

PENNSSTATE



Erie

The Behrend  
College

General Electric Foundation  
Computer Center

---

# **Mail Merge Using Word XP**

**March 4, 2003**



## Alternative Media Statement and Nondiscrimination Policy

**This publication is available in alternative media on request.**

The Pennsylvania State University is committed to the policy that all persons shall have equal access to programs, facilities, admission, and employment without regard to personal characteristics not related to ability, performance, or qualifications as determined by University policy or by state or federal authorities. It is the policy of the University to maintain an academic and work environment free of discrimination, including harassment. The Pennsylvania State University prohibits discrimination and harassment against any person because of age, ancestry, color, disability or handicap, national origin, race, religious creed, sex, sexual orientation, or veteran status. Discrimination or harassment against faculty, staff, or students will not be tolerated at The Pennsylvania State University. Direct all inquiries regarding the nondiscrimination policy to the Affirmative Action Director, The Pennsylvania State University, 328 Boucke Building, University Park, PA 16802-5901; Tel 814-865-4700/V, 814-863-1150/TTY.

### Credit Notice

**Permission to copy all or part of this document is granted provided that the following conditions are met:**

- **Copies may not be made or distributed for commercial use.**
- **Any duplicated materials must be attributed to the Penn State Behrend Computer Center and include this credit notice.**
- **Send a message to the email address listed below and include the following information: your name and title, institution and department, email address, phone number, the name of the document you wish to use, and the purpose for which you will use the document. (The contact information is requested in case of any questions and so that the Computer Center has an idea of which institutions are using the material outside of Penn State Behrend.)**

**Direct any questions or requests to:**

**Carolyn Dudas  
Penn State Behrend  
Computer Center  
Station Road  
Erie, PA 16563-1201**

**Phone: 814-898-6250  
Email: [ddz@psu.edu](mailto:ddz@psu.edu)  
Web Site: [pennstatebehrend.psu.edu](http://pennstatebehrend.psu.edu)**

# Table of Contents

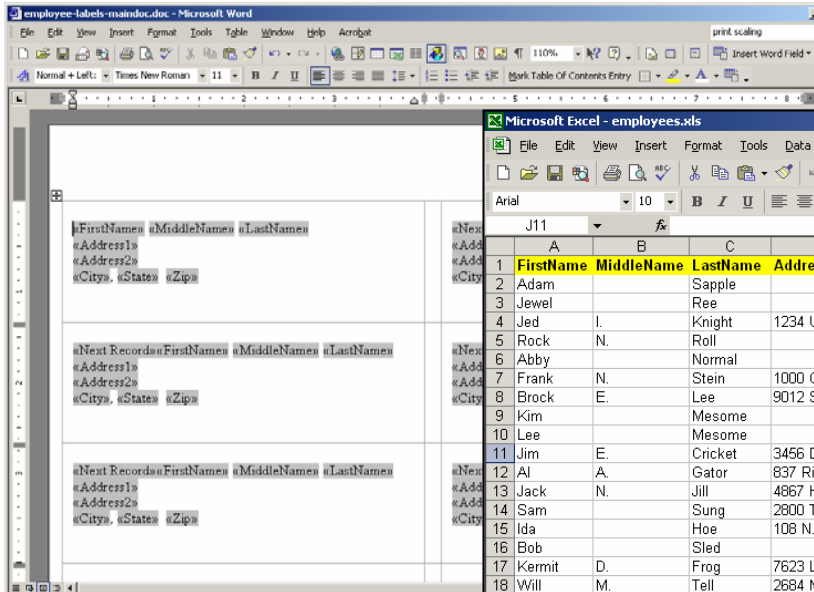
Introduction.....	1
Data Sources .....	2
Using the Mail Merge Wizard .....	2
Display the Mail Merge Toolbar .....	3
Add the Old Mail Merge Helper Button to the Toolbar .....	3
Convert a Mail Merge Main Document to a Normal Word Document.....	3
Display Leading Zeroes in Excel.....	4
Import Excel Spreadsheet into Access.....	4
Display Leading Zeroes in Access.....	4
Establish a DDE Connection for Excel and Access Data Sources .....	5
Change Data Source .....	5
Using a Word 2000 Mail Merge File with Word XP.....	5
Suppress or Unsuppress Blank Lines.....	6
Print Specific Pages .....	6
Create Mailing Labels with Excel or Access as the Data Source .....	7
Create Form Letters with Excel or Access as the Data Source.....	25

# Mail Merge Using Word XP

## Introduction

- The Mail Merge Wizard may be used to create several types of documents such as labels and personalized form letters.
- A mail merge requires the use of two types of documents: the main document (for example, a document specially formatted for labels or form letters) and the data (such as a spreadsheet that contains names and addresses).

### Main Document

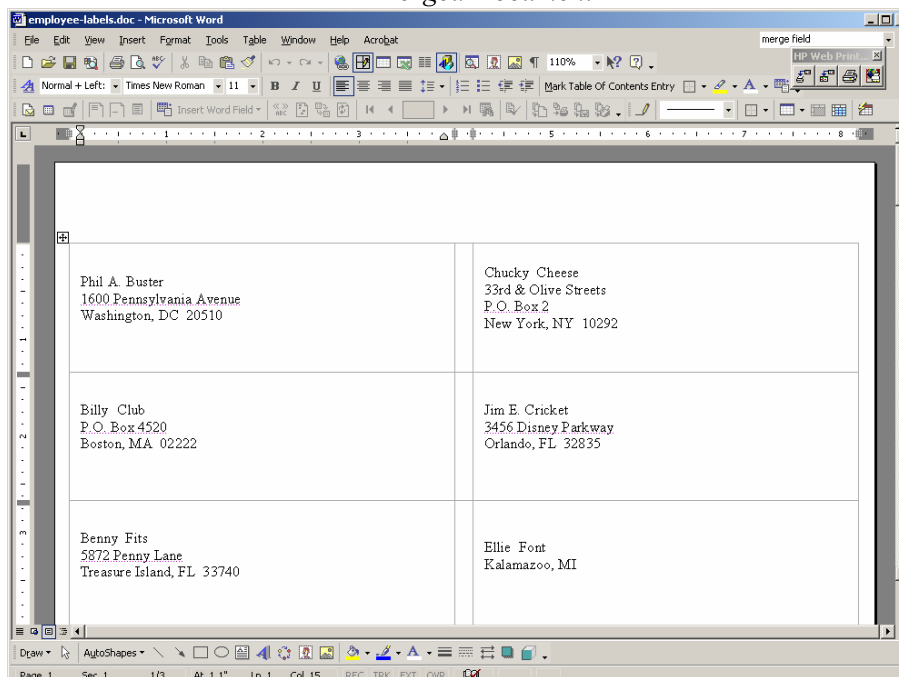


### Data

The screenshot shows a Microsoft Excel window titled "employees.xls". The spreadsheet contains a list of employee records. The columns are labeled: FirstName, MiddleName, LastName, Address1, Address2, City, State, and Zip. The data is as follows:

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21
	Adam	Jewel	Jed	Rock	Abby	Frank	Brock	Kim	Lee	Jim	Al	Jack	Sam	Ida	Bob	Kermit	Will	Cindy	Billy	Allen	
1	Adam																				
2	Adam																				
3	Jewel																				
4	Jed	I.	Knight	1234 Universe Lane																	
5	Rock	N.	Roll																		
6	Abby		Normal																		
7	Frank	N.	Stein	1000 Creepy Hollow Court																	
8	Brock	E.	Lee	9012 Springhill Road	P.O. Box 43	Garden Grove	CA	92842													
9	Kim		Mesome		P.O. Box 122	Hershey	PA	17033													
10	Lee		Mesome		P.O. Box 122	Hershey	PA	17033													
11	Jim	E.	Cricket	3456 Disney Parkway																	
12	Al	A.	Gator	837 Riverside Drive		Okefenokee	GA	31501													
13	Jack	N.	Jill	4867 Hilltop Road		Waterford	PA	16441													
14	Sam		Sung	2800 Technology Way		San Jose	CA	95155													
15	Ida		Hoe	108 N. Tater Street		Waterford	PA	16441													
16	Bob		Sled		P. O. Box 88	Anchorage	AK	99501													
17	Kermit	D.	Frog	7623 Lily Pad Court		Waterville	WA	98858													
18	Will	M.	Tell	2684 Macintosh Street		Farmington	WA	99128													
19	Cindy		Rella	3402 Prince Charming Court		Honolulu	HI	96848													
20	Billy		Club		P.O. Box 4520	Boston	MA	02222													
21	Allen		Wrench	45 Mechanic Street		Girard	PA	16417													

### Merged Document



# Mail Merge Using Word XP

## Introduction – cont'd

- The main document contains special merge fields that act as placeholders for information. For example, merge fields may be inserted for fields such as name, address, city, state, or zip code. These merge fields are enclosed within chevrons (i.e. « »). Other special merge fields, such as «Next Record» may be used to control how the data is placed in the document
- The interface for the Mail Merge Wizard has changed substantially since the previous version, but it's still easy to use.
- The old Mail Merge Helper is still available. You will need to use the old wizard in order to set the suppression or non-suppression of blank lines.

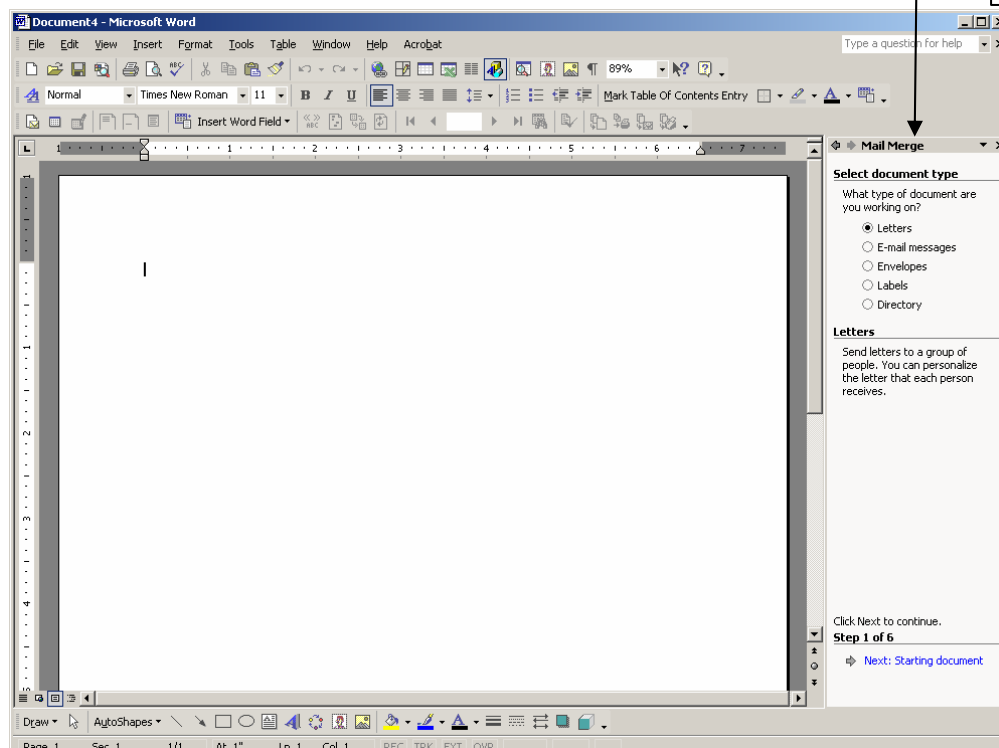
## Data Sources

- A wide variety of file types may be used as the data source. The most common sources include: Excel spreadsheets, Access databases, and Word tables.

## Using the Mail Merge Wizard

- This is the general procedure to follow when using the Mail Merge Wizard.
  1. From the menu, select: **Tools | Letters and Mailings | Mail Merge Wizard.**
  2. In the Mail Merge task pane (on the right side of the screen), make the appropriate selections.
  3. Proceed to the next step of the Mail Merge Wizard by clicking on the Next button (located at the bottom of the task pane).

