

Using Mail Merge in Microsoft Word XP/2002

Created: 12 April 2005

Mail Merge

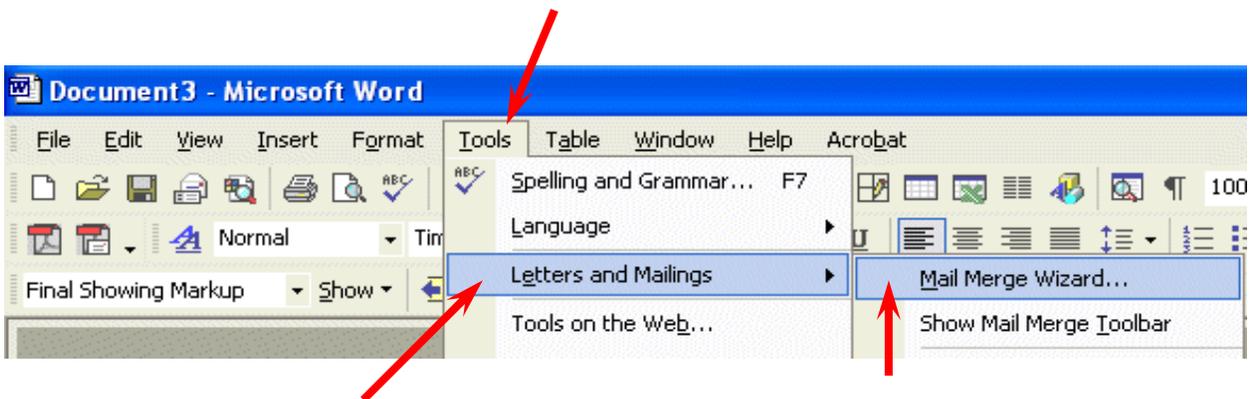
Note: You should be competent in Microsoft Word before you attempt this Tutorial.

Open Microsoft Word XP/2002

Beginning the Merge

You may start Mail Merge with a blank document or one that you have already created. We will use a blank document in this tutorial.

To begin the Mail Merge sequence click Tools in the Menu Bar, select Letters and Mailings, and then Mail Merge Wizard (see arrows below).



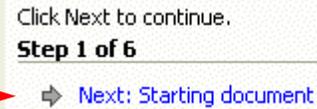
You will now see a Microsoft Mail Merge Task Pane appear on the right side of your screen – similar to the image at the right.

We will begin this tutorial by creating a mail merge letter. When we have completed the letter we'll discuss Envelopes, Labels, and E-mail messages.

Notice that the small circle to the left of Letters has a dot in it. This is the **default selection.** We'll use letters to begin.

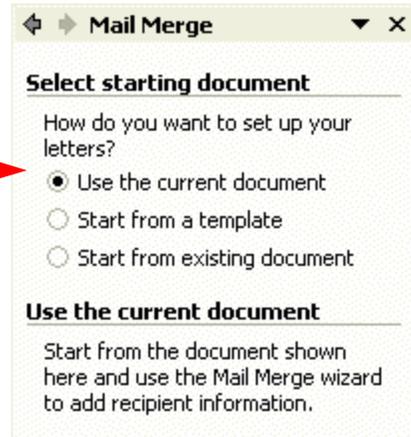


You'll **notice**, at the **bottom** of the **Task Pane** that it **looks like the image on the right**. Now that we've selected Letters, we can proceed to the next step in the Wizard. **Click Next: Starting document.**



We are leaving Step 1 of the Mail Merge Wizard and moving to Step 2.

The **top** of the **Step 2 Task Pane** looks like the image on the right. We indicated earlier that **we are going to use a blank document for this tutorial**. So, we'll remain with the default selection – **Use the current document.**



At the **bottom** of the **Step 2 of 6 Task Pane**, click **Next: Select recipients.**

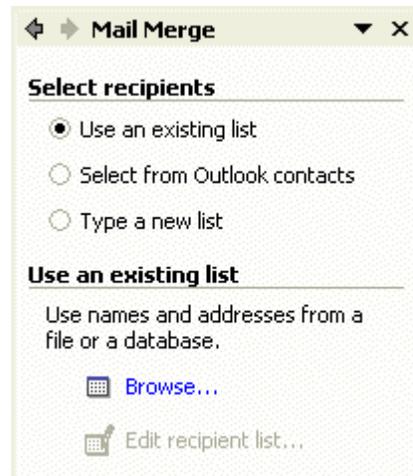


Notice, in the image on the right that, as you proceed through the Mail Merge Task Panes, you **can go back and forth at any time you desire**. This is logical and handy.

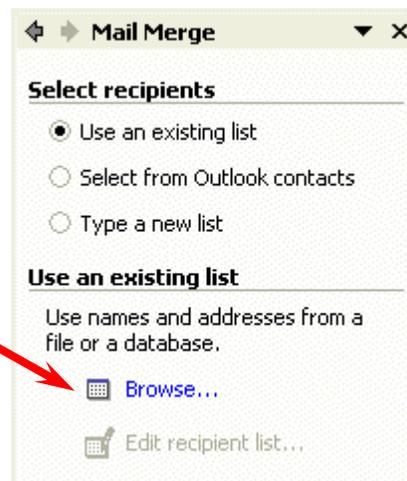
Selecting your merge file (Access, Excel, Word, Outlook)

You are now in **Task Pane 3**. In this task pane you will select the source list for your mail merge. We'll be using an Access database for this tutorial. You can use an Excel spreadsheet, Outlook Mail Contacts, or several other sources.

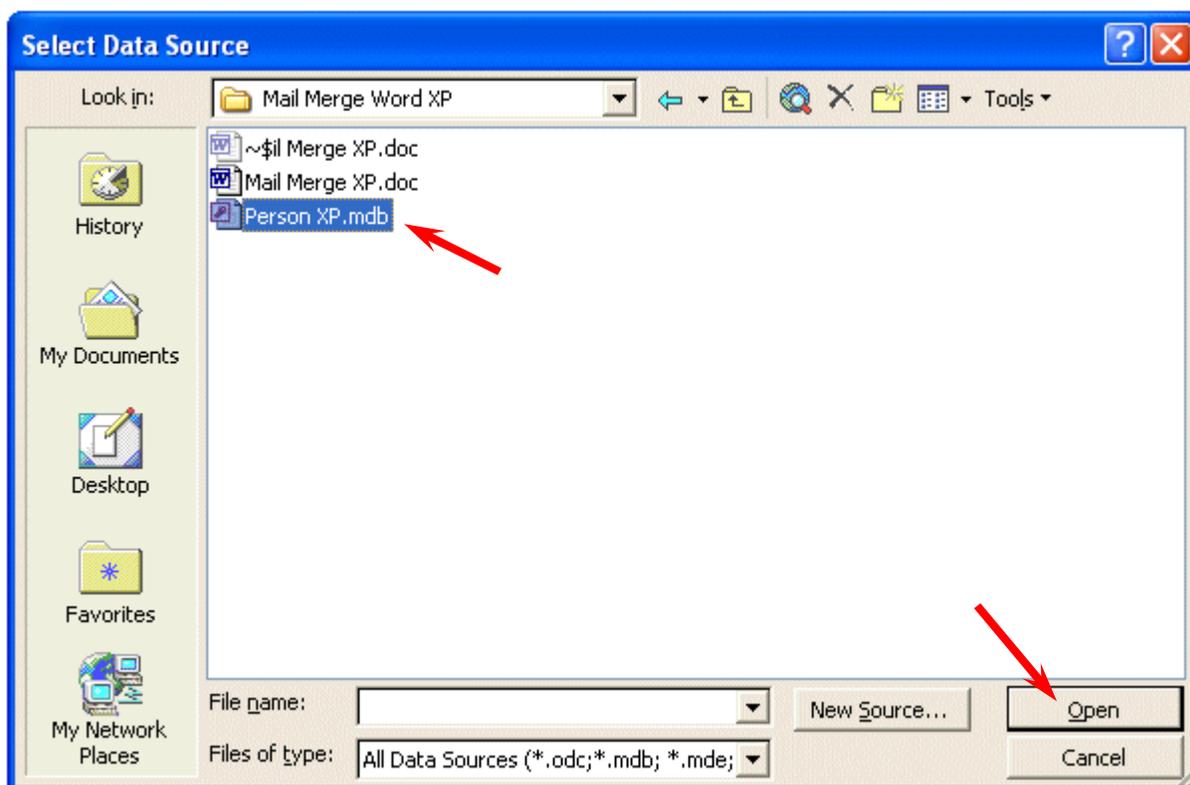
The Access database file we will be using was created with our Access XP/2002 tutorial. If you'd like a copy of this tutorial and database file, please e-mail the address found at the end of the tutorial, or download them from our website, which is also found on the last page.



Click the **Browse** button in Task Pane 3 (see arrow below)



We, as indicated, are going to select an Access Database. It is located on our C: drive in the Folder Mail Merge Word XP.

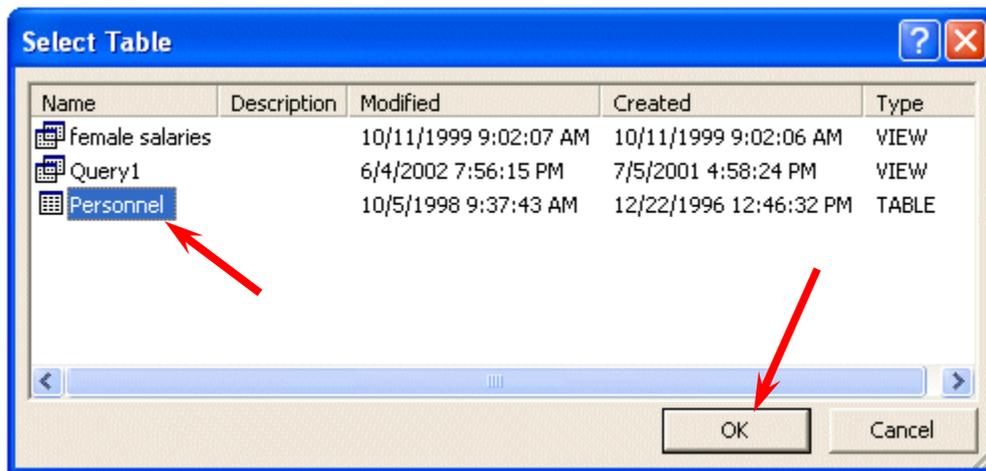


After we select our database we'll **click** the **Open** button.

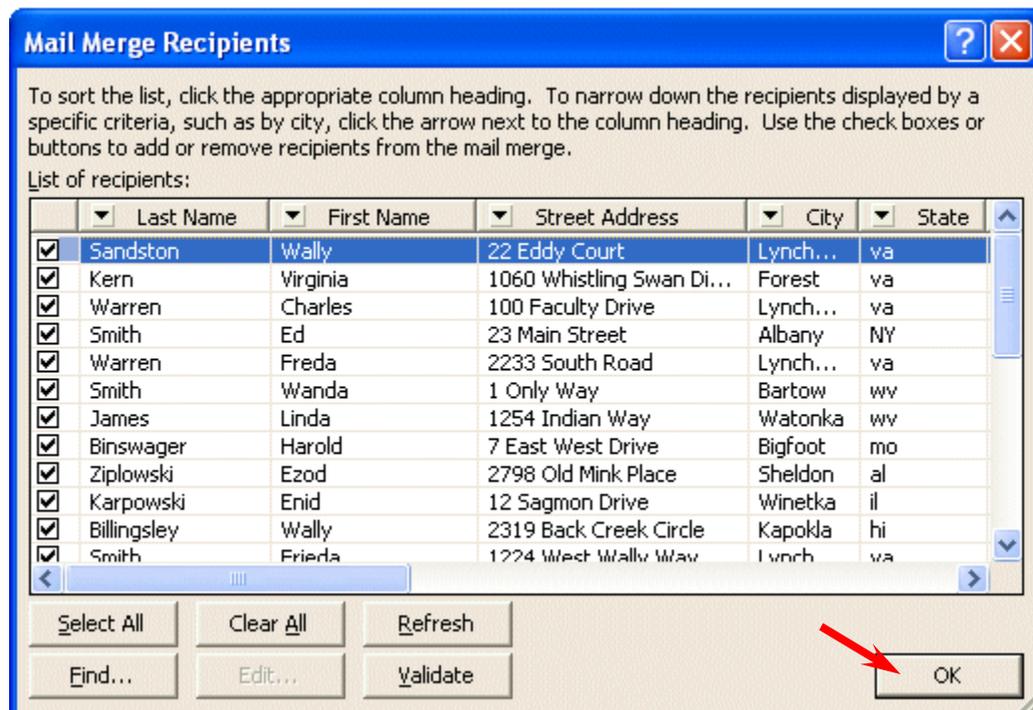
You may choose several other types of files as previously indicated. If you **click the small down arrow to the right of the Files of type:** area in the Select Data Source menu screen (image at bottom of last page and on right), you will see many other file types from which you can merge.



When we **selected** the Person **database** the following **Select Table** menu **appeared**. This database contains three Tables – we are going to choose the **Personnel** Table.



After we select Personnel, we **click** the **OK** button. The Mail Merge Recipients menu screen appears.

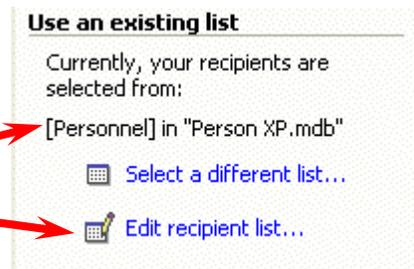


Spend a few moments viewing Mail Merge Recipients screen (at the bottom of the last page). Use the elevator bars at the bottom and on the right of the screen to view your data.

