

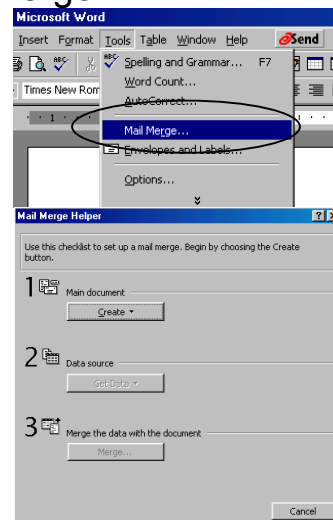
Performing a mail merge is actually a fairly simple task with MS Word, although there are many steps involved in the process. The one component that you must have before starting a mail merge process is a document that contains your source data – this is usually the list that you would like put onto labels or index cards or signs, etc. The source data can be in a variety of formats, such as an MS Word document, an Excel spreadsheet or an MS Access database. The key to success, which is often overlooked, is that your source file should be a document that has columns (a table in Word, for example), and those columns need to have column headings! See the example below:

This is an example of a good source file. It is a Microsoft Word document with address information. Note that the document is really a table with column headings (such as **Last Name**, **First Name**, etc.). If you have a document such as this one, you can easily perform a mail merge.

<u>LastName</u>	<u>FirstName</u>	<u>Street</u>	<u>City</u>	<u>StateOrProvince</u>	<u>PostalCode</u>
Spence	Rita	304 King Edward Pl.	East Vancouver	British Columbia	V3F 4A9
Pence	Stephen	312 6th Ave.	Oakland	CA	94608
Carter	Dale	14 S. Elm Dr.	Iselin	NJ	08830
Jefferson	Walt	23 Tsawassen Blvd.	Tsawassen	British Columbia	T2F 8M4
Smith	M.	1001 West Pender	Vancouver	British Columbia	V3F 2K2
Grant	Arlene	145, rue Châteauneuf	Charlesbourg	Québec	G1H 1G2
Murray	Harold	99 Murphy Way	Altadena	CA	91001
Smith	Rebecca	456 Breezewood Ave.	San Diego	CA	92111
Herron	Tom	89 Wall St.	New York	NY	11373
Hernandez	Jim	14 Fifth Ave.	New York	NY	10001

Performing a Mail Merge

To begin the Mail Merge process, pull down the **Tools** menu and select **Mail Merge**.



You will then see the **Mail Merge Helper** dialog box. This screen will be your tool for creating the Mail Merge. From here, you will

1. create your main document – this document will be the end result – mailing labels or index cards
2. locate your source file (as described above),
3. perform the mail merge

Advertisement



Premiere Web Hosting Services
(This is who I use to host my web sites)

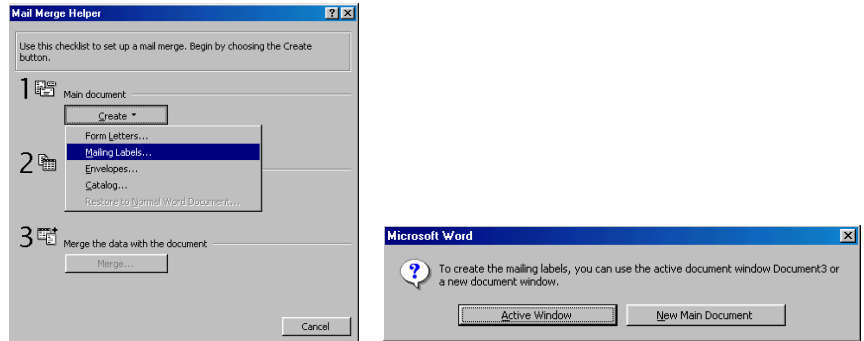
Basic Accounts include:

- ◆ 200 MB's of Storage space
- ◆ Unlimited E-Mail Accounts
- ◆ 15 GB's of Bandwidth
- ◆ Excellent Uptime

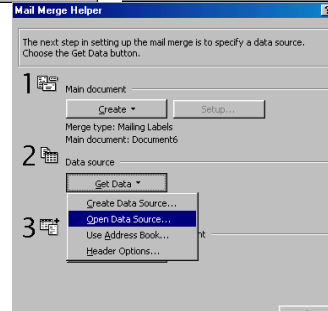
Visit them at prohosting.com or call 1-866-566-HOST(4678)

(Tell them you heard about their services from Richard Truxall)

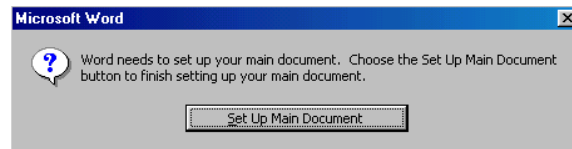
To start the process, click on the **Create** button. A menu will drop down with your choices of types of merged documents that can be created. This example will use **Mailing Labels**.



