



Word 97 Merging Mailing Lists and Documents

Data Sources and Main Documents

You need two documents to create form letters or mailing labels. One document, called the **data source**, contains a set of data, such as names and addresses. The other document, the **main document**, acts as a form that receives the data.

A **main document** can take the form of a mailing list, catalog, mailing labels, or letters.

The main document is like a normal document except that it contains **MERGE FIELD** codes that specify the placement of merged data. In a typical form letter, for example, the main document is a form letter in which the names and addresses are inserted, and the data source is the list of those names and addresses.

The **data source document** must be organized in a very specific way, or the merge process will generate errors. The first row of the data source must be one row of field names. Below the row of names are rows of data.

- Each row of data is a record.
- Each piece of data in the row, such as a last name, is a field.
- The row of names in the first row of the documents is the header record.
- Each name in the first row is a field name.

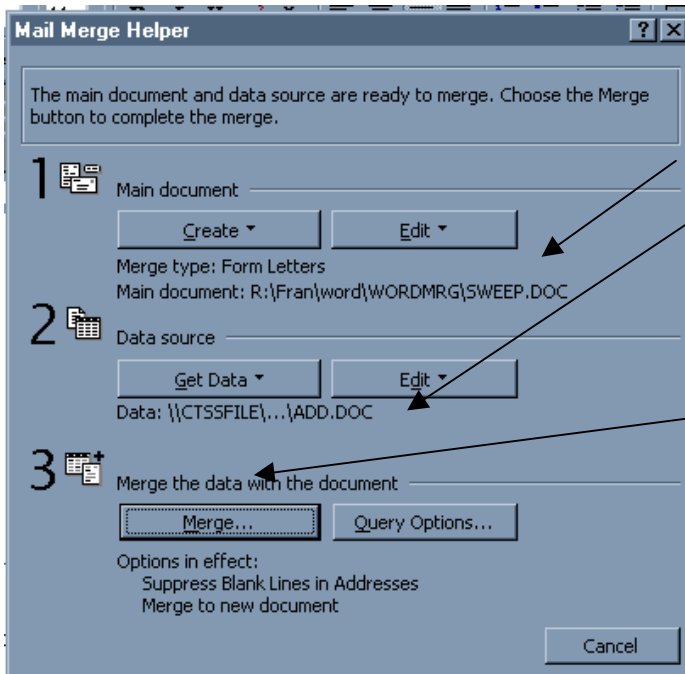
When you merge the documents, Word replaces the merge fields with the appropriate text from the data source.

Merging (Documents already created)

Open the document you want to use as the main document.

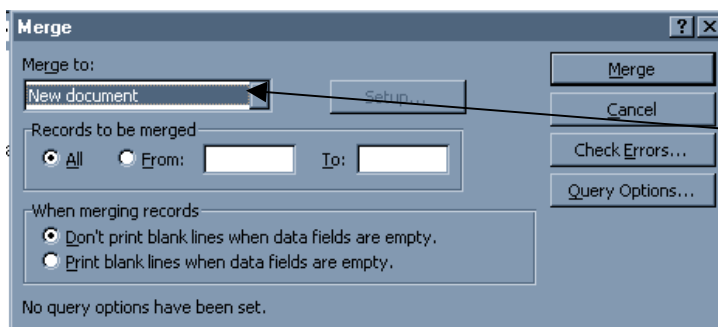
From the **Menu** choose **Tools | Mail Merge**

A **Mail Merge Helper** dialog box will open.



Check to see if the **main document** and **data source** file names are correct.

Click on the **Merge** button to merge the main document and data source.



Word will open a dialog box called **Merge**.

Click on the pull down menu in the **Merge to:** field box.

Options are:

1. Merge to New Document
2. Merge to Printer
3. Merge to Electronic Email

Click on the **Merge** button when finished.

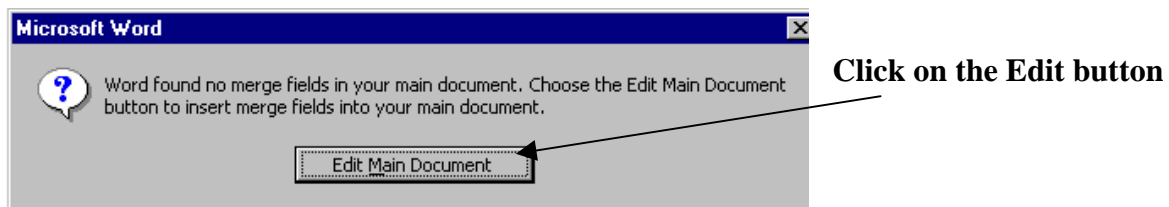
Create the Main Document – Use existing Data Source Document

From the **Tools** menu select **Mail Merge | Main Document | Create | Select type Form Letter | New Document**

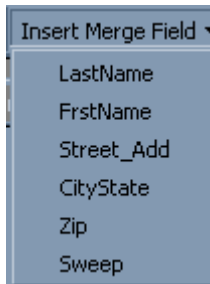
When back at the **Mail Merge Helper** dialog box, select **Get Data** under the **Data Source** section.

