want to change from one letter, label, or envelope to another. The data source will typically be an Access Database table, Excel spreadsheet, Outlook Contacts list, or a Word table.

Note: If you turn an existing document into a mail merge main document and later want to turn it back into a regular document, click Main Document Setup on the Mail Merge toolbar, choose Normal Word Document and select OK.

Consequently, the steps to complete a mail merge are as follows:

1. **Select document type:** Determine if you want to create Letters, E-mail messages, Envelopes, Labels, or a Directory.
2. **Select starting document:** Determine if you want to use the current document, change the current documents layout (from regular document to labels or envelopes), select from Outlook Contacts, or if you want to open an existing document.
3. **Change document layout:** For labels and envelopes only. Select the appropriate label and envelope size.
4. **Select recipients:** Decide what data source to use and locate or create it.
5. **Arrange your labels/Write the letter:** Determine how you want to layout the label, envelope, e-mail, or letter with the merge fields.
6. **Preview:** Proof the labels, envelope, e-mail, or letter and make changes if necessary.
7. **Complete the merge:** Print or edit the merged document.

COMING SOON: This manual will be updated to show instruction of using Mail Merge with Outlook Contacts. Keep checking the Software Training Services website for updates!

Mail Merge Toolbar

The Word 2002 (XP) mail merge toolbar has been changed significantly. When you are first working with the mail merge process, it is recommended that you use the Mail Merge Wizard side pane to get through the process. The mail merge toolbar provides many shortcuts to the task pane and it also provides tools that are in addition to the Wizard. If you place the cursor over the icon, the name for the icon will appear.

The mail merge toolbar can be accessed by:

- Selecting from the menu View, Toolbars, Mail Merge.
- Selecting from the menu Tools, Letter and Mailings, Show Mail Merge Toolbar.
- Right clicking in the gray area at the top of the working window and select Mail Merge.

The Mail Merge Toolbar:

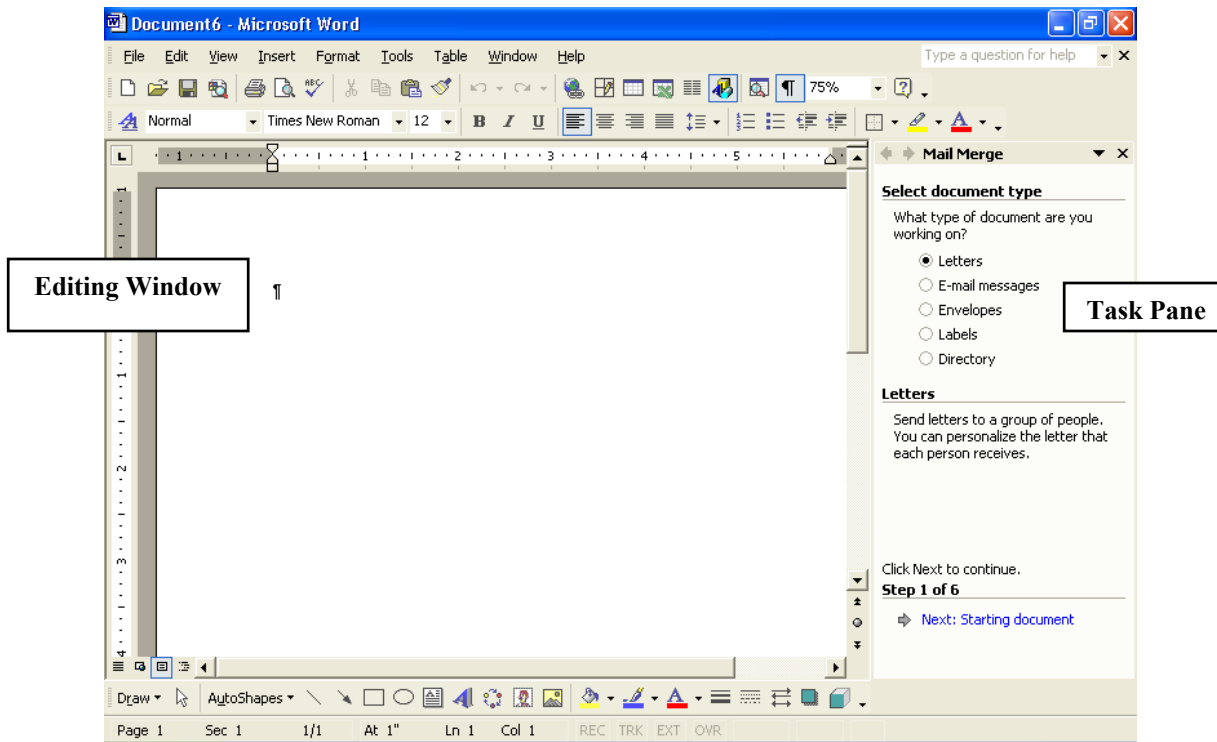


Note: The toolbar buttons only become available as you reach the stage of the mail merge process where they can be used.

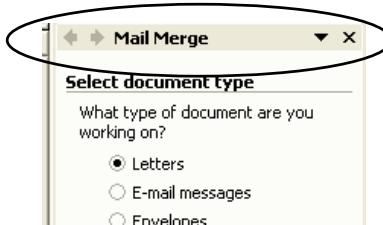
The toolbar and the buttons will not be explored in great detail at this time, as you become more comfortable using mail merge, this may be an area for you to revisit.

Mail Merge Wizard Task Pane

A new addition to Word 2002 (XP) is the use of Task Panes. A task pane is a side pane that appears on the right side of Words editing window, which allows you to choose from all options available to perform a task. Furthermore, the Mail Merge Wizard task pane appears as soon as you make the selection to start the mail merge process. The Word window will appear as follows:



On the top of the task pane there are some additional navigation tools.



- The arrow buttons take you backwards and forwards through the task panes that have been active.
- The down arrow provides a short menu for common tools such as New Document, Clipboard, Search, Insert Clip Art, Styles and Formatting, Reveal Formatting, Mail Merge, and Translate. If selected, the process can be done in the task pane without affecting the editing window.
- The [X] button closes the task pane.


Mail Merge Terms

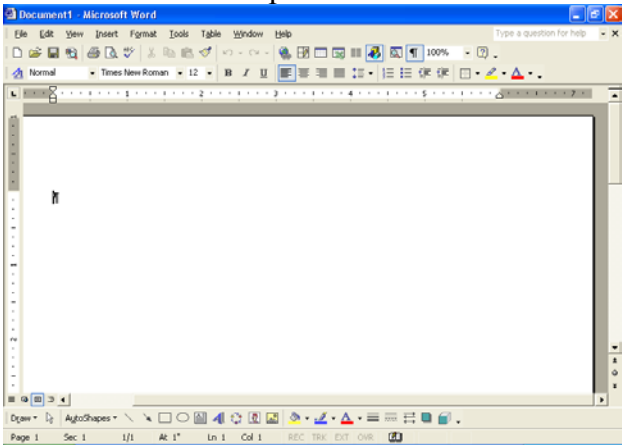
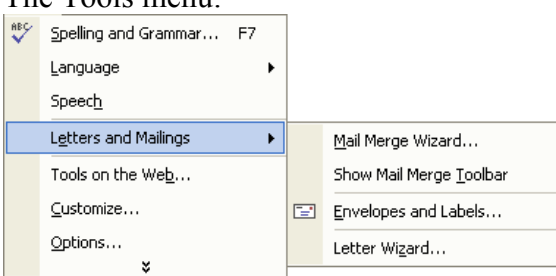
When you begin using Mail Merge there may be some terms that you are unfamiliar with. Some of these terms must be understood in order for you to have a good understanding of the Mail Merge Process.

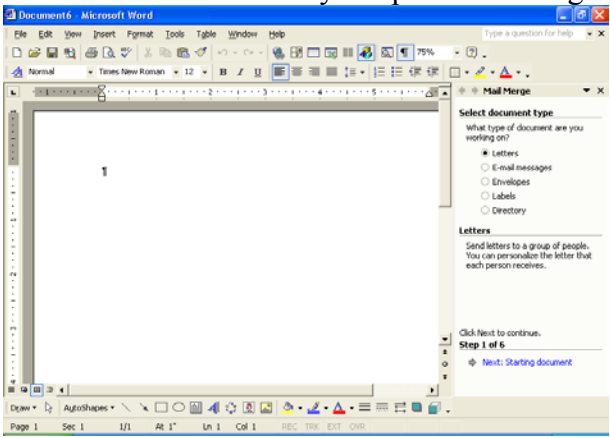

Term	Definition
Address Block	Refers to the area of the main document that contains the name, address, title, and company.
Data Source	Data sources contain the information that will be used to create items with mail merge. For example, a data source can include fields such as name and address. Typically, the data source is an Access table, Excel spreadsheet, Word table, or an Outlook Contacts list.
Filter Records	Enables you to choose which records to print based on detailed criteria that you specify.
Mail Merge	Process of creating custom mailings or other documents.
Main Document	Main Documents are used as templates in mail merge. Main documents contain the information such as text or graphics that will appear in each item created using mail merge.
Mail Merge Wizard	Use the Mail Merge Wizard to create mail merge documents. It helps you organize your data and print the resulting items.
Merge Field	Merge Fields are placeholders used in the main document to let Word know where to place information from the data source.
Sort Records	Enables you to perform detailed sorts, up to three levels.
Task Pane	A side pane that appears on the right side of Words editing window, which allows you to choose from all the options available to perform a task.

