

---

# Microsoft Word 2000

## Mail Merge

---

### Quick Reference Guide

Page 1	Overview Creating the Form Letter
Page 2	The Mail Merge Helper Step One: Creating the Main Document
Page 3 - 6	Step Two: Working with the Data Source
Page 7	Step Three: Merge the Data with the Document
Page 8 - 10	Creating Envelopes and Mailing Labels using Mail Merge

---

# Microsoft Word 2000

## Mail Merge

---

### Overview

Word's Mail Merge feature allows you to easily create form letters, envelopes, or mailing labels. The Mail Merge Helper guides you through organizing the address data, merging it into a generic document, and printing personalized documents.

### Creating the Form Letter

#### Type the Form Letter

Open a new file in Word and enter text that will comprise the letter.

#### Mail Merge Information

As you are entering text, keep in mind that the name and address will be inserted from the data source.

**Tip:** For ease of adding merge fields later, type placeholders in the areas of the letter where you want data inserted. An example of using placeholders:

*Title Name*  
*Address1*  
*Address2*  
*City, State Zip*

Dear *Title Last Name*:

#### Inserting the Date Automatically

- Go to the Insert menu
- Select Date and Time...
- Choose a date format from the Available Format list
- If you want the date updated each time you make changes to the document, check the box to Update Automatically

#### Format the Letter

Add any special formatting to the letter. For example, you may want to change the font and size or make some text **Bold** or *Italicized*.

#### Save the Letter

Click the Save button on the Standard toolbar to open the Save As dialog box, give the form letter a name, and then click Save. You can now leave the form letter open.

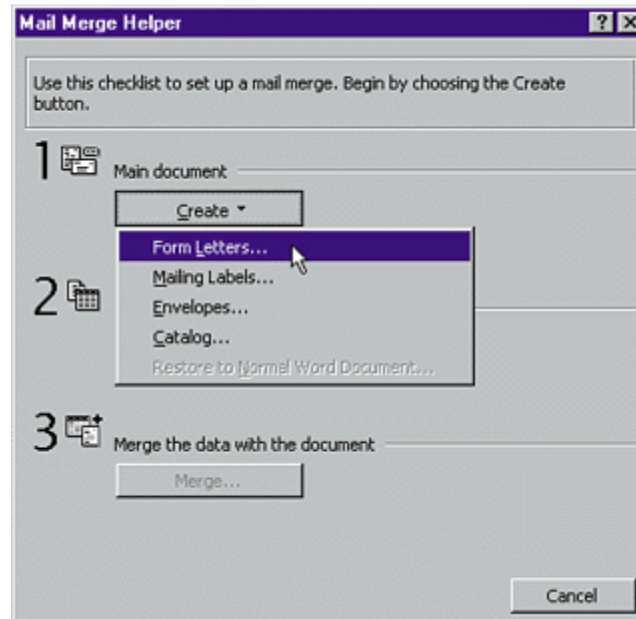
# Mail Merge Helper

## Open Mail-Merge Helper

- Go to the Tools menu
- Select Mail Merge...
- This opens the Mail Merge Helper dialog box

## Step One: Main Document

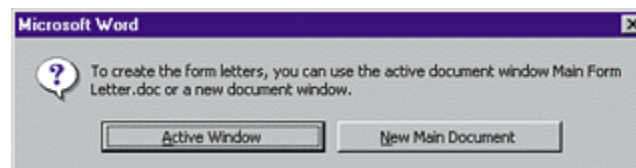
- Click the Create button under the Main Document heading
- Choose Form Letters



## Active Window Prompt

A prompt box appears, asking whether you want to use the active window as the main document or create a new main document.

