

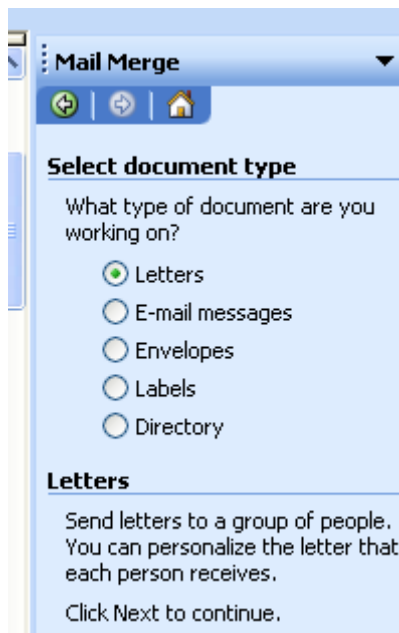
Mail Merge—Letters (Office 2003)

Before you Start

1. Start with a blank document open if you haven't typed letter yet:	<i>or</i>	Start with your letter document open if you have a letter you want to merge already typed.
2. Turn on your Mail Merge toolbar.		How? From the menu choose View, Toolbars, click on Mail Merge

Start Mail Merge Process

1. Choose **Tools, Letters and Mailings, Mail Merge** from the menu. The Task Pane will appear on the right side of the screen.



Call Sukirti Ranade in the TLC, ext 303 if you are needing more help with this.
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Walk through the 6 steps

Step 1	Select document type	(Did you do the “Before you Start steps? See above.) Choose <input checked="" type="radio"/> Letters, ⇒Click Next: Starting Document
Step 2	Select starting document	Choose <input checked="" type="radio"/> Use the current document, ⇒Next
Step 3	Select recipients	Do one of the following: <input checked="" type="radio"/> Use an existing list <input checked="" type="radio"/> Select from Outlook Contacts <input checked="" type="radio"/> Type a new list <i>See next page for further descriptions/directions if needed or skip to Step 4.</i>

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Choice 1

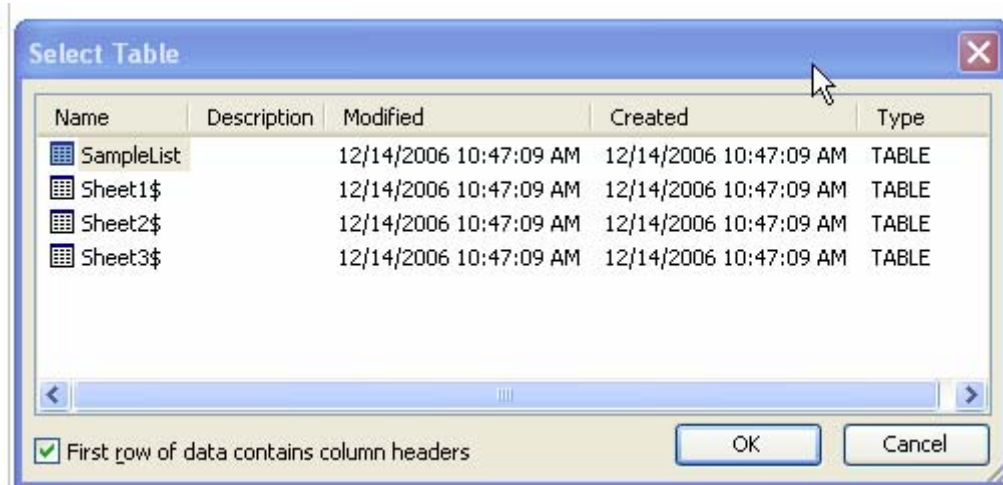
Use an existing list

This may be a word table, excel spreadsheet, access database, etc.

1. Click on **Browse and locate the data file** that has the data you need.

*Depending on the type of data source you select, other dialog boxes may appear asking you to request specific information. For example, if your data source is a **Microsoft Excel worksheet** that has information on multiple tabs, you need to select the tab containing the information you want, and then click **OK**.*

2. Click **Open**.
3. Refine the list of recipients to include in the merge. Click OK



or

Choice 2

Select from Outlook Contacts

1. Click **Choose Contacts Folder**.
2. In the **Select Contact List folder** dialog box, click the contact list you want, and then click **OK**.
3. Refine the list of recipients to include in the merge.

or

Choice 3

Type a new list

1. Click **Create**.
2. In the **New Address List** dialog box, type the information you want to include for the first entry under **Enter Address information**; for example, title, names,

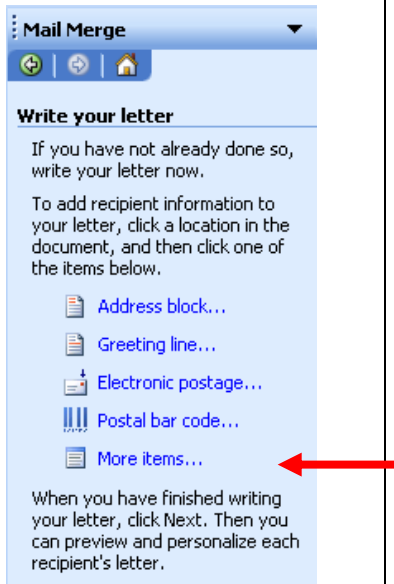
- and address information. You do not have to fill in every field.
- To complete the first entry and move on to a new entry, click **New Entry**.
 - Repeat steps 2 and 3 until you've added all the address entries you want, and then click Close.**
 - In the **Save Address List** dialog box, type a name for the address list in the **File name** box, and select a folder to save the list in.

*By default, the address list is saved in the **My Data Sources** folder. It's best to keep the address list here because this is also the default folder in which Microsoft Word looks for [data sources](#). So if you want to use this address list in a later mail merge, you won't have to navigate through files and folders to locate it.*


- Click **Save**.

*All of the contacts in your new list appear in the **Mail Merge Recipients** dialog box, where you can refine the list of recipients to include in the merge.*

- Refine the list of recipients to include in the merge.

<p>Step 4</p>	<p>Write your letter</p> 	<p>Type your letter. From the task pane, insert the fields as necessary.</p> <p><i>Instead of inserting the address information in separate fields, click on Address Block from the Task Pane, and it will automatically include the person's name and address info.</i></p> <p><i>You can include other data fields where necessary by clicking More Items from the Task Pane, and pick the necessary fields.</i></p>
<p>Step 5</p>	<p>Preview your letter</p> <p><i>NOTE: You will not be seeing all of the letters at this point. Just the first one so you can see the Layout.</i></p>	<p>Preview and make corrections if necessary.</p> <p>Is everything on your letter looking correct at this point? If not, here's your chance to go back to any of the steps for corrections if necessary.</p> <p>If Everything looks great, go to the Next Step.</p>

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Step 6	Complete the merge	<p>I would recommend the option that says Edit Individual Letters.</p> <p>This gives you once last chance to make sure Everything is looking as it should.</p> <p>After merging to Individual Letters, go on to Print.</p>

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