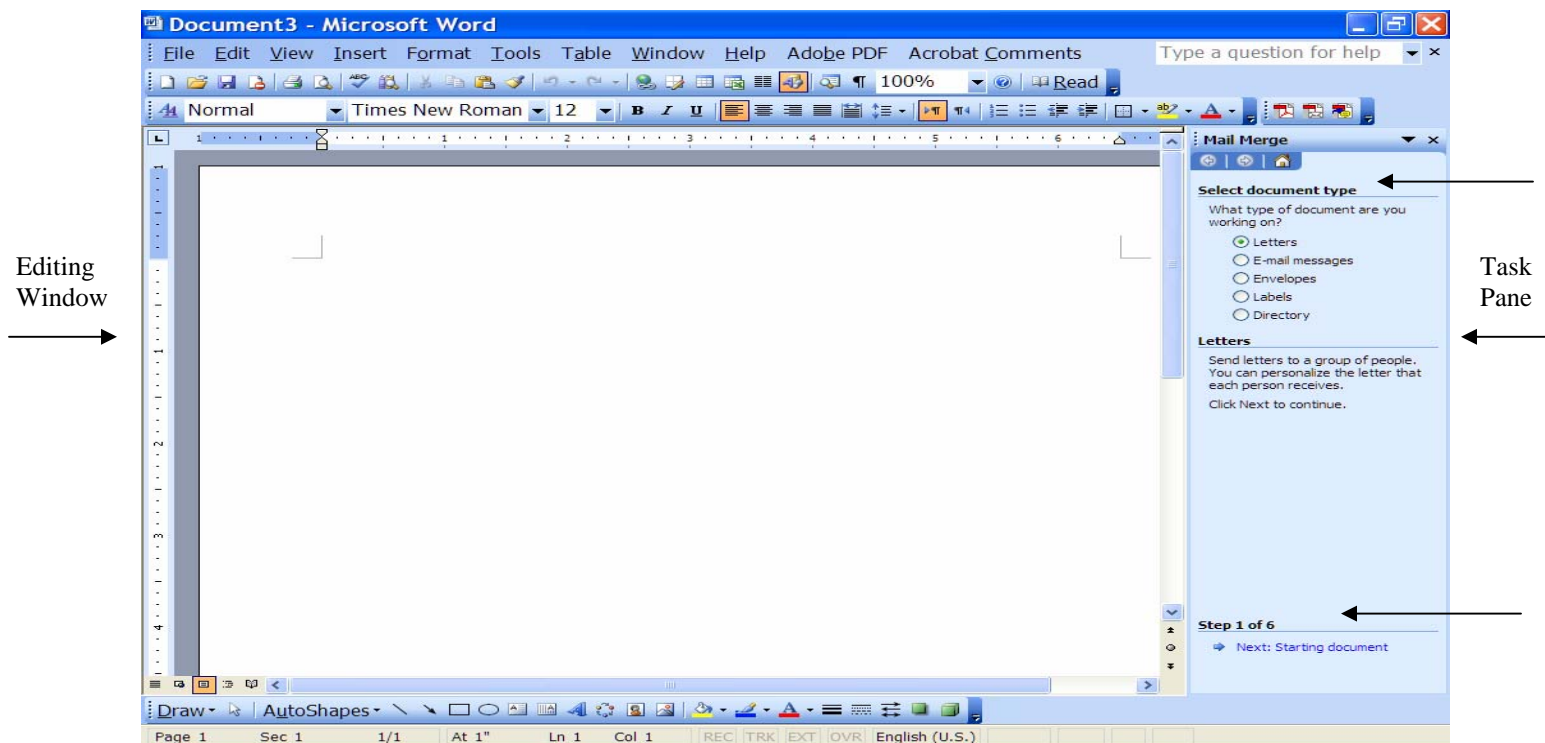


MICROSOFT WORD 2003 MAIL MERGE

Welcome to Microsoft Word 2003 Mail Merge. Mail merge allows for the creation of custom letters, documents, labels, envelopes and emails to be sent to multiple recipients. The Word 2003 Mail Merge Workshop will review changes to the appearance, functions and overall layout of mail merge. Many features, although setup differently, will be easily recognized while other features are new and enhanced.