If you are not familiar with the Mail Merge Recipients Filter Screen, an addendum on how to use this filter screen is provided at the end of this tutorial on Page 30.

Click the **OK** button when you have viewed the screen to your satisfaction.

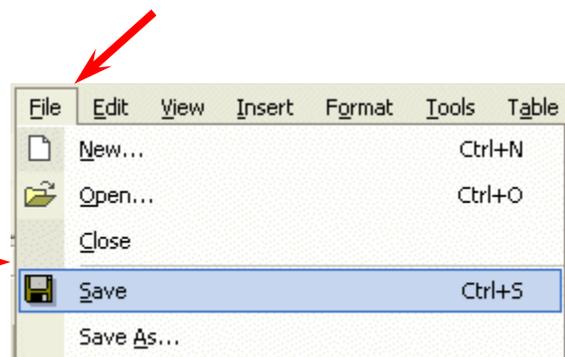
Look at the middle of Task Pane 3 again. Notice that the Browse selection has been replaced by the image to the right. This Task Pane now indicates the database (or other source) you selected and allows you to edit the list which appeared when you made this selection (bottom of last page).



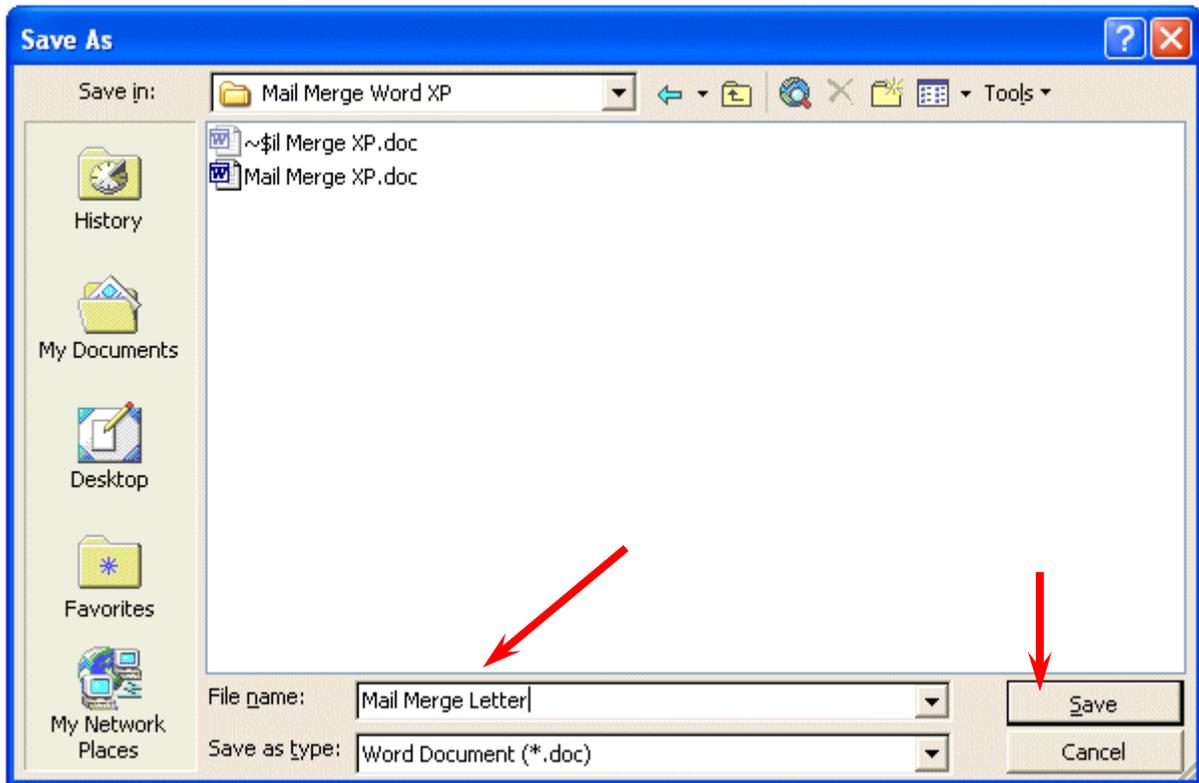
You are now ready to begin inserting fields into your mail merge document. However it would be prudent to save your mail merge letter at this time. **Once you've accessed your database, the save feature will not only save your document, but preserve the link to your data source (database, spreadsheet, etc.)**

Saving your Mail Merge document

You will want to save your mail merge documents periodically. Use your favorite Save method. We'll click File in the Menu Bar and select Save (as shown in the image on the right).



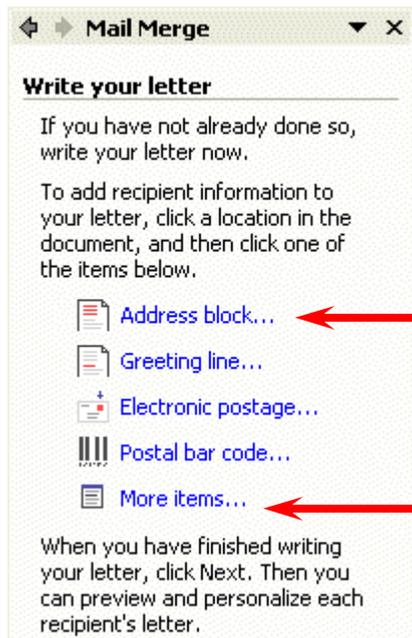
The Save As menu screen will appear (image at the top of the next page).



We will save our document as Mail Merge Letter in the Mail Merge Word XP Folder on our C: drive.

Creating the Mail Merge Document

Having selected our data source, we are now ready to create our mail merge document. Look at the bottom of the Step 3 of 6 Task Pane and **click Next: Write your letter.**



Step 3 of 6

- ➔ Next: Write your letter
- ⬅ Previous: Starting document

You will now be taken to the Step 4 of 6 Task Pane. The top of this Task Pane looks like the image on the left.

We'll cover two of the selections you see at the left – **Address block** and **More items**. Greeting line is similar to Address block.

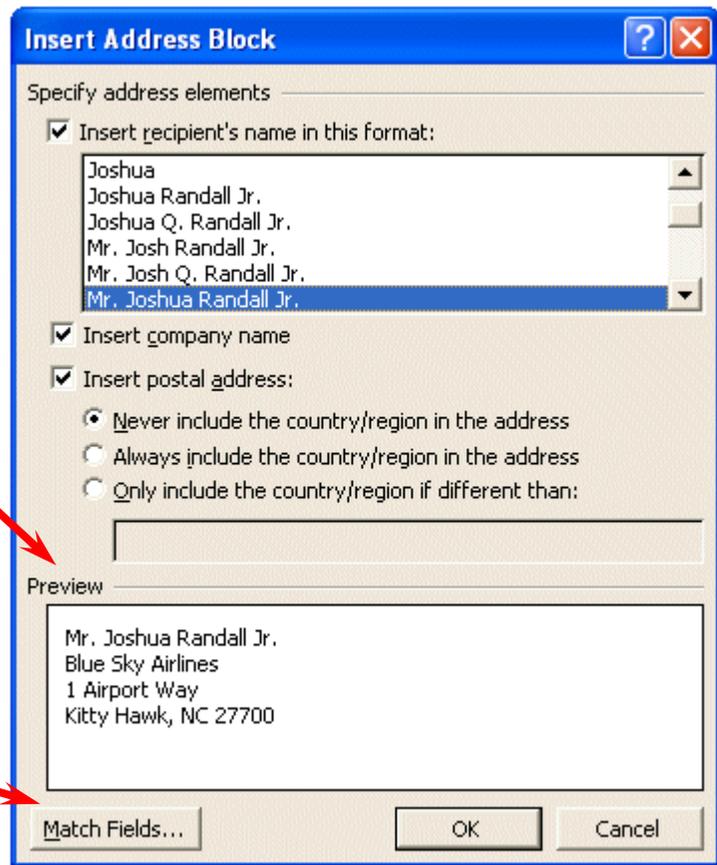
If the cursor is not visible at the top of your document, click the top left corner of your document.

We'll begin our letter with the Address Block.

Click the Address Block selection (as indicated at the bottom of the last page).

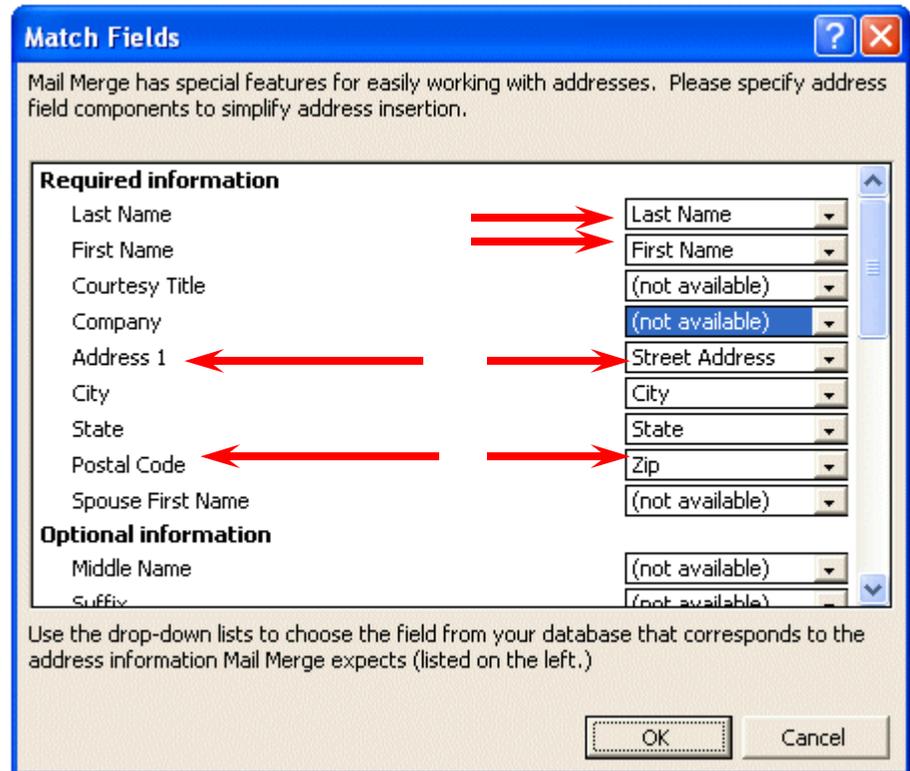
The following Insert Address Block menu screen will appear. If you accept the default setting screen, as shown in the image on the right, it will search your database and attempt to create an address similar to the one shown in the Preview area.

If you have fields that are different, or in addition to those shown, you can click the Match Fields button.

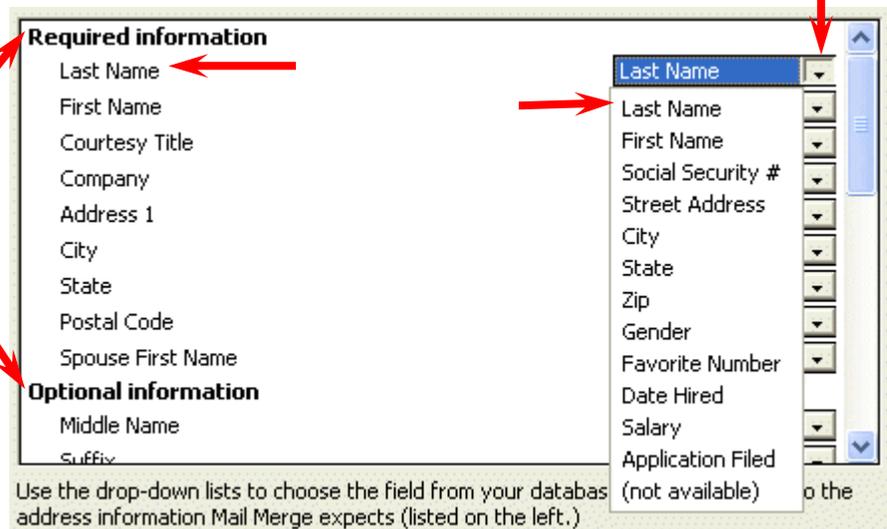


Examples of how to use the Match Fields menu screen are furnished at the top of the next page.

Look at the **right side** of the **Match Fields** menu screen. Notice that Mail Merge had **no problem matching Last Name and First Name** – since these are the same as our field names. However, **also note that it selected our Street Address to Match Address 1 and our Zip to match Postal Code.**

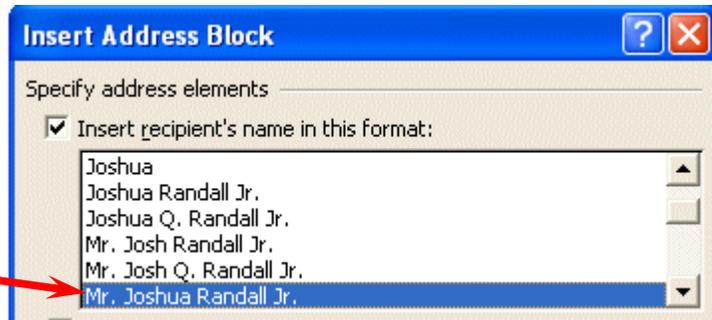


If you desire to change a match, simply choose one of the fields under **Required Information** or **Optional Information** and click the **down arrow on the box to the right**. We chose **Last Name**. When we clicked the arrow fields and our database appeared on the right. To replace a field, simply click on your field on the right.

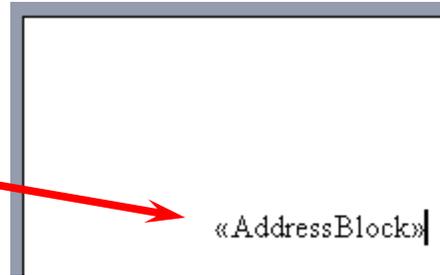


If you change any fields, click the **OK button** and they will be replaced. You will return to the Insert Address Block menu screen.