*View of the Mail Merge Wizard*

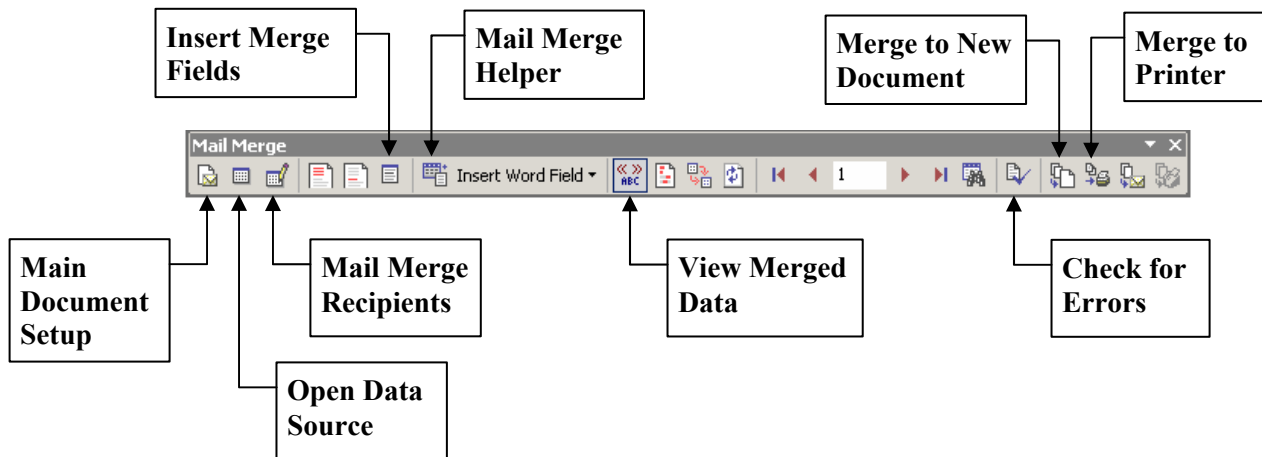


# Mail Merge Using Word XP

## Display the Mail Merge Toolbar

- The Mail Merge toolbar includes buttons for various mail merge functions.
- The toolbar also has the button for the old Mail Merge Helper.


1. From Word's menu, select: **View | Toolbars | Mail Merge**.
  - The Mail Merge toolbar is shown below.



## Add the Old Mail Merge Helper Button to the Toolbar

- There are times when you will need to use the old Mail Merge Helper. For example, the old Mail Merge Helper can be used to suppress (or not suppress) blank lines.
- The Mail Merge Helper button can be added to the toolbar. Instructions are given below.
- You can also display the Mail Merge toolbar. This toolbar contains the Mail Merge Helper button plus many other buttons that can be used for a mail merge. Instructions for displaying the Mail Merge toolbar are given in this document.

1. From Word's menu, select: **Tools | Customize**.
2. Click on the Commands tab.
3. In the Categories column, scroll down and select **All Commands**.
4. In the Commands column, scroll down and find MailMergeHelper. Drag the MailMergeHelper icon to a toolbar.
5. Close the dialog box.

- The Mail Merge Helper button looks like this: 

## Convert a Mail Merge Main Document to a Normal Word Document

- Occasionally, you may want to convert a mail merge main document to a regular Word document.

1. Open the mail merge main document.
2. Display the Mail Merge toolbar.
3. Click on the Main Document Setup button on the Mail Merge toolbar.
4. At the Main Document Type dialog box, click on **Normal Word Document**.
5. Click OK.

## Mail Merge Using Word XP

### Display Leading Zeroes in Excel

- There may be instances when you need to format data in Excel so that the leading zeroes are displayed for a number. (Example: 02222.) Here's how to display the leading zeroes in Excel:
  1. In Excel, select the data that you want to format with leading zeroes.
  2. From the menu, select: **Format | Cells**.
  3. Click on the Number tab.
  4. In the category section, click on **Custom**.
    - To format a zip code: Click on **Special** (instead of **Custom**).
  5. In the Type box, type a custom format to display leading zeroes. To do so, type a zero for each digit that you want displayed.  
Example: **00000**
    - To format a zip code: Click on **Zip Code** (instead of typing the zeroes).
  6. Click OK.

### Import Excel Spreadsheet into Access

- An Excel spreadsheet may be exported to a comma delimited file so that you can retain the leading zeroes when it is imported into Access. The general process is as follows:
  1. Open the Excel spreadsheet.
  2. Format the necessary Excel data so that leading zeroes are displayed.
  3. Save the Excel file as a comma delimited file.
  4. Import the comma delimited file into Access.

### Display Leading Zeroes in Access

- There may be instances when you need to format data in Access so that the leading zeroes are displayed for a number. (Example: 02222.)
  1. Open the Access database.
  2. In Access, go to Design View and click in the Data Type field for the data that you want to format with leading zeroes.
  3. Click on the drop-down arrow in the Data Type field and select **Text**.
  4. Switch to Data Sheet View.
  5. Type the desired number including the leading zeroes.  
**OR**  
For existing data that is not formatted to show leading zeroes, type the appropriate number of zeroes in front of the existing number.

## **Mail Merge Using Word XP**

### **Establish a DDE Connection for Excel and Access Data Sources**

- When you do a mail merge using an Excel worksheet as your data source, some of the numeric data may not retain its formatting in the merged document. This affects Excel data that is formatted as a percentage, currency, or as a zip code. To fix this problem, use the Dynamic Data Exchange (DDE) method to connect to the Excel worksheet.
  - The DDE connection is also needed to allow you to select specific Access tables and queries in the mail merge process.
1. Establish a DDE connection to the spreadsheet or database. From the menu, select: **Tools | Options**.
    - a. Click on the General tab.
    - b. Click in the box next to: **Confirm Conversion at Open**. (There should now be a checkmark in this box.)
    - c. Click OK.
  2. Use the Mail Merge Wizard to configure your mail merge as usual. When you get to **Step 3 of 6** and are prompted to **Confirm Data Source**, select: **MS Excel Worksheets via DDE (\*.xls)** or **Access Database via DDE (\*.mdb, \*.mde)**.
  3. Click OK.
  4. Continue with the mail merge configuration.

### **Change Data Source**

- You may need, at some later time, to change the data source of an existing mail merge document.
1. Open the main document.
  2. Use the Mail Merge Wizard and go to step 3 of 6.
  3. Click on **Select a Different List**.
  4. At the Select Data Source dialog box, click on the desired file.
  5. Click the Open button.
  6. Confirm the data source.
    - For more information about confirming the data source, see the section: **Establish a DDE Connection for Excel and Access Data Sources**.
  7. Click OK.
  8. Select the proper data source object (i.e. spreadsheet or database table).
  9. Click OK.
  10. Select the recipients.
  11. Click OK.

### **Using a Word 2000 Mail Merge File with Word XP**

- If you experience a problem with using a Word 2000 mail merge file, you may need to re-establish the link to your data source.
1. In Word XP, open your Word 2000 mail merge document.
  2. Use the old Mail Merge Helper to re-establish the link to your data source.
  3. Execute the mail merge.

## Mail Merge Using Word XP

### Suppress or Unsuppress Blank Lines

- There are several ways to suppress or unsuppress blank lines, but the easiest way is to use the old Mail Merge Helper.
  1. Display the Mail Merge toolbar.
  2. If you are using the Mail Merge Wizard to create a mail merge... When you get to **Step 4 of 6**, insert the desired merge fields. Don't proceed to the next step using the wizard.

#### **OR**

If the main document for the mail merge has already been created... Open the main document.

3. Click on the Mail Merge Helper button on the toolbar.
4. At the Mail Merge Helper dialog box, click on the Merge button.
5. Click the appropriate item:
  - Don't print blank lines when data fields are empty.

#### **OR**

Print blank lines when data fields are empty.

6. At the Merge dialog box, click the Close button.
7. At the Mail Merge Helper dialog box, click the Close button.
8. Continue with the mail merge.

### Print Specific Pages

- Typically, if you want to print specific pages within a "normal" Word document, you can specify to print the current page or a range of pages. However, you may encounter problems when trying to do the same with merged documents.
- When you create a mail merge file, the pages are placed in sections. According to Microsoft Help, you can print a range of pages within sections by specifying the page numbers and section numbers. For example, if you want to print page 2 (in section 2) and page 3 (in section 3) you would select **File | Print** from the menu and then type the following into the Page Range box: p2s2-p3s3. However, this won't work with a mail merge document.
- If you can't print the current page or range of pages with a mail merge document, try this:
  1. From the menu, select: **File | Print**.
  2. In the Page Range box, type the range of numbers by specifying only the section numbers.  
Example: **s2-s3** (to print pages 2 to 3)

# Mail Merge Using Word XP

## Create Mailing Labels with Excel or Access as the Data Source

- The following Excel spreadsheet will be used as the data source for the mail merge. (The same data is contained in an Access database.)

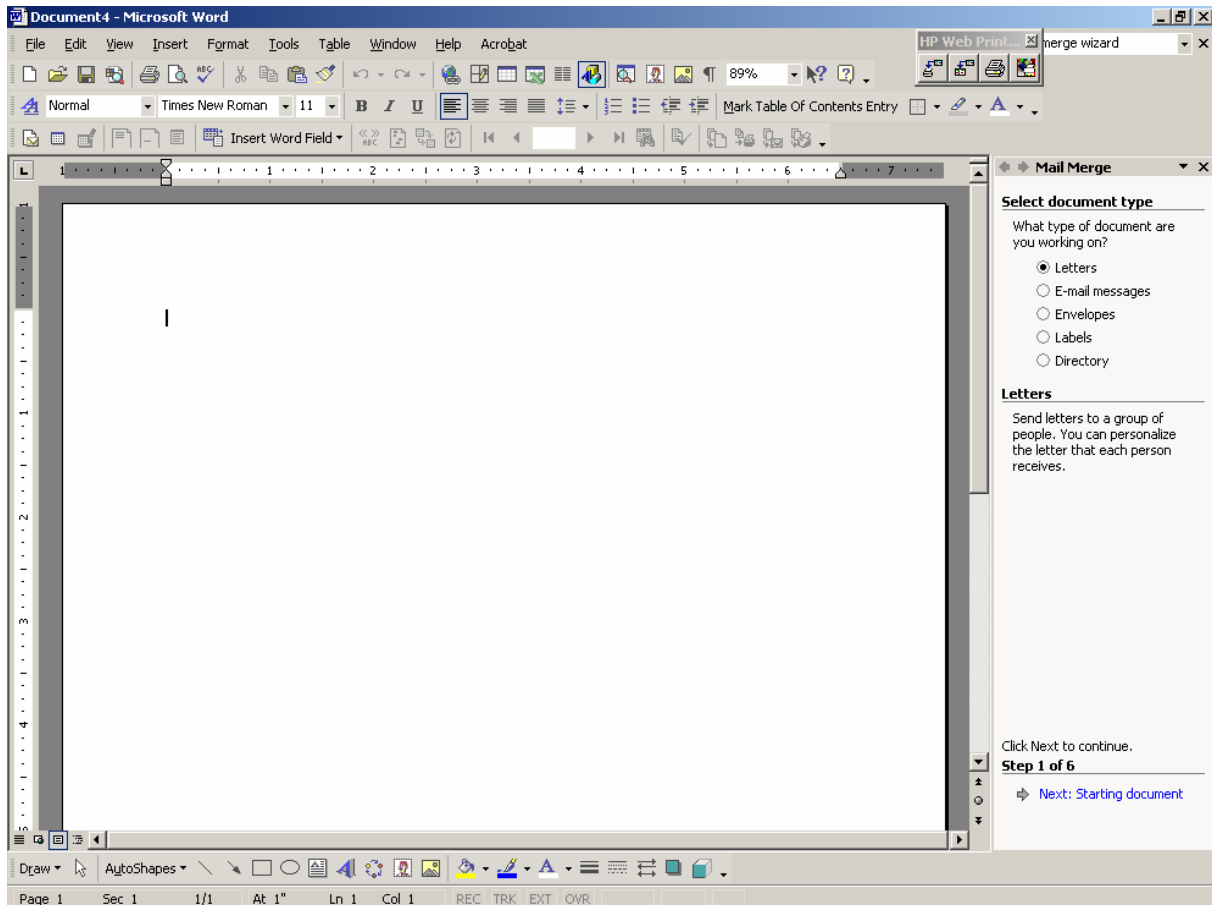
The screenshot shows a Microsoft Excel spreadsheet titled "employees.xls". The spreadsheet contains a list of 34 employees with their names and addresses. The columns are labeled as follows:

	A	B	C	D	E	F	G	H
1	FirstName	MiddleName	LastName	Address1	Address2	City	State	Zip
2	Adam		Sapple					
3	Jewel		Ree					
4	Jed	I.	Knight	1234 Universe Lane		Los Angeles	CA	90001
5	Rock	N.	Roll			Cleveland	OH	44101
6	Abby		Normal			Erie	PA	
7	Frank	N.	Stein	1000 Creepy Hollow Court		New Castle	PA	16108
8	Brock	E.	Lee	9012 Springhill Road	P.O. Box 43	Garden Grove	CA	92842
9	Kim		Mesome		P.O. Box 122	Hershey	PA	17033
10	Lee		Mesome		P.O. Box 122	Hershey	PA	17033
11	Jim	E.	Cricket	3456 Disney Parkway		Orlando	FL	32835
12	Al	A.	Gator	837 Riverside Drive		Okefenokee	GA	31501
13	Jack	N.	Jill	4867 Hilltop Road		Waterford	PA	16441
14	Sam		Sung	2800 Technology Way		San Jose	CA	95155
15	Ida		Hoe	108 N. Tater Street		Waterford	PA	16441
16	Bob		Sled		P. O. Box 88	Anchorage	AK	99501
17	Kermit	D.	Frog	7623 Lily Pad Court		Waterville	WA	98858
18	Will	M.	Tell	2684 Macintosh Street		Farmington	WA	99128
19	Cindy		Rella	3402 Prince Charming Court		Honolulu	HI	96848
20	Billy		Club		P.O. Box 4520	Boston	MA	02222
21	Allen		Wrench	45 Mechanic Street		Girard	PA	16417
22	Jack	B.	Nimble	6904 Candlewick Road		Mystic	CT	06355
23	Benny		Fits	5872 Penny Lane		Treasure Island	FL	33740
24	Chucky		Cheese	33rd & Olive Streets	P.O. Box 2	New York	NY	10292
25	Mary		Mepleaz	281 Flower Road		Erie	PA	16509
26	Bobby		Pin		P.O. Box 809	Auburn	NH	03032
27	Rick		O'Shay			Boston	MA	02107
28	Phil	A.	Buster	1600 Pennsylvania Avenue		Washington	DC	20510
29	E.	Norm	Uz			Casa Grande	AZ	85222
30	April		Showers	92 May Street		Springfield	OR	97477
31	Ellie		Font			Kalamazoo	MI	
32	Ben		Gaye	2800 Viejo Drive			WI	
33	Lynn		Guinni	624 Vino Boulevard		Chicago		60666
34	Pete		Zah		P. O. Box 35	Philadelphia		

# Mail Merge Using Word XP

1. Start Word.
2. Set up the DDE connection. From the menu, select: **Tools | Options**.
  - Hint: This connection is needed to preserve the numeric formatting of Excel data when it is used in a mail merge. You also need to set the DDE connection to allow you to select specific Access tables and queries later on in the mail merge.
  - a. Click on the General tab.
  - b. Click in the box next to: **Confirm Conversion at Open**. (There should now be a checkmark in this box.)
  - c. Click OK.
3. From the menu, select: **Tools | Letters and Mailings | Mail Merge Wizard**.
  - The Mail Merge task pane is used to configure the merge document and to select the data source.

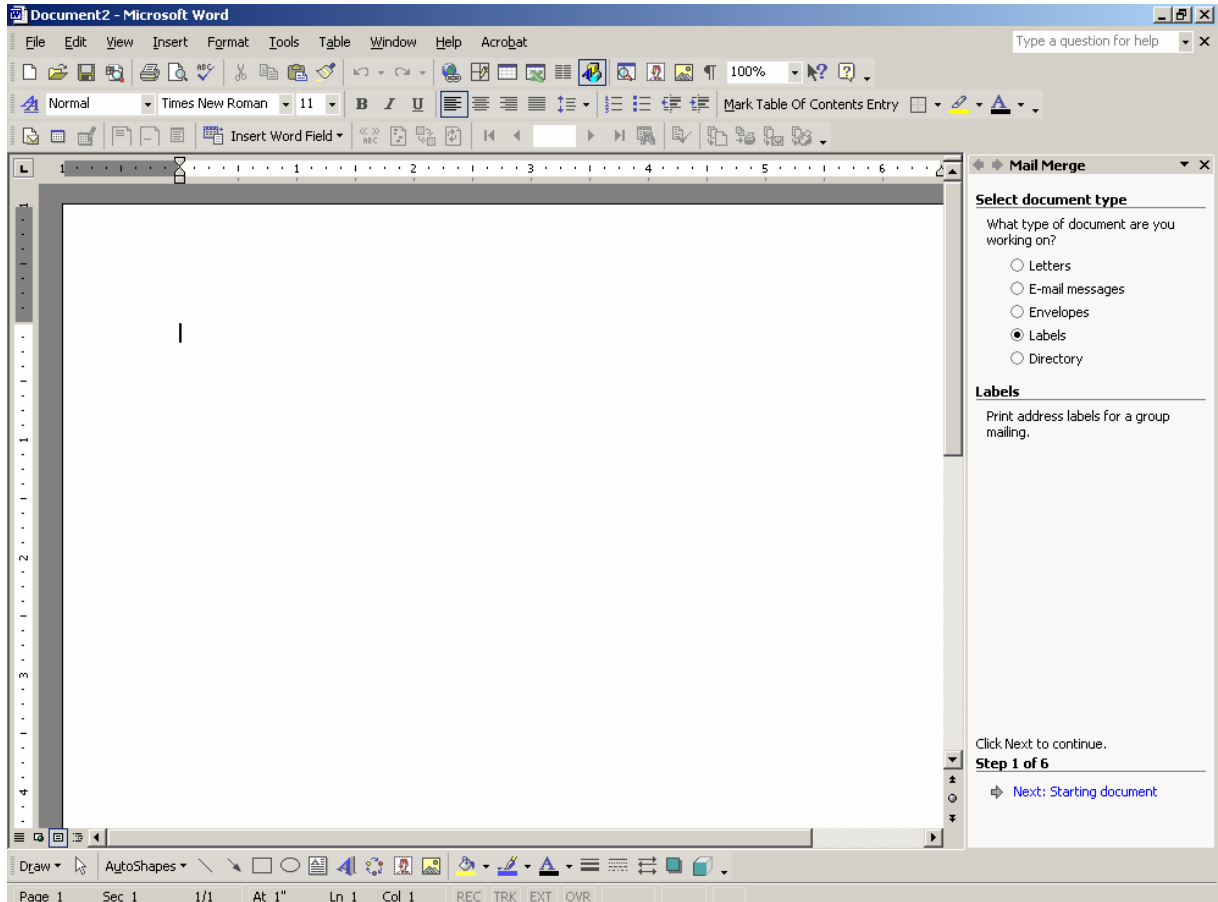
## *Starting Screen for the Mail Merge Wizard*



# Mail Merge Using Word XP

## Step 1 of 6

4. At the Mail Merge task pane, select the document type. In this case, click on **Labels**.



5. Click on the Next button.

# Mail Merge Using Word XP

## Step 2 of 6

6. Select the starting document.

Example: **Change document layout**

7. Click on **Label Options**.

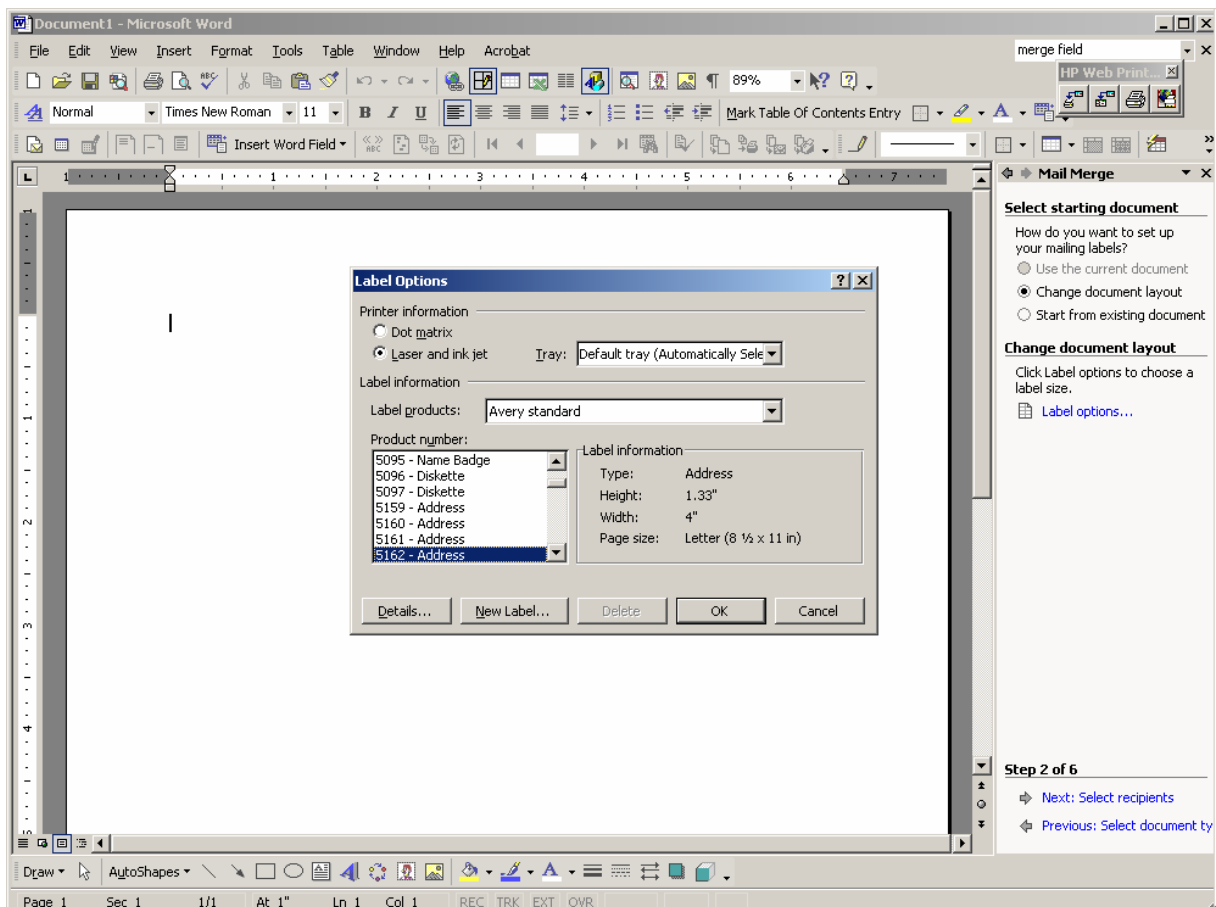
a. Select the Printer Type and Tray.

b. Select the Label Product.

Example: **Avery Standard**

c. Select the Product Number.