To begin mail merge go to Tools > Letters & Mailings > Mail Merge. A task pane will automatically open to the right-hand side of the document. The task pane acts as a Mail Merge wizard with six (6) steps to follow to complete the merge.

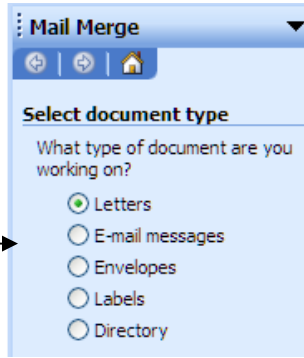
STEP 1 OF 6 – SELECT DOCUMENT TYPE



Begin by selecting a document type from the list provided:

- Letters
- E-mail messages
- Envelopes
- Labels
- Directory

The most commonly used merges include letters, envelopes and labels. Once a letter is generated it's easy to create envelopes and labels from the same data source by simply changing the document type to envelopes or labels then select print.



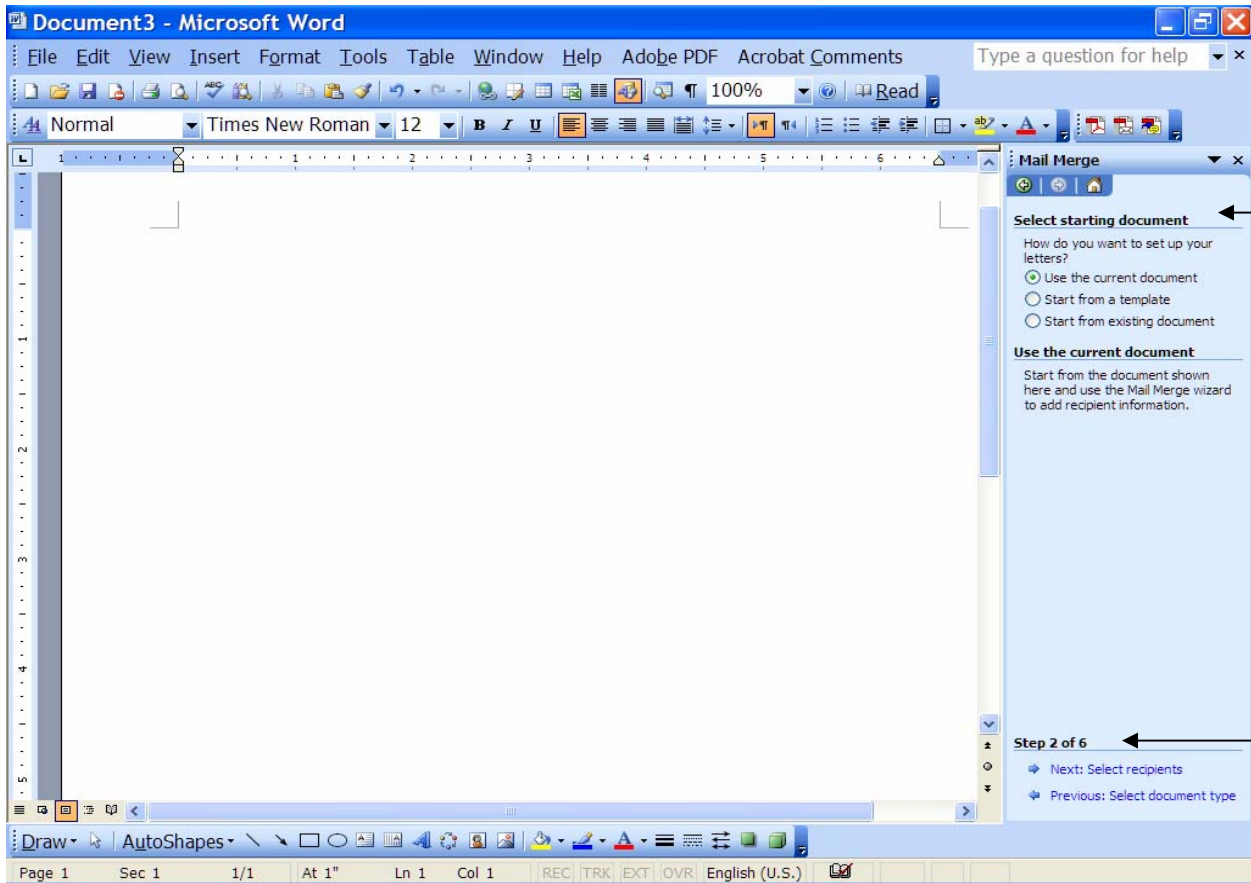
NOTE:

If you want to send a letter or document to an e-mail list DO NOT SELECT the e-mail messages listed above. This option allows for the creation of one specific email to be sent to multiple recipients.

Instead, complete the letter or document then upon the final merge instead of merging to the printer select merge to e-mail. The letter or document will automatically be sent via e-mail to the recipient list selected in Step 3.

After selecting a document type press NEXT.

STEP 2 OF 6 – SELECT STARTING DOCUMENT

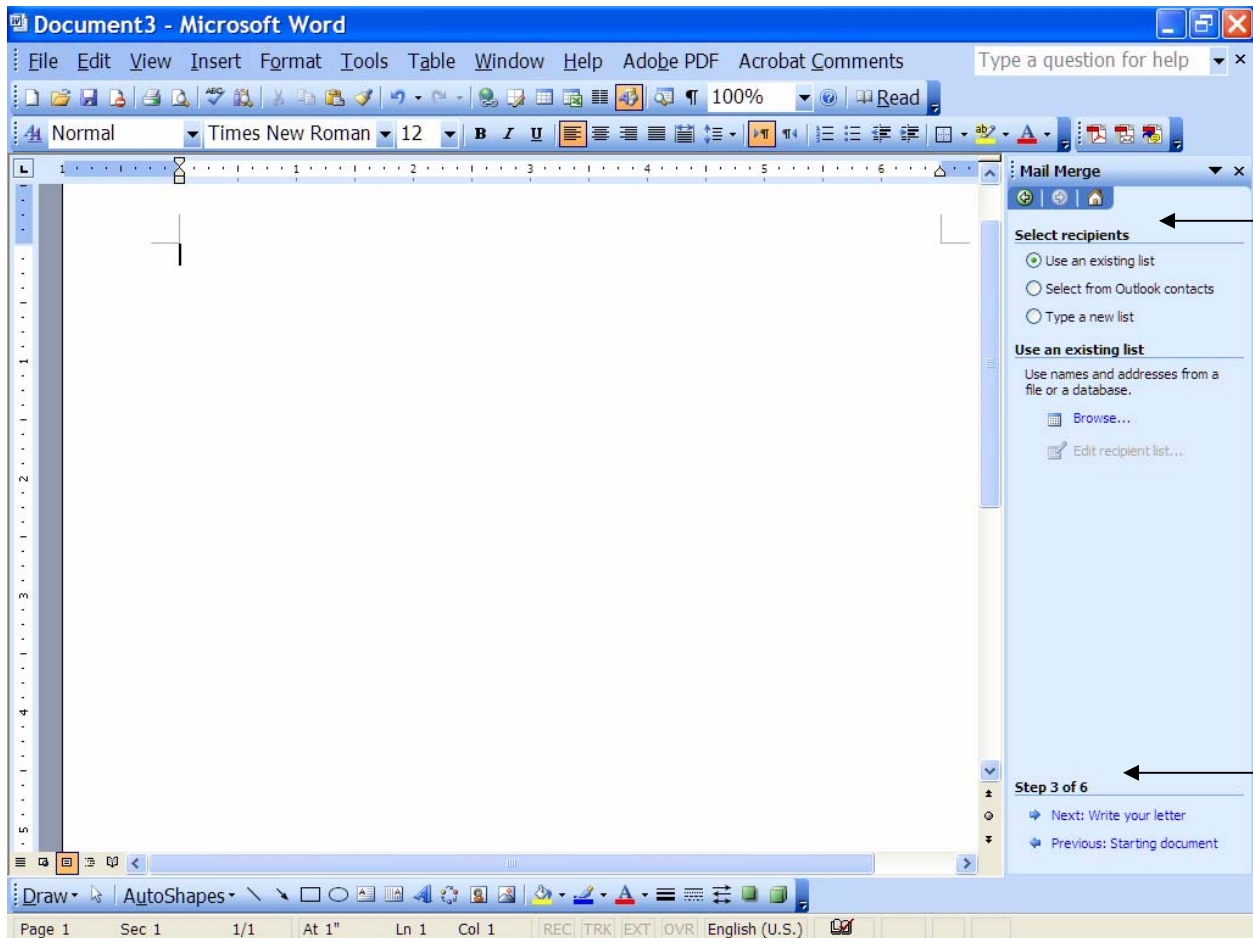


Choose the document to use as the main document for the mail from the selection(s):

- Use the current document
- Start from a template
- Start from existing document

Choose RETURN to previous to select a document type or press NEXT to continue.

