

## **Tip - Mail Merge for Form Letters in Word 2003**

Mail merge is a feature of Word that can be used to create a series of printed documents where only a few pieces of information need to be changed from one document to the next.

Mail Merge can be used for:

- Creating personal form letters
- Printing addresses on mailing labels
- Printing envelopes

### **Mail Merge Terminology**

#### Main Document

This is a file that contains text/graphics that do not change.

Example: A form letter

#### Data Source

This is a file that contains text/graphics that do change.

Example: A list of names and addresses

#### Merge Fields

These are "place holders" for information that is merged into the main document from a data source.

Example: A person's name or a city in an address

To use mail merge for form letters in Word 2003, there are six steps in the Mail Merge pane:

1. Select the document type you need to create.
2. Select the starting document.
3. Select recipients.
4. Write your letter (if not using an existing letter).
5. Preview your letters.
6. Complete the merge.

Each of these six steps is shown on the following pages.

## Create a Mail Merge

Open Word 2003.

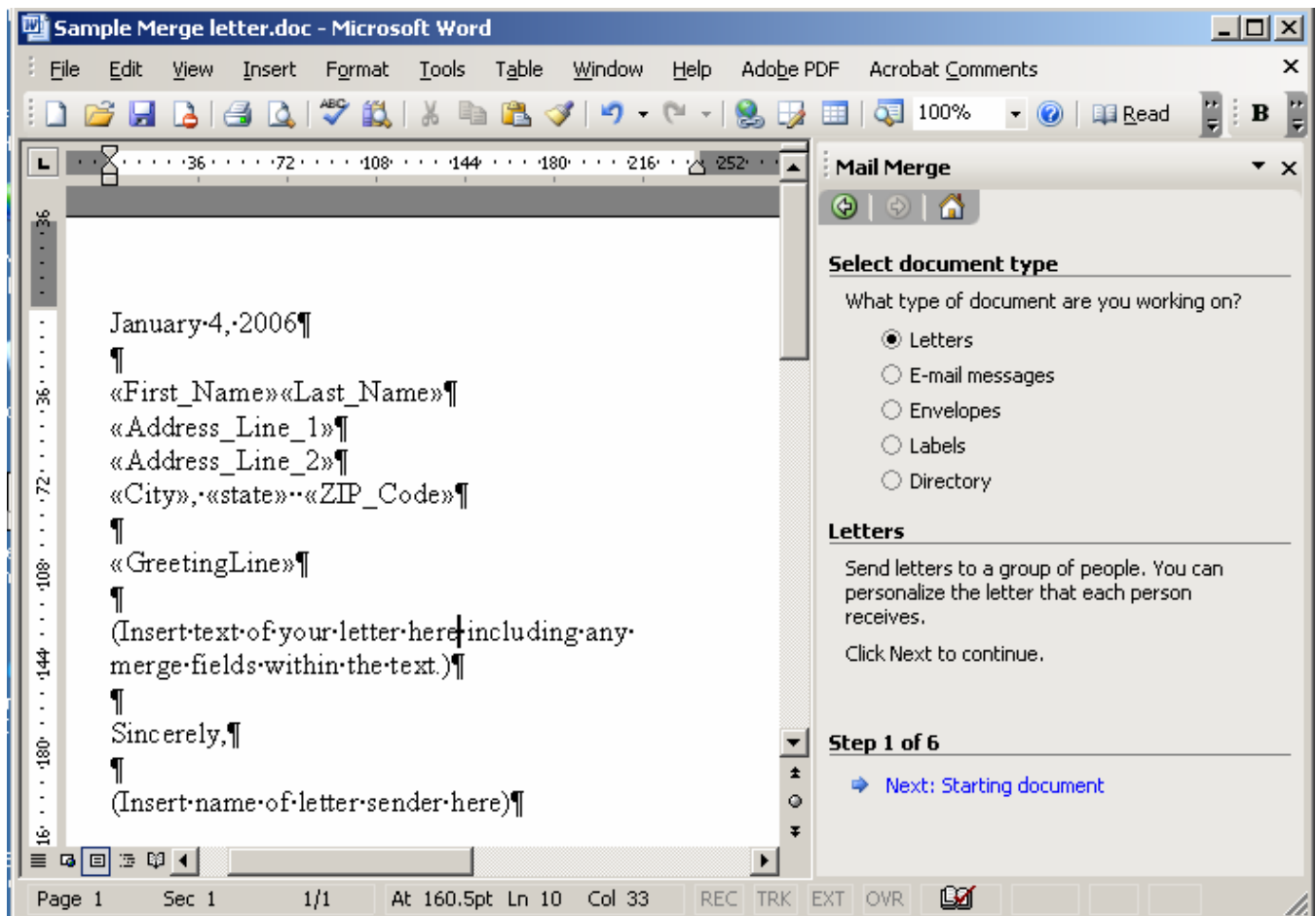
From the Tools menu, select Letters and Mailings and slide to Mail Merge.