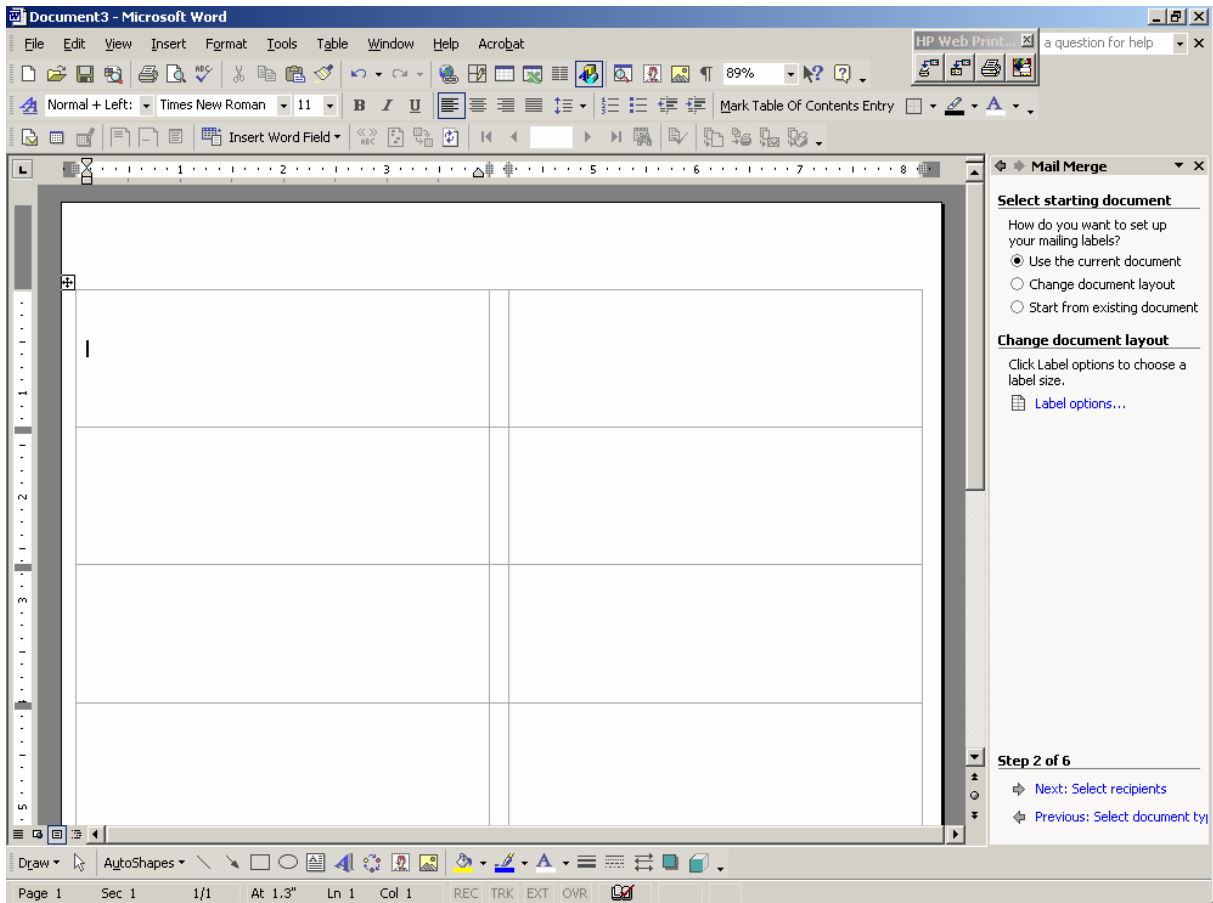
Example: **5162-Address**



8. Click OK.

# Mail Merge Using Word XP

*Sample Screen after Selecting Label Options*

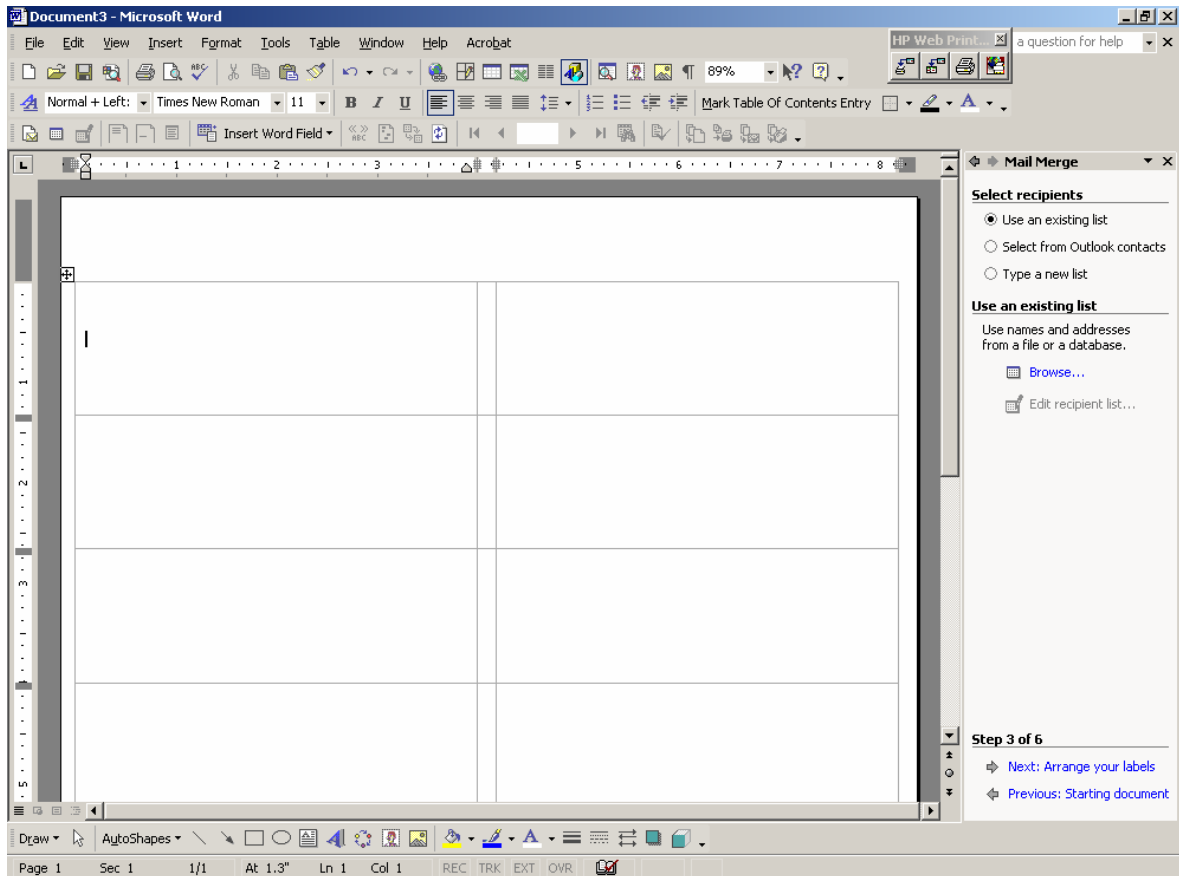


9. Click on the Next button.

# Mail Merge Using Word XP

## Step 3 of 6

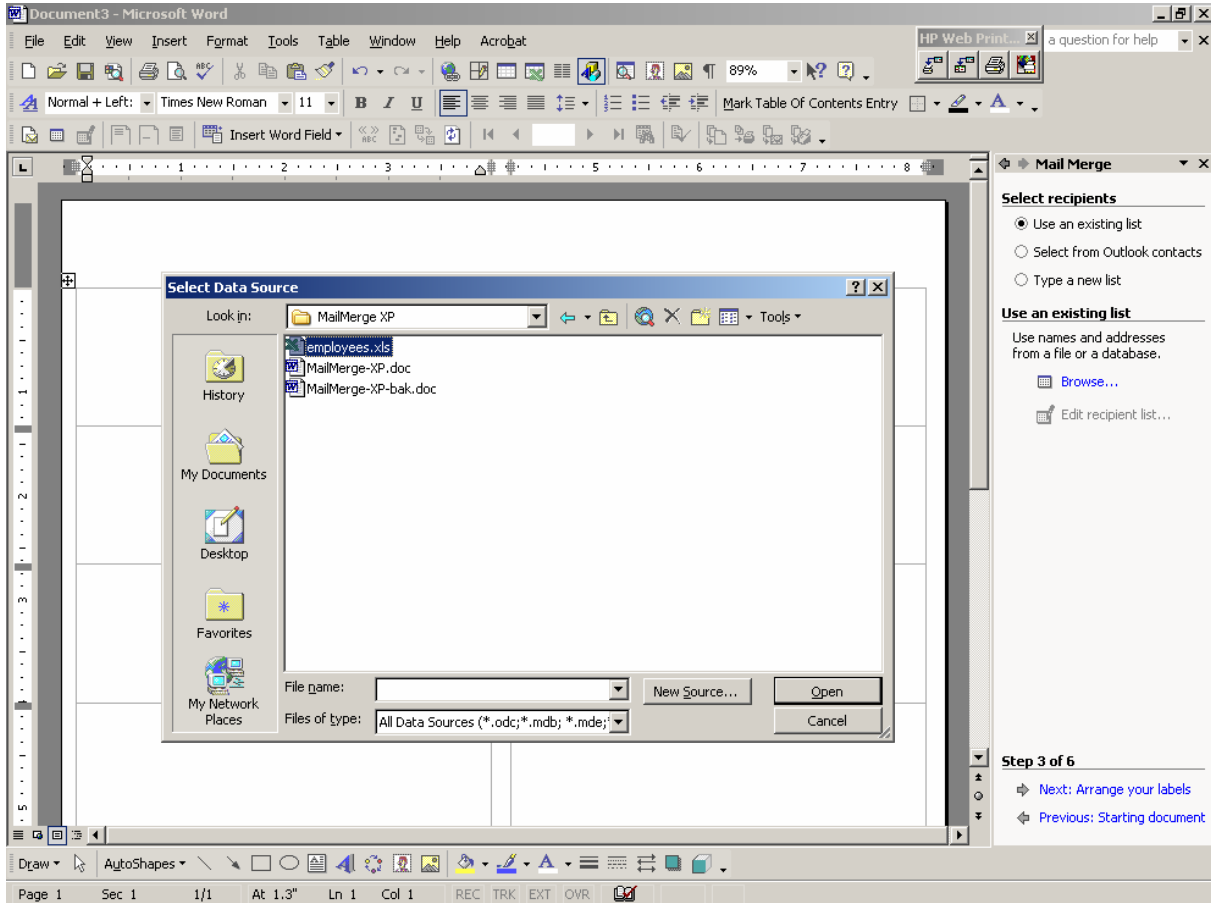
10. Select the recipients. In this case, select: **Use an Existing List.**



## Mail Merge Using Word XP

11. Click on **Browse** and select an existing Excel or Access file that contains the desired data.

*Example of Selecting an Excel Worksheet as the Data Source*

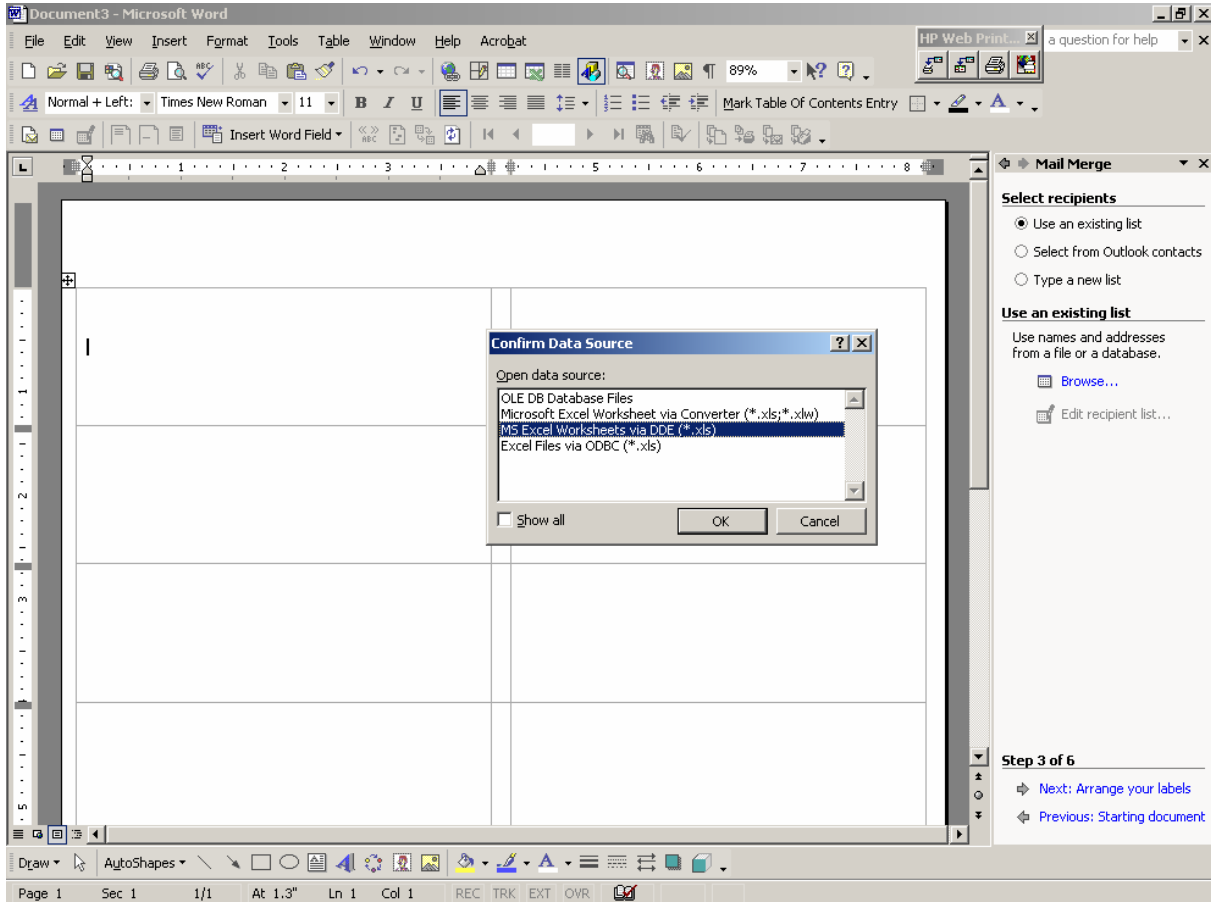


12. Click the Open button.

## Mail Merge Using Word XP

13. Confirm the data source. Choose one of the following:  
**MS Excel Worksheets via DDE (\*.xls)**  
**OR**  
**MS Access Database via DDE (\*.mdb, \*.mde)**