STEP 3 OF 6 – SELECT RECIPIENTS



Choose a data source or create a data source by selecting an option:

- Use an existing list
- Select from outlook contacts (Not applicable)
- Type a new list

USE AN EXISTING LIST

Select Use an existing list under Select Recipient then choose [Browse](#) to locate the data source. After selecting the [Browse](#) option please disregard the two default options that appear in the dialogue box and proceed to the drop down list to select/find the data source.

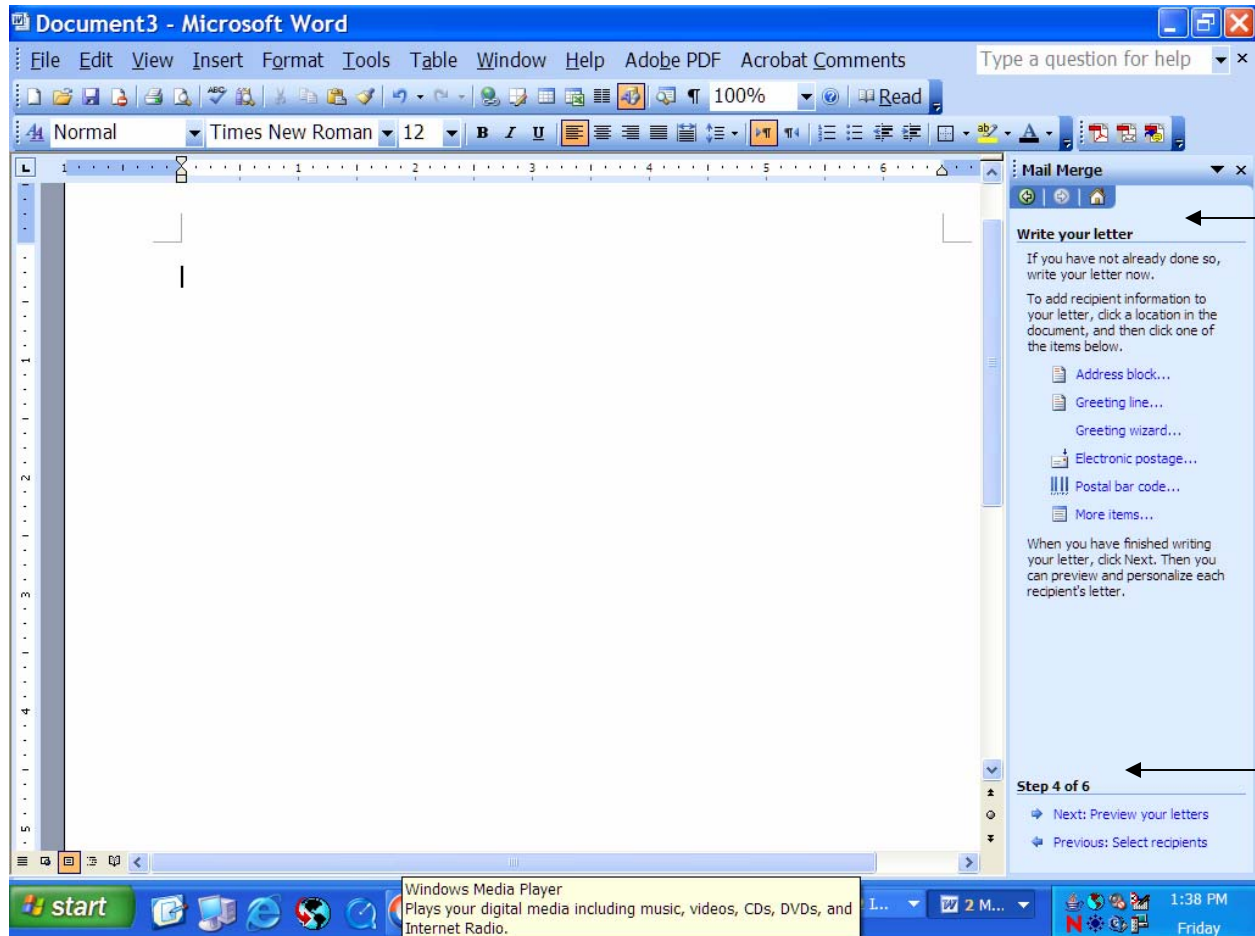
To edit the existing list choose [Edit Recipient List](#) under Select Recipient. A dialogue box titled [Mail Merge Recipients](#) will appear with all of the vital information. To edit/sort this list select a handle at the top of the chosen column then pick the item to be deleted or edited.