Select **Get Data | Open Data Source | Select the file**

Word will ask if you want to Edit the Main Document



Word will open a blank page. Type the new main document and insert the merge fields.



Click on the **Insert Merge field** button and select the merge fields.

Enter any punctuation needed around merge field codes.

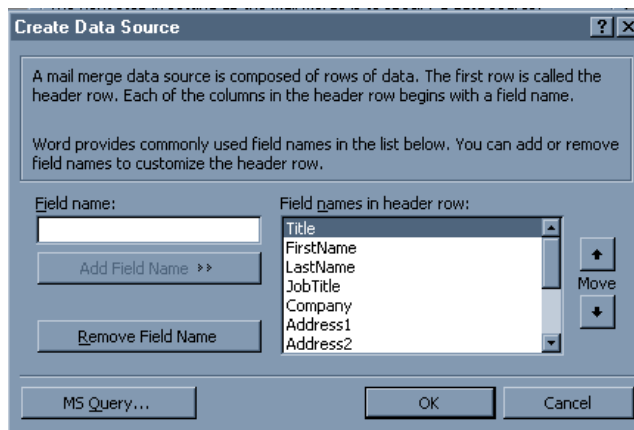
Example: Dear <FrstName>:

Create the Main Document and the Data Source Document

From the **Tools** menu select **Mail Merge | Main Document | Create | Select Form Letter | New Document**

When back at the **Mail Merge Helper** dialog box, select **Get Data** under the **Data Source** section

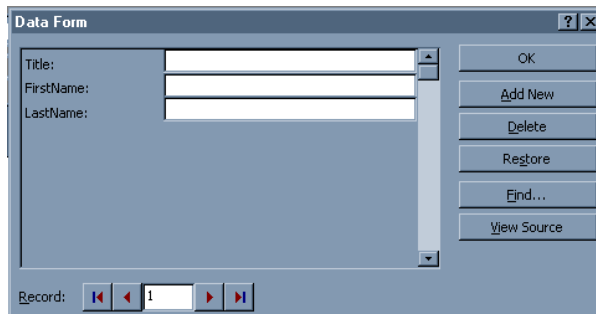
Under the **Data Source** section select **Create Data Source**.



Word displays a dialog box that lists field names for information commonly used in form letters, mailing labels, and envelopes.

All the fields are used unless you **Remove** them. You can also **ADD** fields. When the list is complete, choose the **OK** button. Word displays a dialog box so that you can save the new data source.

A new dialog box will appear asking if you want to **Edit the Data Source** or **Edit the Main Document**. Select **Edit Data Source**.



A **Data Form** dialog box will open. Add new records. Enter the information for each field.

Click **OK** when finished. Word will return you to the Main Document. Create the main document and insert the merge fields.

Note: You can manually create data source documents by typing data into tables or by typing each record in a row and separating the fields with commas or tabs.

Rules for Field Names

- Names must start with a letter.
- Names must not contain a space. Use an underscore if you need to separate words.
- Names must not be longer than 40 characters.
- Names must be unique. You cannot have two field names spelled the same.
- You must save the document containing your data source to disk before you can use it.

To Set Up and Print Envelopes by Using the Mail Merge Command

To see what is used for the Return Address

Select Tools | Options | User Information

The address displayed will be used for the return address. **Note:** You can edit the address in the **User Information** box.

To set up and print envelopes by using the mail Merge Command

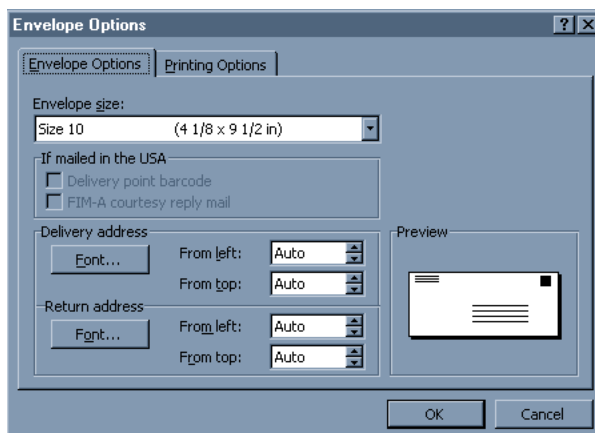
Select Tools | Mail Merge

Under **Main Document**, choose the **Create** button, and then choose **Envelopes**.

When Word displays a message, choose the **Active Window** button.

Under **Data Source**, choose the **Get Data** button. Select the file with the address information or create the data source.

An **Envelopes Options** dialog box will open asking you to select the envelope size.

