

*CREATING CUSTOM LETTERS AND  
LABELS WITH MAIL MERGE  
MICROSOFT WORD 2003*

REFERENCE GUIDE



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UNIVERSITY TECHNOLOGY SERVICES  
COMPUTER TRAINING

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## Vocabulary

<b>Mail merge term</b>	<b>Meaning</b>
<b>Mail merge</b>	A process that merges data into documents to create envelopes, labels, form letters, e-mail messages, faxes, individually numbered coupons, directories, and more.
<b>Main document</b>	The document you start with in a mail merge. You add content and fields to this document. When you merge data from a data file with this document, each record from the data file becomes a unique merged document.
<b>Data file</b>	A file that contains information organized into labeled columns and rows.
<b>Data file field</b>	A placeholder added to a main document that is replaced by information from data file records when you merge. You can also use Word fields to insert information that comes from your computer's operating system or that results from an action or calculation.
<b>Merged document</b>	One unique document (letter, e-mail message, envelope, label, or fax) that results from merging information from a data file into a main document.
<b>Comprehensive document</b>	A document you can choose to create when you are merging information onto envelopes, labels, or form letters that contains the entire set of merged documents, with one document per page or section.

## Data file types Word can connect to during a mail merge

<b>Use</b>	<b>To create</b>
Microsoft Office Word	Document (.doc) file consisting of a single table.
Microsoft Office Excel	Worksheet or named range in a workbook (.xls) file.
Microsoft Office Access	Table or query that is part of a database (.mdb) file.
Any HTML editor	HTML file consisting of a single table.
Any text editor	Text (.txt) file that includes columns separated by commas or tabs and rows separated by paragraphs.
Microsoft Office Outlook	Contacts list.

<p>Messaging Application Programming Interface (MAPI)-compatible program, such as:</p> <ul style="list-style-type: none"> <li>• Microsoft Exchange Server</li> <li>• Outlook Express</li> <li>• Microsoft Schedule+ 7.0</li> </ul>	<p>Electronic address book.</p>
<p>Any single-tier, file-based database program for which you have an OLE-DB provider or ODBC driver installed</p>	<p>Any data source file you can connect to using the <b>Data Connection Wizard</b> or locate on a server.</p>

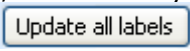
### Form Letters: Steps in a mail merge

<p><b>Create the letter</b></p>	<p>1. Create and save the form letter you want to send.</p>
<p><b>Start the Mail Merge wizard</b></p>	<p>1. On the <b>Tools</b> menu, point to <b>Letters and Mailings</b>, and then click <b>Mail Merge</b> to open the <b>Mail Merge</b> task pane.</p>
<p><b>Choose a document type</b></p>	<p>1. In the task pane, click the Letter document type. 2. Click <b>Next: Starting document</b> at the bottom of the task pane to move to the next step.</p>
<p><b>Open the main document</b></p>	<p>1. Choose your starting document by clicking an option in the task pane. 2. Click <b>Next: Select recipients</b> at the bottom of the task pane.</p>
<p><b>Connect to a data file</b></p>	<p>Click one of the options in the task pane to:</p> <ol style="list-style-type: none"> <li>1. Connect to a data file on your computer or on a server that already exists. You'll have to browse to locate the file, and then choose the worksheet or table within the file that you want to use. Connect to your Outlook Contacts file. You'll have to choose the contact list folder you want to use.</li> <li>2. <b>Note:</b> At this point, you can create a new data file from scratch. To simplify troubleshoots, it is recommended that you create your data source before running the mail merge wizard.</li> </ol>

<p><b>Choose the records you want to use in the merge</b></p>	<p>After you connect to the data file, the <b>Mail Merge Recipients</b> dialog box opens.</p> <ol style="list-style-type: none"> <li>1. Use the column headings, check boxes, and buttons to sort and choose the data file records you want to use in the merge.</li> <li>2. Click <b>Next: Write your letter</b> at the bottom of the task pane.</li> </ol>
<p><b>Add content and fields to the main document</b></p>	<p>Type, insert, or paste into the main document the content that you want to appear in each merged copy.</p> <p>In the task pane, click the:</p> <ul style="list-style-type: none"> <li>• <b>Address block</b> link to add an address block field.</li> <li>• <b>Greeting line</b> link to add a greeting line field.</li> <li>• <b>More items</b> link to add a field representing any column from your data file.</li> </ul> <p>Click <b>Next: Preview your letters</b> at the bottom of the task pane.</p>
<p><b>Preview</b></p>	<p>Use the buttons and links in the task pane to preview the merged documents. If you see errors, click <b>Previous</b> at the bottom of the task pane to return to the previous step and fix the problems.</p>
<p><b>Complete the merge</b></p>	<p>Click a link in the task pane to:</p> <ul style="list-style-type: none"> <li>• Print the merged documents.</li> <li>• Create a comprehensive document that contains all the merged documents, one document per page.</li> </ul>