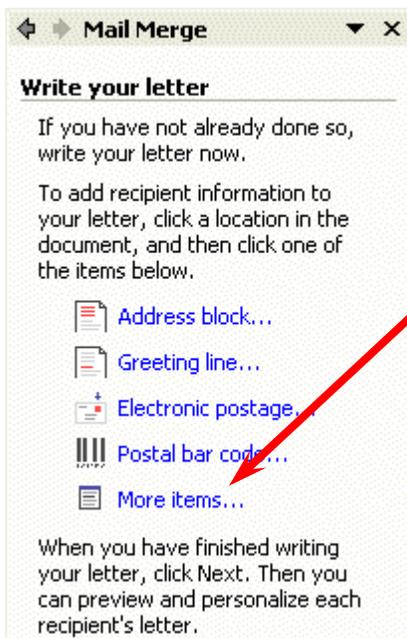
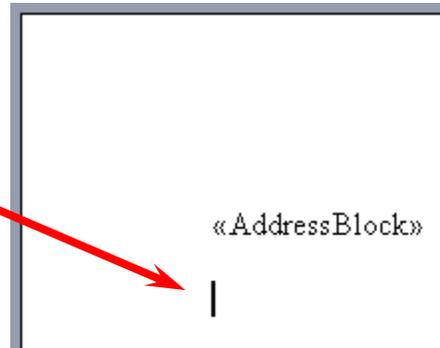
We'll use the default Address (that you see on the right). You choose the one you desire and then **click OK**.



The upper left corner of your document should look like the image on the right.



Tap the Enter key a couple of times to make sure your cursor is below the <<AddressBlock>>. Your document and cursor should look similar to the one on the right.

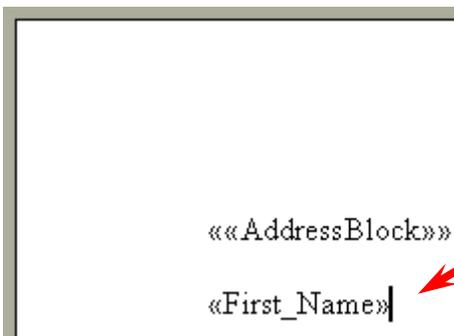
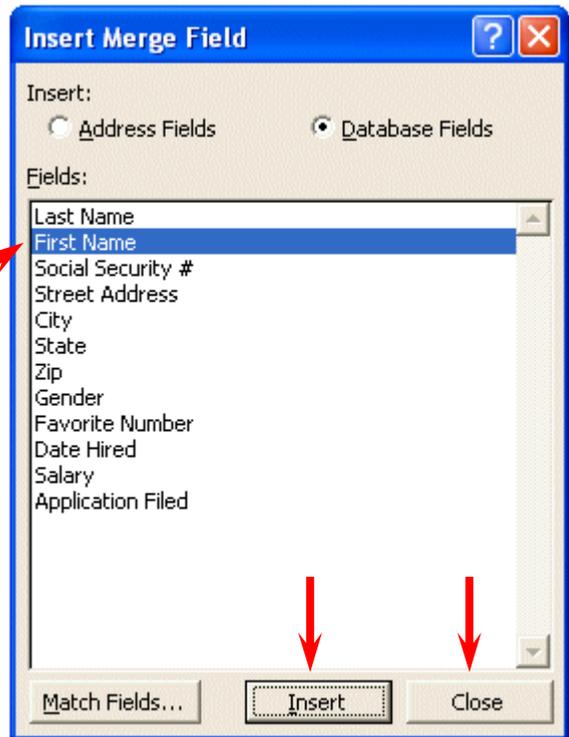


Now that we've inserted an Address Block, **we'll use the More Items selection** to show you another way to do this.

You will then be able to compare the two methods and select the one you like best.

Click the **More items...** selection. The Insert Merge Field Menu Screen at the right will appear.

In the Insert Merge Field Menu screen, **click the First Name selection**, then **click the Insert button at the bottom of the screen** (see image and arrows on the right), then **click the Close button**.



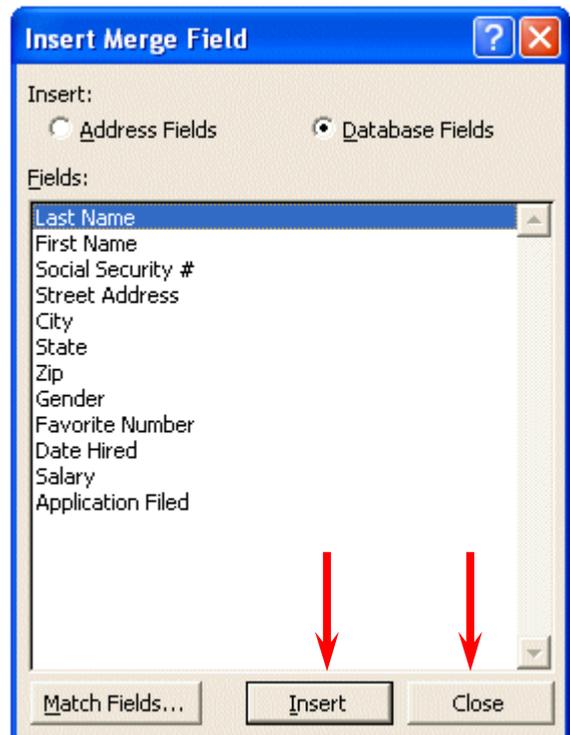
When you do, the <<First_Name>> text will appear below the <<AddressBlock>> text.

Click the **More items...** button in the Mail Merge Task Pan on the right again.



When the Insert Merge Field Menu Screen appears, **click the following: (when you click a field name, click the Insert button after each selection):**

Last Name (Insert), Street Address (Insert), City (Insert), State (Insert), Zip (Insert) – and now **click the Close button**. Your screen should now look like the text at the top of the next page.



««AddressBlock»»

«First_Name»«Last_Name»«Street_Address»«City»«State»«Zip»|

Don't worry about this. Since you are already an accomplished Word user, we'll now arrange this text to look like a normal mailing address.

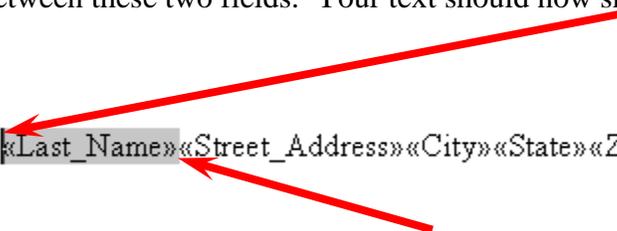
Move your cursor **between the First_Name>> and <<Last_Name arrows** and **click the left mouse button**. When you click, your text should look like the image below.

«First_Name»|«Last_Name»«Street_Address»«City»«State»«Zip»



Tap the Space Bar to place a space between these two fields. Your text should now show a space like the image below.

«First_Name» |«Last_Name»«Street_Address»«City»«State»«Zip»



Now, **move your cursor between the Last Name and Street Address arrows (>> <<)** and **click the left mouse button**. Then **tap the Enter Key**. Your text should now look like the image below.

«First_Name» «Last_Name»
|«Street_Address»«City»«State»«Zip»



We'll continue this process to create a logical mailing label. **Click between the arrows between Street Address and City** and **tap the Enter Key**. Your text should now look like the image on the right.

«First_Name» «Last_Name»
«Street_Address»
|«City»«State»«Zip»

««AddressBlock»»

«First_Name» «Last_Name»
«Street_Address»
«City», «State» «Zip»

|

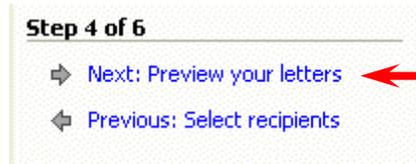
Click between the arrows between City and State and tap a comma (,) and then tap the Space Bar. Then click between the arrows between State and Zip and tap the Space Bar. Click to the right of the arrow at the end of Zip and tap the Enter Key twice. Your text should look like the image on the left.

Now, we'll insert a greeting. **Tap the Enter Key two more times** – just to create some space – and **type in Dear** and then **tap the Space Bar**. **Click the More Items button** in the Task Pane on the right and **insert the field First Name**. **Type a comma after the First Name field** and **tap the Enter Key twice**. Your document should now look like the one on the right.

««AddressBlock»»
 «First_Name» «Last_Name»
 «Street_Address»
 «City», «State» «Zip»

Dear «First_Name»,
 |

Previewing your documents



We are now ready to preview our efforts. **Click the Next: Preview your letters choice at the bottom of the Mail Merge Task Pane on the right of your screen.**

Wally Sandston
 22 Eddy Court
 Lynchburg, va 24501

You will now move to the Mail Merge Task Pane screen 5 of 6. It will look similar to the image on the right.

Your document should look similar to the one on the left.

Wally Sandston
 22 Eddy Court
 Lynchburg, va 24501

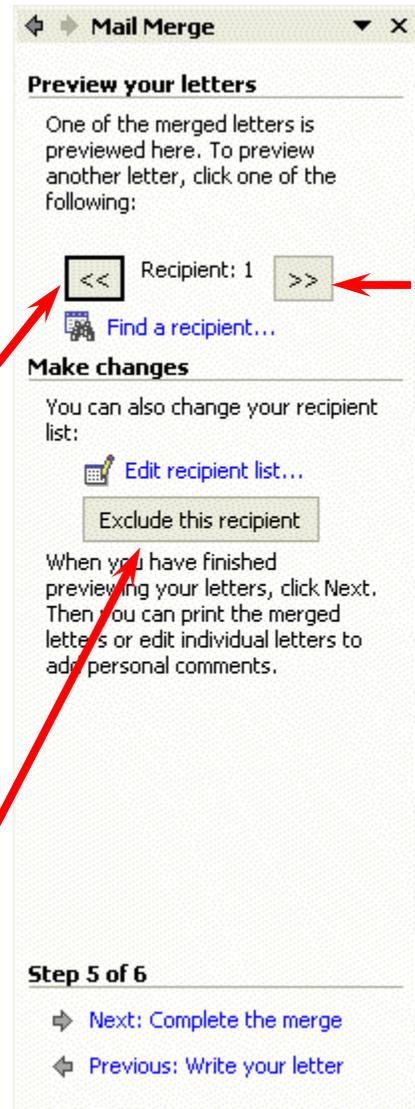
You can browse your addresses and greeting by clicking the arrows on the right and left of Recipient.

Dear Wally,

Notice two things –

On purpose, we created our State field in Access with a lower case state designation (e.g. va). This happens frequently and we'll show you how to correct this.

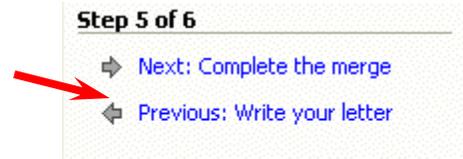
As you browse through your documents, if you see one you wish to remove, you can click the Exclude this recipient button.



We'll now look at the last two things we mentioned on the last page – lower case States and Excluding recipients.

Lower case states – this is the reason we used both the Address Block and More Items choices in our information above.

First - the Address Block. If you **move back to the previous screen by clicking the Previous: Write your letter** choice at the bottom of the Task Pane, you'll again see your Address Block and More Items field codes.



Move your cursor over the Address Block field code and **click the RIGHT mouse button**. In the menu that appears, click **Toggle Field Codes**. Your Address Block will now look like the image below.

««AddressBlock»»

```
{ ADDRESSBLOCK \f "<<_TITLE0_>><<_FIRST0_>><<_LAST0_>><<_SUFFIX0_>>
<<_COMPANY_
>><<_STREET1_
>><<_STREET2_
>><<_CITY_>><<,_STATE_>><<_POSTAL_>><<
_COUNTRY_>>" \i 1033 \c 2 \e "United States" \d }
```

Click and drag your left mouse button over the <<,_STATE_>> field to highlight the field. It should look like the image on the right.



Move your cursor over the highlight and **click the RIGHT mouse button**. In the menu that appears, click the **Font** choice. In the Font Menu screen **click in the small box to the left of ALL CAPS** and then **click OK**. This “should” mark your states to be all capitals. **Note: sometimes this works, and sometimes it doesn't – that's why we're showing you both the Address Block and More Items techniques.**

RIGHT click again on the Address Block (you see above) and select **Toggle Field Codes** again and you will see only the <<AddressBlock>> again.

Now we'll do the **same thing for More Items**. **Highlight the <<State>> field** – like them image on the right. **RIGHT click on the highlighted field** and choose **Font** again. Then choose **ALL CAPS** again, and **click OK**.

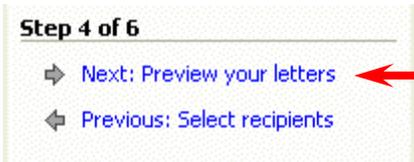
«Street_Address»
«City», «State» «Zip»



Notice that your <<STATE>> field now is shown in all capital letters. **THIS ALWAYS WORKS.**

«Street_Address»
«City», «STATE» «Zip»





Now we'll return to "re-preview" our letters – after these two changes. **Click the Next: Preview your letters** choice at the bottom of the Step 4 of 6 Task Pane.

We are now back on Task Pane Step 5 screen – Preview your letters and you will **notice**, as we suggested, that **the Address Block state did not "take" the ALL CAPS selection.**

Wally Sandston
22 Eddy Court
Lynchburg, va 24501

Wally Sandston
22 Eddy Court
Lynchburg, VA 24501

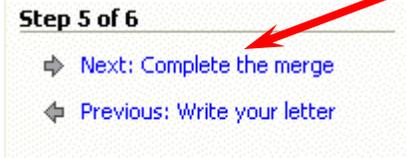
But, the **More Items choice did accept the ALL CAPS.**

We could go into how to do this with other coding, but we're trying to keep this simple.