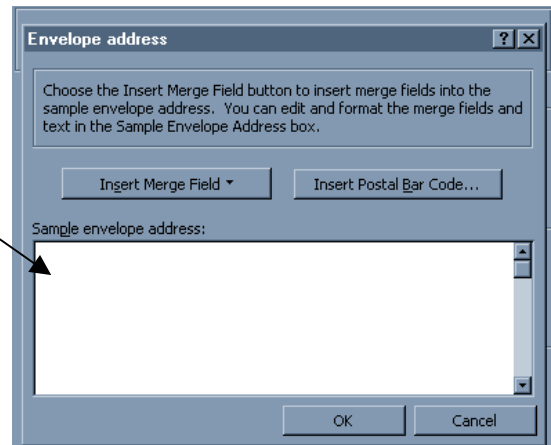


Choose **OK** when finished.

In the **Envelope Address** dialog box, position the cursor in the **Sample Envelope Address** box.

Then choose the **Insert Merge Field** button and choose the appropriate merge fields. Type any spaces and punctuation you want between the merge fields, and press Enter at the end of each line.

Click on the **OK** button when finished.



Word will display the **Mail Merge Helper** dialog box. Click on the **Merge** button.

Word will display the **Merge** dialog box. Select your options and click on the **Merge** button.

More about Printing Envelopes

Changing the envelope size or the printer options: If you want to change the envelope size, the format or position of the return or delivery address, or envelope printing options, use the **Envelopes and Labels** command on the **Tools** menu.

To Set Up and Print Mailing Labels Using the Mail Merge Command

You can use mail merge to print names and addresses on many kinds of commonly used mailing labels, name tags, and other labels.

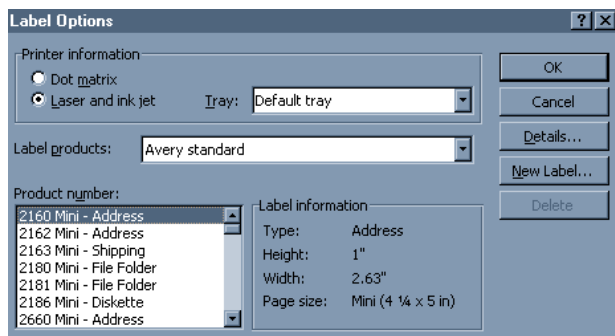
In a new document window, choose **Mail Merge** from the **Tools** menu.

Under **Main Document**, choose the **Create** button, and then choose **Mailing Labels**.

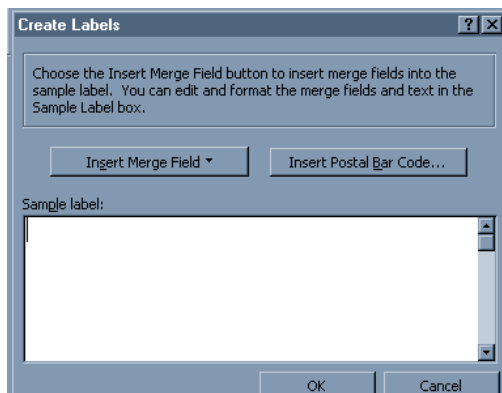
When Words displays a message, choose the **Active Window** button.

In the **Mail Merge Helper** dialog box under **Data Service**, choose the **Get Data** button, and then do one of the following:

Open Data Source or Create Data Source



In the **Label Options** dialog box, select the type of printer and label feed method, and the type of label and label product number you are using. Then choose the **OK** button.



In the **Create Labels** dialog box, position the cursor in the **Sample Label** box. Then choose the **Insert Merge Field** button and choose the appropriate merge fields. Type any spaces and punctuation you want between the merge fields, and press **Enter** at the end of each line. Then choose the **OK** button.

Choose **Merge** from the **Mail Merge Helper** dialog box.

Changing the Data Source from the Main Document

To change the Data Source click on the **Edit Data Source** button in the **Mail Merge** toolbar.



Record: [Left Arrow] [Right Arrow] 1 [Left Arrow] [Right Arrow]

This will open the **Data Form** dialog box.

New entries can be added

Entries can be deleted

Text can be modified for each record

Use the arrows to change records

Click on the **View Source** button to view the data source in a table format.

Example of the Table format from the View Source

<u>FirstName</u>	<u>LastName</u>	<u>Company</u>	<u>JobTitle</u>	<u>Address1</u>	<u>Address2</u>	<u>City</u>	<u>State</u>	<u>Pr</u>
Jane	Smith	Csu	Training	CTSS	221 Weber	Fort Colli ns	CO	80
Jack	Crack	Csu	Training	CTSS	221 Weber	Fort Colli ns	CO	80
Frank	Sweeney	CSTI	Training	CTSS	221 Weber	Fort	CO	80

Field Names, text and column arrangements can be changed from this view.