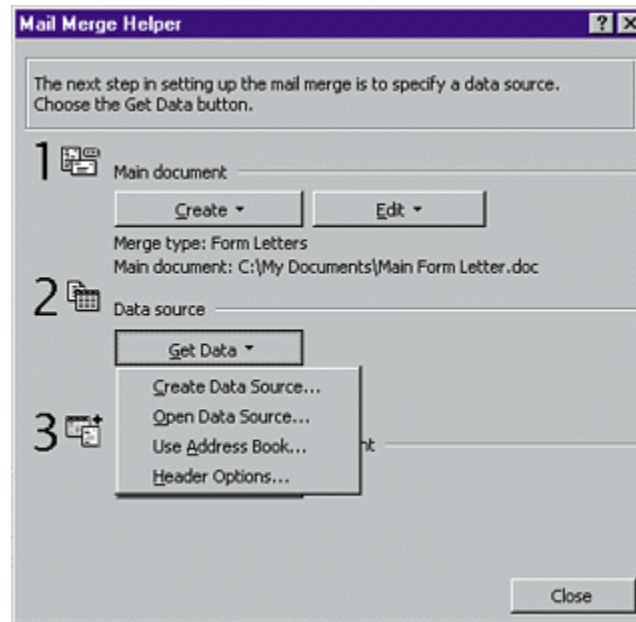
Click Active Window. This tells Word to use the form letter we created in the previous steps as your main document for the mail merge.



## Step Two: Data Source

### Get Data

- Click the Get Data button under the Data source heading
- Choose a data source option from the drop-down list



### Open Data Source

If you already have a database created, specify which one you want to use.

**Note:** Word is able to use data stored in an Access database or Word table.

### Create Data Source

If you don't have an address database, you may create your own by using the mail-merge feature.

Keep in mind that this will slow you down a bit because you have to enter a record for each person to whom you want to send the form letter.

### Choose a Database File

If you selected **Open Data Source**, you must locate the database or table file.

Select the file from the list box and click Open.

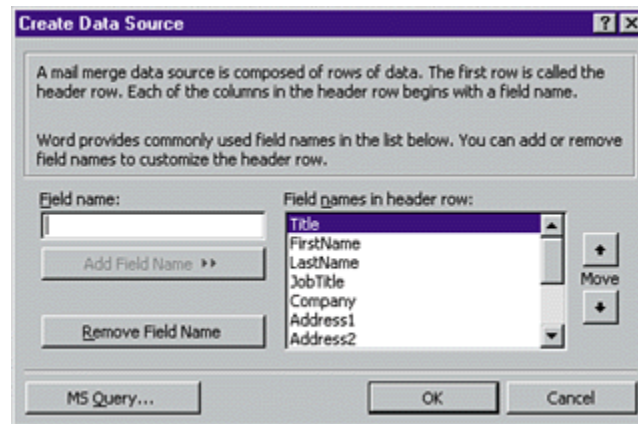
**Tip:** In order to see all types of files, make sure you have All Files selected in Files of Type box.

## Create Your Own Address List

If you selected Create Data Source, the Create Data Source dialog box opens. Word displays common field names in the list box.

Fields represent different parts of the address record (such as name, city, state).

You may choose the fields you don't want to use in your data source or add new ones.

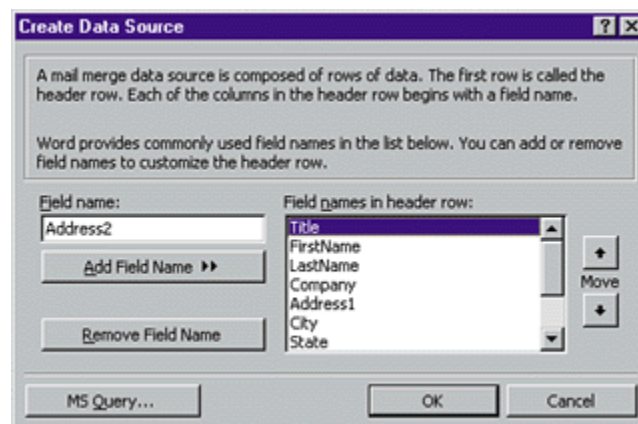


## Edit the Field Names

Word provides you with a list of typical field names.

To remove a field from the list, such as *HomePhone*, select it and then click the Remove Field Name button.

To add a field, enter it in the Field name text box and click the Add Field Name button.



## Check the List

Use the Move buttons to reposition a field in the list box.

Click the field you move, and then click the appropriate Move arrow button (click Up to move the item up in the list, click Down to move it down).

When you have edited the list to contain all the fields you want to use in the database and positioned them just as you want them, click OK.