TYPE A NEW LIST

Select Type a new list under Select Recipient then choose [Create](#) to begin typing a new list. A New Address dialogue box will appear and allows new entries, deletions, find, filter/sort and customization of the newly types list.

Choose NEXT to write the letter or return to previous.

STEP 4 OF 6 – WRITE YOUR LETTER



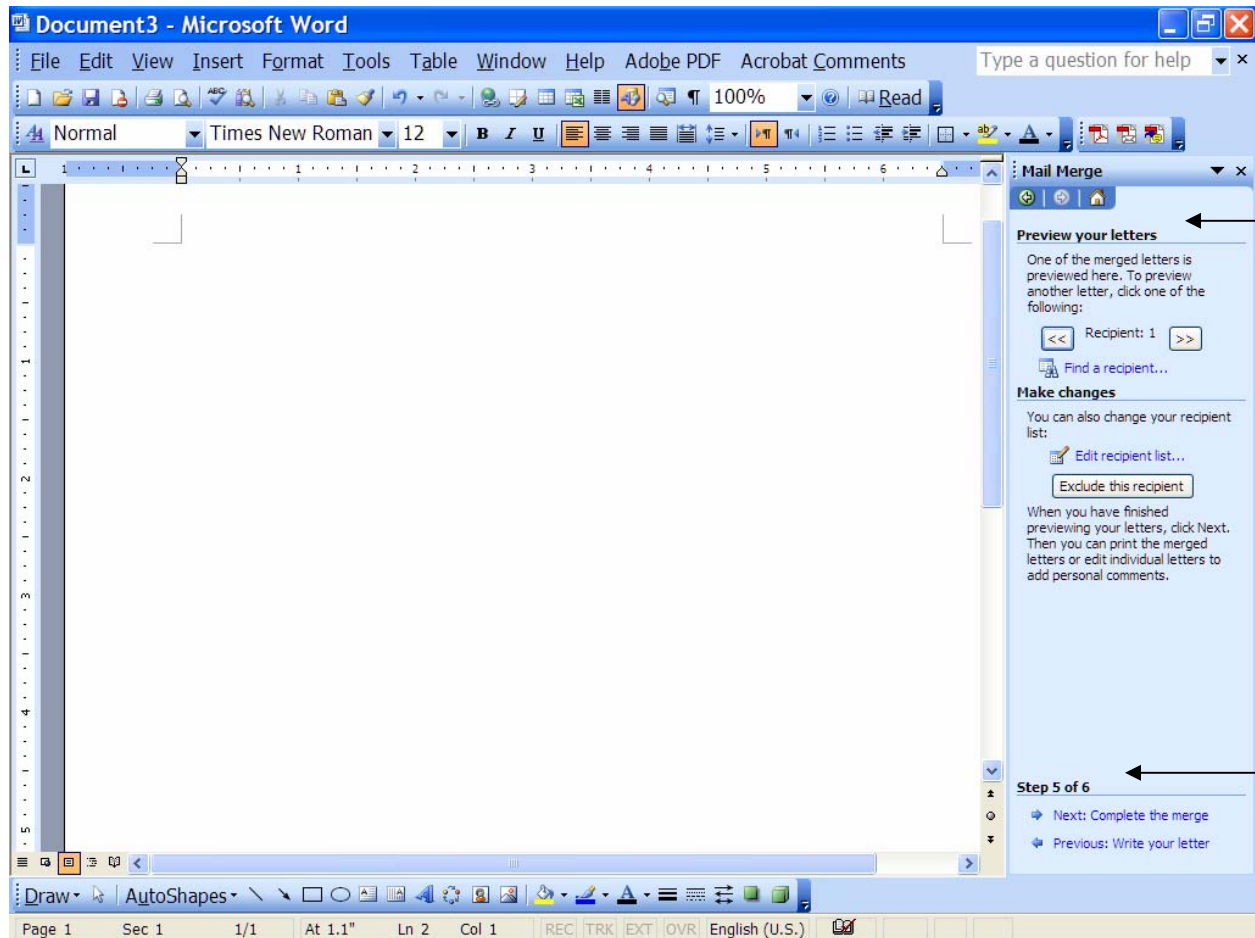
Once the letter/document is written then add recipient's information to the letter by clicking on a location within the letter/document then selecting from the following to insert the merge fields:

- Address block
- Greeting line – Greeting wizard
- Electronic postage (Not applicable)
- Postal bar code
- More items

Each of these options contains a specific dialogue box to help make the right selection for the type of letter/document being created.

Choose NEXT to preview the letter or previous to select recipients.