*Example for Confirming the Data Source for Excel*

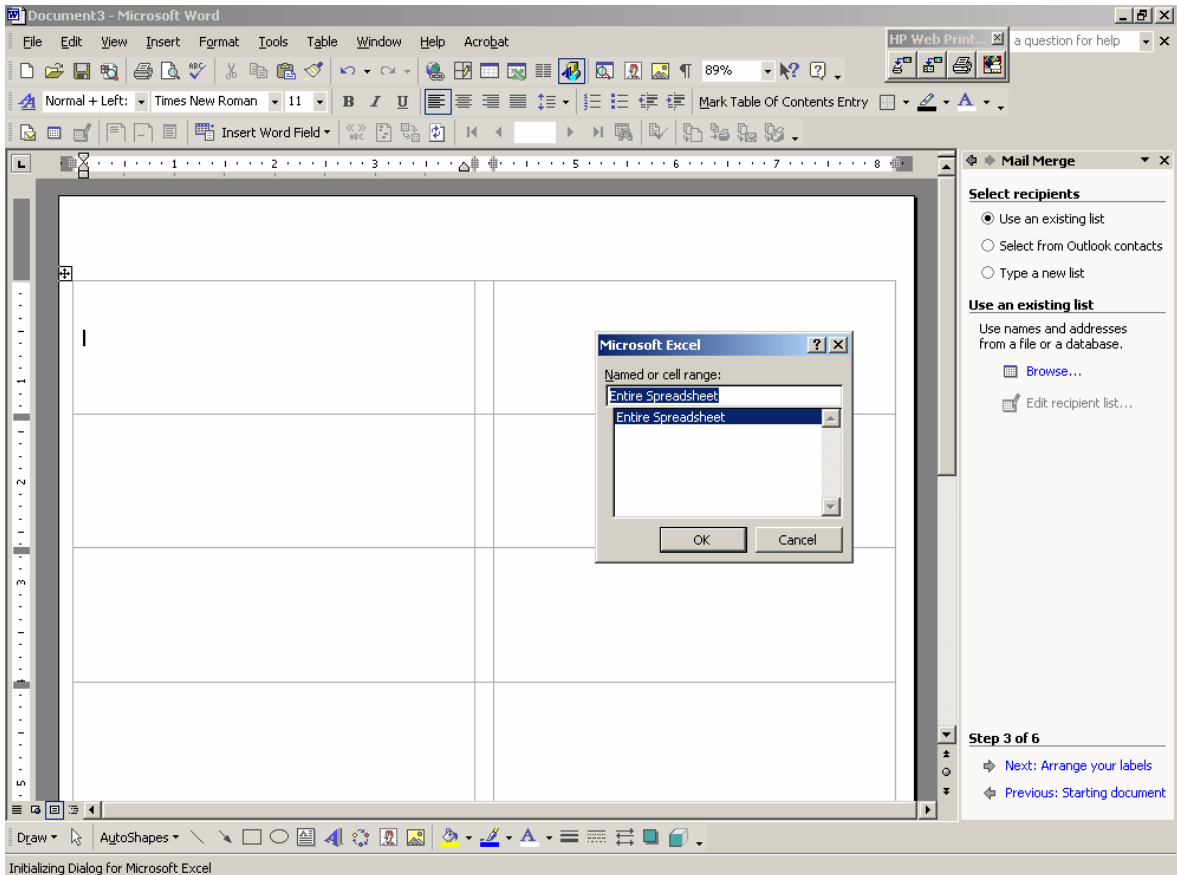


14. Click OK.

## Mail Merge Using Word XP

15. Select the proper data source object. For an Excel data source, select the Named or Cell Range. For an Access data source, select a Table or Query.

*Example of Selecting an Entire Excel Worksheet*

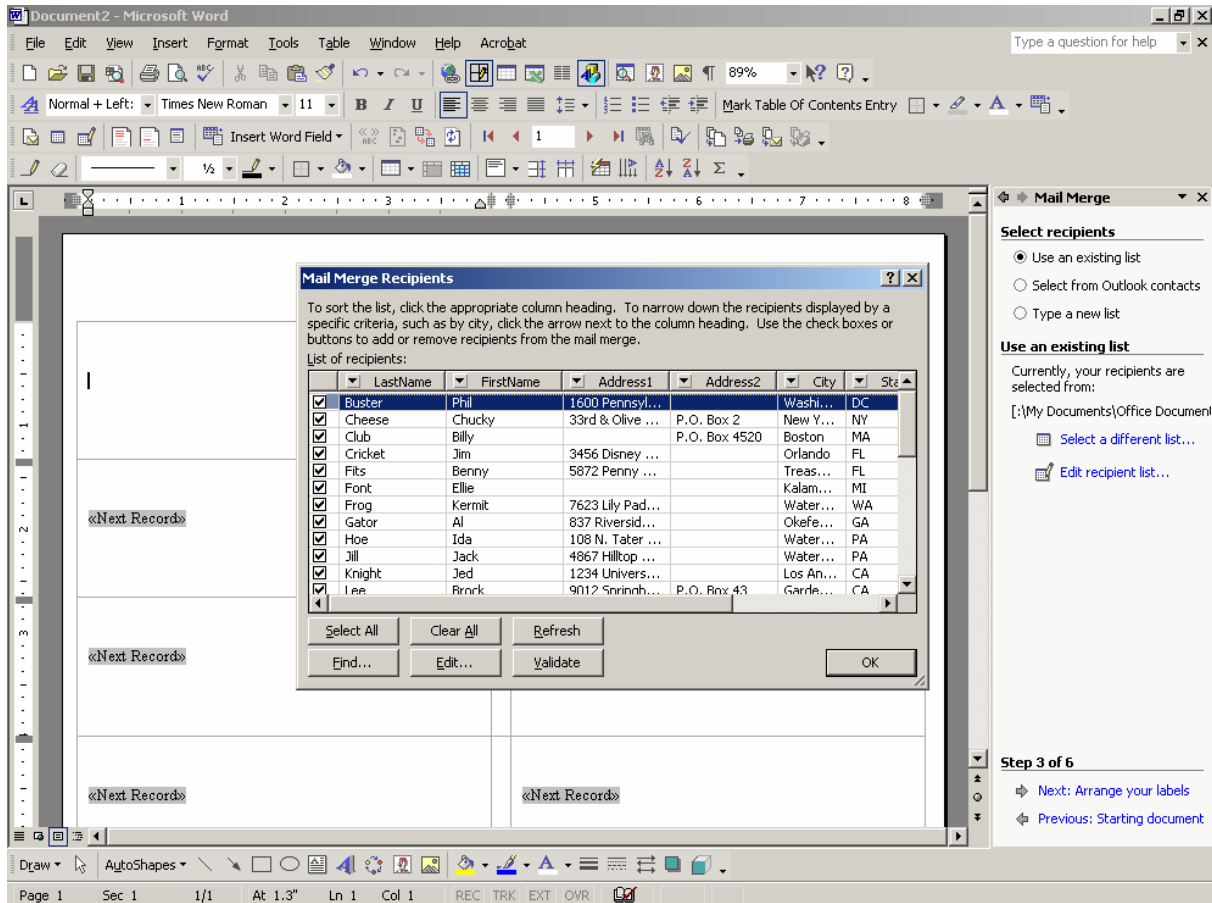


16. Click OK.

## Mail Merge Using Word XP

17. Select the desired recipients.

- Hint: You can select everyone or just certain individuals. (In the latter case, you can add or remove the checkmark next to each person's name.)



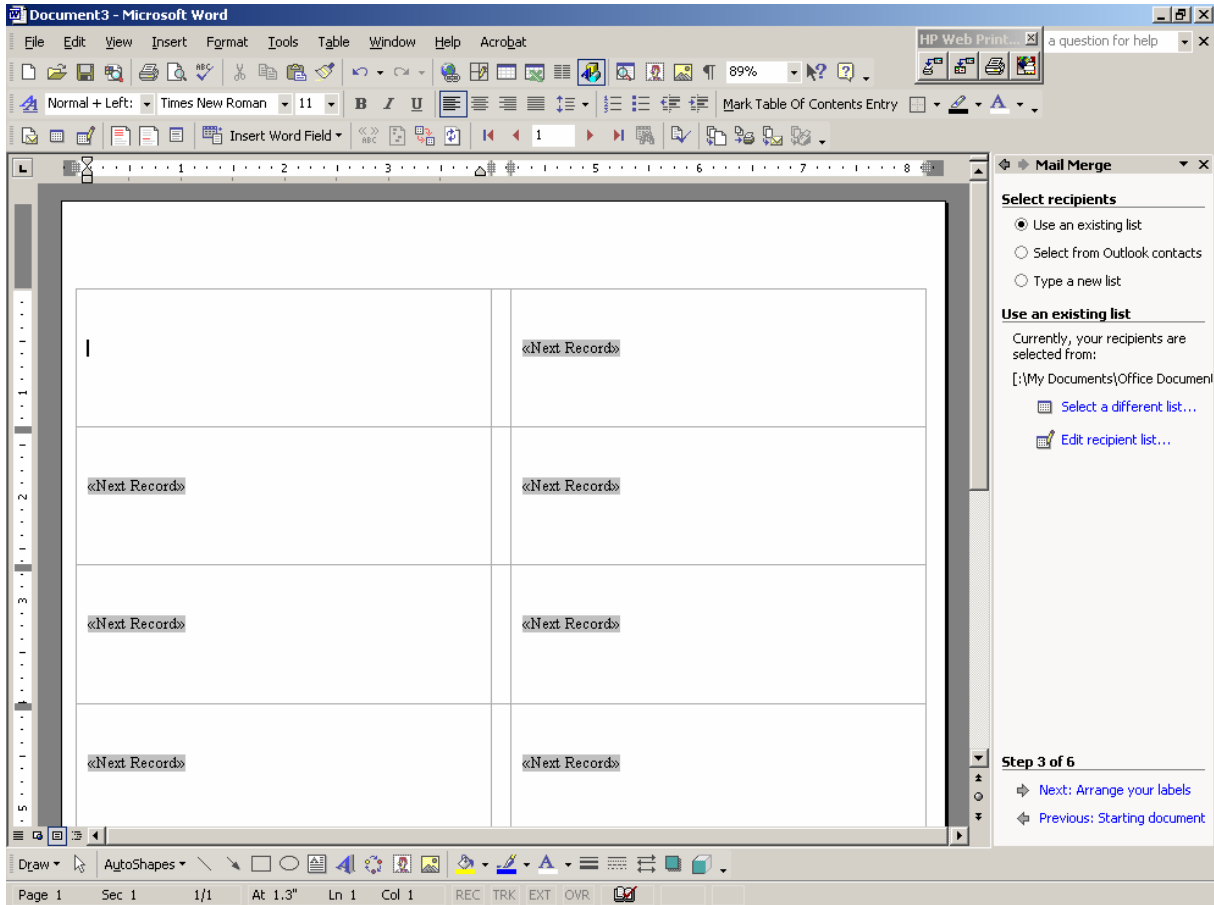
18. Sort the recipients, if desired.

- Hint: To sort in ascending or descending order, click on the column heading name.
- Hint: For more advanced sorting options, click the arrow next to a column heading and then choose (Advanced) from the menu.

19. Click OK.

# Mail Merge Using Word XP

*Sample Screen after Choosing Recipients*



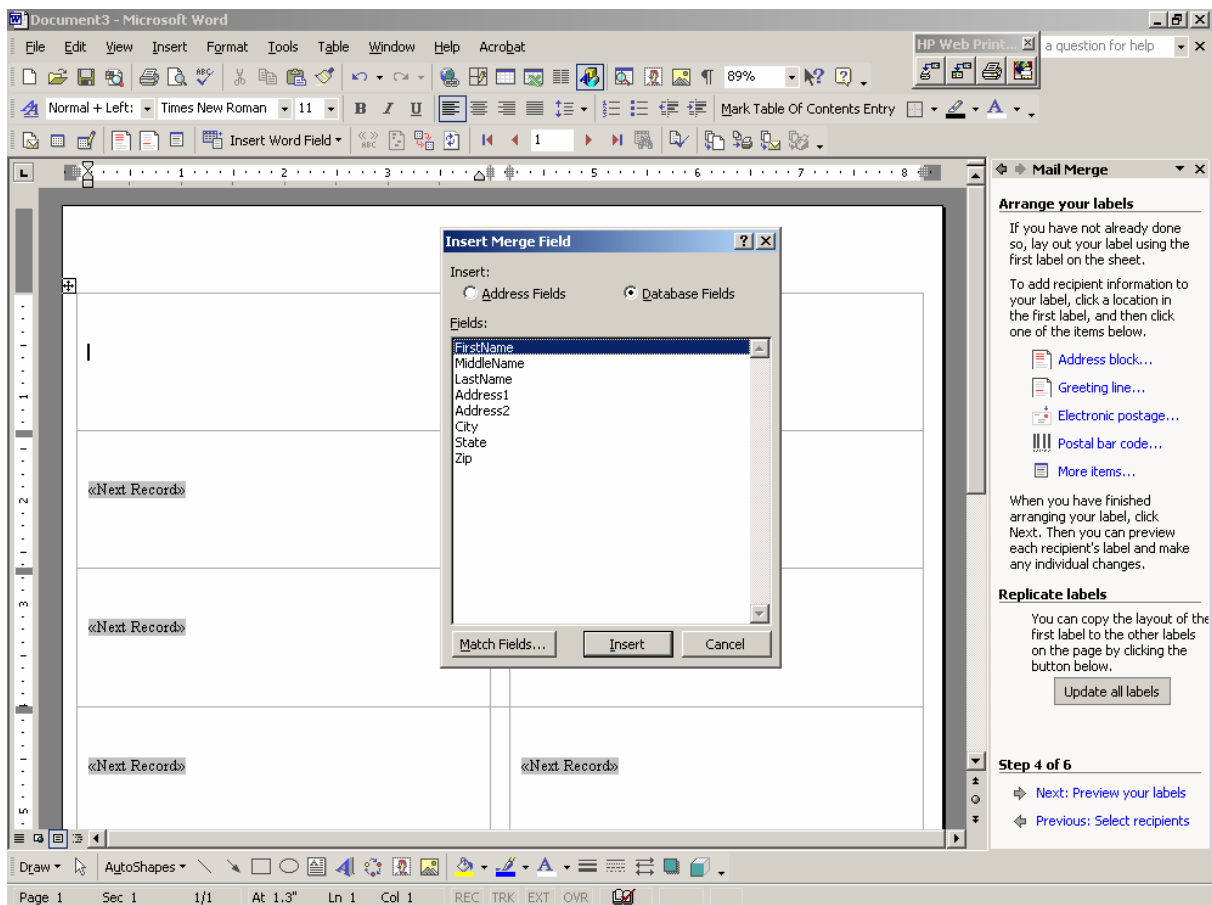
20. Click the Next button.