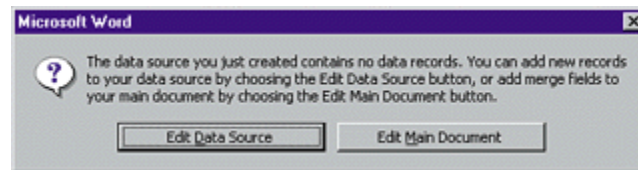
## Give the Data Source a Name

The Save As dialog box opens so you can give the data source a name.

Type in a name for the address list in the File name text box and click Save.

## Edit the Data Source

A prompt box appears telling you there are no data records.  
To add records click the Edit Data Source button.



## Enter the First Record

A Data Form opens onscreen and you can enter the first record.  
The fields shown are based on those you specified.  
To start entering the text for the first field, just start typing.  
Use the Tab key to move from field to field and enter text

A "Data Form" dialog box with a purple title bar. It has several input fields on the left: "FirstName:", "LastName:", "Address1:", "City:", "State:", "PostalCode:", and "Country:". To the right of these fields are buttons: "OK", "Add New", "Delete", "Restore", "Find...", and "View Source". At the bottom, there is a "Record:" label followed by navigation buttons (back, forward, first, last) and a text box containing the number "1".

## Click Add New

Click the Add New button to continue adding records to your database.

## Enter the Next Record

Repeat the process for additional records.

## Move Between Records

To move back and forth between records you've previously entered, click the arrow buttons at the bottom of the form.

You may edit the text within each field just like you edit document text.  
Use the Backspace and Delete keys to fix mistakes.

A "Data Form" dialog box with a purple title bar. The input fields are now populated with text: "FirstName:" is "Melissa", "LastName:" is "Willard", "Address1:" is "714 S. Chestnut Street", "City:" is "Kewanee", "State:" is "IL", "PostalCode:" is "75849", and "Country:" is "USA". The buttons on the right remain the same. At the bottom, the "Record:" text box now contains the number "4".

## Click OK

Click OK when you are finished entering all the records.

## Merge Fields

You must tell Word where to place the name and address in the form.

When you perform the mail merge, Word inserts data from each record into the merge fields, creating a letter for each person in the data source.

## The Mail-Merge Toolbar

The Mail-Merge toolbar appears above your form letter.



## Insert the Merge Fields

- Click in the form letter where you want a field inserted.
- Click the Insert Merge Field drop-down list on the Mail-Merge toolbar.
- Choose fields one at a time to add to the form letter.

## The Field Code

Word inserts the field code, surrounded by brackets, into the document.

Example: «FirstName» «LastName»

## Sample Address:

```
«FirstName»·«LastName»¶
«JobTitle»¶
«Address1»¶
«City»,«State»·«PostalCode»¶
«Company»¶
¶
Dear·«FirstName»:¶
```

**Note:** Be sure to include punctuation or spacing between field codes.

### Step Three: Merge the Data with the Document

After completing the form letter, choosing or creating a data source, and inserting all the necessary field codes into the document, you are ready to run a mail merge.

When you complete the merge, Word displays an individual document for each person in your data source and the field codes fill to reflect data from that person's record.

### Merge the Data

- Open the Mail Merge Help by going to Tools/Mail Merge...
- Click Merge under the Merge the Data with the Document heading
- The Merge dialog box appears
- Select merge to a new document

### Records to be Merged

Use this option to choose which records you want to use with the mail merge.

You may choose all of the records or a range of records.

### Blank Fields

You may also designate how the mail merge should handle blank fields in your records.

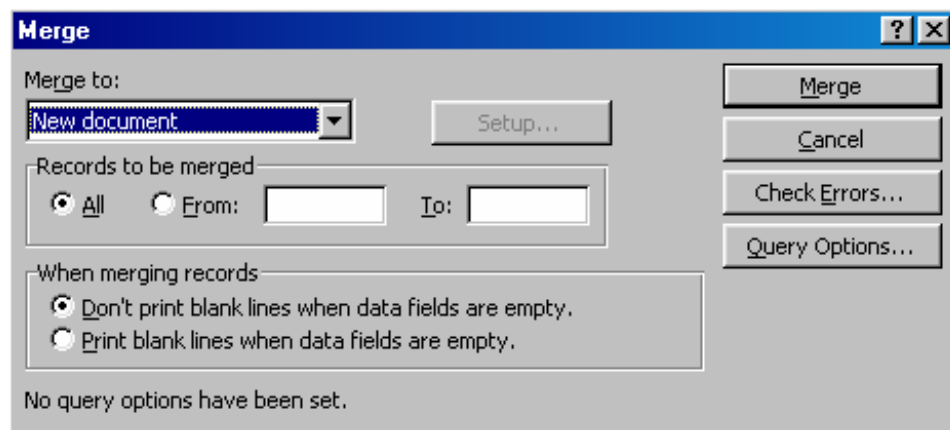
A good use for this is to get an address without spaces.