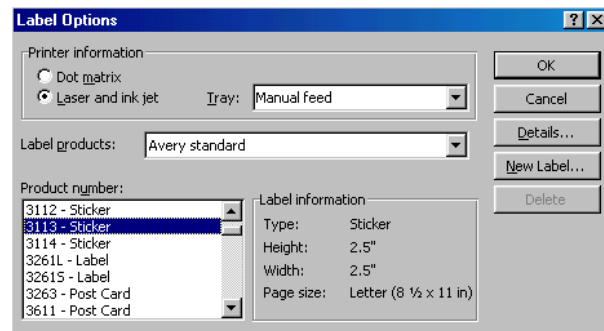
After you have selected the type of document for your main document, you will have to select or create your data source. (You will format your main document after you select your data source. That seems backward, but it is necessary). To select your data source, click on the **Data Source** button and select



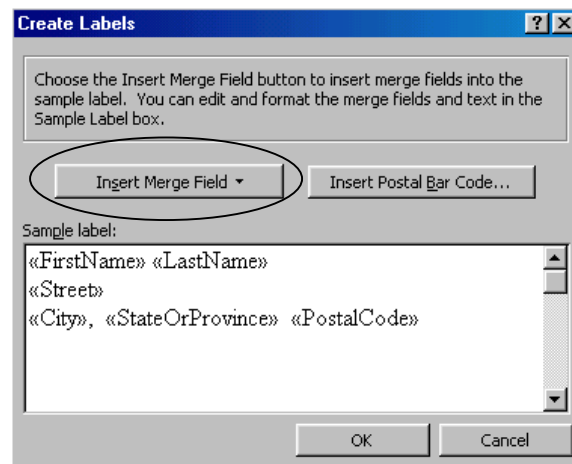
After selecting your data source, you will then set up your main document. You will see a dialog box that will let you choose your document formatting.



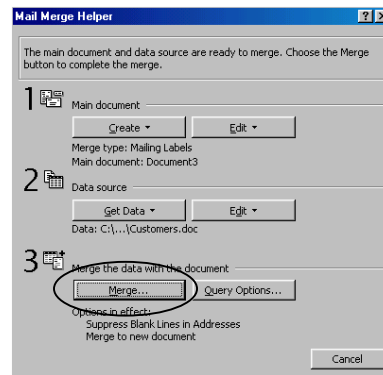
Since I selected labels as my main document, I am taken to the **Label Options** dialog box. From here, all you need to do is to select the type of Label that you have purchased. Word makes it very easy: all you need to do is select the brand of your label and match that brand product number with the choices on this dialog box. This will set up the document with the proper spacing automatically. Click on the **OK** button to continue the process.



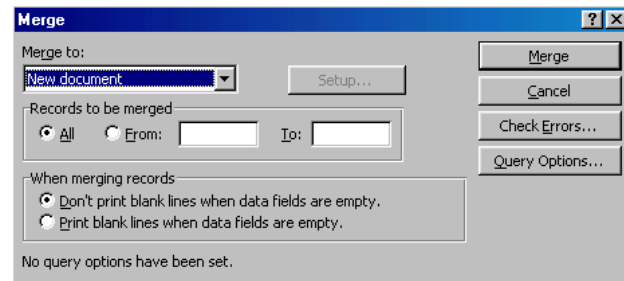
You will now need to tell Word which fields (columns) that you want to include on the labels. Click on the **Insert Merge Field** and select the fields in the order that you would like them to appear on your label. Treat this like a little word processing document. If you want particular fields in a particular order, you need to enter them in that order. If you want to include other punctuation, such as a comma, type the character where it belongs, such as between the <<City>> field and the <<State>> field.



After you have defined your document fields, you can simply click on the **Merge** button to continue the process...



Then, you will be asked if you want the merge to occur in a New Document, your printer or to an E-Mail message. Typically, I would recommend sending it to a New Document so that you can view the results before printing the final product.



You should then see a new document that contains the results of your merge. If you are satisfied with the results, put your labels into the printer and print the document just like you would print any other Word document.

Rita Spence 304 King Edward Pl East Vancouver, British Columbia V3F 4A9	Stephen Pence 312 6th Ave Oakland, CA 94608
Dale Carter 14 S. Elm Dr. Iselin, NJ 08830	Walt Jefferson 23 Tsawassen Blvd. Tsawassen, British Columbia T2E 8M4

This Free Tutorial was created by:

Richard
Truxall
Seminars

Personal and Small Business Computer Support

Individual, In-Home Computer and Internet Training

I can help you:

- Solve Internet and computer problems
- Set up business and home networks
- Learn to use the Internet and your computer
- Get the most out of your computer investment

Contact Me at Richard@Truxall.com or 877- 805-1431

About the Author, Richard Truxall

Richard has presented Internet and Computer seminars throughout Michigan since 1992. His goal is always to help his seminar participants get the most benefit from their computers and the Internet by explaining technology in realistic and understandable terms. In 1995, Richard was fortunate to help with the initial development of the internationally acclaimed Internet Public Library (ipl.org), which continues to be an extremely useful tool. In addition to starting his own training and consulting company (Richard Truxall Seminars & Consulting), he also works as the Collection Librarian for the Michigan section of the Michigan Electronic Library (mel.org). Richard is available for technology seminars, workshops and consulting. For more information about Richard, visit his web site at truxall.com.

© 2001 by Richard Truxall Seminars. Permission to use, copy, and distribute this document in whole or in part for non-commercial purposes and without fee is hereby granted, provided that appropriate credit to ShortGuides.com and Richard Truxall Seminars is included in all copies. Commercial use of this document is prohibited.