

Job Aid: Word 2003: Using a Mail Merge and Creating Form Letters



When you need to have a document personalized for many different recipients, the Mail Merge feature is the easiest option. A Mail Merge allows you to enter fields (such as name, address, city, state, etc) that will change according to information contained in a data source (such as an Excel spreadsheet).

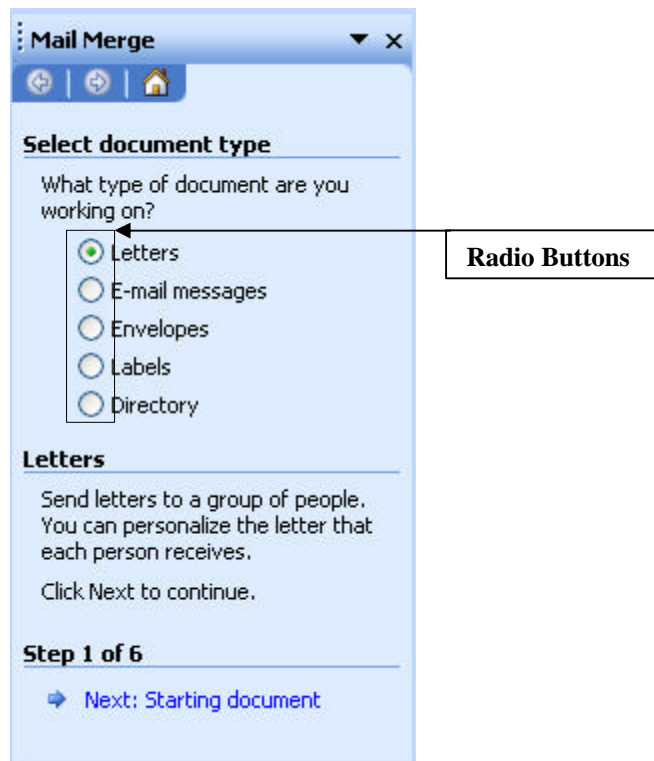


Open Microsoft Word 2003.


1. You can create a mail merge from a blank document or an existing one. Open the document you want to work with (either a new document, or hit **File > Open** and select the document to modify).
2. Click **Tools > Letters and Mailings > Mail Merge**. This opens the Mail Merge pane on the right hand side of the document.



Note: Make sure that the Mail Merge toolbar is open. You can click **View > Toolbars** and if there isn't a check mark next to Mail Merge, click on Mail Merge.

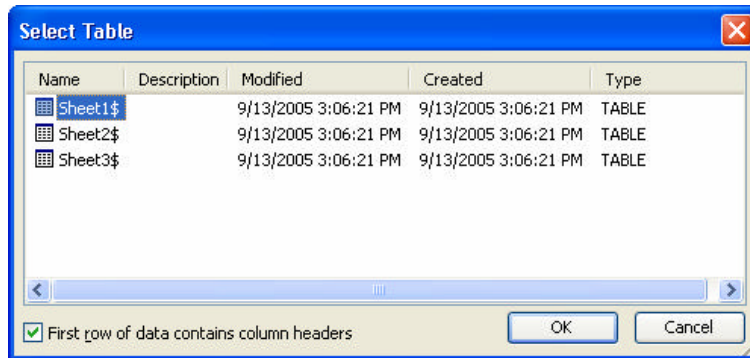


3. *Step 1 of 6:* Select the **Letters** radio button, and click **Next** on the bottom of the pane.
4. *Step 2 of 6:* Select the **Active Document** radio button, and click **Next** again.