For example: everyone might not have an Address2 field.

By selecting Don't print blank lines when data fields are empty, the address is displayed without blank spaces.

Select the options you want to use, and then click Merge.

### Click Merge



### Merged Data

Word merges your form letter with the fields you specified from the data source and creates an individual letter for each record in your data source.

### Save It

You can print the letters now or save them to print later.

To save the merge, open the File menu and select Save As.

Enter a file name in the Save As dialog box and click Save.



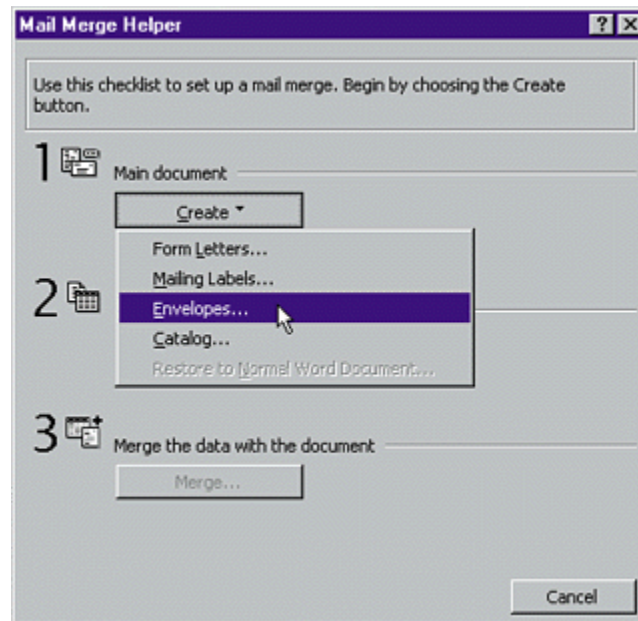
# Using Mail Merge to Create Envelopes or Labels

## Open the Mail Merge Helper

Go to the Tools menu and choose Mail Merge...

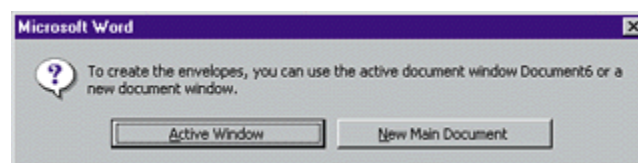
## Select Envelopes or Labels

From the Mail-Merge Helper dialog box, click the Create button and choose Envelopes or Mailing Labels from the list. The remainder of this tutorial will focus on envelopes.



## Choose a New Document

From the prompt box that appears, click New Main Document to start the merge in a new file.



## Select a Data Source

Click the Get Data button and choose your data source.

To use an existing data source, such as an Access database, select Open Data Source.

## Select the File

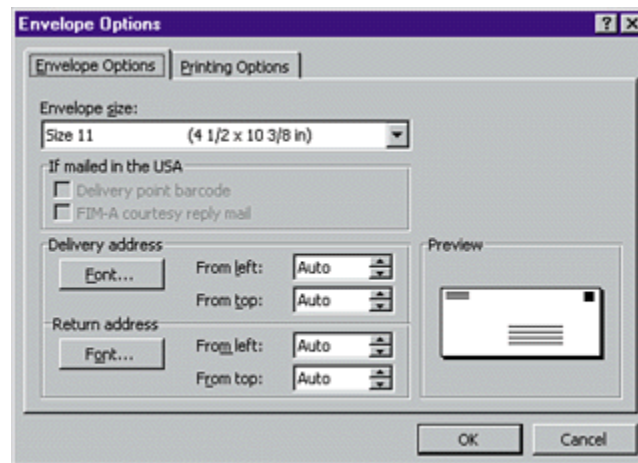
From the Open Data Source dialog box, select the data source file you want to use and click Open.