# Mail Merge Using Word XP

## Step 4 of 6

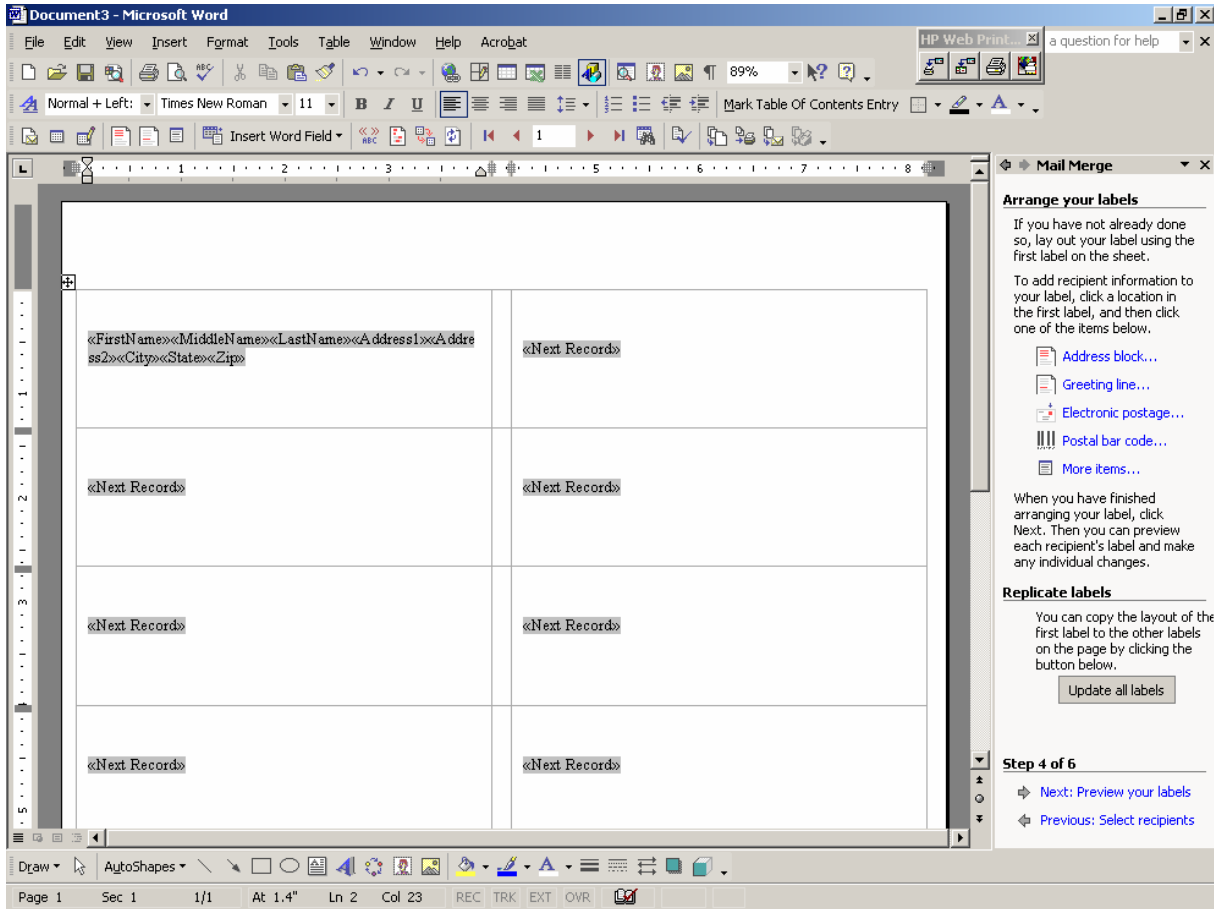
21. Arrange your labels by adding the fields that you want to print on the labels. One method to do this:
  - a. Within the first label, click on **More Items** to select the desired fields.
  - b. At the Insert Merge Field dialog box, click on a field name and then click the Insert button.
  - c. Repeat the above step as many times as needed.
  - d. Click the Close button when finished inserting fields.

### *Example of Using "More Items" for Inserting Merge Fields*



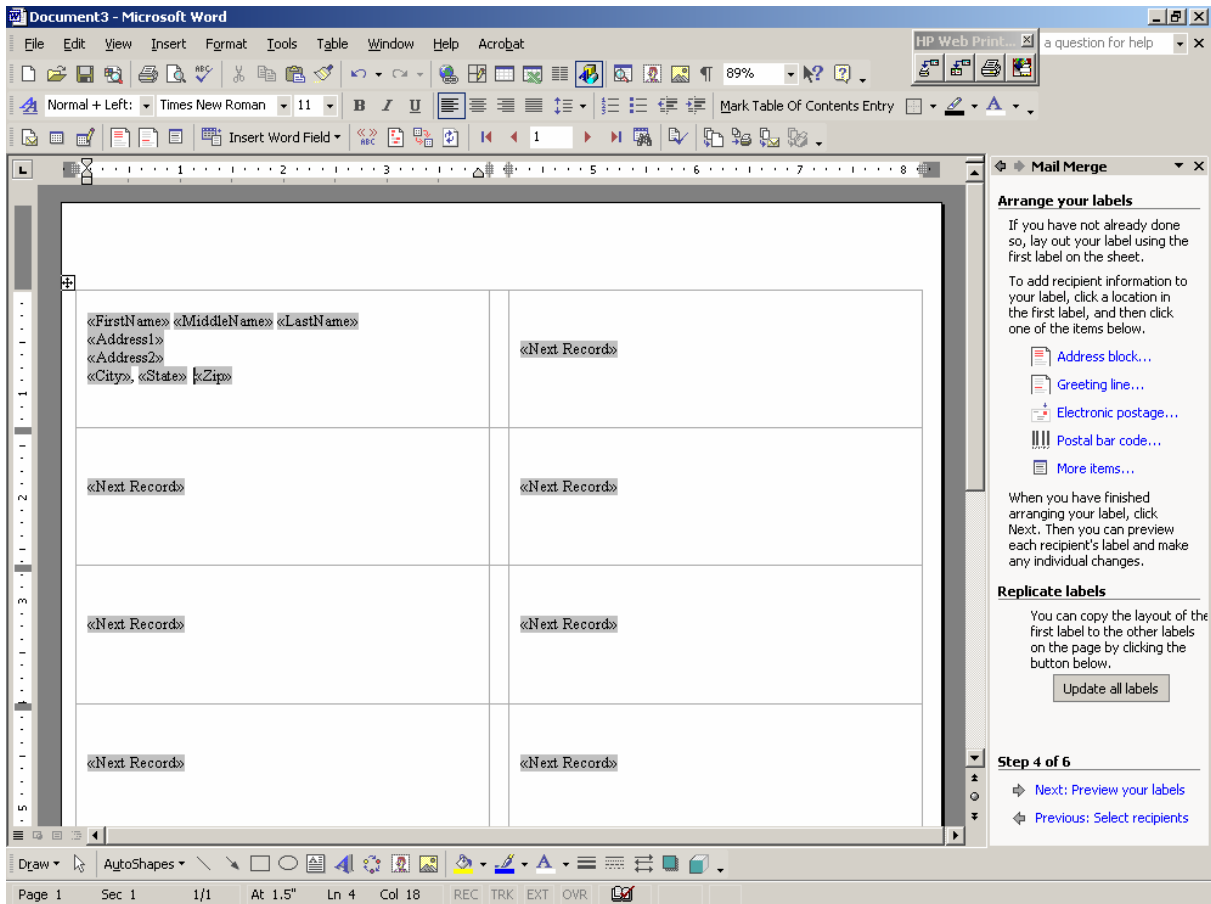
# Mail Merge Using Word XP

## Sample Screen after Inserting Field Names



## Mail Merge Using Word XP

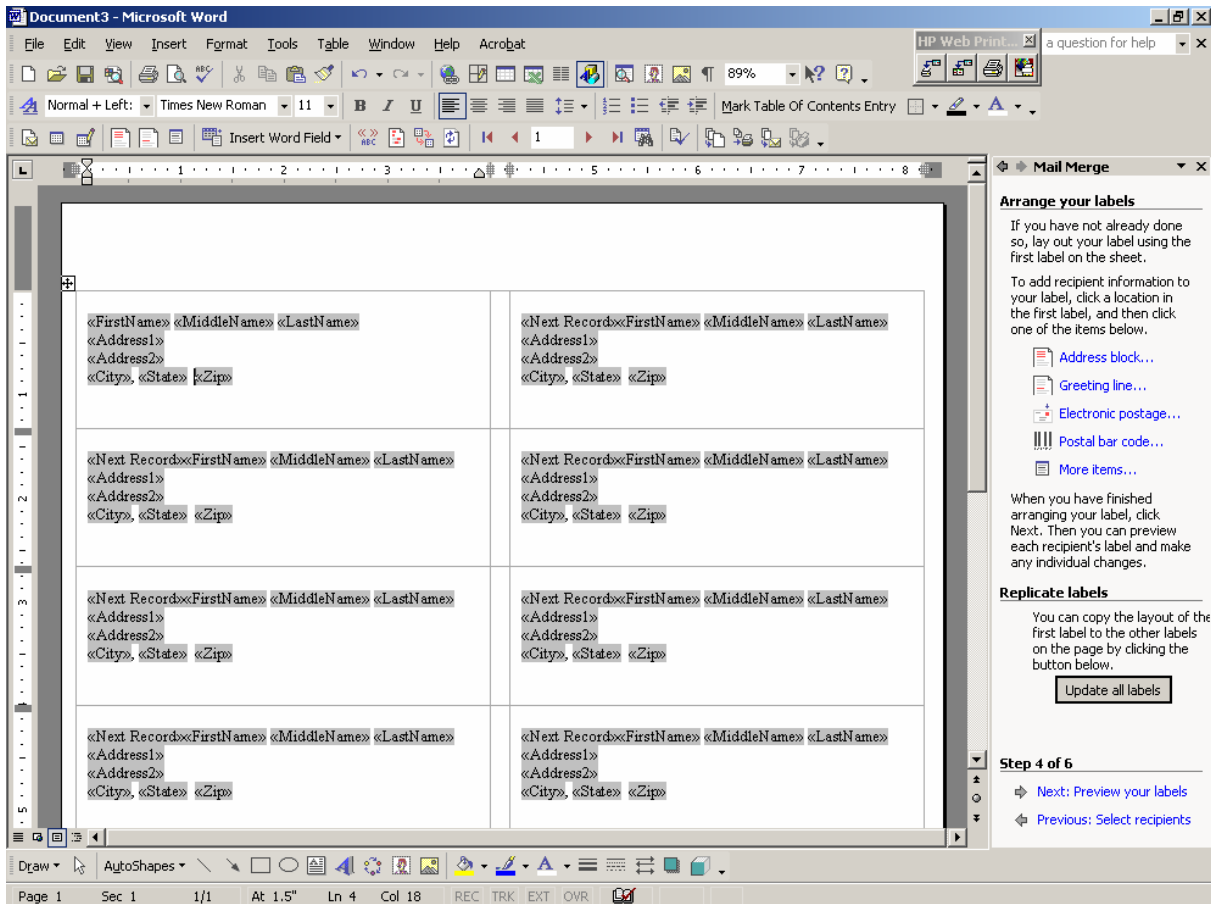
22. To rearrange the location of the fields, use the Enter key to put a field on a new line. If necessary, separate fields with a space, comma, or other appropriate characters.



23. If desired, change the font and font size.
- Hint: Select the entire document to make the formatting changes.

## Mail Merge Using Word XP

24. Click the **Update All Labels** button to replicate the fields from the first label to all of the remaining labels.



25. If you need to suppress or unsuppress blank lines...
- Display the Mail Merge Toolbar or add the Mail Merge Helper button to the toolbar.
  - Click on the Mail Merge Helper button.
  - At the Mail Merge Helper dialog box, click on the Merge button.
  - Click the appropriate item:
    - Don't print blank lines when data fields are empty.

**OR**

    - Print blank lines when data fields are empty.
  - Click the Close button for the Merge dialog box.
  - Click the Close button for the Mail Merge Helper.