STEP 5 OF 6 – PREVIEW YOUR LETTERS

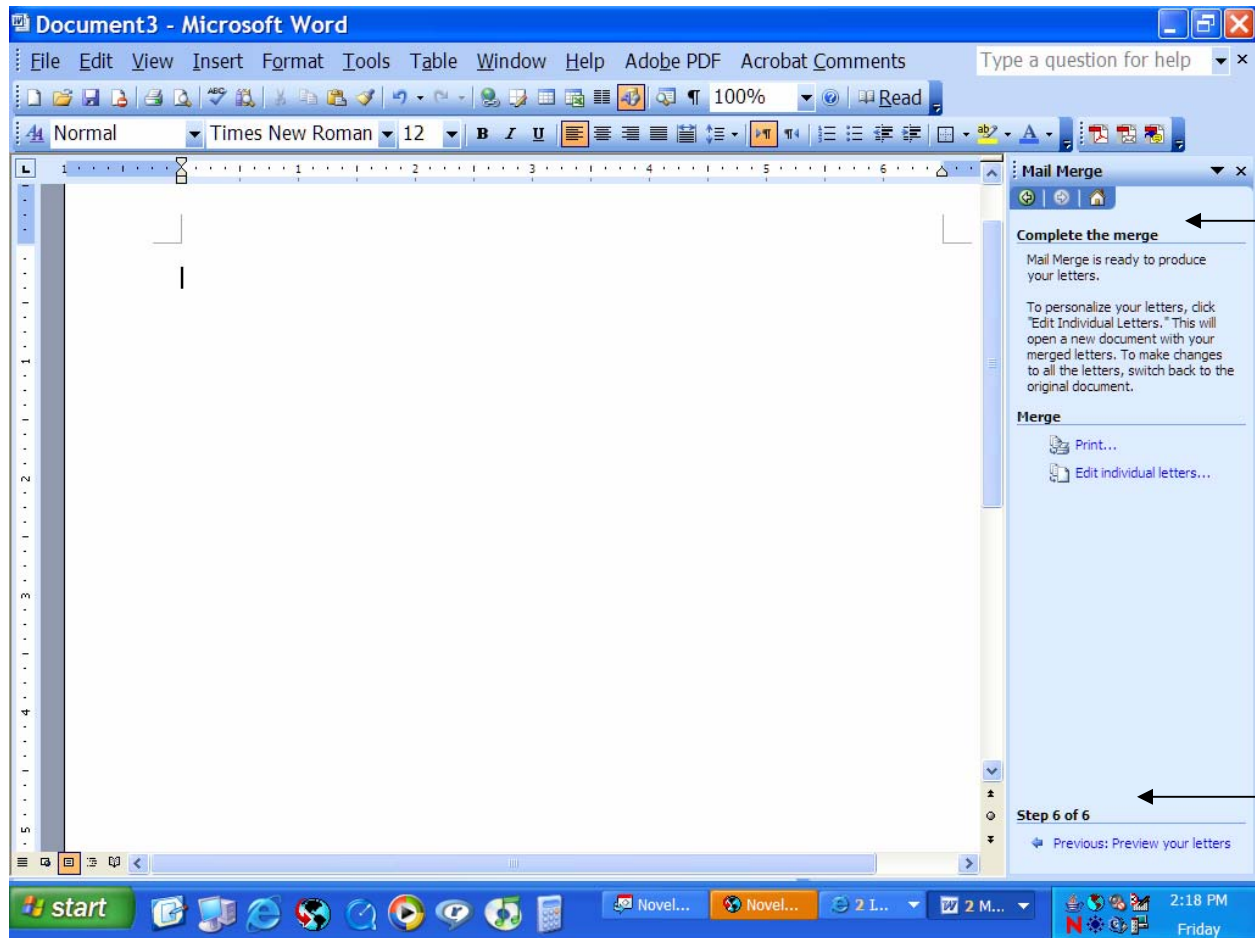


The first letter is automatically previewed. The status bar should show 1/1 regardless of how many recipients are in the data source. To view additional recipients use the task pane scroll feature or select [Find a recipient](#) under Preview your letters.

The option to [edit the recipient list](#) remains in the task pane under Make Changes. While in preview mode the option exists to exclude a recipient without changing the main data source by click on the Exclude this recipient button located under Make Changes.

Chose NEXT to complete the merge or previous to additional changes.

STEP 6 OF 6 – COMPLETE THE MERGE



To make additional changes before printing select [Edit individual letters](#).

CAUTION: This feature merges the letters to be edited into a NEW MERGE DOCUMENT. Only use this option for special changes to a batch of letters within a data source. To make simple modifications while retaining the complete data source click [Previous: Preview your letters](#) and make changes under the Make Changes section of the merge.

MERGE TO PRINTER

The [print option](#) under Merge in the task pane automatically uses Mail Merge's printer to merge the letter to the printer. Using Mail Merge's printer helps eliminate glitches in the merge and forces the letter/document to print correct. **DO NOT USE THE FILE PRINT OPTION** for Mail Merge because the Mail Merge does not always recognize all the settings and printing errors can occur.