## Set Up Main Document Prompt Box

Click Set Up Main Document.

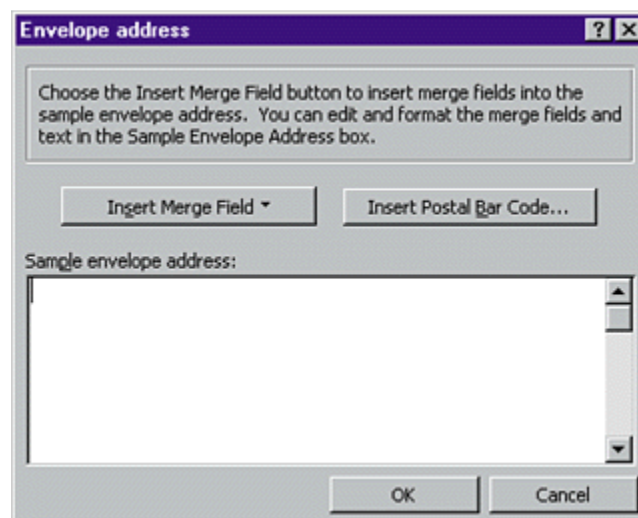
## Choose an Envelope Size

Select the envelope size you want to use from the Envelope Options dialog box by clicking on the drop down arrow at the Envelope Size option. Click OK to continue.



## Enter Address Fields

Click the Insert Merge Field button to begin building the field codes you want to include on each envelope in the merge.

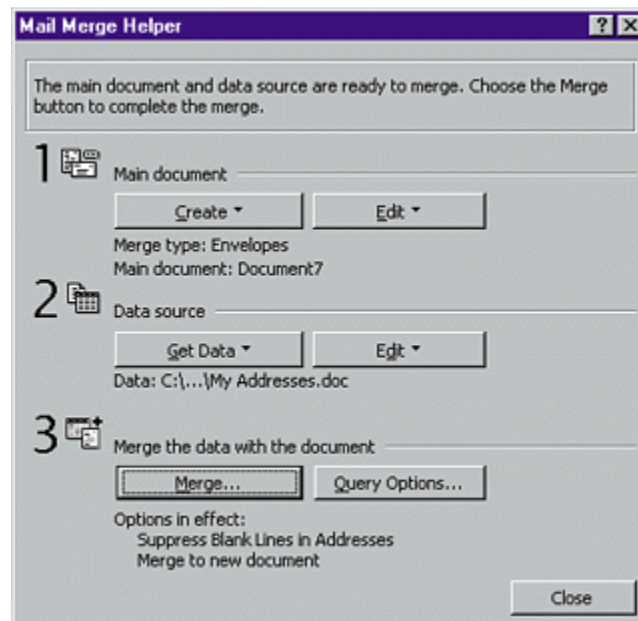


## Choose a Field

From the list that appears, select the first field to appear on the envelope. Continue entering fields, inserting punctuation or spaces where needed. To start a new line, press Enter. Click OK when finished entering all the necessary fields.

## Open Mail Merge Helper

From the Mail Merge Helper dialog box, click the Merge button.

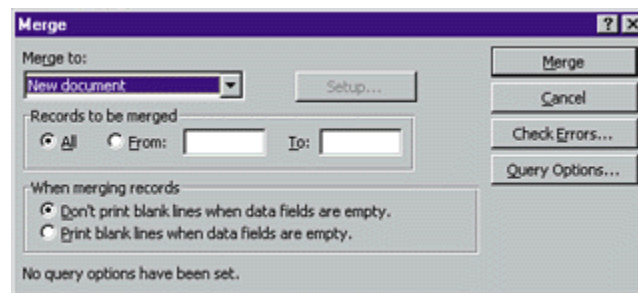


## Choose the Records

To merge the envelopes to a new file so you can check them over before printing, leave New Document selected.

You may also specify which records to merge; click All to create envelopes for every person in the data source or specify which records to create.

When you're ready to perform the merge, click the Merge button.



## Envelopes Are Created

Word creates a file with envelopes for each person in your data source.

You may now print or save the file as needed.