We suggest you use the More Items selection for all of your fields rather than trying to make the Address Block and Greetings Line selections work. It may take a minute or so more, but as just shown, you have more control.

Printing your merged documents

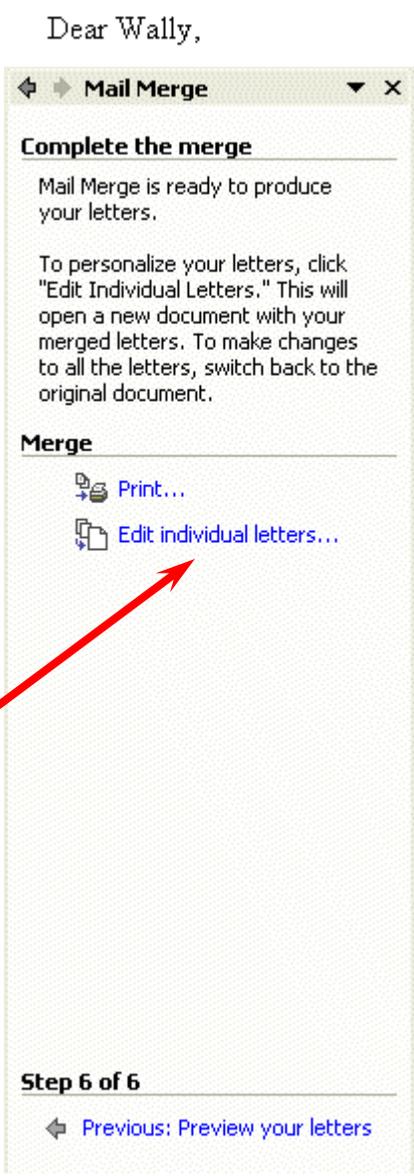
Let's move on to printing our letters. In the **Step 5 of 6 selection, at the bottom of the Mail Merge Task Pane, select Next: Complete the merge.**



The Mail Merge Step 6 of 6 Task Pane – like the one on the right will appear.

First, before we print our merged documents, there is a really IMPORTANT choice – Edit individual letters....

Remember, in the Step 5 Task Pane, that if you did not desire to include a specific letter – because of some minor editing requirement – you could click the Exclude this recipient button. That would have removed that letter from the printing group. You would then have to return to that letter and work on it individually. However, if you desire to make the minor changes to a letter, you do not have to exclude it. You can proceed to this screen and print that letter individually. To do this you would **click the Edit individual letters... selection.** The menu screen at the top of the next page would appear.

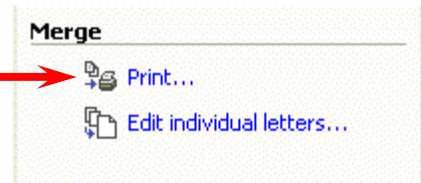


Notice you have **several choices**. We find most users make a note of the Recipient number(s) - (e.g. Recipient 6) and then enter them in the From: area in the Merge to New Document menu on the right. When you click OK, a Word document – of that letter – will open. **You would make your changes and then only print the revised letter(s) by selecting Print current page.**



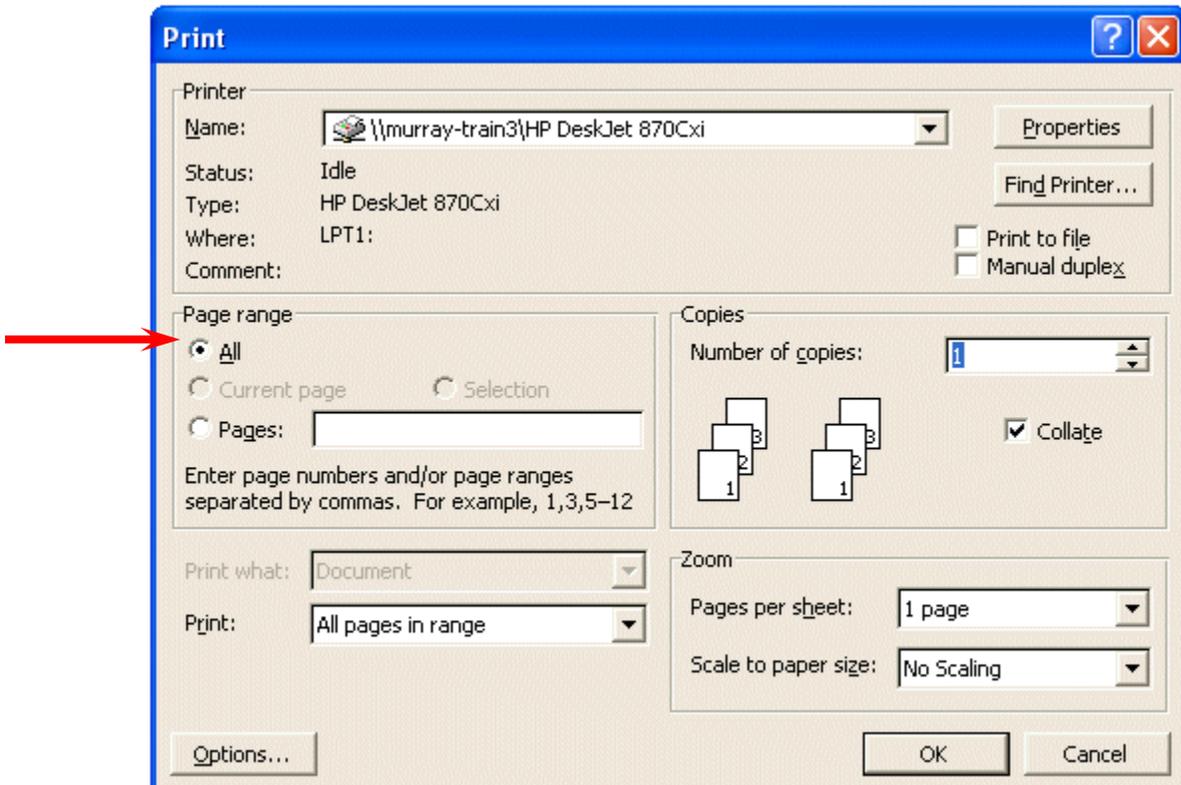
After printing, when you close the revised letter, you would return to your Mail Merge screen and Task Pane.

Now we're ready to print the letters (that did not need editing). **Click the Print... selection in the Task Pane** as shown in the image on the right.



You will be taken to the Merge to Printer menu screen. Since you are now printing all of the letters that were not excluded, **make sure that All is selected**. Then **click the OK button**.

The Print menu screen (below) will appear.



Once the Print menu screen appears, choose the printer on which you desire to print your merged documents. Then, make sure the All Page range (above) is selected and click the OK button.

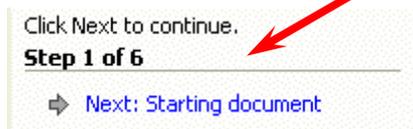
If you are using letterhead paper – don't forget to leave room at the top of your document for this.

Mailing Labels

We'll now use Word to merge addresses to mailing labels. You can close your mail merge document you created and open Microsoft Word XP/2002 again, or "click back" to Mail Merge Task Pane Step 1 of 6. When you are on this Task Pane, **select Labels** – as shown in the image on the right.



Then **select Next: Starting document** at the bottom of the Step 1 of 6 Mail Merge Task Pane.



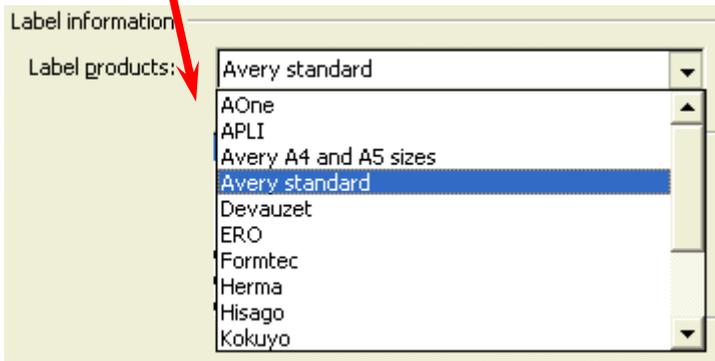
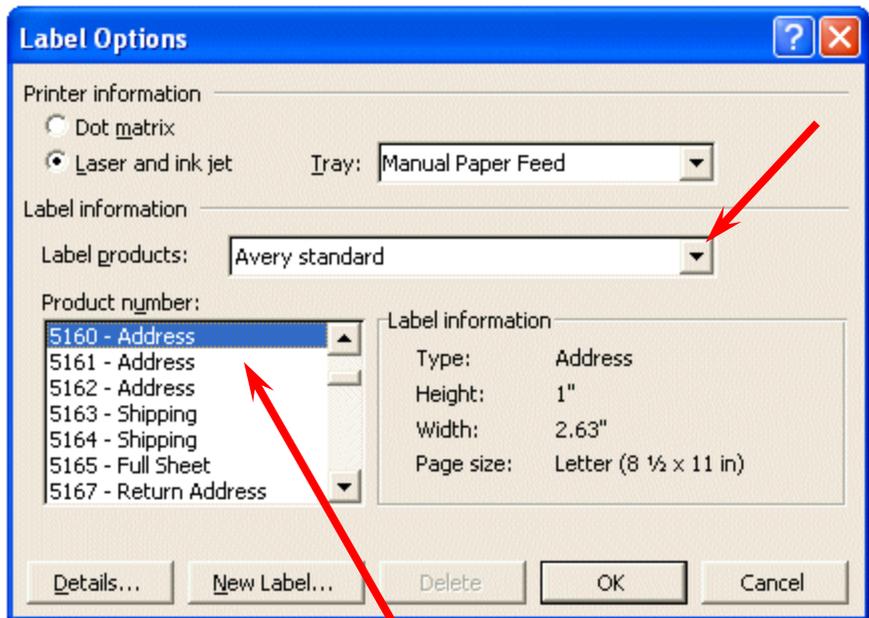
The Mail Merge Task Pane 2 of 6 will now appear and you will **notice** that it is logically "tailored" to **Labels**.

The first thing you will need to do is to select the type of label you are using. Click the Label options selection. The Label Options menu screen at the top of the next page will appear.



When the Label Options menu screen appears, notice several “things.”

First, if you click the down arrow on the right of Label products: (see arrow on right) you will see various brands of labels (see image below).



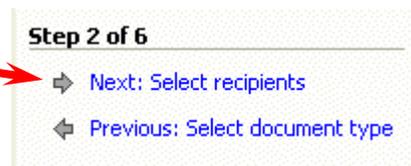
You will need to **select the brand of labels you are using**. We find that Avery 5160 is a popular choice, so we are going to use it for our Label Merge lessons.

Once you have chosen your Label, **click the OK** button.

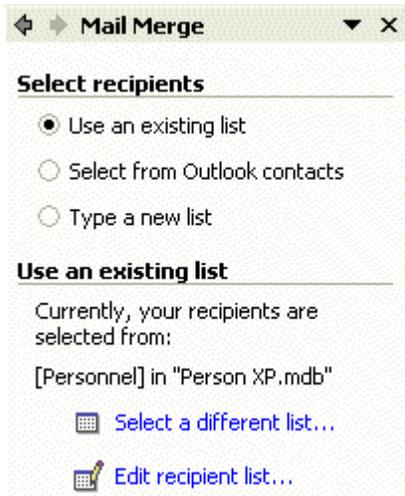
As soon as you click OK, you will see a “page” of your Labels appear to the left.



When your Labels appear, **click Next: Select recipients** at the bottom of the Mail Merge Step 2 of 6 Task Pane.



You will now be taken to the Mail Merge Step 3 of 6 Task Pane. **What you do here is exactly what you did on this Task Pane on Pages 2 through 5 above.** You can review these pages as you desire.

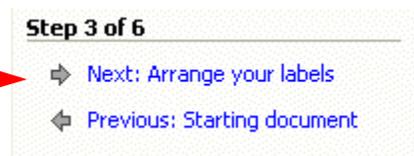


When we have finished selecting your recipients your Task Pane will change to look like the one on the left.

And, your **Labels** will look like the image below.

	«Next Record»	«Next Record»
«Next Record»	«Next Record»	«Next Record»

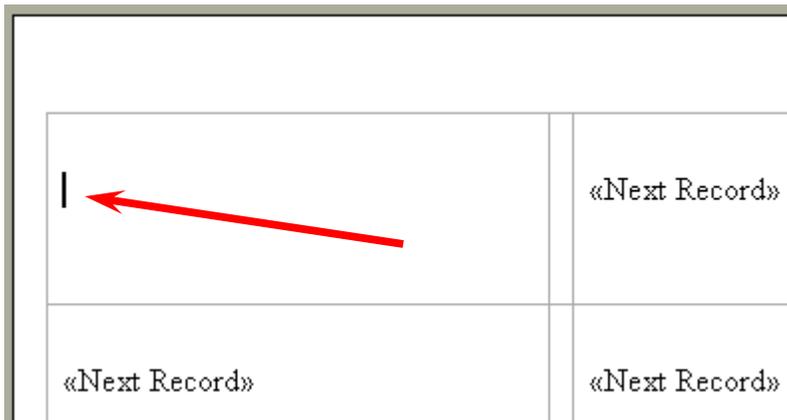
We'll now **select Next: Arrange your labels** from the bottom of the Task Pane.



Notice that Mail Merge Task Pane Step 4 of 6 has changed slightly to reflect **Arrange your labels**.