## Mail Merge Using Word XP

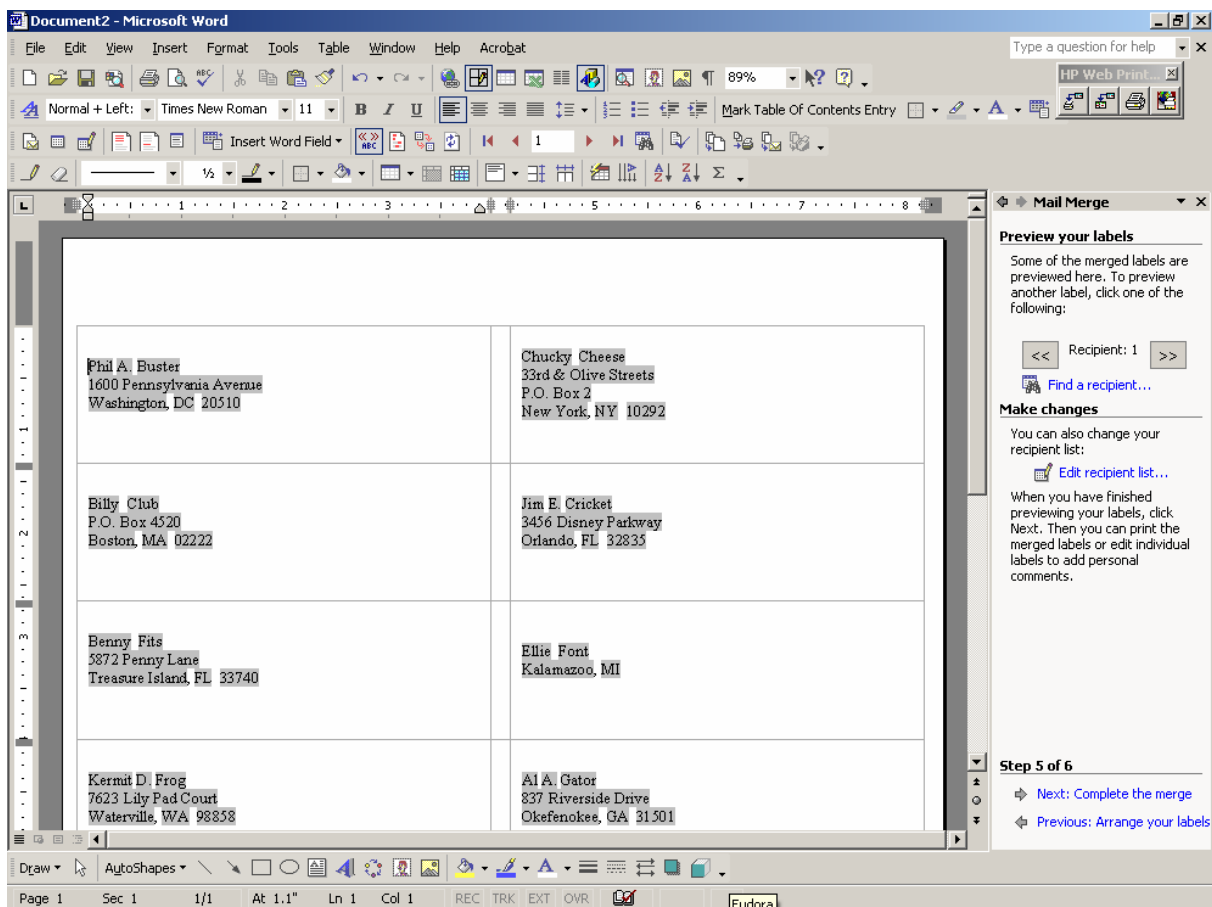
26. If you need to reuse this label format again for future mail merges, save the file.
- Hint: Save the file with a name that indicates that it is a mail merge main document.

Examples: **employee-labels-maindoc.doc**

27. Click the Next button.

### Step 5 of 6

28. Preview a sample page of the labels.

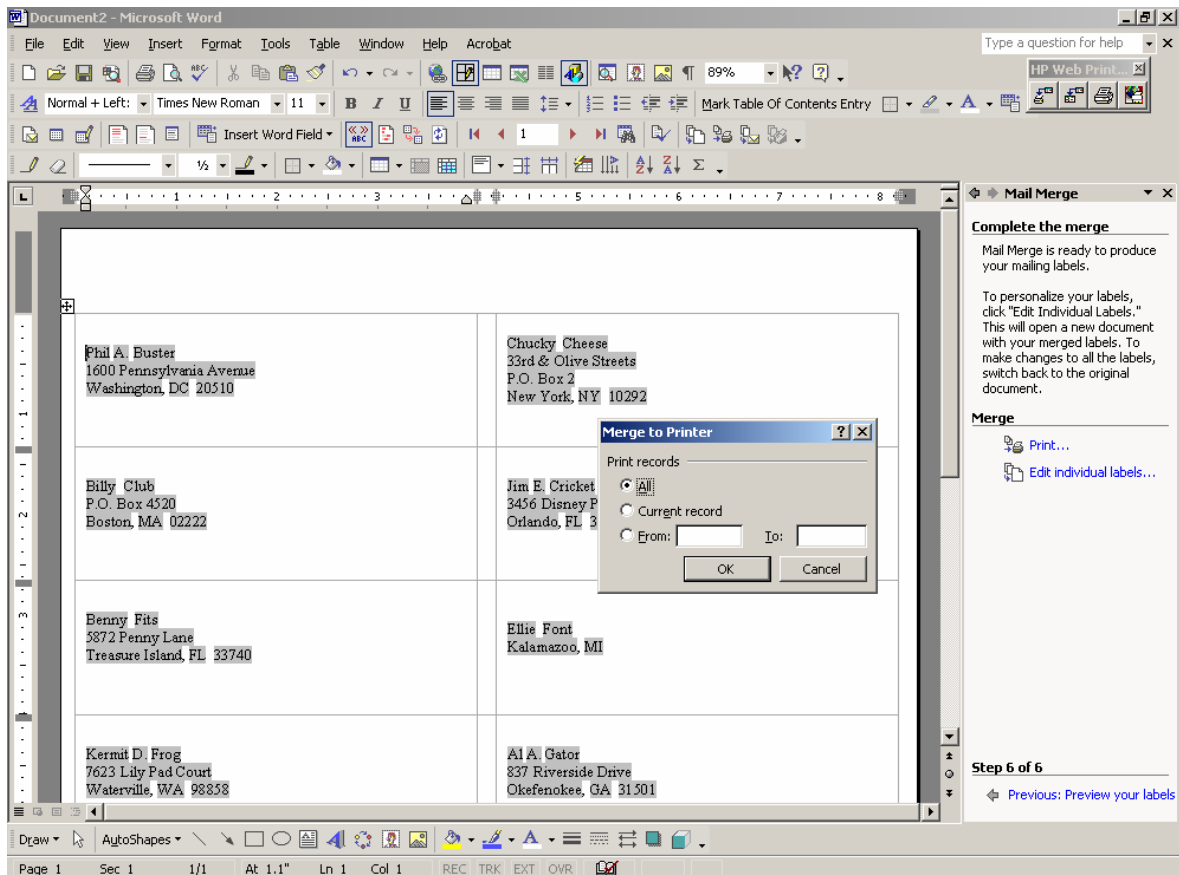


29. Click the Next button.

# Mail Merge Using Word XP

## Step 6 of 6

30. Click on **Print** to begin the process of printing your labels.
  - a. At the Merge to Printer dialog box (with All as the default selection), click the OK button to print all of the labels.



- b. At the Print dialog box, select the appropriate options to print your labels.
    - c. Click OK.

## Mail Merge Using Word XP

31. If needed, save the labels... Click on **Edit Individual Labels**.
- a. At the Merge to New Document dialog box (with All as the default selection), click the OK button.
  - b. Save the file.
    - Hint: Save the new document with a different name (i.e. employee-labels). Don't save it with the same name as your main document (i.e. employee-labels-maindoc.doc).

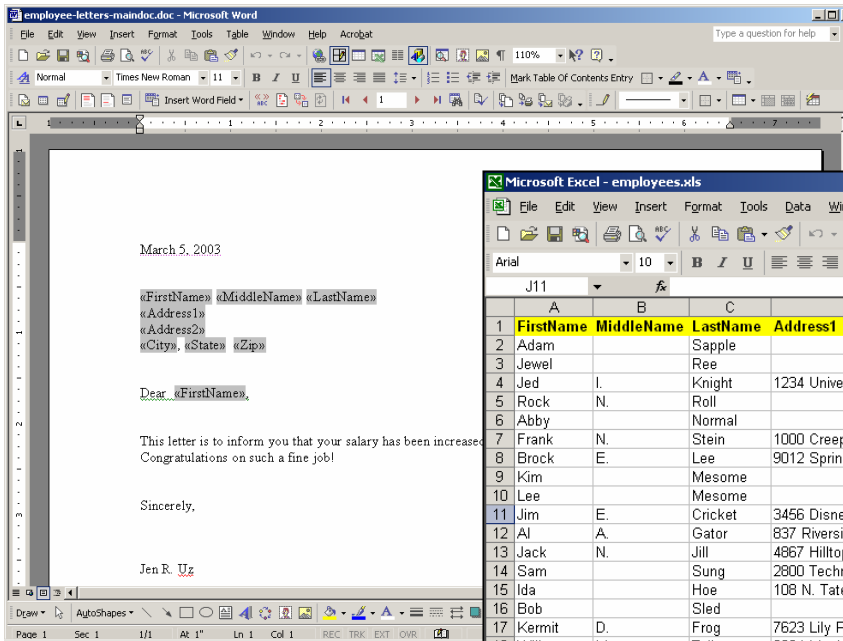
Example: **employee-labels.doc**

# Mail Merge Using Word XP

## Create Form Letters with Excel or Access as the Data Source

- Form letters are created in a similar manner as labels.
- Instructions are given for how to create a basic form letter.

### Main Document

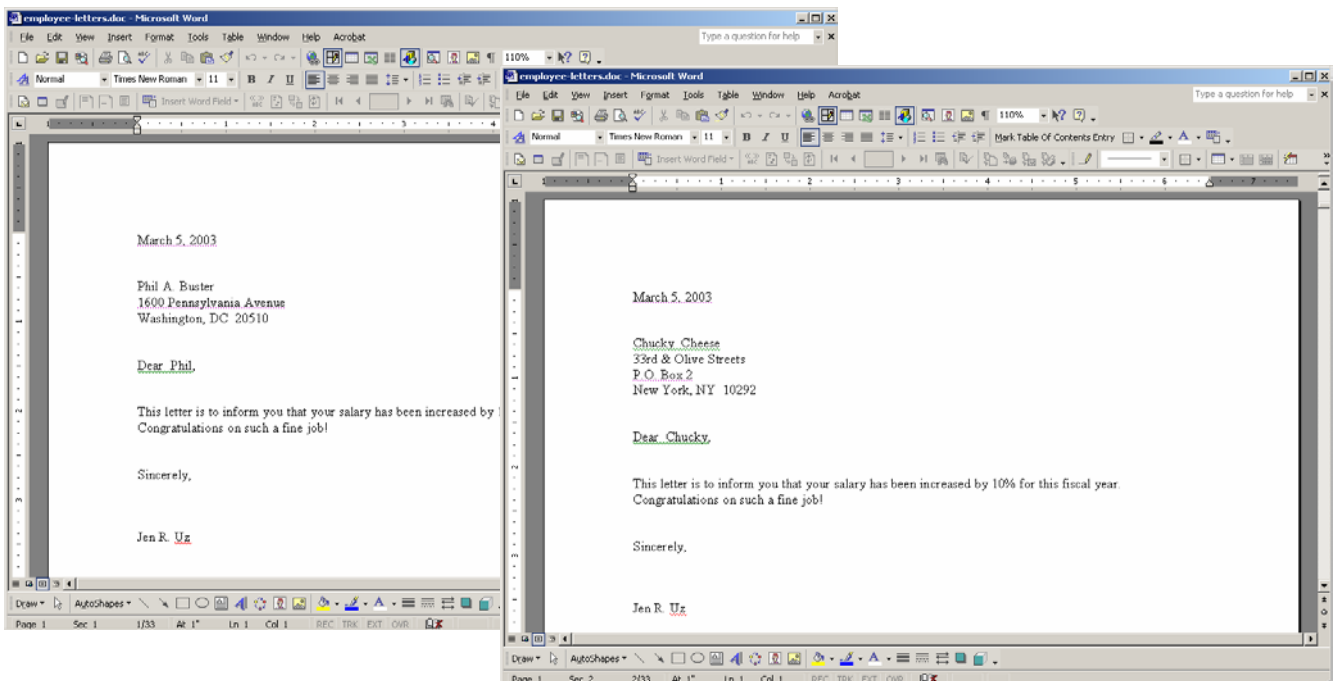


### Data

The screenshot shows the Microsoft Excel XP interface with a spreadsheet titled "employees.xls". The spreadsheet contains the following data:

	A	B	C	D	E	F	G	H
1	FirstName	MiddleName	LastName	Address1	Address2	City	State	Zip
2	Adam		Sapple					
3	Jewel		Ree					
4	Jed	I.	Knight	1234 Universe Lane		Los Angeles	CA	90001
5	Rock	N.	Roll			Cleveland	OH	44101
6	Abby		Normal			Erie	PA	
7	Frank	N.	Stein	1000 Creepy Hollow Court		New Castle	PA	16108
8	Brock	E.	Lee	9012 Springhill Road	P.O. Box 43	Garden Grove	CA	92842
9	Kim		Mesome		P.O. Box 122	Hershey	PA	17033
10	Lee		Mesome		P.O. Box 122	Hershey	PA	17033
11	Jim	E.	Cricket	3456 Disney Parkway		Orlando	FL	32835
12	Al	A.	Gator	837 Riverside Drive		Okefenokee	GA	31501
13	Jack	N.	Jill	4867 Hilltop Road		Waterford	PA	16441
14	Sam		Sung	2800 Technology Way		San Jose	CA	95155
15	Ida		Hoe	108 N. Tater Street		Waterford	PA	16441
16	Bob		Sled		P. O. Box 88	Anchorage	AK	99501
17	Kermit	D.	Frog	7623 Lily Pad Court		Waterville	WA	98858
18	Will	M.	Tell	2684 Macintosh Street		Farmington	WA	99128
19	Cindy		Rella	3402 Prince Charming Court		Honolulu	HI	96848
20	Billy		Club		P.O. Box 4520	Boston	MA	02222
21	Allen		Wrench	45 Mechanic Street		Girard	PA	16417

### Merged Documents



## Mail Merge Using Word XP

1. Start Word.
2. Set up the DDE connection. From the menu, select: **Tools | Options**.
  - Hint: This connection is needed to preserve the numeric formatting of Excel data when it is used in a mail merge. You also need to set the DDE connection to allow you to select specific Access tables and queries later on in the mail merge.
  - a. Click on the General tab.
  - b. Click in the box next to: **Confirm Conversion at Open**. (There should now be a checkmark in this box.)
  - c. Click OK.
3. From the menu, select: **Tools | Letters and Mailings | Mail Merge Wizard**.
  - The Mail Merge task pane is used to configure the merge document and to select the data source.

### Step 1 of 6

4. At the Mail Merge task pane, select the document type. In this case, click on **Letters**.
5. Click on the Next button.

### Step 2 of 6

6. Select the starting document. In this case, select: **Use the Current Document**.
7. Click on the Next button.

### Step 3 of 6

8. Select the recipients. In this case, select: **Use an Existing List**.
9. Click on **Browse** and select an existing Excel or Access file that contains the desired data.
10. Click the Open button.

## Mail Merge Using Word XP

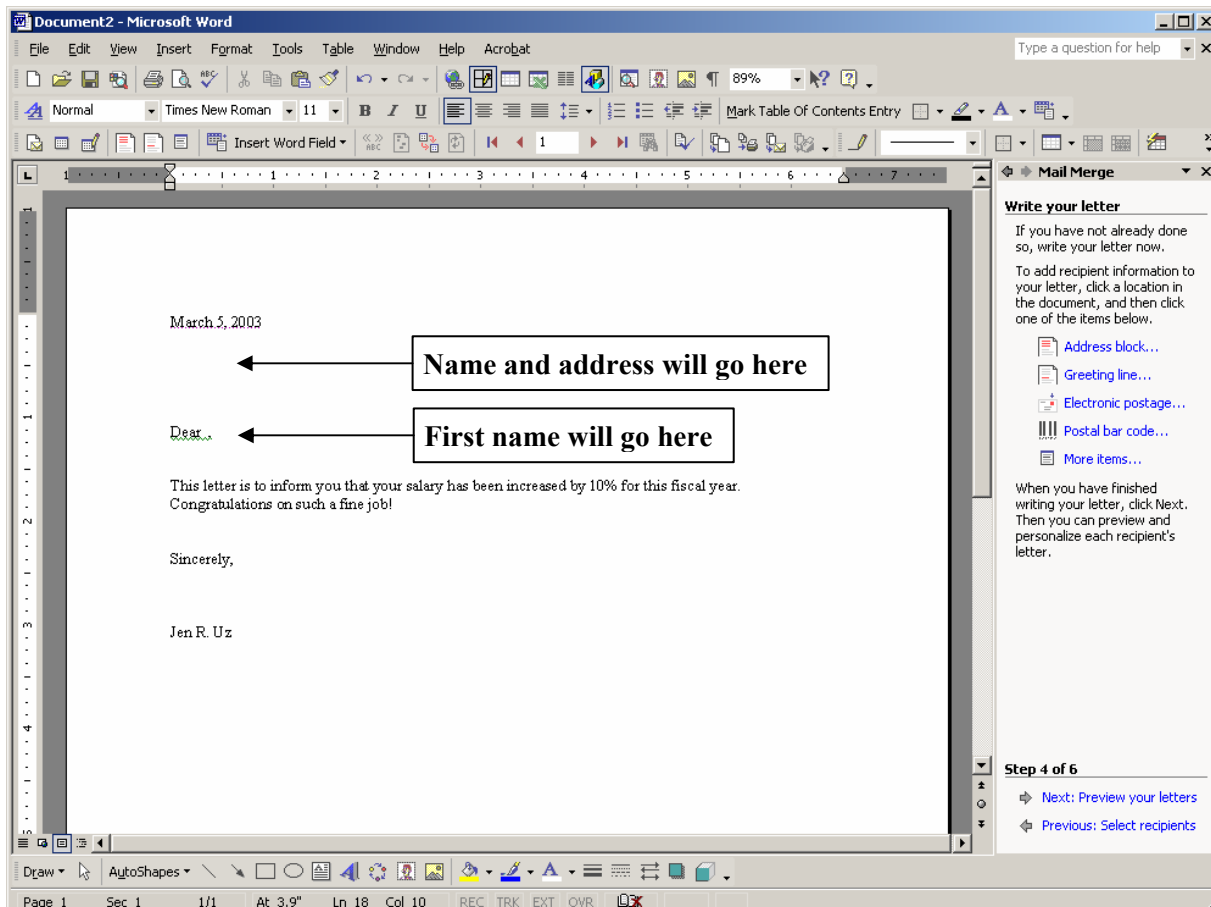
11. Confirm the data source. Choose one of the following:  
**MS Excel Worksheets via DDE (\*.xls)**  
**OR**  
**MS Access Database via DDE (\*.mdb, \*.mde)**
12. Click OK.
13. Select the proper data source object. For an Excel data source, select the Named or Cell Range. For an Access data source, select a Table or Query.
14. Click OK.
15. Select the desired recipients.
  - Hint: You can select everyone or just certain individuals. (In the latter case, you can add or remove the checkmark next to each person's name.)
16. Sort the recipients, if desired.
  - Hint: To sort in ascending or descending order, click on the column heading name.
  - Hint: For more advanced sorting options, click the arrow next to a column heading and then choose (Advanced) from the menu.
17. Click OK.
18. Click on the Next button.

# Mail Merge Using Word XP

## Step 4 of 6

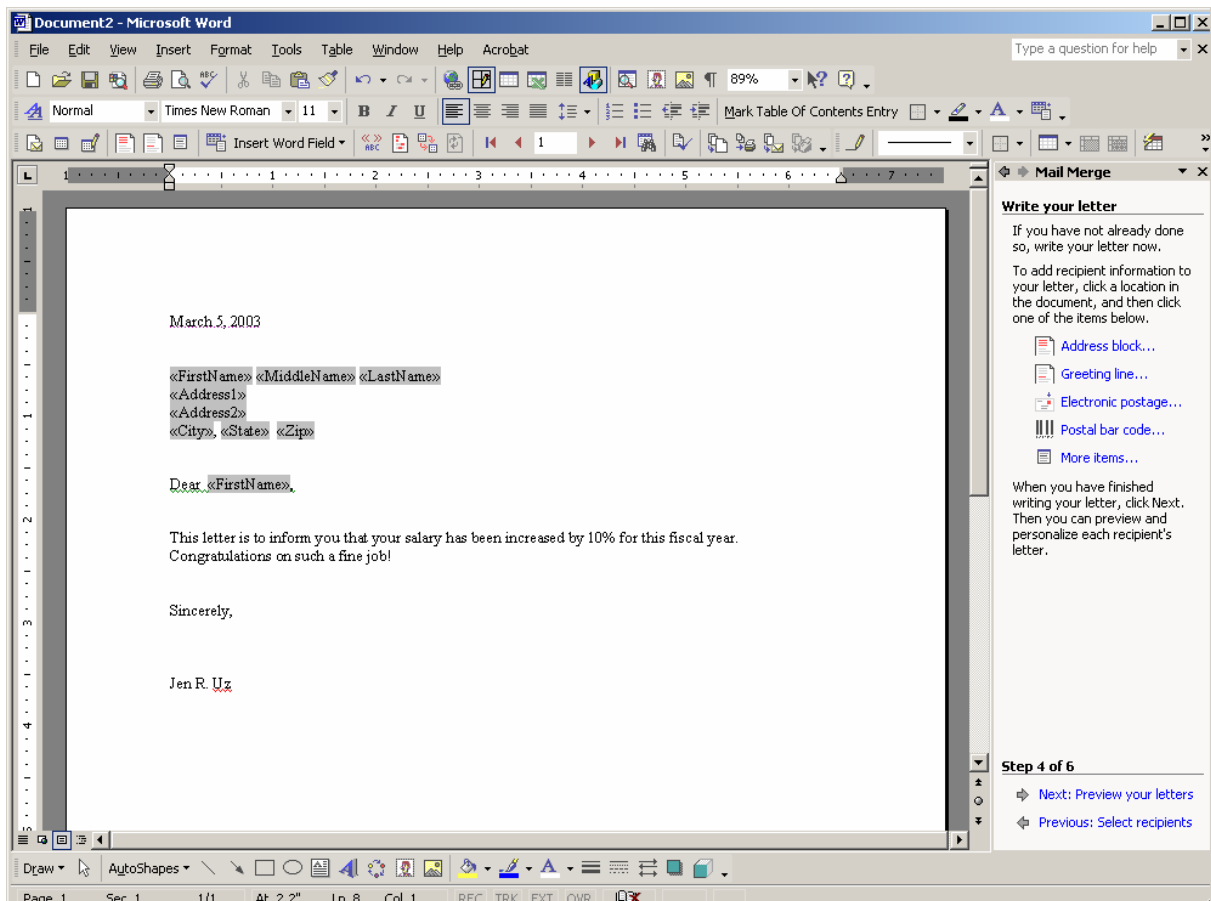
19. Type the text for the letter.
  - a. Leave a blank space or line where you want to personalize the information in the letter.
    - The next step explains how to insert the merge fields to create a personalized letter.

### *Example of the Text for a Form Letter*



## Mail Merge Using Word XP

20. Add the desired fields to personalize the letter. One method to do this:
  - a. Click in the location where you want to insert personalized information.
  - b. Click on **More Items** to select the desired fields.
  - c. At the Insert Merge Field dialog box, click on a field name and then click the Insert button.
  - d. Repeat the above step as many times as needed.
  - e. Click the Close button when finished inserting fields.
21. Repeat the previous step, as needed, to insert additional fields for personalization.
22. To rearrange the location of the fields, use the Enter key to put a field on a new line. If necessary, separate fields with a space, comma, or other appropriate characters.



23. If desired, make any formatting changes (font, font size, bold, etc.).

## Mail Merge Using Word XP

24. If you need to suppress or unsuppress blank lines...
- Display the Mail Merge Toolbar or add the Mail Merge Helper button to the toolbar.
  - Click on the Mail Merge Helper button.
  - At the Mail Merge Helper dialog box, click on the Merge button.
  - Click the appropriate item:
    - Don't print blank lines when data fields are empty.
    - OR**
    - Print blank lines when data fields are empty.
  - Click the Close button for the Merge dialog box.
  - Click the Close button for the Mail Merge Helper.
25. If you need to reuse this letter format again for future mail merges, save the file.
- Hint: Save the file with a name that indicates that it is a mail merge main document.
- Examples: **employee-letters-maindoc.doc**

26. Click the Next button.

### Step 5 of 6

27. Preview a sample page of the letter.
- Hint: Use the forward and backward arrows (i.e. << and >> ) to navigate between each letter.
28. Click the Next button.

## Mail Merge Using Word XP

### Step 6 of 6

29. Click on **Print** to begin the process of printing your labels.
  - a. At the Merge to Printer dialog box (with All as the default selection), click the OK button to print all of the labels.
  - b. At the Print dialog box, select the appropriate options to print your labels.
  - c. Click OK.
  
30. If needed, save the labels... Click on **Edit Individual Labels**.
  - a. At the Merge to New Document dialog box (with All as the default selection), click the OK button.
  - b. Save the file.
    - Hint: Save the new document with a different name (i.e. employee-letters). Don't save it with the same name as your main document (i.e. employee-letters-maindoc.doc).

Example: **employee-letters.doc**