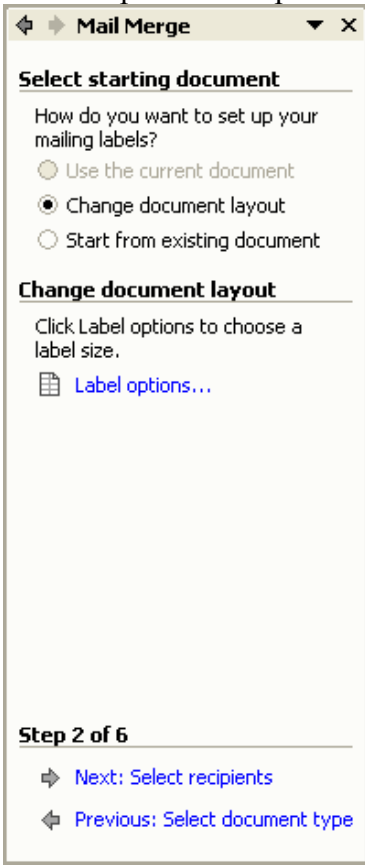
Creating Labels and Envelopes

The first process that will be outlined in mail merge is creating labels. If you need to create envelopes, the process is the same as creating labels so substitute envelopes for labels. Any place where there is a significant difference there will be a “**Note**” for your reference.

You may find it easier to create labels and envelopes in Mail Merge if you display hidden characters such as spaces and paragraph marks by clicking on the Show/Hide Paragraph Marks  button on the standard toolbar.

What You Do	What you see
1. Open Word and if necessary, click the New Blank Document button on the Standard Toolbar.	<p>The Word window opens:</p> 
2. Select from the menu Tools, Letters and Mailings, Mail Merge Wizard .	<p>The Tools menu:</p> 

What You Do	What you see
<p>3. The Mail Merge Wizard task pane returns.</p> <p>The window adjusts and changes to show the Mail Merge task pane on the right and leaves the editing window on the left.</p>	<p>The Word window after you open Mail Merge:</p> 
<p>4. You are ready for the first step.</p> <p>You will want to follow the task pane from top to bottom.</p> <p>The first step is to select the document type.</p> <p>At the top of the task pane under the Select document type title, select the radio button for Envelopes or Labels.</p> <p>The bottom of the task pane will adjust to the selection you just made.</p> <p>You are now ready to go to the next step. Click the hyperlink, Next: Starting document, at the bottom of the task pane to continue.</p>	<p>The first step in the task pane:</p> 

What You Do	What you see
<p>5. At the top of the task pane, under the title, Select starting document, determine how you want the mailing labels set up.</p> <p>When working with labels, you will have two options available to you:</p> <ul style="list-style-type: none">▪ Change document layout: This allows you to adjust the document in the editing window to work with labels.▪ Start from existing document: Allows you to select an existing mail merge file to work with. If you select this option, Word displays a list of any mail merge documents that you have worked with recently. <p>If you are starting a new mail merge, select Change document layout.</p>	<p>The task pane for Step 2:</p> 

What You Do

6. In the middle of the task pane under the title, ***Change document layout***, select the hyperlink for **Label options**. Here you can select the product number for the label you will be using.

Select the **Product Number** and verify on the right under **Label information** that the data is correct for the labels that you will be using.

Select **OK**.

Note for Envelopes: The Envelope Option box returns. Select the correct envelope size and select **OK**.

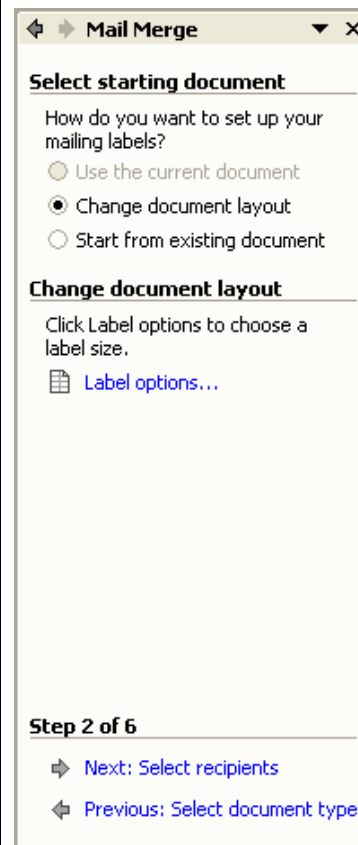
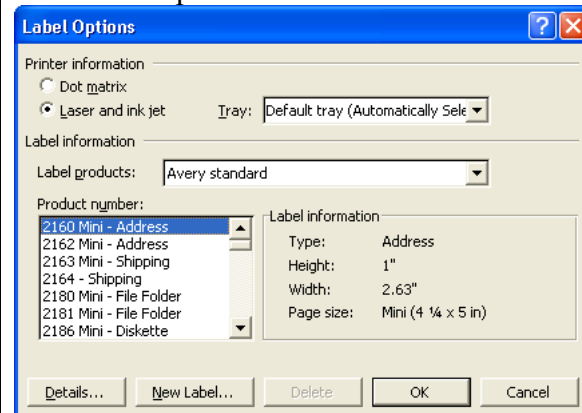
When you return, you may notice some changes in the editing window. This is just Word adjusting/formatting the main document to reflect the changes you just made.

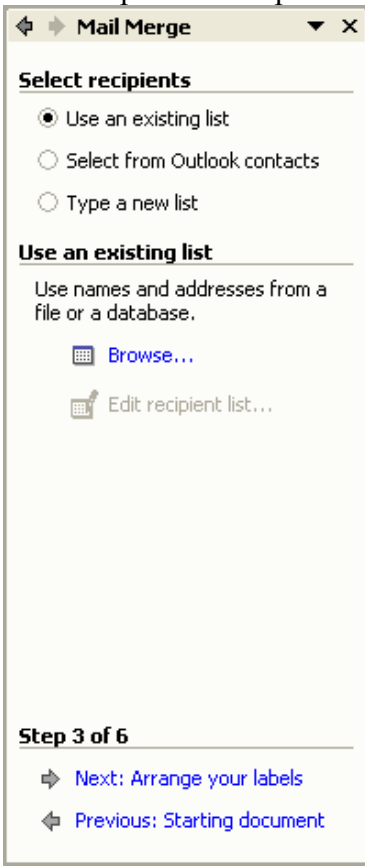
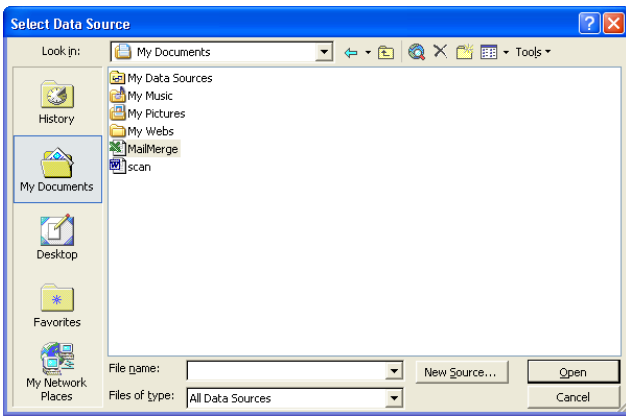
You are ready for the next step. Click on the hyperlink, **Next: Select recipients**, at the bottom of the task pane.

Note: You can go to the previous task panes (previous steps) by clicking on the **Previous** link at the bottom of the task pane. This is true for all steps from this point forward.

What you see

The Label Option box returns:



What You Do	What you see
<p>7. At the top of the task pane, under the title Select recipients, you will need to identify the data source. The selections that you have available are:</p> <ul style="list-style-type: none"> ▪ Use an existing list: Select this option if you already have the list of names that you want to draw on. You would have this list stored in an Access database, Excel spreadsheet, Word table or some other document. ▪ Select from Outlook contacts: Select this option to select recipients out of your Contacts list in Outlook Mail. ▪ Type a new list: This option will allow you to create a new list using a Word table as part of the current mail merge process. Note that Word tables best lend themselves to small mail merges. <p>Most often, you will be selecting the option for Use an existing list. After you select this option, you will need to locate the file. In the middle of the task pane, under the title, Use an existing list select the Browse hyperlink.</p>	<p>The task pane for Step 3:</p> 
<p>8. The Select Data Source box returns.</p> <p>Locate the file that will be used as the data source and select the Open button.</p> <p><i>Note:</i> You may need to adjust the field, Files of type: to All Data Sources.</p>	<p>The Select Data Source box:</p> 

What You Do

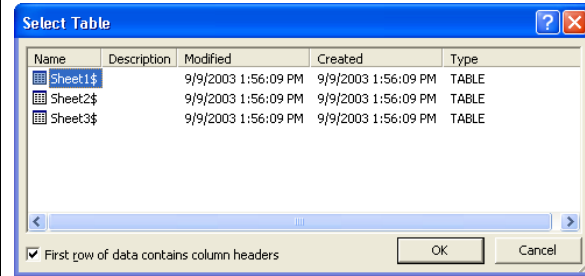
- 9. A box may appear asking you to select a table. If this box appears, select the table or spreadsheet that contains your data.