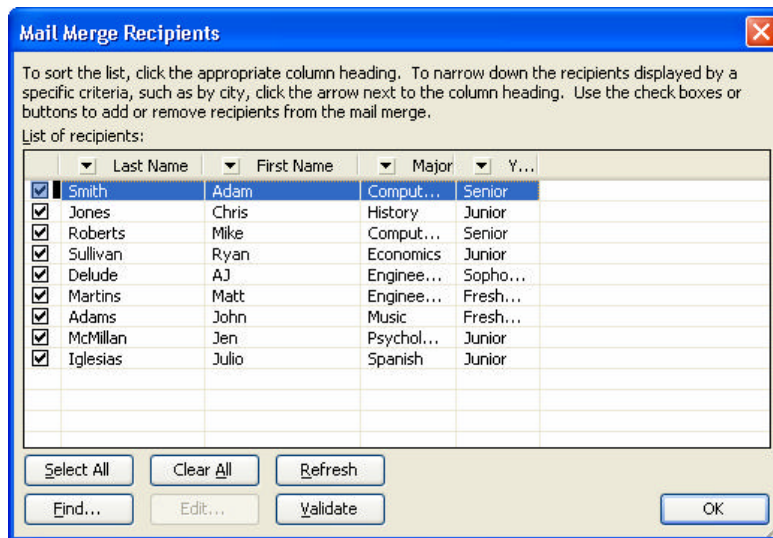
5. Step 3 of 6: Click the  **Browse...** link.
6. From the Select Data Source window, navigate and find the Excel spreadsheet that contains your data. Double click the file.
7. From the Select Table window, select which worksheet your data is on.




Hint: When creating Excel spreadsheets to be used in a mail merge, always name your worksheets and delete unused worksheets.

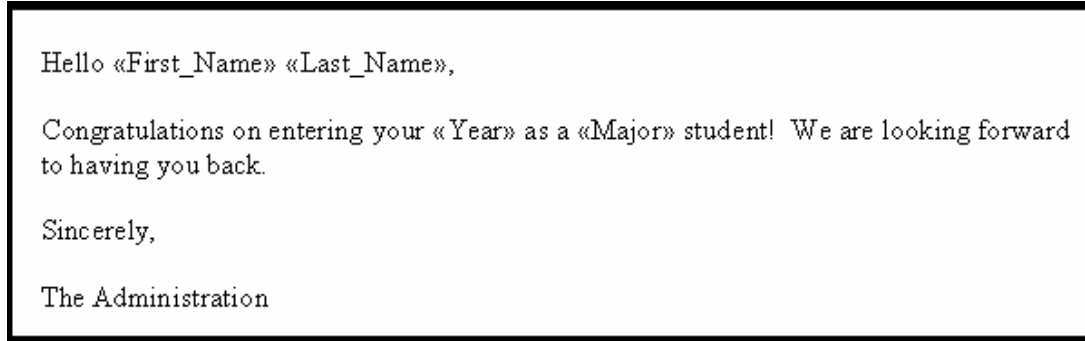


8. From the Mail Merge Recipients window, make sure that the checkboxes to the left of the data that you want to include in the merge are checked off. Also, make sure none of the blank records' checkboxes are marked. Click **OK**.



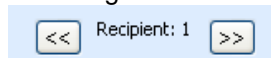
9. Click the **Next: Write Your Letter** link on the bottom of the Mail Merge pane.
10. Step 4 of 6: Compose your letter or modify the existing document.
11. When you want to insert a field (data) from the spreadsheet, click the insert merge field button () from the Mail Merge toolbar.

- From the Insert Merge Field window, select the merge field you want to enter, and click **Insert**, and then click **Close**.
- Once your letter is done, it should look like the example below.

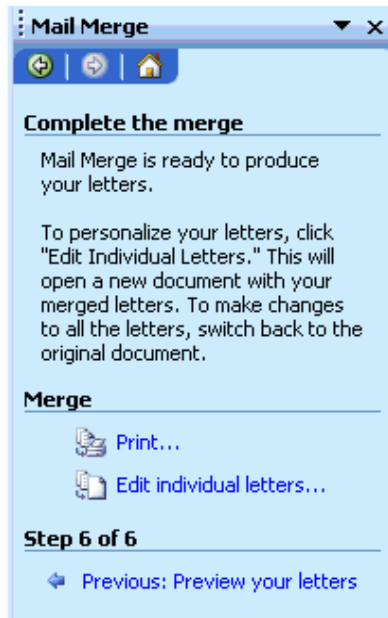


Note: You can see how the merge fields are represented with the double brackets.

- Click the **Next: Preview Your Letters** link on the Mail Merge pane.
- Step 5 of 6:* You are now viewing the preview of your merged document. You can cycle through all the recipients' letters by clicking on the double arrow buttons on the Mail Merge Pane.



- Click the **Next: Complete the Merge** link.
- Step 6 of 6:* Click the **Edit Individual Letters** link in the Mail Merge pane.



- Select All and click **OK** to merge all records.



19. Click the **Save** button in the new document to save the merged document.
20. To Print, select **File > Print**.