

MAILMERGE BASICS

This is the introduction to a series of articles that describes the basic steps in the mail merge process, using form letters as an example. It's a great place to get an overall picture of the process. The series includes:

Step 1: Choose a document type and main document.

Step 2: Connect to a data file and select records

Step 3: Add fields to the main document

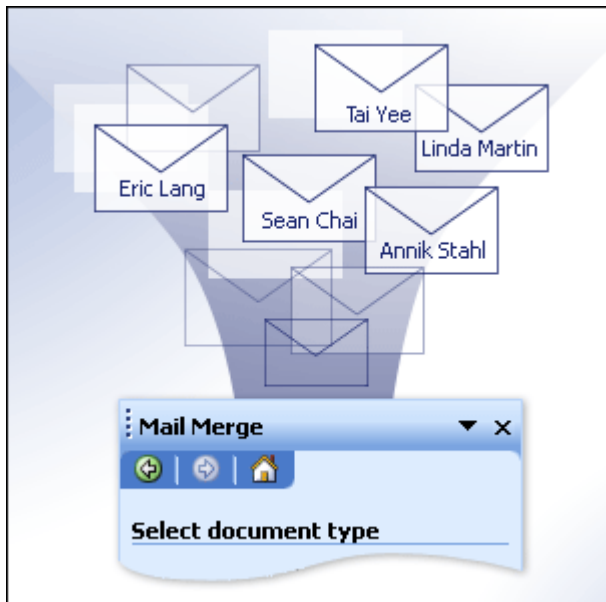
Step 4: Preview the merge and then complete it

After you see the big picture, you can learn more about using mail merge to create labels, envelopes, faxes, e-mail messages, and directories by clicking a link in the **See Also** box.

The power of mail merge

You use mail merge when you want to create a set of documents that are essentially the same but where each document contains unique elements. For example, in a letter that announces a new product, your company logo and the text about the product will appear in each letter, and the address and greeting line will be different in each letter.

Using mail merge, you can create:



A set of labels or envelopes The return address is the same on all the labels or envelopes, but the destination address is unique on each one.

A set of form letters, e-mail messages, or faxes The basic content is the same in all the letters, messages, or faxes, but each contains information that is specific to the individual recipient, such as name, address, or some other piece of personal data.

A set of numbered coupons The coupons are identical except that each contains a unique number.

Creating each letter, message, fax, label, envelope, or coupon individually would take hours. That's where mail merge comes in. Using mail merge, all you have to do is create one document that contains the information that is the same in each version. Then you just add some placeholders for the information that is unique to each version. Word takes care of the rest.

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Let's get started...

To start the **Mail Merge** process:

1. Start **Word**. A blank document opens by default. Leave it open. If you close it, the next step won't work.
2. On the **Tools** menu, point to **Letters and Mailings**, and then click **Mail Merge**.

The **Mail Merge** task pane opens. By using hyperlinks in the task pane, you navigate through the mail-merge process.

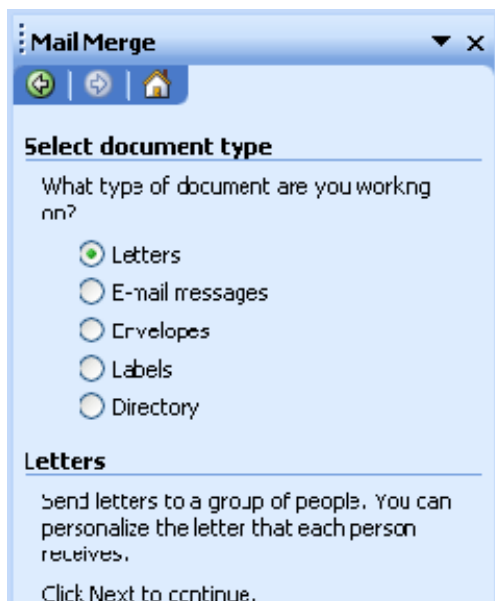
Tip

You can also perform a mail merge by using buttons on the **Mail Merge** toolbar (**View** menu, **Toolbars** submenu, **Mail Merge** command). Until you are familiar with the process, however, it is probably easier to use the task pane.