Select **OK**.

Note: You will notice some changes in the editing window again. This is just Word adjusting/formatting the main document to reflect the selection you just made.

What you see

The Select Table box returns:



What You Do

10. The Mail Merge Recipients box returns. In this step, you need to select who will get your message.

The Mail Merge Recipients box shows all people that are listed in the data source. This box will allow you to remove individual people by clearing the check box to the left of their name.

You can also **Select All** or **Clear All** by selecting the corresponding buttons at the bottom of the box.

To Sort all the names in the mailing list, click on the field name you want to sort by.

You also have additional options available by clicking on the downward pointing arrow. The options that you have available are:

All: Displays all records, will turn off filtering based on specific field.

Blank: Displays records containing no information for that field.

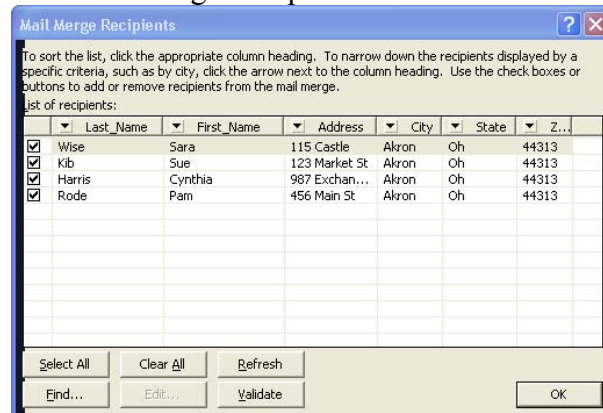
Nonblanks: Displays only records that do contain information in that field.

Advanced: Select this option to get even more control over the search. If you select this option, the Filter and Sort box returns. See the next row (the “**Note**”) for details.

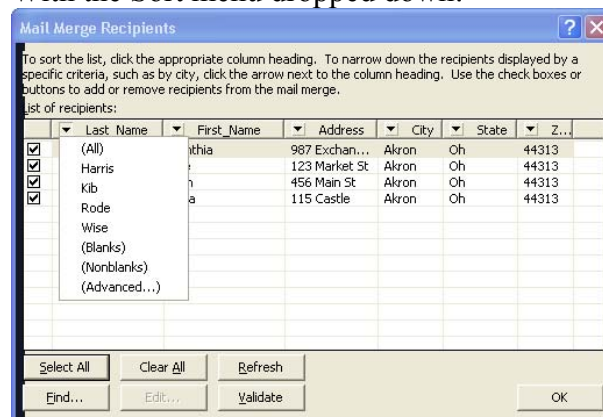
After you select (or unselect), sort, and filter the Recipients list, select **OK**.

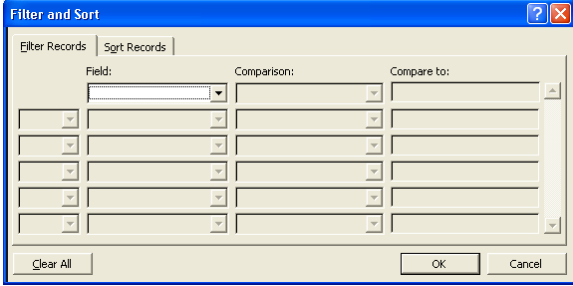
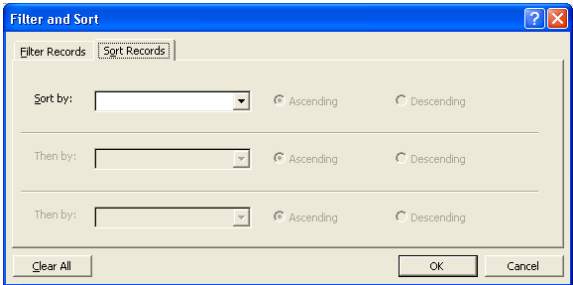
What you see

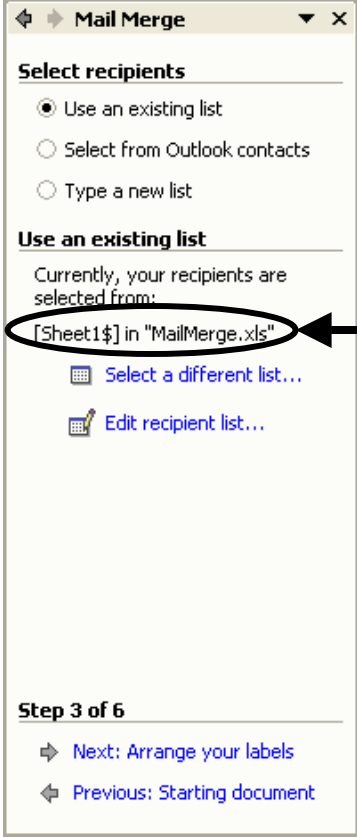
The Mail Merge Recipients box:

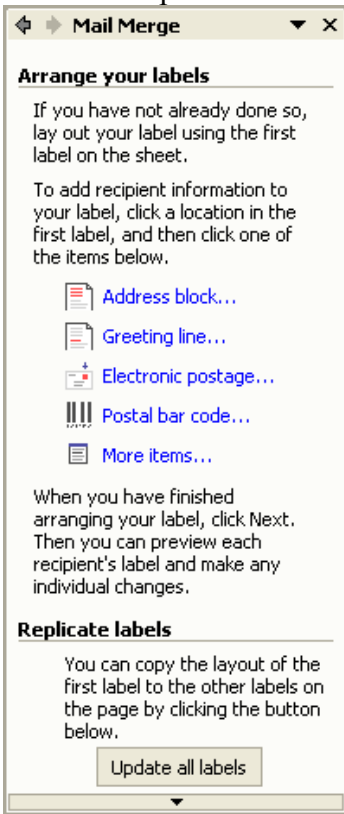
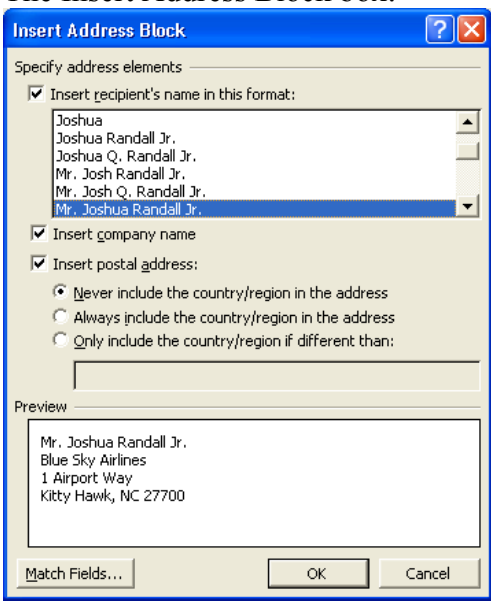


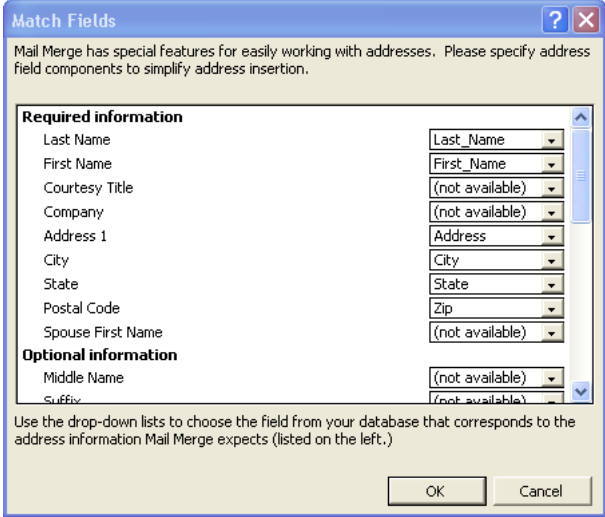
With the Sort menu dropped down:

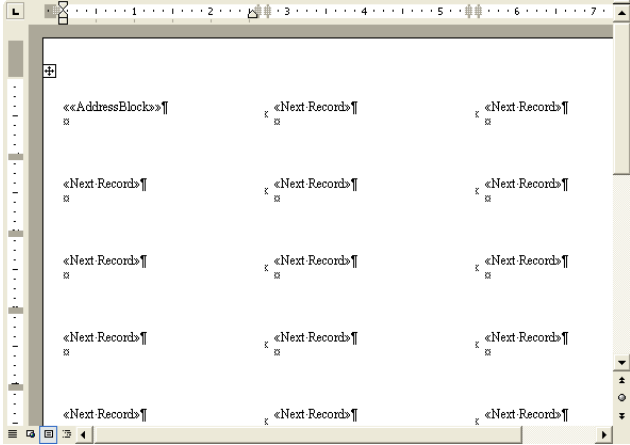
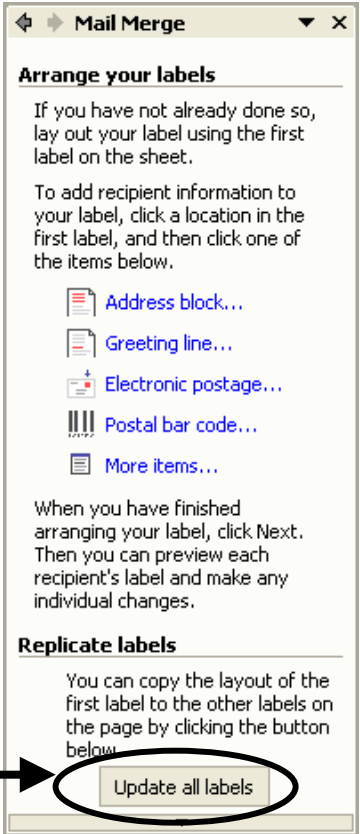


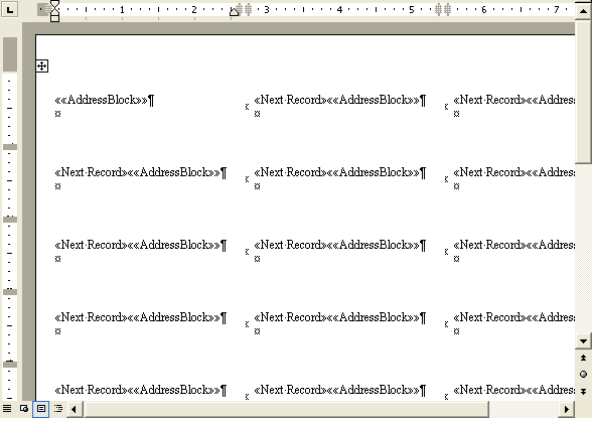
What You Do	What you see
<p>Note: If you need to perform a Filter or Sort, you would select Advanced from the menu as seen in the previous step. The Filter and Sort box returns</p> <p>On the first tab, the Filter tab, you can filter the recipient list. The fields are as follows:</p> <p>Field: Select any field from the data source. This is the field that you want to filter based on.</p> <p>Comparison: Select a phrase such as Equal to or Contains.</p> <p>Compare to: This is what you want the filter to locate and use in the final merge.</p> <p>On the Sort tab, you can sort by any field contained in the data source. You can sort up to three levels. The fields on the Sort tab are as follows:</p> <p>Sort by: Choose from the dropdown, the field that you want to sort by.</p> <p>Ascending or Descending: Select the radio button for the direction you want the sort to go.</p> <p>Select OK on either tab to accept the changes. Select OK again to return to the wizard.</p>	<p>The Filter tab:</p>  <p>The Sort tab:</p> 

What You Do	What you see
<p>11. The task pane returns and under the title, <i>Use an existing list</i>, the filename you selected is shown.</p> <p>If you need to change the data source, select the link for Select a different list. This will allow you to select a different file.</p> <p>If you need to edit the Recipients list now or at a later time, select the Edit recipient list link.</p> <p>You are ready for the next step. Click on the hyperlink, Next: Arrange your labels, at the bottom of the task pane.</p>	<p>The Recipient task pane:</p>  <p>[Sheet1\$] in "MailMerge.xls"</p>

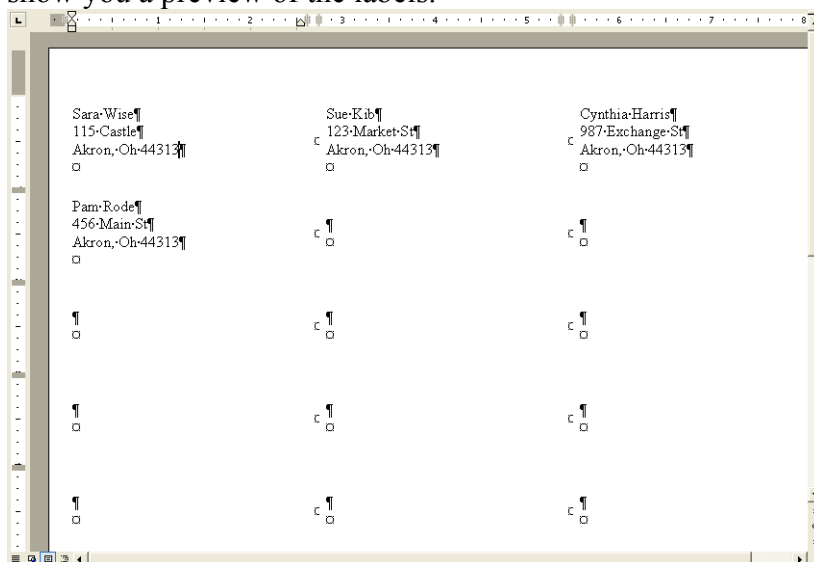
What You Do	What you see
<p>12. At the top of the task pane, under the title <i>Arrange your labels</i>, you will need to layout the label with the appropriate fields.</p> <p>For labels, select Address block. This refers to the portion of a main document containing the recipient's name and address.</p> <p>An address block typically looks as follows:</p> <p>Mrs. Sally Zippy 123 Carroll Street Akron, Ohio 44321</p> <p>Note for Envelopes: Before you click on the link for Address block, click with the insertion point in the middle of the envelope where the address block will appear. The insertion point defaults in the upper left corner of the envelope and this is NOT where you want the outgoing names and addresses to appear.</p>	<p>The next step returns:</p> 
<p>13. The Insert Address Block box returns.</p> <p>Make the necessary selections/changes for the name format, company name, and postal address.</p> <p>Verify that the preview is accurate.</p> <p>Click on the Match Fields button at the bottom to match the data source fields to the address block template.</p>	<p>The Insert Address Block box:</p> 

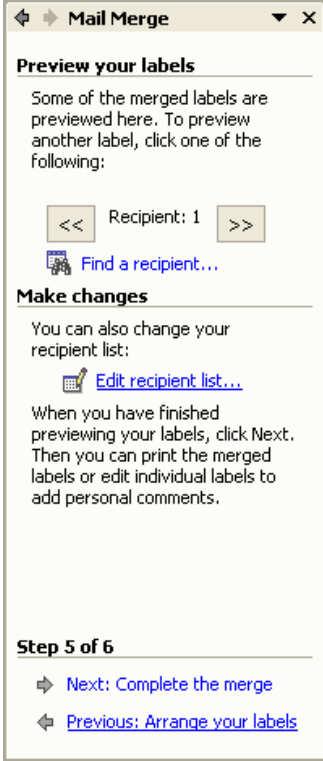
What You Do	What you see
<p>14. The Match Fields box will return. Word is going to attempt to automatically match the field names in your data source with the field names it uses in the address block.</p> <p>If Word cannot match your fields (from the data source) you can still match the fields using this box. You will see (not available) if Word was unsuccessful in matching.</p> <p>On the left are the fields that Word is using to create the address block. On the right are the fields that Word has matched using your data source. You can override any field by using the down arrow and selecting the appropriate field name.</p> <p>For example, the required field is Last Name and Word looks at the data source to find a fit. If Word can identify a field that seems appropriate, the field will fill in with that field name. If Word cannot identify a Last Name fit, you will see (not available) and you will need to select the corresponding field.</p> <p>You will want to check this box with all merges to verify that Word was able to match your fields and if Word could not make a match you will need to add them in order to make your merge successful.</p> <p>Select OK once you have verified and completed all applicable Match Fields. Select OK again to leave the Insert Address Block box.</p>	<p>The Match Fields box:</p> 

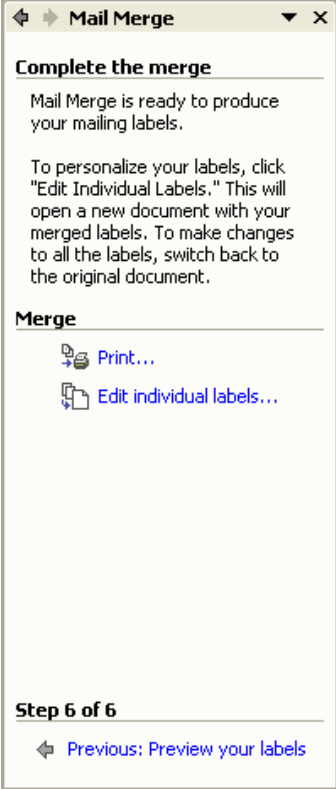

What You Do	What you see
<p>15. The main document in the editing window will change again to reflect the changes you just made.</p> <p>Note how the label in the top left corner shows: <<Address Block>> and the other labels show: <Next Record>.</p> <p>You will need to add the address block to all labels in the document.</p> <p>Note for Envelopes: You will notice <<Address Block>> in the middle of the envelope.</p>	<p>The main document after address block is selected:</p> 
<p>16. Click ONCE on the Update all Labels button.</p> <p>Note for Envelopes: It is not necessary to use the Update all labels button when working with envelopes.</p>	<p>The task pane with the Update all Labels button circled:</p> 

What You Do	What you see
<p>17. The main document in the editing window will change once again reflect the changes you just made.</p> <p>Now all labels now show: <<AddressBlock>></p> <p>You are ready for the next step. Click on hyperlink, Next: Preview your labels, at the bottom of the task pane. You may have to click on the downward pointing arrow at the bottom of the task pane to reveal the next step link.</p> <p><i>Note:</i> The template that you see in the editing window is how the label is going to appear, but with the real data from the data source. If you see extra <<AddressBlock>> indications, you will want to delete them from the label in the top left corner. If you do not delete the extra merge field indications, the label will print with the same name and address several times. Remember, what you see is what you get!</p>	<p>The main document after you Update all labels:</p> 

18. After you click on the link for the next step, the main document in the editing window will show you a preview of the labels.