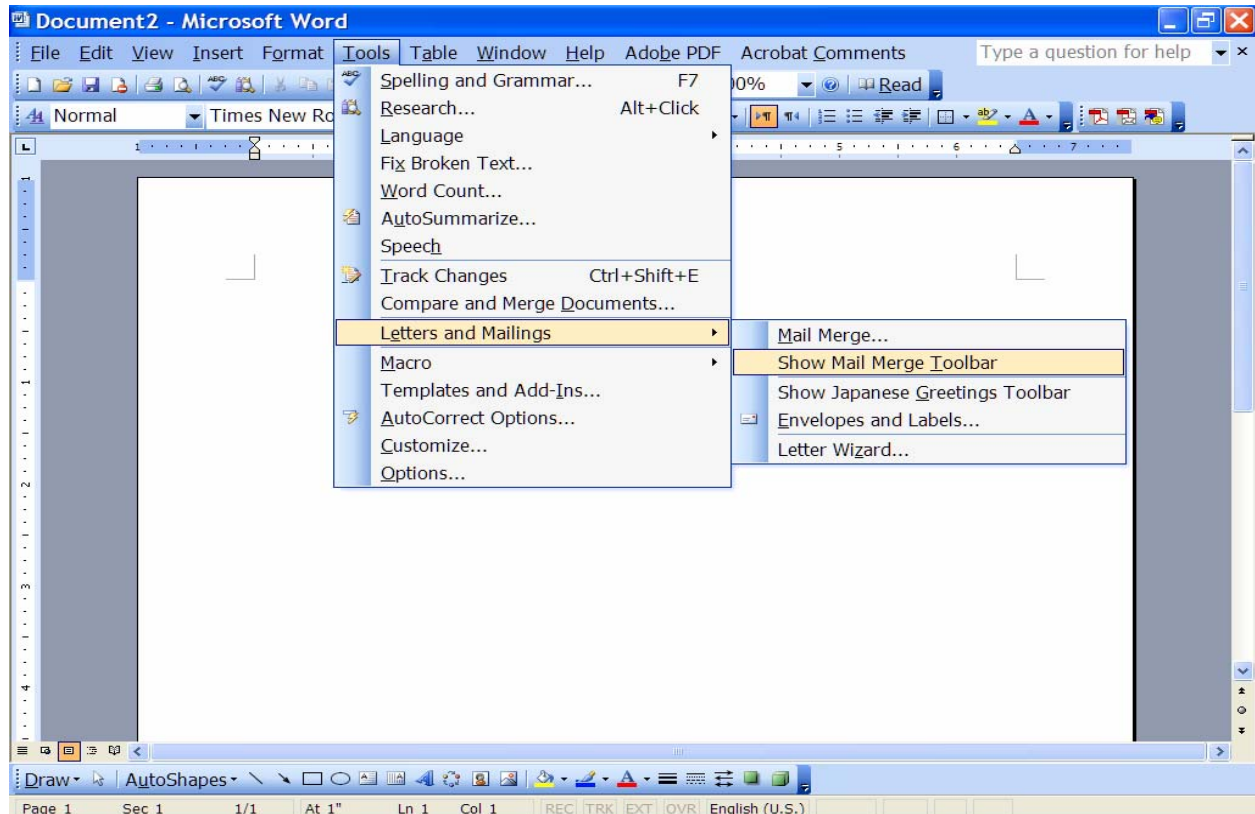
Once print is selected specific records can be chosen and merged to the printer or the entire data source can be sent.

To preview letters select [Previous: Preview your letters](#).

EXTRA TIPS:

MAIL MERGE TOOLBAR

In the previous version of Word mail merge functions were found on the mail merge toolbar. In the Word 2003 version of mail merge the toolbar has been replaced with the task pane (mail merge wizard). To reference the old style toolbar go to **TOOLS > LETTERS AND MAILINGS > SHOW MAIL MERGE TOOLBAR**.



MAIL MERGE TERMS

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	Allows specific records to merge from the data source to the merged document.
Sort Records	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.

DATA SOURCE TROUBLESHOOTING

If problems occur while importing a data source, such as strange characters appearing or misplaced numbers, please contact IT at extension 73406 for assistance.

Consider adding information here regarding the label making – especially in reference to editing labels.