A Mail Merge pane opens to the right of the document window.

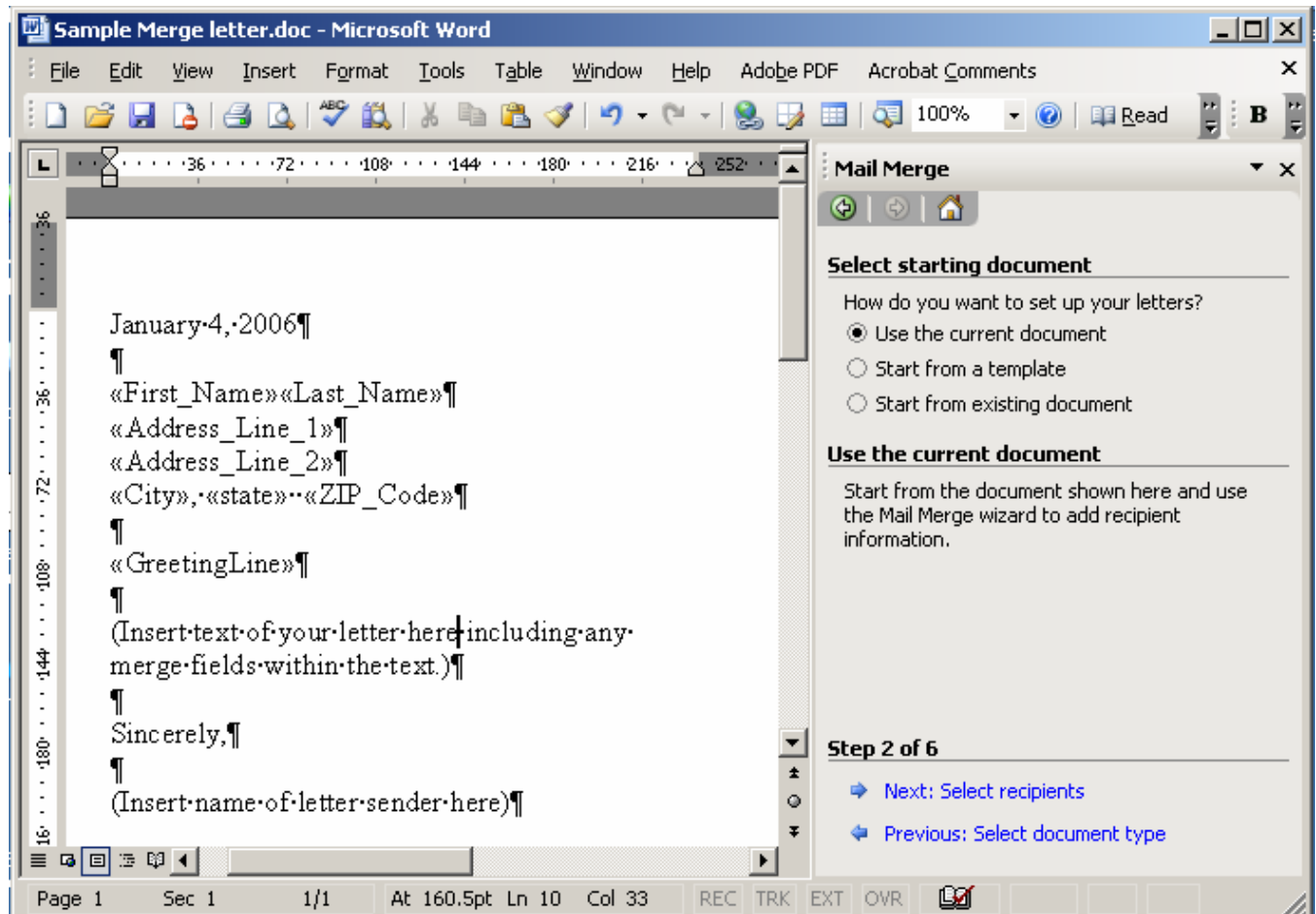
In the Mail Merge pane, complete the following six steps:

**Note:** Click Next under Step at bottom of Mail Merge Pane after each of the selections.

### 1. Select the document type you need to create.



## 2. Select the starting document.



The screenshot shows the Microsoft Word interface with the Mail Merge wizard open. The document content is as follows:

January 4, 2006¶  
¶  
«First\_Name»«Last\_Name»¶  
«Address\_Line\_1»¶  
«Address\_Line\_2»¶  
«City», «state» «ZIP\_Code»¶  
¶  
«GreetingLine»¶  
¶  
(Insert text of your letter here including any merge fields within the text.)¶  
¶  
Sincerely,¶  
¶  
(Insert name of letter sender here)¶

The Mail Merge task pane on the right is titled "Mail Merge" and shows "Step 2 of 6". Under the heading "Select starting document", there are three radio button options:

- Use the current document
- Start from a template
- Start from existing document

Below these options, under the heading "Use the current document", there is a paragraph: "Start from the document shown here and use the Mail Merge wizard to add recipient information."

At the bottom of the task pane, under "Step 2 of 6", there are two blue arrows with text:

- Next: Select recipients
- Previous: Select document type

The status bar at the bottom of the window shows: Page 1, Sec 1, 1/1, At 160.5pt Ln 10 Col 33, REC TRK EXT OVR.



#### 4. Write your letter (if not using an existing letter).

The screenshot shows the Microsoft Word interface with the Mail Merge task pane open on the right. The document window on the left contains a letter template with the following text:

January 4, 2006¶  
¶  
«First\_Name»«Last\_Name»¶  
«Address\_Line\_1»¶  
«Address\_Line\_2»¶  
«City», «state» «ZIP\_Code»¶  
¶  
«GreetingLine»¶  
¶  
(Insert text of your letter here including any merge fields within the text.)¶  
¶  
Sincerely,¶  
¶  
(Insert name of letter sender here)¶

The Mail Merge task pane on the right is titled "Mail Merge" and shows the "Write your letter" step. It includes the following text and options:

**Write your letter**

If you have not already done so, write your letter now.

To add recipient information to your letter, click a location in the document, and then click one of the items below.

- Address block...
- Greeting line...
- Electronic postage...
- Postal bar code...
- More items...

When you have finished writing your letter, click Next. Then you can preview and personalize each recipient's letter.

**Step 4 of 6**

- Next: Preview your letters
- Previous: Select recipients

The status bar at the bottom of the window shows "Page 1 Sec 1 1/1 At 160.5pt Ln 10 Col 33".

## 5. Preview your letters.

The screenshot shows the Microsoft Word interface with the Mail Merge task pane open on the right. The main document window displays a letter template with the following text:

January 4, 2006¶  
¶  
John Harvard¶  
1350 Mass Ave.¶  
Suite 1¶  
Cambridge, MA 02138¶  
¶  
Dear John Harvard,¶  
¶  
(Insert text of your letter here including any merge fields within the text.)¶  
¶  
Sincerely,¶  
¶  
(Insert name of letter sender here)¶