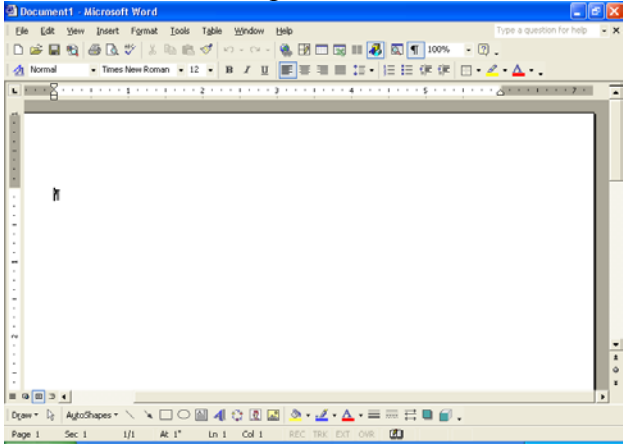
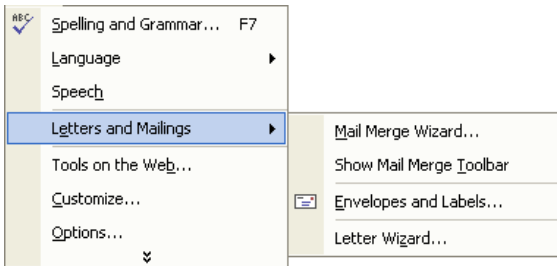
What You Do	What you see
<p>19. At the top of the task pane, under the title <i>Preview your labels</i>, you can go forward or backwards through the labels. You can also locate a specific recipient by clicking on the link for Find a recipient.</p> <p>If you need to edit the list of recipients, click on the Edit recipient link under the title, <i>Make changes</i> to return to the Mail Merge Recipients box.</p> <p>Click on the link for Next: Complete the merge at the bottom of the task pane to move to the last step.</p>	<p>The next step returns:</p>  <p>The screenshot shows a window titled "Mail Merge" with a close button. It is divided into three sections: "Preview your labels", "Make changes", and "Step 5 of 6".</p> <ul style="list-style-type: none">Preview your labels: Contains the text "Some of the merged labels are previewed here. To preview another label, click one of the following:" followed by a "Recipient: 1" label with left and right navigation arrows, and a "Find a recipient..." link with a magnifying glass icon.Make changes: Contains the text "You can also change your recipient list:" followed by an "Edit recipient list..." link with a list icon.Step 5 of 6: Contains two navigation links: "Next: Complete the merge" with a right arrow and "Previous: Arrange your labels" with a left arrow.

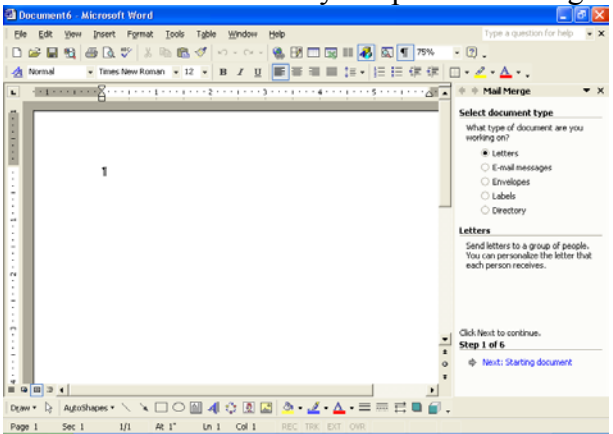
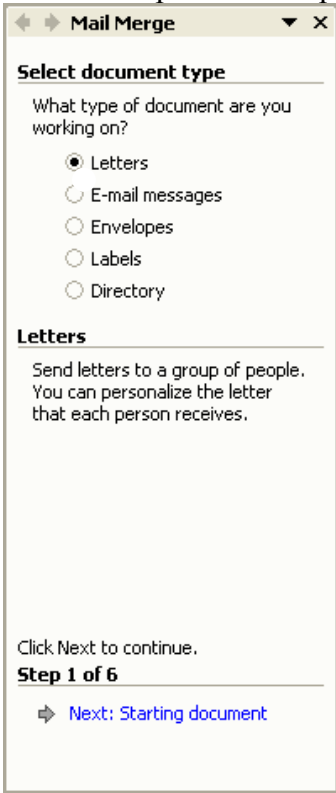
What You Do	What you see
<p>20. The last step is to complete the merge.</p> <p>To Print the labels, click on the Print link under the <i>Merge</i> title.</p> <p>In the Merge to New Document box, select All and select OK. The Print box returns. Make the necessary selections and click OK.</p> <p>If you want to personalize the labels, click on the link for Edit individual labels to open a new document with the merged labels. You can save the new document as a separate file. Note that you are saving just the labels or envelopes and NOT the mail merge main document file.</p>	<p>The last task pane returns:</p>  <p>The Merge to New Document box returns:</p> 


Creating a Letter

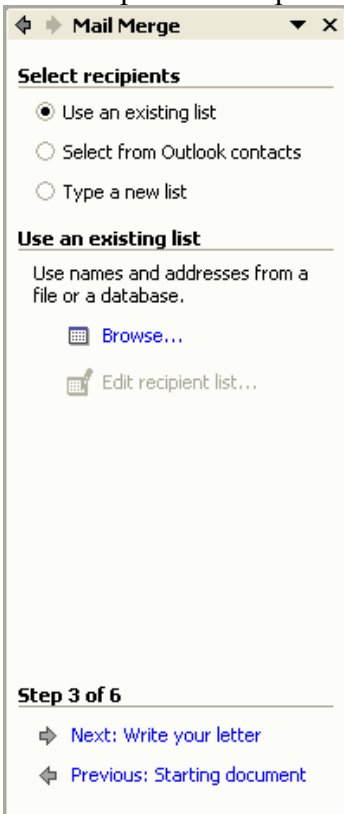
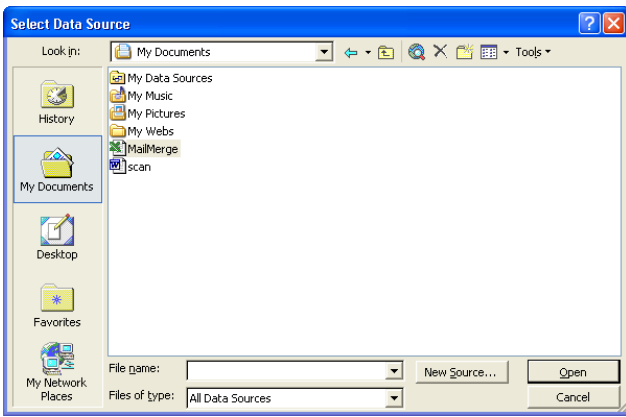
This section of the manual outlines the steps for performing a mail merge to create form letters. This will be done using the Mail Merge Wizard. When you create a form letter, Word creates a new letter for each set of merge data which means a separate letter for each recipient.

You may find it easier to do a letter in Mail Merge if you display hidden characters such as spaces and paragraph marks by clicking on the Show/Hide Paragraph Marks  button on the standard toolbar.