Step 1: Choose a document type and main document

This step in the **mail merge** process involves two choices. First, you choose the **type of document** that you want to merge information into. Then, you choose the **main document** that you want to use. The main document is the document that you start with. It's the model for all of the merged documents that you eventually create.

Note: Remember, we're using form letters as the example in this article series. If you are creating a set of merged labels or envelopes, the process is a little different. To go directly to information about labels or envelopes, click a link in the **See Also** section of this column.



Choose the type of document you want to merge information into:

The **Mail Merge** task pane opens with a question about what type of merged document you are creating. After you choose, click **Next** at the bottom of the task pane.

Note: If you don't see the Mail Merge task pane, on the **Tools** menu, point to **Letters and Mailings**, and then click **Mail Merge** (or **Mail Merge Wizard**, if you're using Word 2002).

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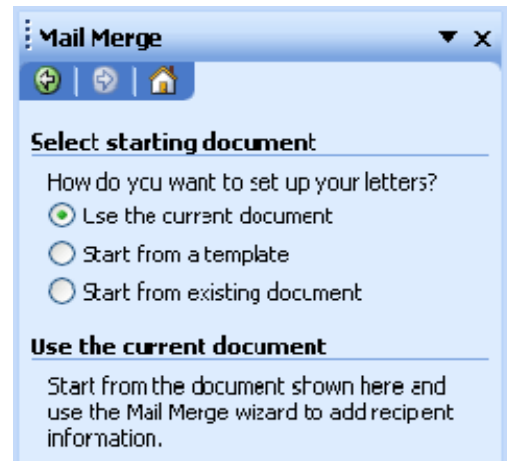
Choose the main document you want to use:

If your main document (called the **starting document** in the task pane) is already open, or you are starting with a blank document, you can click **Use the current document**.

Otherwise, click **Start from a template** or **Start from existing document**, and then locate the template or document that you want to use.

Tip

When you click **Start from a template** and then click **Select template** in the task pane, you open the **Select Template** dialog box. From there, you can open one of the many templates that are installed with Word. You can also access the hundreds of templates available on the Microsoft Office Online Web site.

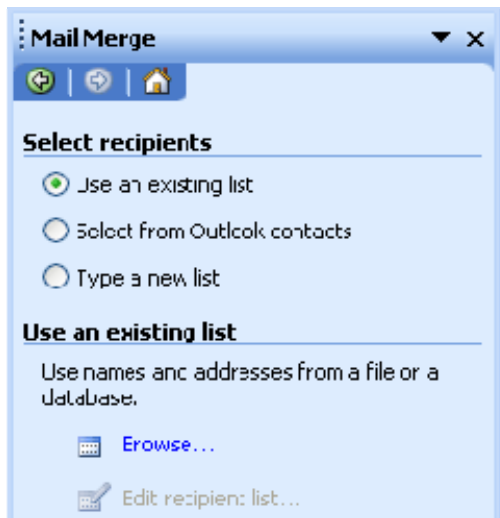


Step 2: Connect to a data file and select records

To merge unique information into your main document, you must **connect to** (or create and connect to) the data file where the unique information is stored. If you don't want to use all the data in the file in your merge, you can **choose** the records that you want to use.

Connect to the data file

In this step in the **Mail Merge** process, you connect to the data file where the unique information that you want to merge into your documents is stored.



After you connect your main document to a data file, you're ready to **add fields** that indicate where the unique information will appear in each copy of the document that you generate when you merge. To make sure that Word can find a column in your data file that corresponds to every address or greeting element, you may need to **match fields**.

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Add Fields

If your main document is still blank, type the information that will appear in each copy. Then, add fields by clicking the hyperlinks in the task pane.