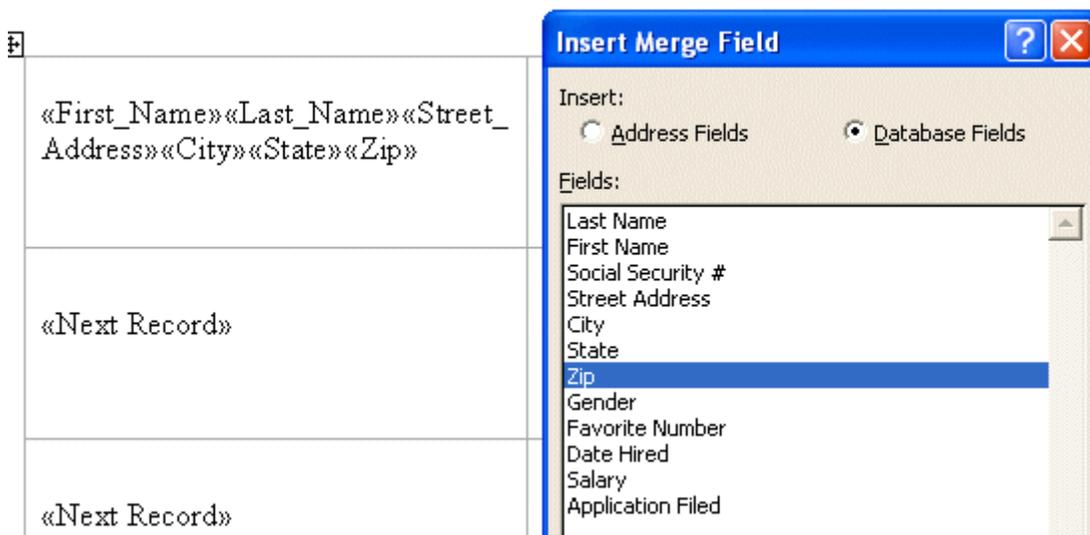


Because of the dilemmas we mentioned on Pages 13 and 14 we're **ONLY** going to use the More items... selection to create our Labels.



Make sure you can see your cursor in the upper left Label and click the More items ... selection.

When the Insert Merge Field menu screen appears (as shown below) follow the instructions on Pages 10 and 11 above. Select First Name, Last Name, etc. When your Label looks like the image below, click the Close Button. We'll edit the Labels, like we did on Pages 10 and 11.



When your top left Label looks like you desire (ours is seen in the image on the right - we followed the steps on Pages 10 and 11 again) click the **Update all labels button** in the Replicate labels area of the Task Pane.

«First_Name» «Last_Name» «Street_Address» «City», «STATE» «Zip»	«Next Record»
-----------------------------------------------------------------------	---------------

Replicate labels

You can copy the layout of the first label to the other labels on the page by clicking the button below.

THIS IS A HUGE CLICK -
We have found that this is the most frequent error in producing merged labels.

Notice that we once again changed the Font for STATE to ALL CAPS so that our states would be capitalized.

Your Labels will look something like the image below. **Don't worry if they don't look "perfect"** in this view. In the next Task Pane we'll see what they will really look like.

«First_Name» «Last_Name» «Street_Address» «City», «STATE» «Zip»	«Next Record»«First_Name» «Last_Name» «Street_Address» «City», «STATE» «Zip»	«Next Record»«First_Name» «Last_Name» «Street_Address» «City», «STATE» «Zip»
«Next Record»«First_Name» «Last_Name» «Street_Address» «City», «STATE» «Zip»	«Next Record»«First_Name» «Last_Name» «Street_Address» «City», «STATE» «Zip»	«Next Record»«First_Name» «Last_Name» «Street_Address» «City», «STATE» «Zip»

So, let's move to the next Task Pane. **Click on Next:**
Preview your labels in the Step 4 of 6 Task Pane.

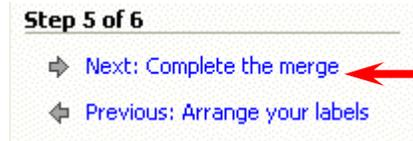
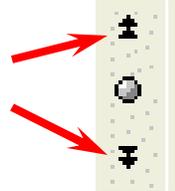
Step 4 of 6

➔ [Next: Preview your labels](#)
 ⬅ [Previous: Select recipients](#)

Your Labels should now look similar to the image below. **Notice that all the States are capitalized.** To review your labels you can move from label page to label page.

Wally Sandston 22 Eddy Court Lynchburg, VA 24501	Virginia Kern 1060 Whistling Swan Dirve Forest, VA 24551	Charles Warren 100 Faculty Drive Lynchburg, VA 24501
Ed Smith 23 Main Street Albany, NY 45126	Freda Warren 2233 South Road Lynchburg, VA 24501	Wanda Smith 1 Only Way Bartow, WV 71400

If you have more than one sheet of labels, use the Page Up and Page Down movement arrows in the lower right corner of the vertical elevator bar on the right of your screen to move from page to page.



Now we're ready to print our labels. Click **Next: Complete the merge** in the Step 5 of 6 Mail Merge Task Pane.

The Mail Merge Task Pane 6 of 6 will now appear and you are ready to print your labels the same way we printed documents on Pages 14 and 15 above.

If you use these Labels often, you should save your file, just as we did with Documents, for the file will automatically link with your database or spreadsheet and update with any new entries.



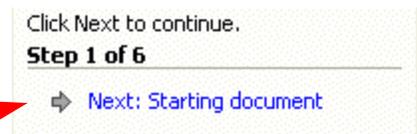
Envelopes



Note -we closed and saved the Label Mail Merge document, just as we did the Letter Mail Merge document. When we open either of these again, they will already be linked to the database, spreadsheet, etc. and ready to use. They will also grow in size as additional names are added to the data source.

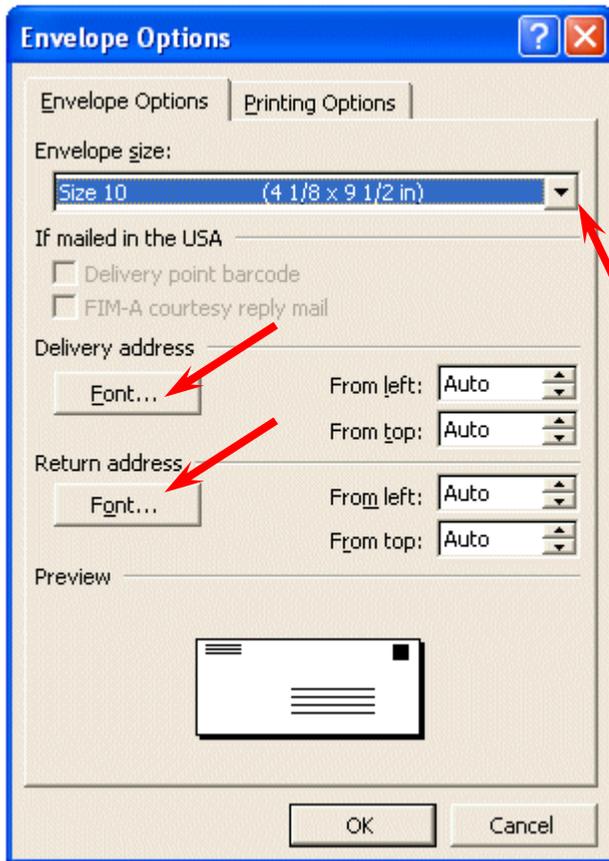
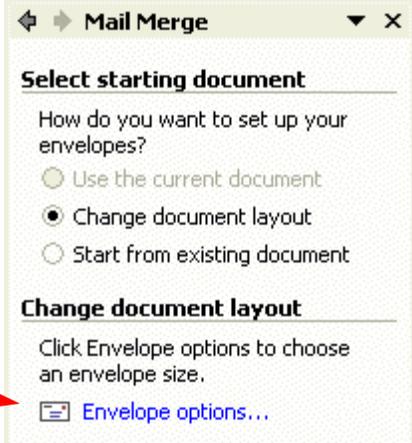
We'll now open a new blank document and **follow the steps on Page 1**. But this time, we'll **choose Envelopes**.

At the bottom of the Mail Merge Envelopes Task Pane 1 of 6, **click the Next: Starting document** selection.



At the top of the Mail Merge Envelopes Task Pane 2 of 6, you will, once again, notice that the Task Pane is “tailored” to your selection – Envelopes. Word, once again, furnishes you a logical choice.

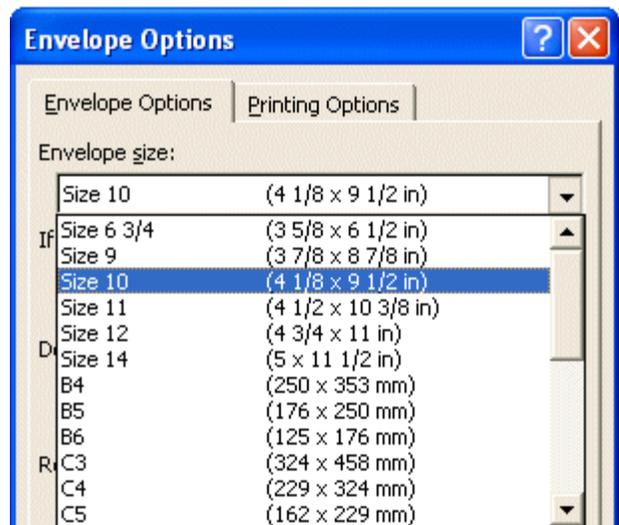
Click the Envelope options... selection.

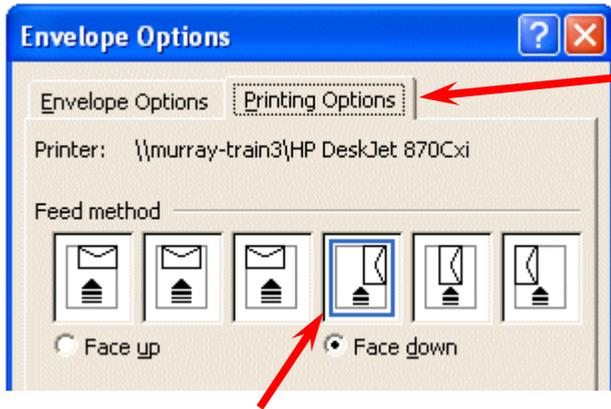


The Envelope Options menu screen (at the left) will appear.

Notice: that you can select the Font you desire to print on your envelope for both the Delivery and Return Addresses (see arrows on left of the Envelope Options image).

Click the small down arrow to the right of Envelope size:. The Envelope size: image (you see below) will appear. **Select the size for your envelope from the selections on the screen.** If none of the selections “fit,” the last selection is Custom. You can choose it and define your envelope dimensions.

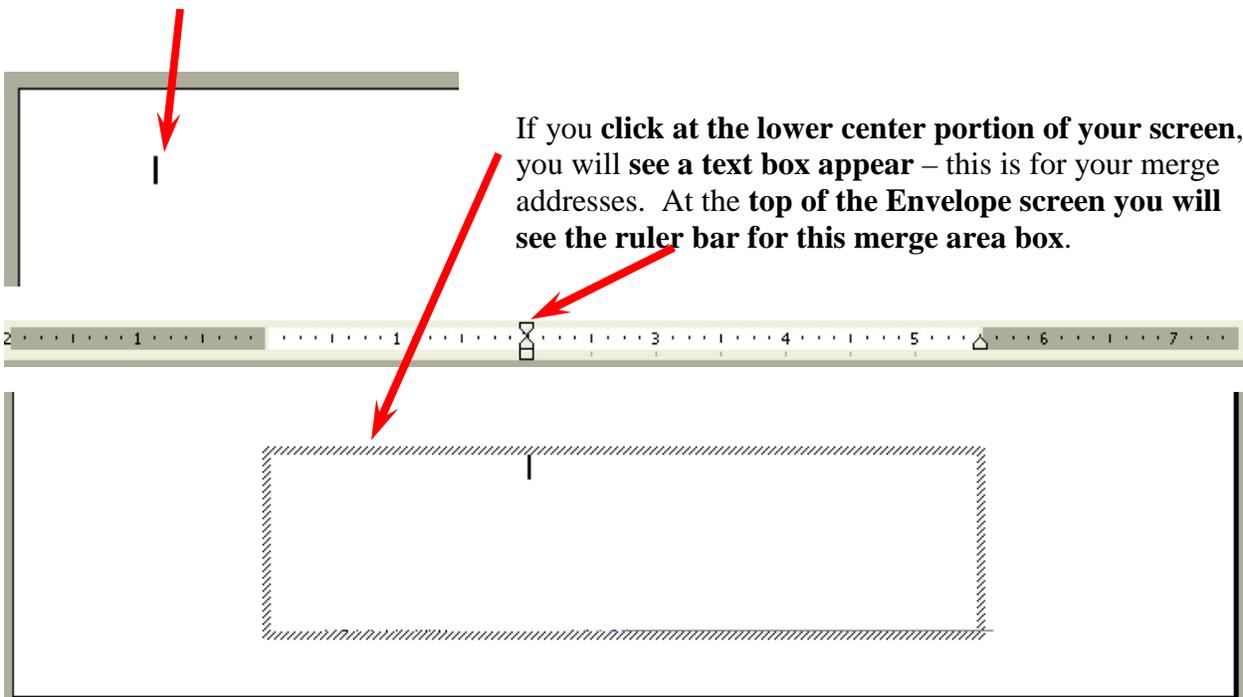




After you have selected a size for your envelope, **click the Printing Options tab** (as indicated in the image on the left). You will see how to insert envelopes into your printer. **This varies by printer.** For our HP DeskJet, you see the appropriate Feed method.