What You Do	What you see
<p>1. Open Word and if necessary, click the New Blank Document button on the Standard Toolbar.</p>	<p>The Word window opens:</p> 
<p>2. Select from the menu Tools, Letters and Mailings, Mail Merge Wizard.</p>	<p>The Tools menu:</p> 

What You Do	What you see
<p>3. The Mail Merge Wizard task pane returns.</p> <p>The window adjusts and changes to show the Mail Merge task pane on the right and leaves the editing window on the left.</p>	<p>The Word window after you open Mail Merge:</p> 
<p>4. You are ready for the first step.</p> <p>You will want to follow the task pane from top to bottom.</p> <p>The first step is to select the document type.</p> <p>At the top of the task pane under the Select document type title, select the radio button for Letters.</p> <p>The bottom of the task pane will adjust to the selection you just made.</p> <p>You are now ready to go to the next step. Click the hyperlink, Next: Starting document, at the bottom of the task pane to continue.</p>	<p>The first step in the task pane:</p> 

What You Do	What you see
<p>5. At the top of the task pane, under the title, Select starting document, determine how you want the letter set up.</p> <p>When working with letters, you will have all three options available to you:</p> <ul style="list-style-type: none"> ▪ Use the current document: Allows you to use the current document in the editing window as your letter. ▪ Start from a template: Allows you to choose a Word template to use as your letter. ▪ Start from existing document: Allows you to select an existing file to work with. If you select this option, Word displays a list of mail merge documents that you have worked with recently or you can choose Open to search for a file. <p>If you still need to create the letter, select Use the current document. You will type the letter at a later step.</p> <p>If you already have a file saved and need to open it, select Start from existing document. Locate the file and the file will open in the editing window. Then, select the radio button for Use the current document.</p> <p>You are ready for the next step. Click on the hyperlink, Next: Select recipients, at the bottom of the task pane.</p> <p>Note: You can go to the previous task panes (previous steps) by clicking on the Previous link at the bottom of the task pane. This is true for all steps from this point forward.</p>	<p>The task pane for Step 2:</p> 

What You Do	What you see
<p>6. At the top of the task pane, under the title Select recipients, you will need to identify the data source. The selections that you have available are:</p> <ul style="list-style-type: none"> ▪ Use an existing list: Select this option if you already have the list of names that you want to draw on. You would have this list stored in an Access database, Excel spreadsheet, Word table or some other document. ▪ Select from Outlook contacts: Select this option to select recipients out of your Contacts list in Outlook Mail. ▪ Type a new list: This option will allow you to create a new list using a Word table as part of the current mail merge process. Note that Word tables best lend themselves to small mail merges. <p>Most often, you will be selecting the option for Use an existing list. After you select this option, you will need to locate the file. In the middle of the task pane, under the title, Use an existing list select the Browse hyperlink.</p>	<p>The task pane for Step 3:</p> 
<p>7. The Select Data Source box returns.</p> <p>Locate the file that will be used as the data source and select the Open button.</p> <p>Note: You may need to adjust the field, Files of type to All Data Sources.</p>	<p>The Select Data Source box:</p> 

What You Do

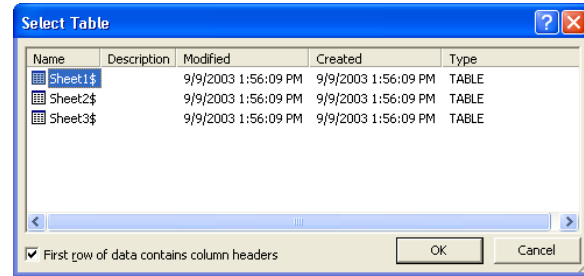
8. A box may appear asking you to select a table. If this box appears, select the table or spreadsheet that contains your data.

Select **OK**.

Note: You will notice some changes in the editing window again. This is just Word adjusting/formatting the main document to reflect the selection you just made.

What you see

The Select Table box returns:



What You Do

9. The Mail Merge Recipients box returns. In this step, you need to select who will get your message.

The Mail Merge Recipients box shows all people that are listed in the data source. This box will allow you to remove individual people by clearing the check box to the left of their name.

You can also **Select All** or **Clear All** by selecting the corresponding buttons at the bottom of the box.

To Sort all the names in the mailing list, click on the field name you want to sort by.

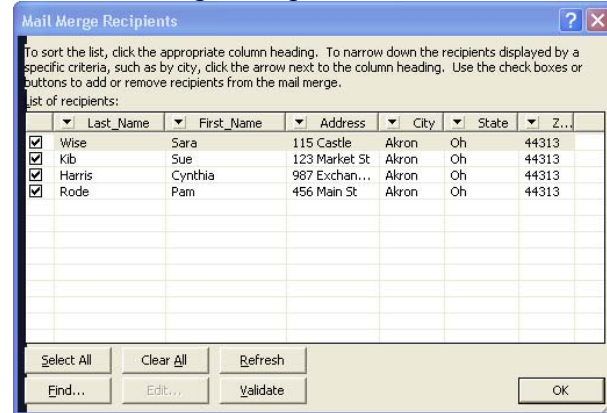
You also have additional options available by clicking on the downward pointing arrow. The options that you have available are:

- All:** Displays all records, will turn off filtering based on specific field.
- Blank:** Displays records containing no information for that field.
- Nonblanks:** Displays only records that do contain information in that field.
- Advanced:** Select this option to get even more control over the search. If you select this option, the Filter and Sort box returns. See the next row (the “**Note**”) for details.

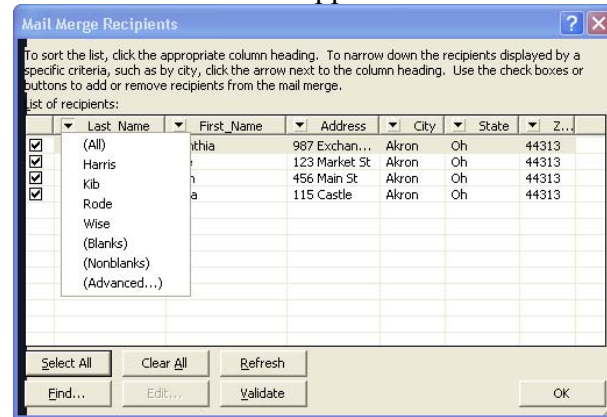
After you select (or unselect), sort, and filter the Recipients list, select **OK**.

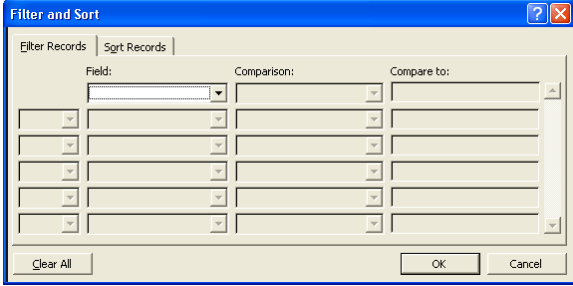
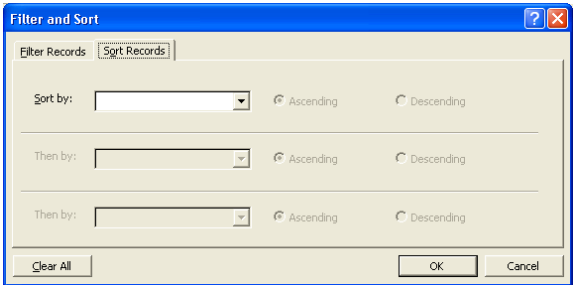
What you see

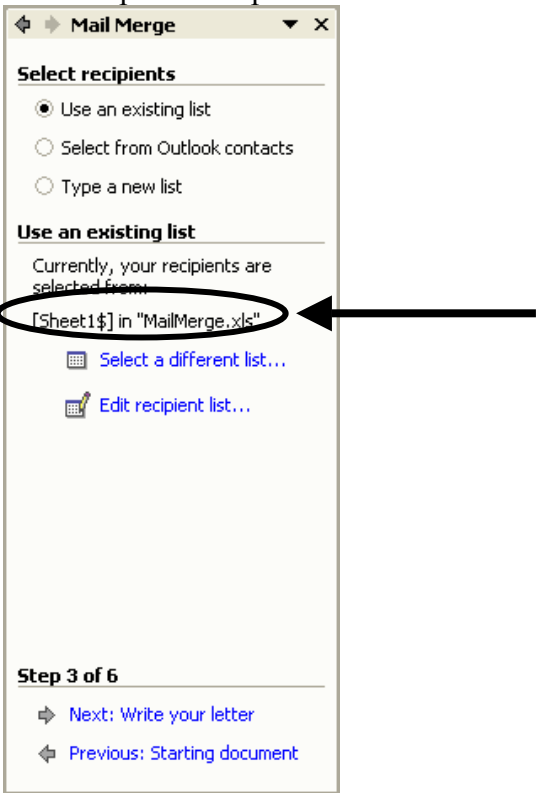
The Mail Merge Recipients box:

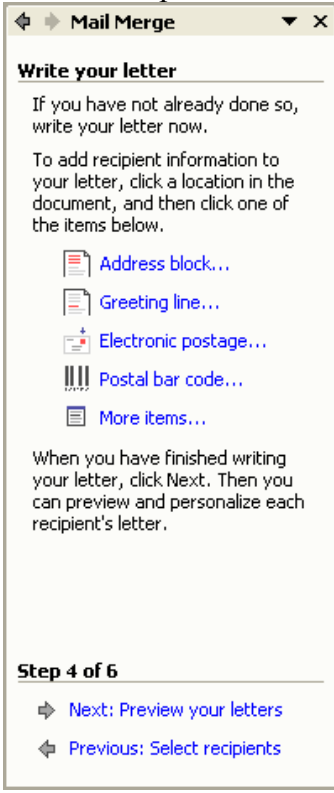
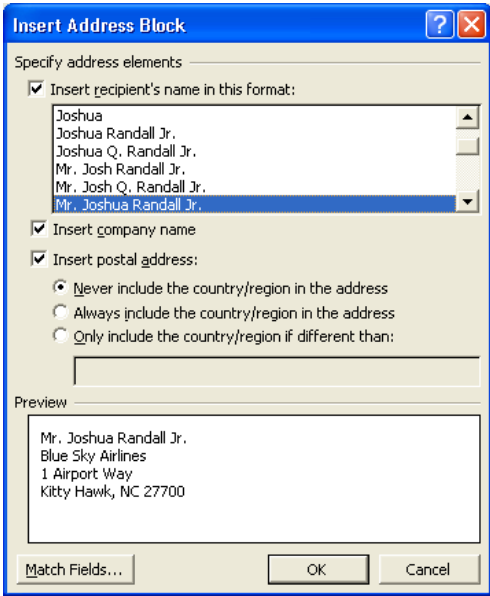


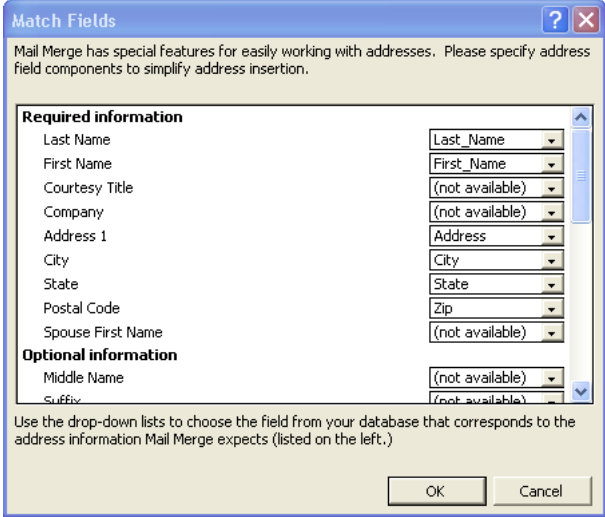
With the Sort menu dropped down:

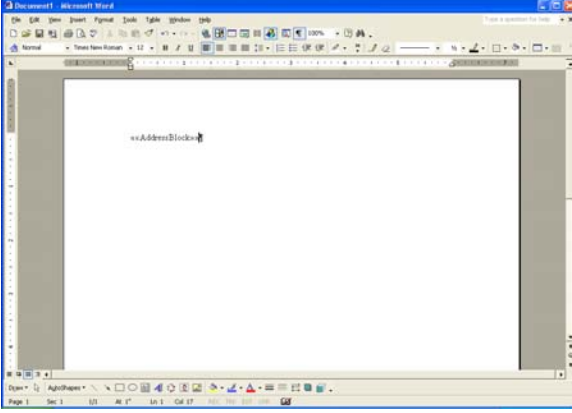
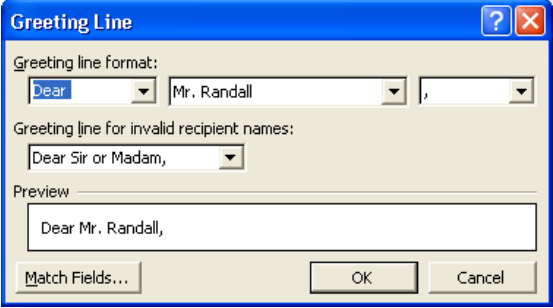
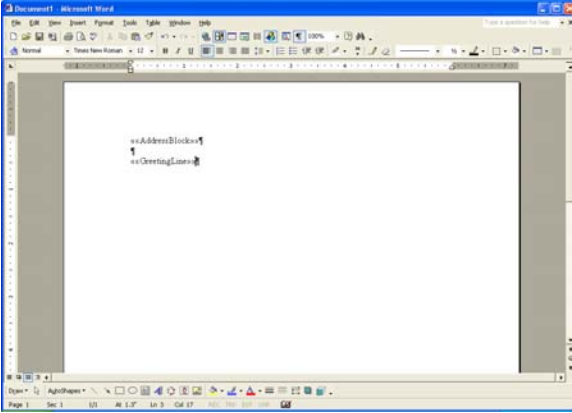


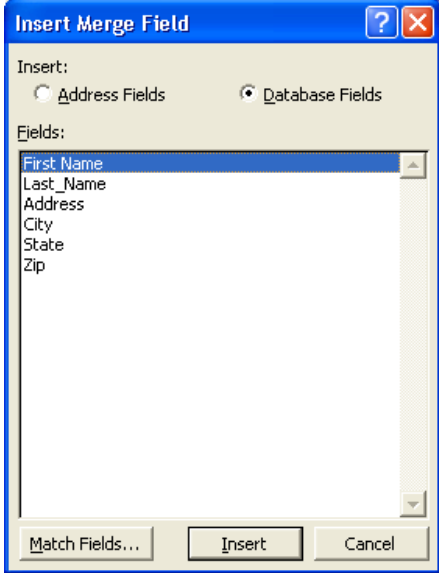
What You Do	What you see
<p>Note: If you need to perform a Filter or Sort, you would select Advanced from the menu as seen in the previous step. The Filter and Sort box returns</p> <p>On the first tab, the Filter tab, you can filter the recipient list. The fields are as follows:</p> <p>Field: Select any field from the data source. This is the field that you want to filter based on.</p> <p>Comparison: Select a phrase such as Equal to or Contains.</p> <p>Compare to: This is what you want the filter to locate and use in the final merge.</p> <p>On the Sort tab, you can sort by any field contained in the data source. You can sort up to three levels. The fields on the Sort tab are as follows:</p> <p>Sort by: Choose from the dropdown, the field that you want to sort by.</p> <p>Ascending or Descending: Select the radio button for the direction you want the sort to go.</p> <p>Select OK on either tab to accept the changes. Select OK again to return to the wizard.</p>	<p>The Filter tab:</p>  <p>The Sort tab:</p> 

What You Do	What you see
<p>10. The task pane returns and under the title, <i>Use an existing list</i>, the filename you selected is shown.</p> <p>If you need to change the data source, select the link for Select a different list. This will allow you to select a different file.</p> <p>If you need to edit the Recipients list now or at a later time, select the Edit recipient list link.</p> <p>You are ready for the next step. Click on the hyperlink, Next: Write your letter, at the bottom of the task pane.</p>	<p>The Recipient task pane:</p>  <p>The screenshot shows a task pane titled "Mail Merge" with the following content:</p> <ul style="list-style-type: none"> Select recipients <ul style="list-style-type: none"> <input checked="" type="radio"/> Use an existing list <input type="radio"/> Select from Outlook contacts <input type="radio"/> Type a new list Use an existing list <p>Currently, your recipients are selected from:</p> <p>[Sheet1\$] in "MailMerge.xls"</p> <ul style="list-style-type: none"> Select a different list... Edit recipient list... Step 3 of 6 <ul style="list-style-type: none"> Next: Write your letter Previous: Starting document

What You Do	What you see
<p>11. At the top of the task pane, under the title <i>Write your letter</i>, you will need to layout the letter with the appropriate merge fields.</p> <p>First, if you want the recipients address to print in the upper left corner of the letter, place the insertion point where you want this to appear in the editing window. Then, select Address block. The Address block refers to the portion of a main document containing the recipient’s name and address, the same as it appears for labels and envelopes.</p> <p>An address block typically looks as follows:</p> <p>Mrs. Sally Zippy 123 Carroll Street Akron, Ohio 44321</p>	<p>The next step returns:</p> 
<p>12. The Insert Address Block box returns.</p> <p>Make the necessary selections/changes for the name format, company name, and postal address.</p> <p>Verify that the Preview is accurate.</p> <p>Click on the Match Fields button at the bottom to match the data source fields to the address block template.</p>	<p>The Insert Address Block box:</p> 