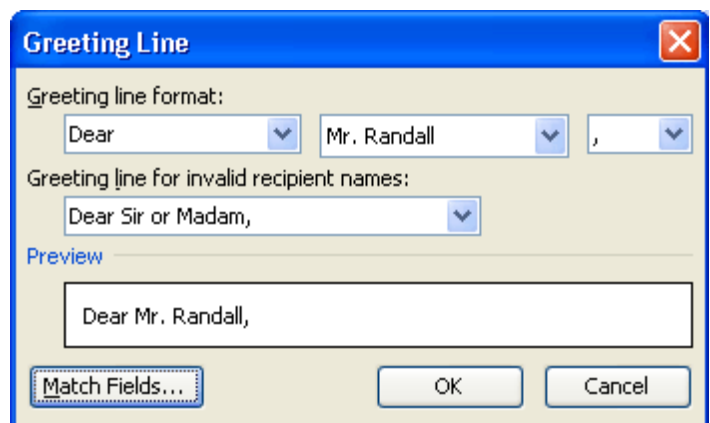


Fields are placeholders that you insert into the main document at locations where you want unique information to appear. For example, you can click the **Address block** or **Greeting line** links in the task pane to add fields near the top of a new product letter, so that each recipient's letter contains a personalized address and greeting. Fields appear in your document within chevrons, for example, «**AddressBlock**».

If you click **More items** in the task pane, you can add fields that match any of the columns in your data file. For example, your data file might include a column called **Personal Note**. By putting a **Personal_Note** field at the bottom of a form letter, you can further personalize each copy. You can even customize envelopes by adding a postal bar code if you are using the English (U.S.) language version of Word or electronic postage.

Match fields

If you insert an address block field or a greeting line field into your document, you are prompted to choose the format that you prefer. For example, the illustration shows the **Greeting Line** dialog box that opens when you click **Greeting line** in the task pane. You use the lists under **Greeting line format** to make your choices.

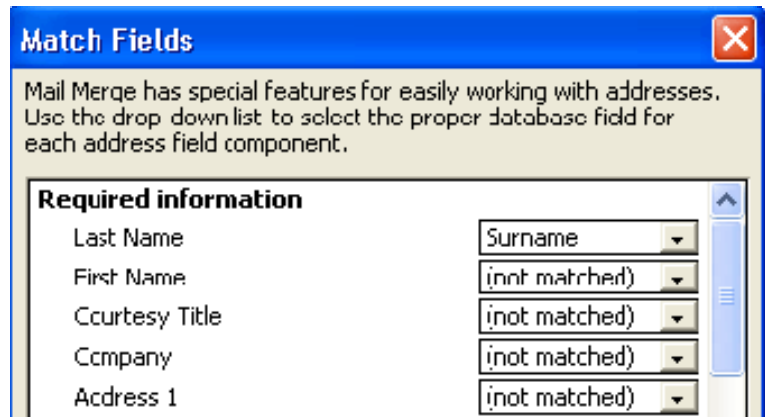


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Step 4: Preview the merge and then complete it

When you finish adding and matching the fields in your main document, you are ready for the next step.

If Word can't match each greeting or address element with a column from your data file, the addresses and greeting lines will not be merged correctly. To help avoid problems, click **Match Fields**. The **Match Fields** dialog box opens.



The elements of an address and greeting are listed on the left. Column headings from your data file are listed on the right.

Word searches for the column that matches each element. In the illustration, Word automatically matched the data file's **Surname** column to **Last Name**. But Word was unable to match other elements. From this data file, for example, Word can't match **First Name** or **Address 1**.

By using the lists on the right, you can select the column from your data file that matches the element on the left. In the illustration, the **Name** column now matches **First Name**, and the **Address** column matches **Address 1**. It's okay if **Courtesy Title**, **Company**, and **Spouse First Name** aren't matched, because they aren't relevant in the documents that you are creating.