When you have made all of your selections, **click the OK button.**

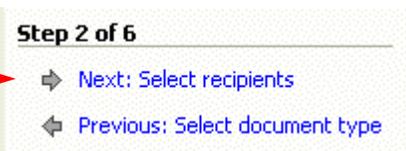
As soon as you click the **OK button**, the **image in your Word screen will change to a blank envelope**. Look closely at your screen. In the **upper left corner of the envelope** you will see a **flashing cursor**. This allows you to **type your return address** - that will print on each envelope. If you are using envelopes with your institution or business logo/address, you don't have to do anything here.



If you click at the **lower center portion of your screen**, you will see a **text box appear** – this is for your merge addresses. At the **top of the Envelope screen** you will see the **ruler bar** for this merge area box.

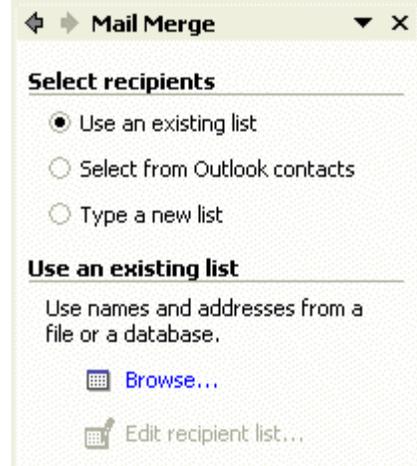
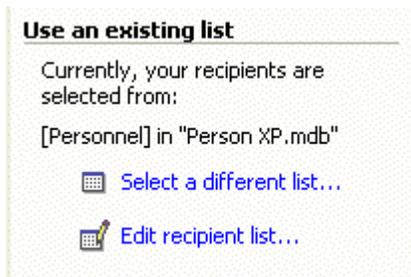
This text box is where we'll create our merge envelope addresses.

Click the Next: Select recipients selection at the bottom of the Mail Merge Envelopes Task Pane.

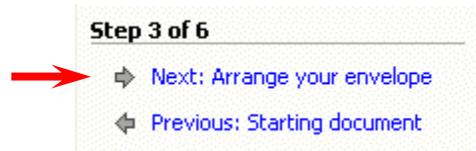


You will now, once again, be on the Select Recipients Task Pane. **Follow the instructions on Pages 2 through 5 above.**

When you finish selecting your data source, your Mail Merge Envelopes Task Pane will look like the image below.

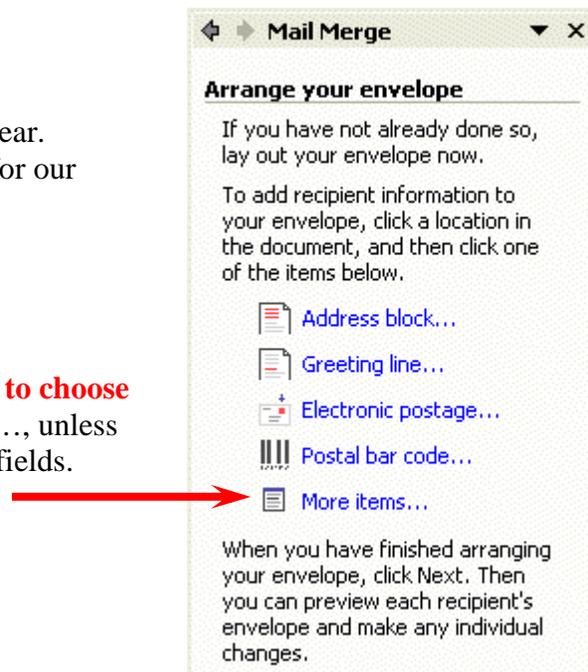


When you have selected your recipients, **click the Next: Arrange your envelope selection** at the bottom of the Mail Merge Envelope Step 3 of 6 Task Pane.



Your Mail Merge Envelopes Step 4 of 6 will appear. We'll use this Task Pane to set the merge fields for our envelopes.

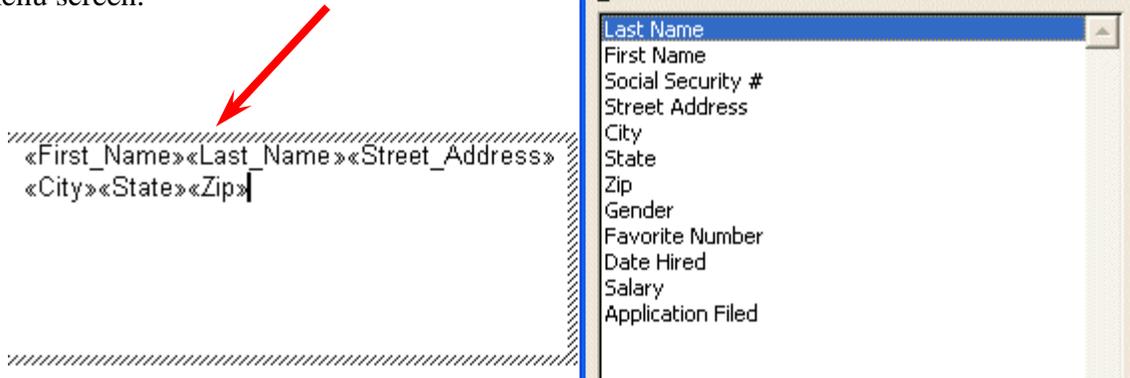
As we have indicated before, **it is probably best to choose the More items... selection** than Address block..., unless your addresses exactly match the Address block fields. **We'll choose More items...**



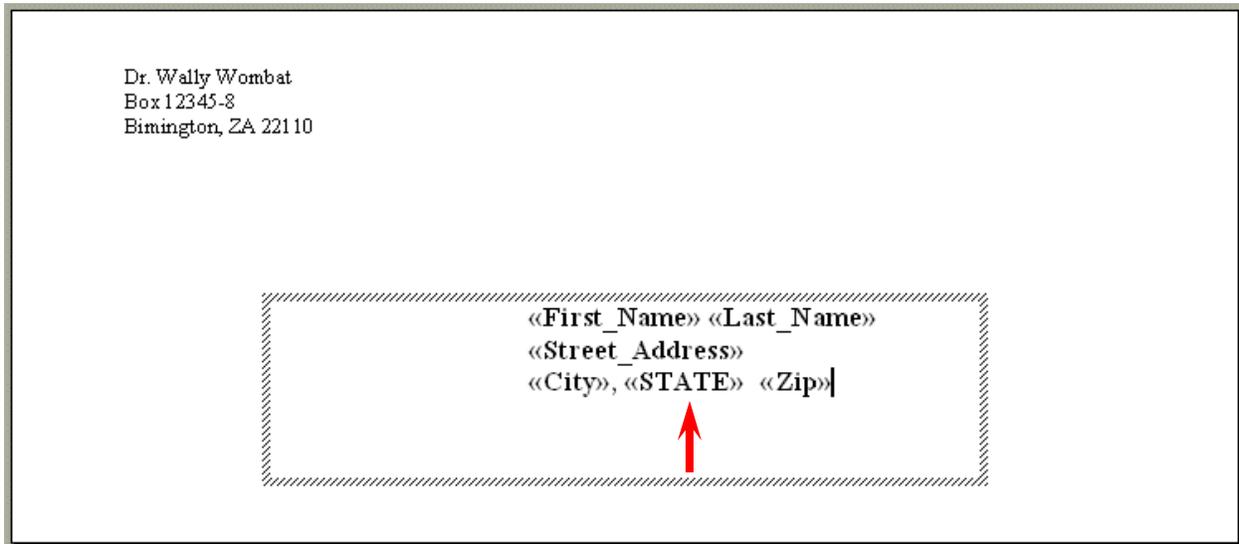
After we chose More items..., we **followed the instructions on Pages 9 through 12 above.**

When we entered our fields in the Envelope Address area, our screen looked like the image below.

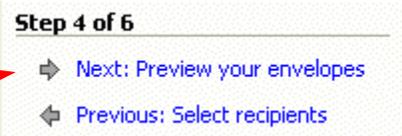
We selected our fields, as before, and when we **finished**, we **clicked the Close button** at the bottom of the Insert Merge Field menu screen.



We then edited, as we did on Page 11, our Envelope address area so that it looked like the image below.



We're now ready to preview our envelopes. At the bottom of the Mail Merge Envelopes Task Pane 4 of 6, **click the Next: Preview your envelopes selection**.

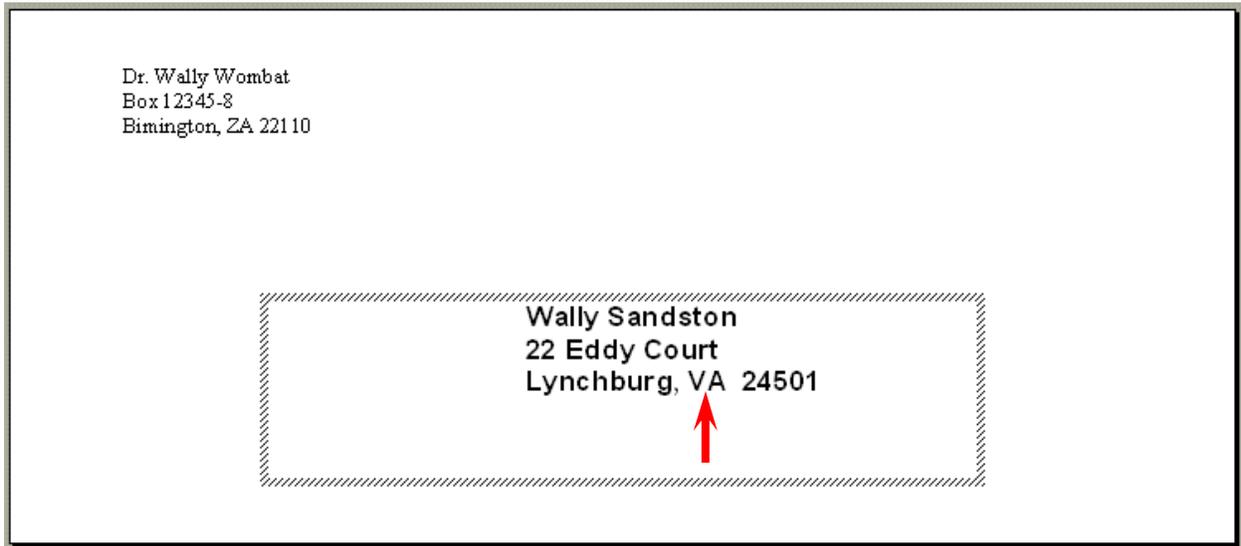
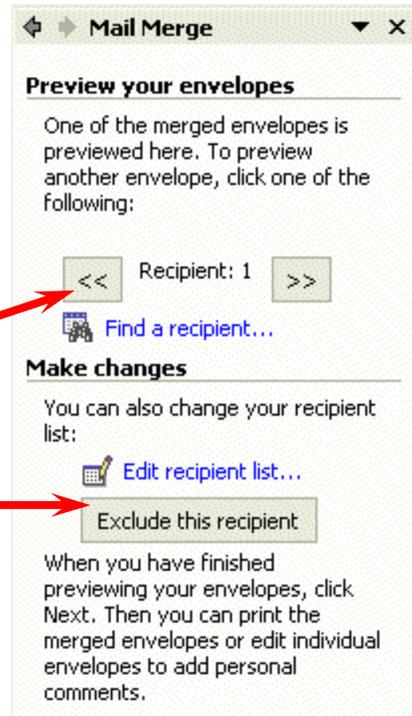


When you move to the Mail Merge Envelopes Task Pane 5 of 6, the Task Pane image will look like the one on the right.

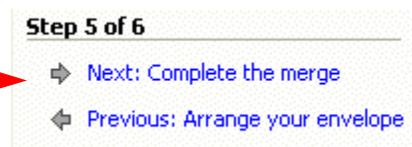
You can browse through your envelopes, as you did with your documents and labels, by clicking the << and >> to move through the various recipients.

If you need to exclude an envelope you can do this as well by choosing the Exclude this recipient button.

Your envelope should look similar to the image below. We made the text bold and used a larger font so that you could see it more easily. **We also capitalized STATE** as you can see in the envelope image on the last page and below.



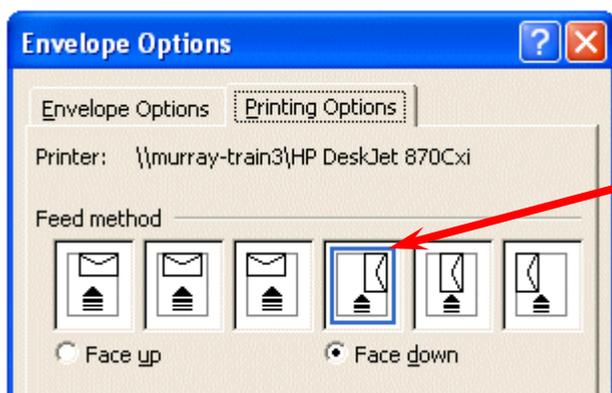
When you have finished reviewing your envelopes, **click the Next: Complete the merge selection** at the bottom of the Mail Merge Envelopes Step 5 of 6 Task Pane.



You are now ready to print your envelopes (same as on Page 15).

This can be a bit tricky, depending on your printer.

Very few folks have “envelope feeder” printers. If you have an envelope feeder, load your envelopes in the feeder as indicated for your printer.



On the left is the same image as Page 23 (for our printer). It is an ink jet that requires us to “feed” envelopes individually into the feeder tray as indicated. You may want to “experiment” a bit with this before you print a lot of envelopes.

E-Mail Merge

You may desire to check with your e-mail provider before you attempt the below. This is explained at the bottom of Page 29.

E-mail merge is exactly like Document Mail Merge on Pages 1 through 15 above – except for the first and last Mail Merge E-mail Task Panes.