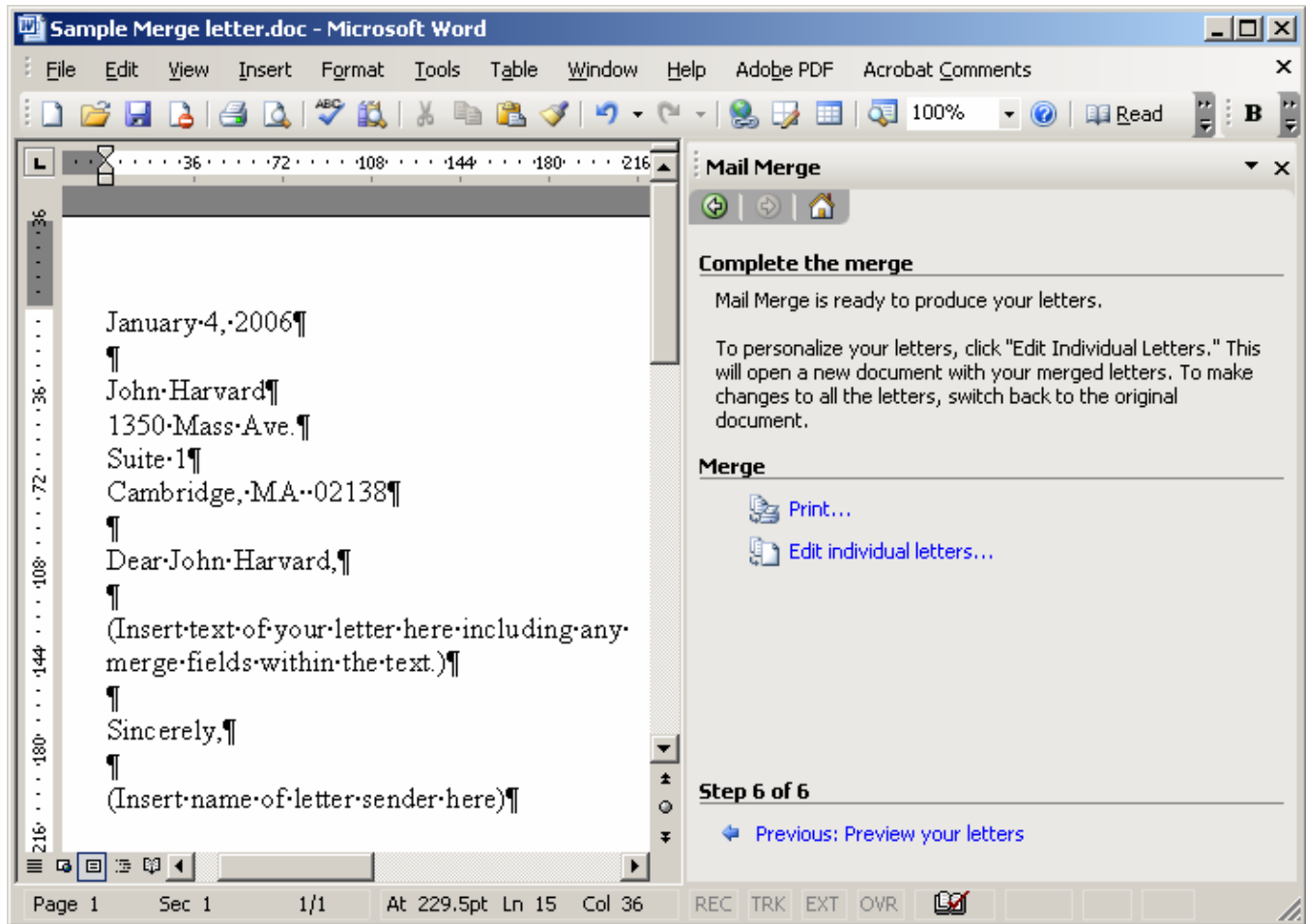
The Mail Merge task pane on the right is titled "Mail Merge" and contains the following sections:

- Preview your letters**: A section with a home icon and instructions: "One of the merged letters is previewed here. To preview another letter, click one of the following:". It includes navigation buttons "<<" and ">>" next to "Recipient: 1", and a "Find a recipient..." button.
- Make changes**: A section with instructions: "You can also change your recipient list:". It includes an "Edit recipient list..." button and an "Exclude this recipient" button.
- Step 5 of 6**: A section with instructions: "When you have finished previewing your letters, click Next. Then you can print the merged letters or edit individual letters to add personal comments." It includes two blue arrows with text: "Next: Complete the merge" and "Previous: Write your letter".

The status bar at the bottom of the window shows "Page 1", "Sec 1", "1/1", "At 229.5pt Ln 15 Col 36", and a taskbar with "REC", "TRK", "EXT", "OVR", and a "L" icon.

## 6. Complete the merge.

Now you can edit any individual letters before printing, or go ahead and print the merge letters.



Whenever you need help with any computer issue, please check our Support Services website as information is constantly added and updated:

[http://www.uis.harvard.edu/support\\_services/](http://www.uis.harvard.edu/support_services/)