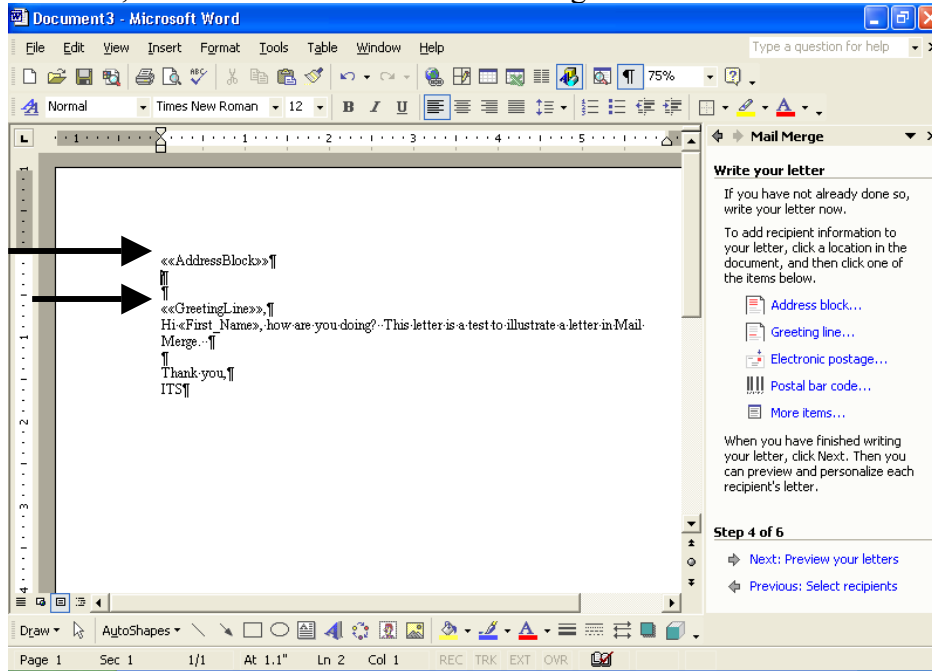
What You Do	What you see
<p>13. The Match Fields box will return. Word is going to attempt to automatically match the field names in your data source with the field names it uses in the address block.</p> <p>If Word cannot match your fields (from the data source) you can still match the fields using this box. You will see (not available) if Word was unsuccessful in matching.</p> <p>On the left are the fields that Word is using to create the address block. On the right are the fields that Word has matched using your data source. You can override any field by using the down arrow and selecting the appropriate field name.</p> <p>For example, the required field is Last Name and Word looks at the data source to find a fit. If Word can identify a field that seems appropriate, the field will fill in with that field name. If Word cannot identify a Last Name fit, you will see (not available) and you will need to select the corresponding field.</p> <p>You will want to check the Match Field box with all merges to verify that Word was able to match your fields and if Word could not make a match you will need to add them in order to make your merge successful.</p> <p>Select OK once you have verified and completed all applicable Match Fields. Select OK again to leave the Insert Address Block box.</p>	<p>The Match Fields box:</p> 

What You Do	What you see
<p>14. The main document in the editing window will change again to reflect the changes you just made.</p> <p>Note how the letter shows <<Address Block>> in the top left corner.</p>	<p>The main document after address block is selected:</p> 
<p>15. You can customize the salutation of the letter, for example, to read: "Dear Mr. Smith,"</p> <p>The first step is to place the insertion point in the document where you want the greeting line to be.</p> <p>Then, select the link for Greeting line in the task pane.</p> <p>The Greeting Line box returns. Make the appropriate selections in the Greeting line format and Greeting line for invalid recipients names fields.</p> <p>After you make those selections, click on the Match Fields button so you can verify and/or finish mapping the merge fields.</p> <p>At this point, you can type the remainder of your letter.</p>	<p>The Greeting Line box:</p>  <p>The main document after greeting line is selected:</p> 

What You Do	What you see
<p>16. Another type of customization that you can make to the form letter is to put merge fields in the body of the letter.</p> <p>First, place the insertion point in the letter where you want the merge field to go.</p> <p>Then, select the link for More items and the Insert Merge Field box returns.</p> <p>Select the merge field from the data source Fields list that you want added to the letter. For example, you may want to add the person’s first name in the body of the letter; therefore, you would select the First_Name field. Then, select Insert.</p> <p>Add any additional merge fields and then select Close.</p>	<p>The Insert Merge Field:</p> 

What You Do**What you see**

17. After you have the address block, greeting line, and any other merge fields inserted into the letter, it will look similar to the following:

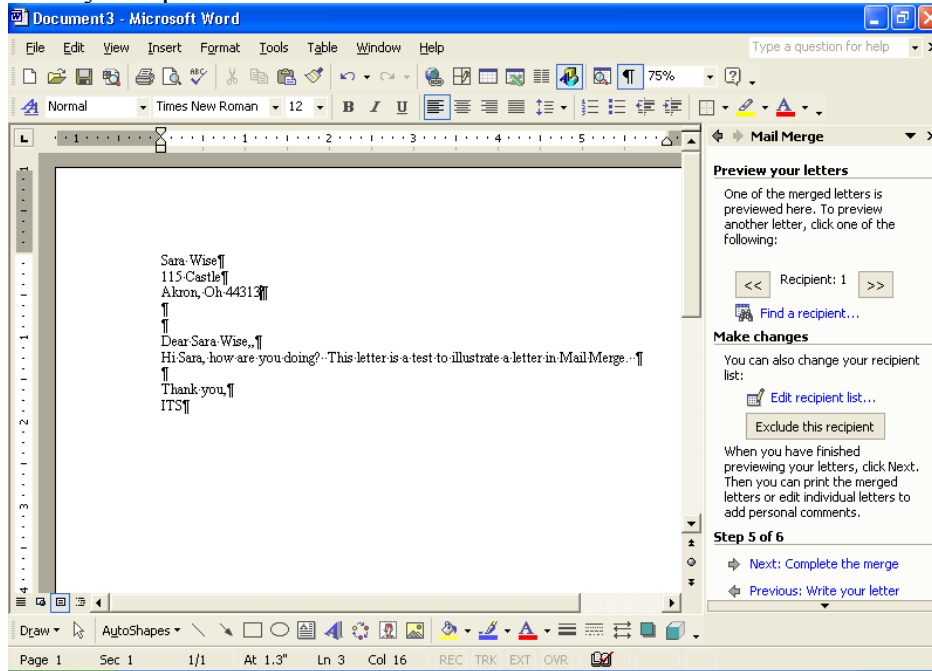


Your main document is finished. You are ready for the next step. Click on the link **Next: Preview your letters** to advance.

Note: The template that you see in the editing window is how the letter is going to appear, but with the real data from the data source. If you see extra indications of merge fields, you will want to delete them from the letter. If you do not delete the extra merge field indications, the label or letter will print with the same name and address several times. Also, be sure to place appropriate spacing before and after the merge fields. If you do not place spaces appropriately you may have gaps or words that run together. Remember, what you see is what you get!

What You Do**What you see**

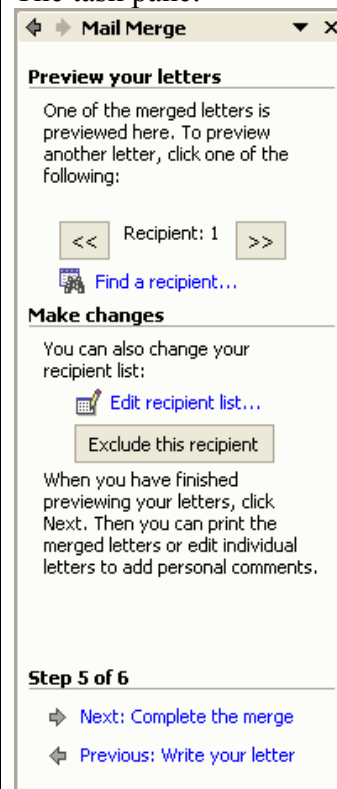
18. After you click on the link for the next step, the main document in the editing window will show you a preview of the letters.

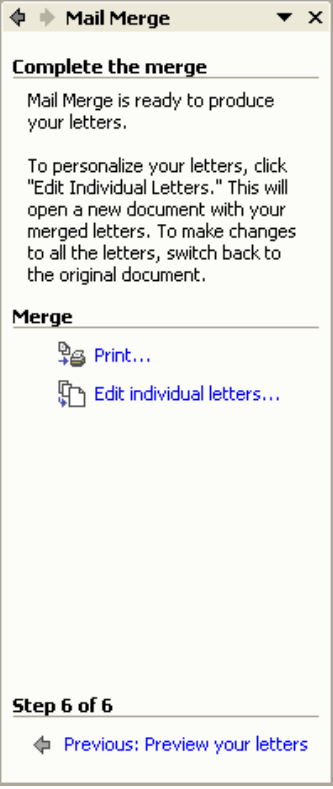


19. At the top of the task pane, under the title **Preview your letters**, you can go forward or backwards through the letters using the arrows buttons. You can also locate a specific recipient by clicking on the link for **Find a recipient**.

If you need to edit the list of recipients, click on the **Edit recipient list** link under the title, **Make changes** to return to the Mail Merge Recipients box. You can also use the button to **Exclude this recipient** to remove a person from the merge.

Click on the link for **Next: Complete the merge** at the bottom of the task pane to move to the last step.

The task pane:

What You Do	What you see
<p>20. The last step is to complete the merge.</p> <p>To Print the labels, click on the Print link under the <i>Merge</i> title.</p> <p>In the Merge to New Document box, select All and select OK. The Print box returns. Make the necessary selections and click OK.</p> <p>If you want to personalize the letters, click on the link for Edit individual letters to open a new document with the merged letters. You can save the new document as a separate file. Note that you are saving just the letters and NOT the mail merge main document file.</p>	<p>The last task pane returns:</p>  <p>The Merge to New Document box returns:</p> 