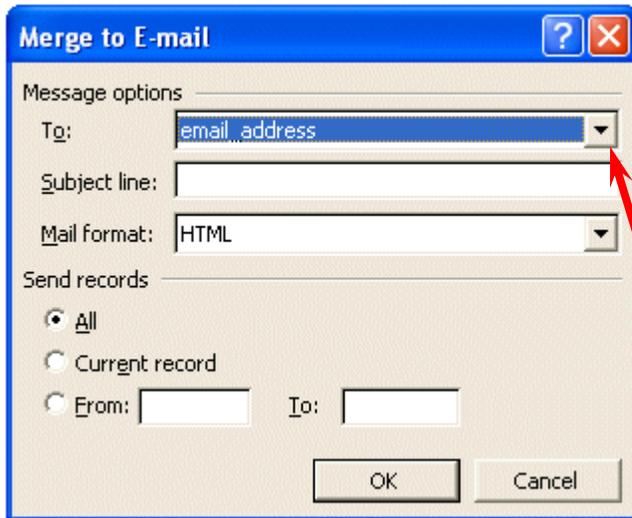
You must have an e-mail address as a field in your database, spreadsheet or address file.

On the Mail Merge E-Mail Task Pane 1 of 6 **select E-mail messages.**

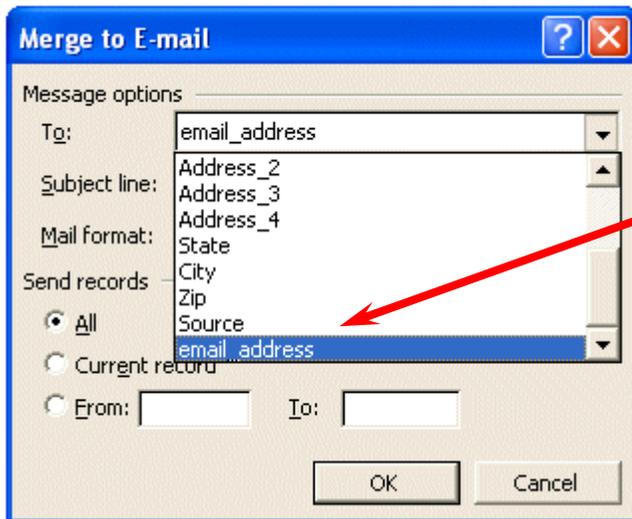
Proceed through Mail Merge E-mail Task Panes 2 through 5 as you did for Mail Merge Documents.



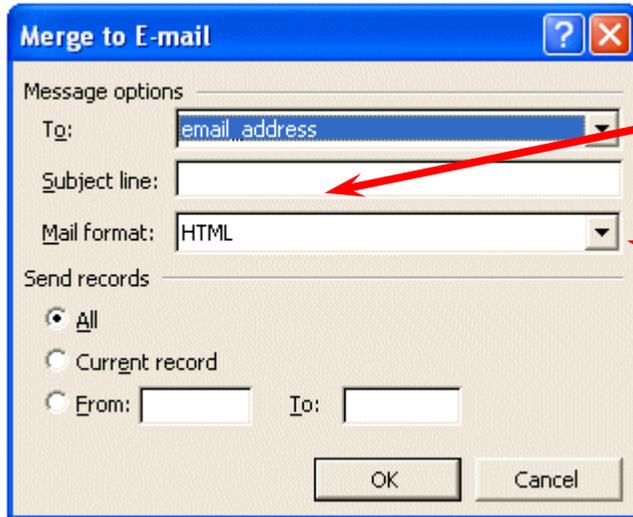
When you move to **Mail Merge E-mail Task Pane 6** it will look like the image on the right. **Click the Electronic Mail... selection**



The Merge to E-mail menu screen will appear (like the image on the left). Notice that the merge “intelligently” selected the email-address in our Access database. **If your recipient source does not do this, click the down arrow on the right of the To: area.**



You will now see all of the fields from your recipient data source. **Choose the field that you are using for your e-mail addresses.**



In the Subject line: area, type in a subject for your e-mail message.

In the Mail format: area select Plain Text or HTML.

NOW THIS IS HUGE – when you click the OK button all of your messages will be sent to the addresses in your recipients source (database, spreadsheet, etc.). You will see a momentary “blink” at the bottom left of your Word screen as each message is sent. **A COPY OF EACH, INDIVIDUAL, MESSAGE WILL BE PLACED IN the SENT ITEMS FOLDER IN YOU E-MAIL ACCOUNT.** So, if you send several hundred messages, you will have several hundred messages in your Sent Items. Some e-mail systems handle this well, others do not. You may want to check with your e-mail provider before you do this.

Microsoft Office Tutorials

In addition to this tutorial, other Office tutorials are available at:

<http://www.officetutorials.com>

This site is updated frequently with tutorial revisions as well as tutorials from a number of collegiate institutions. Please feel free to visit and download as you desire.

You can download the Access XP/2002 database file (and tutorial) from this site. Or, we’ll send them to you by e-mail.

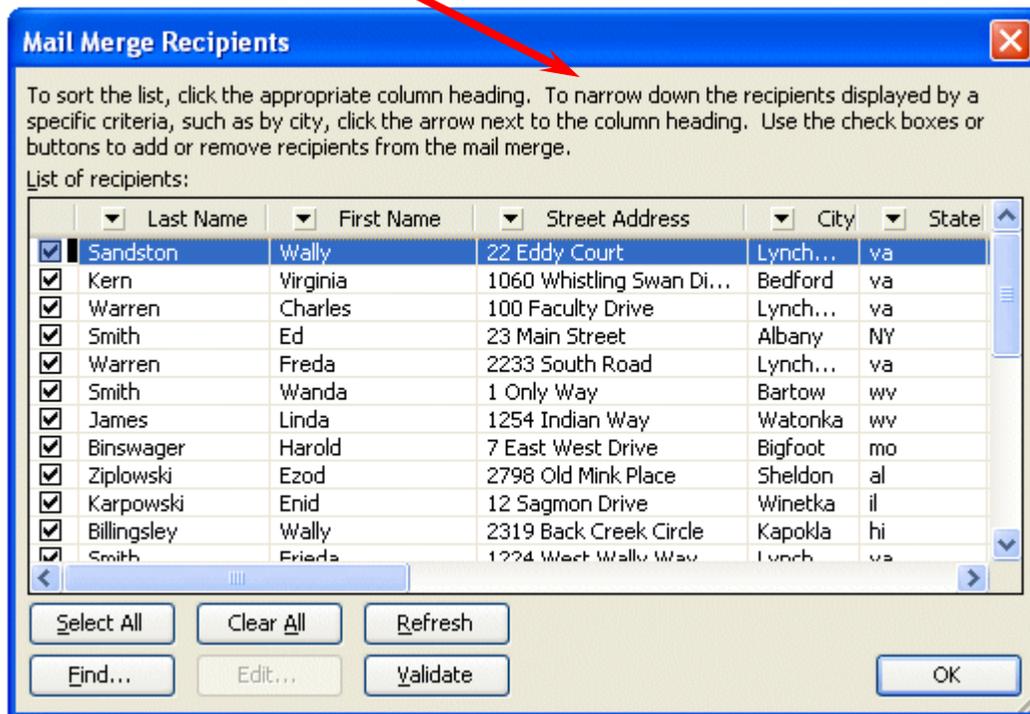
This has been an introduction into the basics of Microsoft Word XP/2002 Mail Merge. If you have any questions about Microsoft Word XP/2002 Mail Merge, comments on this tutorial, or desire the Access database file and tutorial, please contact:

murray.t@lynchburg.edu

Thank you for your patience and good luck.

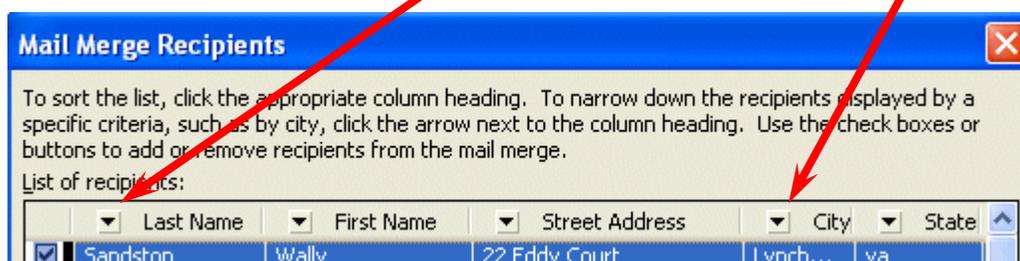
Mail Merge Recipients Filter Addendum

The Mail Merge Recipients Menu Screen (Page 4) allows you great flexibility in viewing the data that will be merged into your documents, labels, envelopes and e-mail messages. Take a few minutes to read the information at the top of the menu screen.



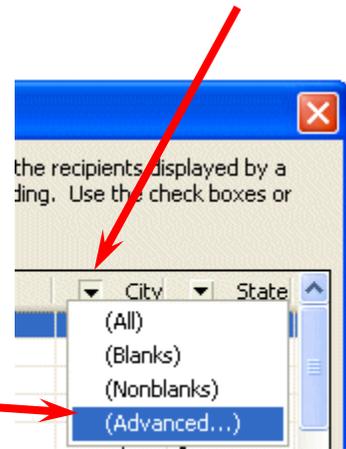
As you can see from the menu screen, you can click on any of the column headings (e.g. Last Name, State, Zip, etc.), and the Recipients will sort by that heading. You can remove someone from your merge by clicking the check mark on the left – to remove the check – and that person will not be included. For a more detailed grouping of your recipients you can use the advanced filter features of the menu screen.

To access the **Advanced Filter**, simply **click on any of the down arrows to the left of a column name**.

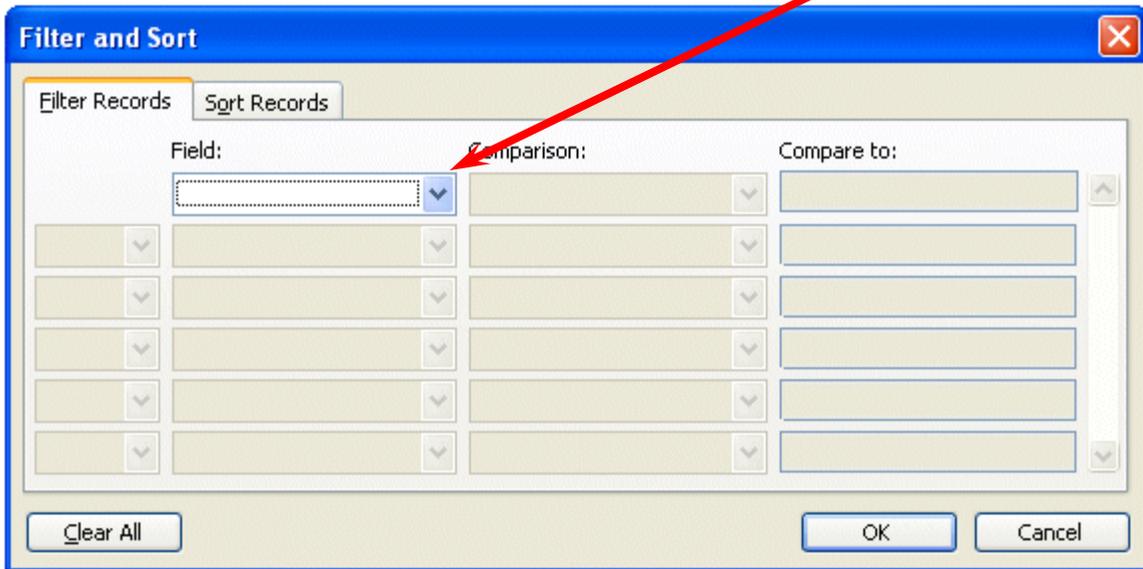


We clicked the down arrow to the left of City and the image on the right appeared. Notice the selections. For the City column you can select All - to see all the Cities. If you want to find recipients who do not have a City filled in, you can select Blanks. You can experiment as you desire with the different columns.