### **Mailing Labels: Steps in a mail merge**

<p><b>Create document</b></p>	<ol style="list-style-type: none"> <li>1. Create a new, blank document.</li> </ol>
<p><b>Get started</b></p>	<ol style="list-style-type: none"> <li>1. On the <b>Tools</b> menu, point to <b>Letters and Mailings</b>, and then click <b>Mail Merge</b> to open the <b>Mail Merge</b> task pane.</li> </ol>
<p><b>Choose a document type</b></p>	<ol style="list-style-type: none"> <li>1. In the task pane, mark <b>Labels</b>.</li> <li>2. Click <b>Next: Starting document</b> at the bottom of the task pane to move to the next step.</li> </ol>

<p><b>Open the main document</b></p>	<ol style="list-style-type: none"> <li>1. Mark <b>Change document layout</b> under the <b>Select starting document</b> heading</li> <li>2. Select the label format, click <b>Label options...</b> under the <b>Change document layout</b> heading. Choose the appropriate Avery label format and product number and click <b>OK</b>.</li> <li>3. Click <b>Next: Select recipients</b> at the bottom of the task pane.</li> </ol>
<p><b>Connect to a data file</b></p>	<p>Either:</p> <ul style="list-style-type: none"> <li>• Connect to a data file that already exists. You'll have to browse to locate the file, and then choose the worksheet or table within the file that you want to use, or</li> <li>• Connect to your Outlook Contacts file. You'll have to choose the contact list folder you want to use.</li> </ul>
<p><b>Choose the records you want to use in the merge</b></p>	<p>After you connect to or create the data file, the <b>Mail Merge Recipients</b> dialog box opens. Use the column headings, check boxes, and buttons to sort and choose the data file records you want to use in the merge.</p> <p>Click <b>Next: Arrange your labels</b> at the bottom of the task pane.</p>
<p><b>Add content and fields to the main document</b></p>	<p>Type, insert, or paste into the main document the content that you want to appear in each merged copy.</p> <p>In the task pane, click the:</p> <ul style="list-style-type: none"> <li>• <b>Address block</b> link to add an address block field.</li> <li>• <b>Greeting line</b> link to add a greeting line field.</li> <li>• <b>More items</b> link to add a field representing any column from your data file.</li> </ul> <p>Once you have entered the desired fields, make sure your cursor is in the formatted label and click .</p> <p><b>Tip</b> You can add pictures to merged labels</p> <ol style="list-style-type: none"> <li>1. With the main document open, on the <b>Insert</b> menu, point to <b>Picture</b>, and then click <b>From File</b>.</li> <li>2. In the <b>Insert Picture</b> dialog box, locate the picture you want to use, and then click <b>Insert</b>.</li> <li>3. On the <b>Format</b> menu, click <b>Picture</b>. On the <b>Layout</b> tab, click <b>Square</b>, and then click <b>OK</b>.</li> <li>4. Insert the Address block field to the right of the picture.</li> <li>5. In the task pane, click <b>Update all labels</b> to add the picture and address block fields to the other labels on the sheet.</li> </ol>

<b>Preview</b>	Use the buttons and links in the task pane to preview the merged documents. If you see errors, click <b>Previous</b> at the bottom of the task pane to return to the previous step and fix the problems.
<b>Complete the merge</b>	Click a link in the task pane to: <ul style="list-style-type: none"><li>• <b>Print</b> the merged documents, or,</li><li>• <b>Edit individual labels</b> to create a comprehensive document that contains all the merged records.</li></ul>

### **Reverting to a regular document**

<b>Removing Mail Merge from a Main Document</b> <i>By removing the associated data source from a main document, you can convert it to a regular document.</i>	<ol style="list-style-type: none"><li>1. Open the main document from which you want to remove the data source.</li><li>2. On the <b>View</b> menu, point to <b>Toolbars</b>, and then click <b>Mail Merge</b>.</li><li>3. Click <b>Main Document Setup</b> .</li><li>4. Click <b>Normal Word document</b>.</li></ol>
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