We are going to **select the Advanced choice.**



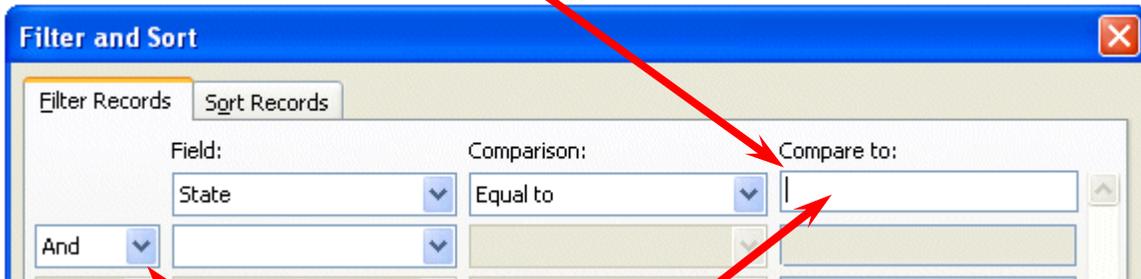
When we do, the **Filter and Sort Menu Screen** below appears. Let's say that we want to send our mail merge to only recipients in Virginia (VA), West Virginia (WV) and New York (NY). This is where the Filter and Sort menu assists. First we **click the down arrow to the right of Field.**



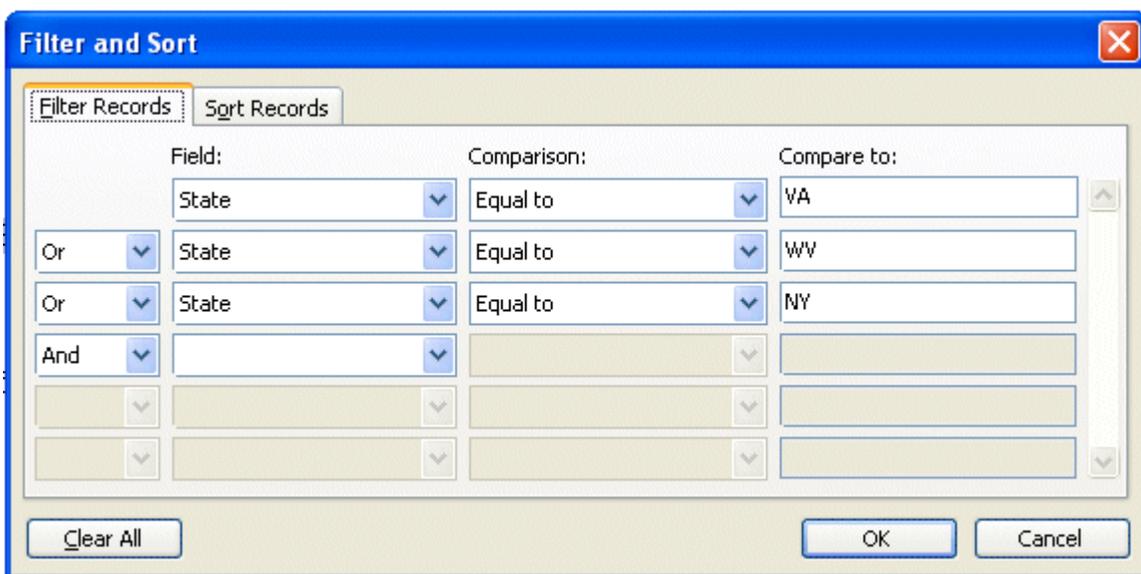
When we **clicked the down arrow on the lower right of the Field: column** a list of the fields in our recipient file appeared. Since we desire to **only send** our merge **to certain states**, we clicked on the State choice.



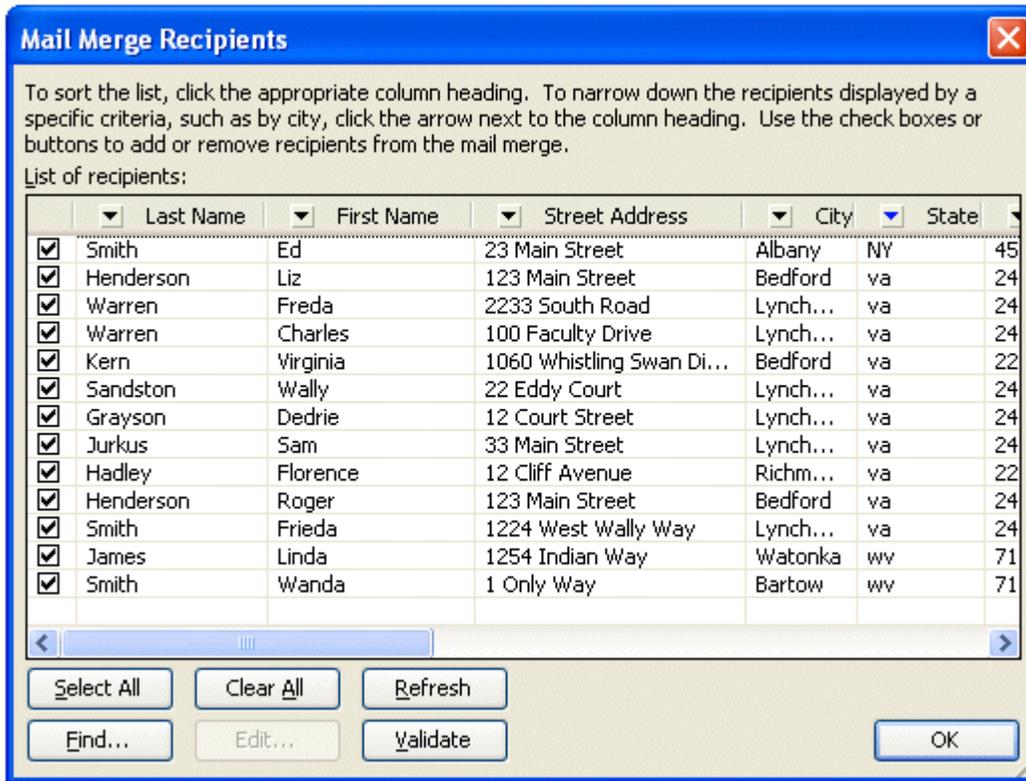
As soon as we click State our menu screen changes to look like the image below. We now have to tell Filter and Sort that we want only recipients in VA, WV and NY. We **click** in the **Compare to** cell and **type the abbreviation** (e.g. VA, WV or NY) for one of our states.



In our first Filter Sort Menu Screen row we typed VA for Virginia. Then we **clicked** on the **down arrow to the right of And** in the second row (see lower left arrow above) and **changed the selection to Or**. We desire our recipients to be from Virginia or one of the other states. **And (as a choice) will not work.** If you think about it for a moment, a recipient could be from West Virginia or New York, but could not be from West Virginia and New York (at the same time). To get the correct filter we need to use Or. We then repeated selecting State in the Field Column and added West Virginia and New York in our Compare to: column. When we finished, our Filter and Sort screen looked like the image below. We then **clicked** the **OK** button.

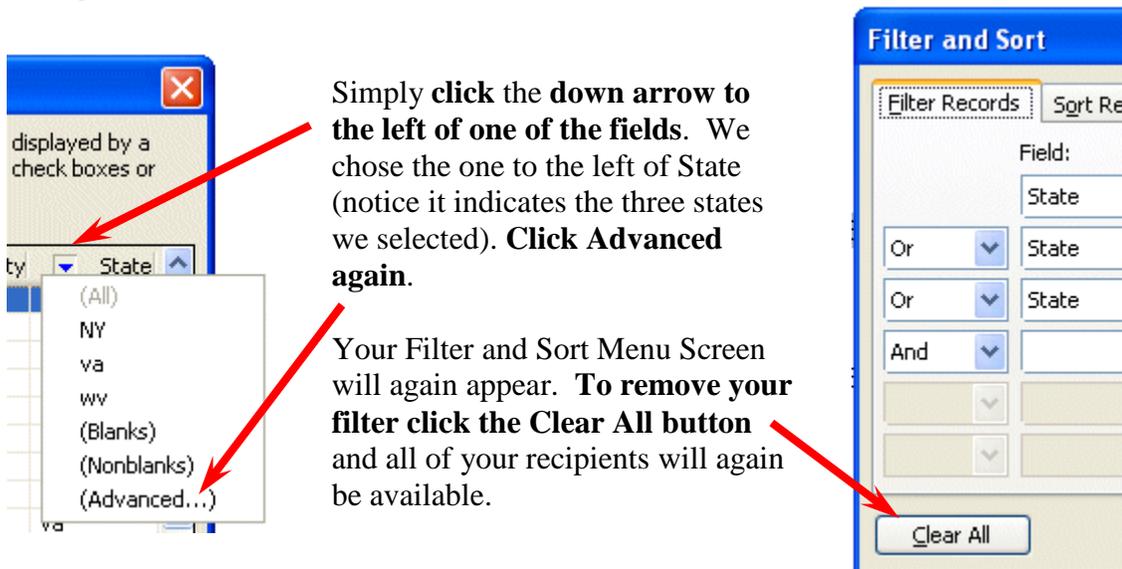


We returned to the Mail Merge Recipients Menu Screen. Notice that ours now **only includes recipients from the three states**. We would continue with our merge at this point.

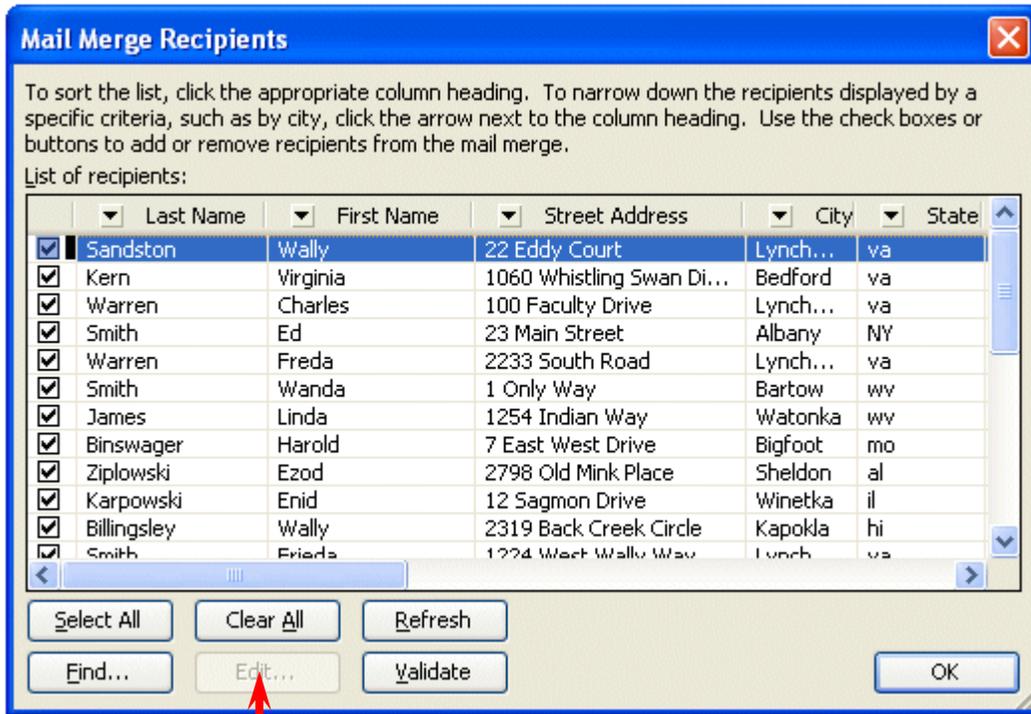


A BIG THING

Once you have created a filter, you'll need to clear it if you desire to have your entire list available again or to do another filter.



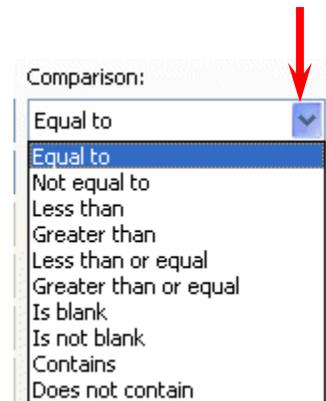
You can now create another filter as you did beginning on Page 1 of this Addendum.



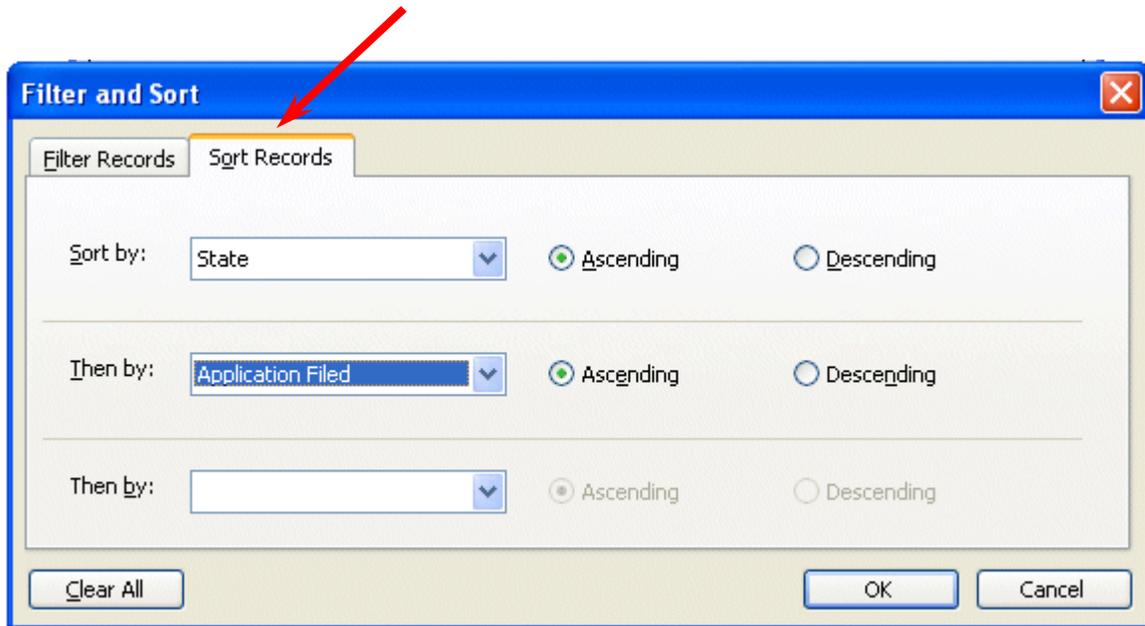
After you have cleared of your filter settings, and when you return to the Mail Merge Recipients screen, notice there are a number of other buttons you can use to enhance your filter.

Additional Notes:

In the **Filter and Sort Menu Screen** you will see an area titled **Comparison:** We left the selection for our filter set to Equal to. There are many other selections which aid significantly in filtering your data. If you click the down arrow on the right of this area, you'll see the other selections.



In the Filter and Sort Menu Screen you will also see a Sort Records tab. When you click this tab your screen will look similar to the image below. You can also enhance your filter using this feature as well.



Hopefully these notes will assist you as you work with the Mail Merge features in Microsoft Word XP/2002 and 2003. Experiment with all of the filters and buttons to get a better understanding of how they all work together to create precise groups of data.

If you have any questions about Microsoft Word XP/2002 or 2003 Mail Merge, or comments on this addendum, please contact:

murray.t@lynchburg.edu