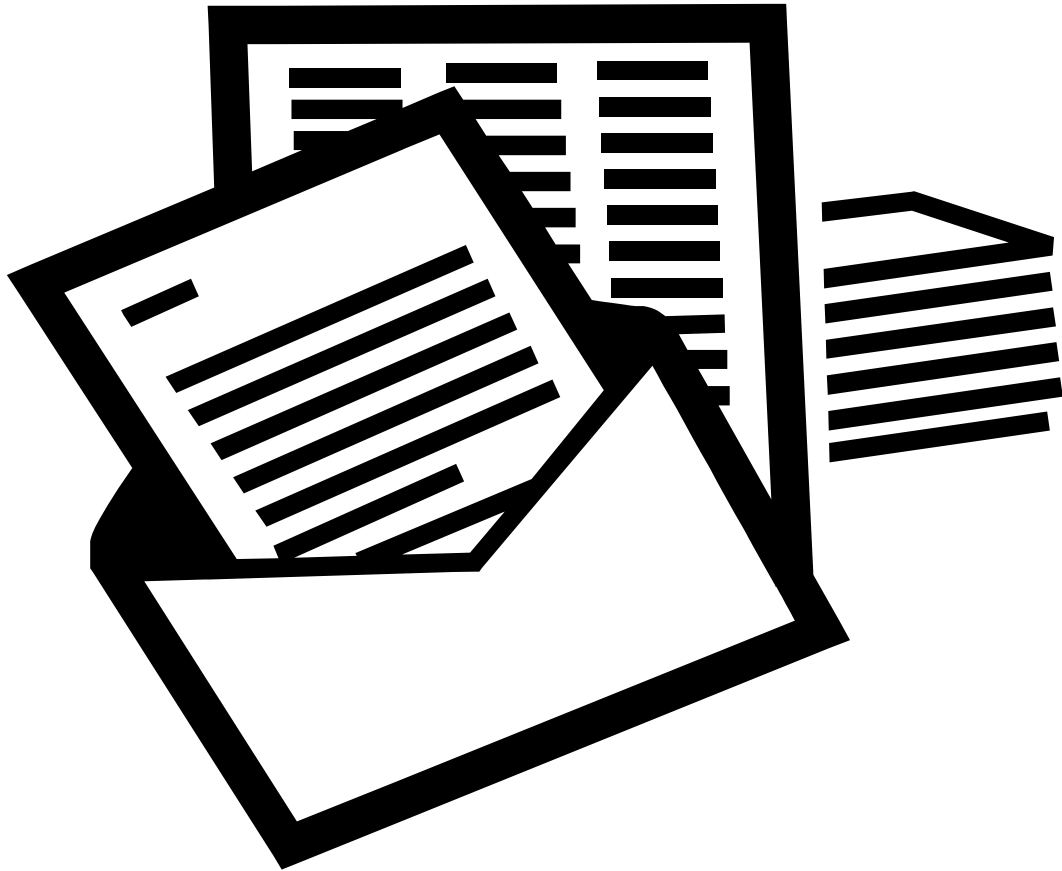


# Simple Mail Merges

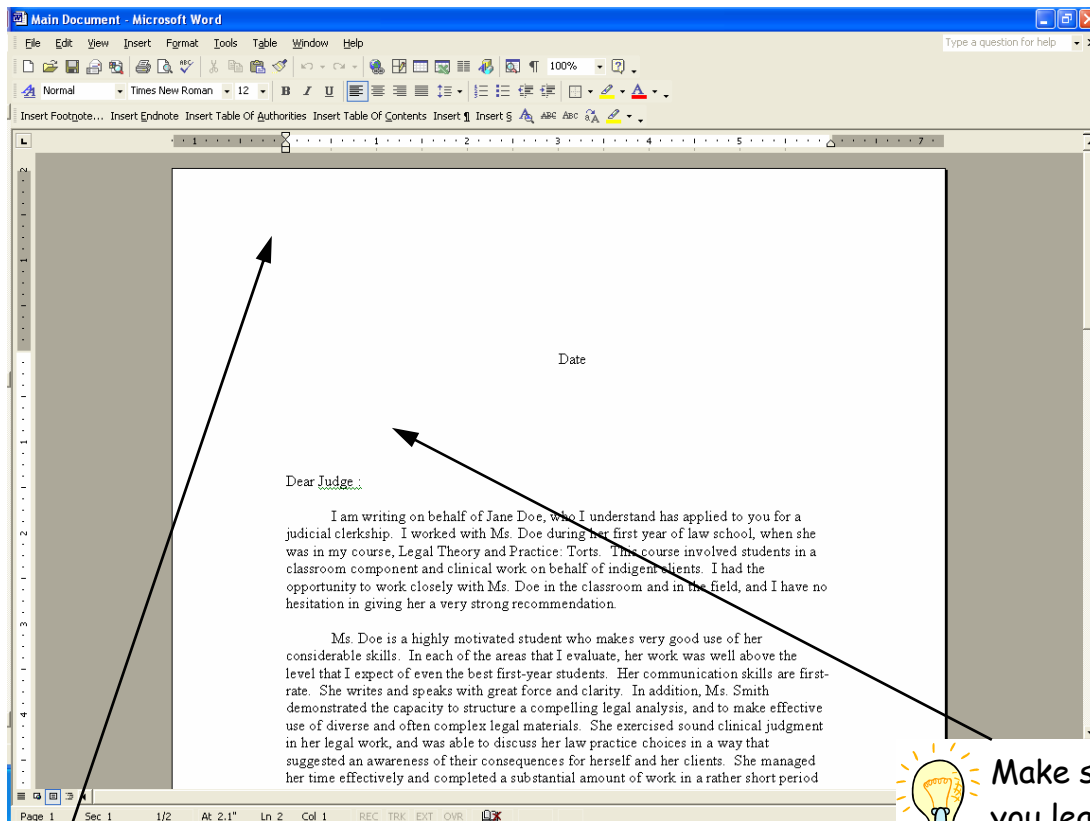


With Microsoft Word and  
Microsoft Excel for XP



# Creating your Main Document in Microsoft Word

Hopefully, before you have reached this point, you have some idea as to what your Main Document is going to entail. Create your main document just as if you were sending this letter to one person with this one exception: Leave space for the data that will be merged.



Don't Forget! If you are sending your letters out on letterhead, make sure you have a 2" margin at the top and 1.75" margin at the bottom of the first page!



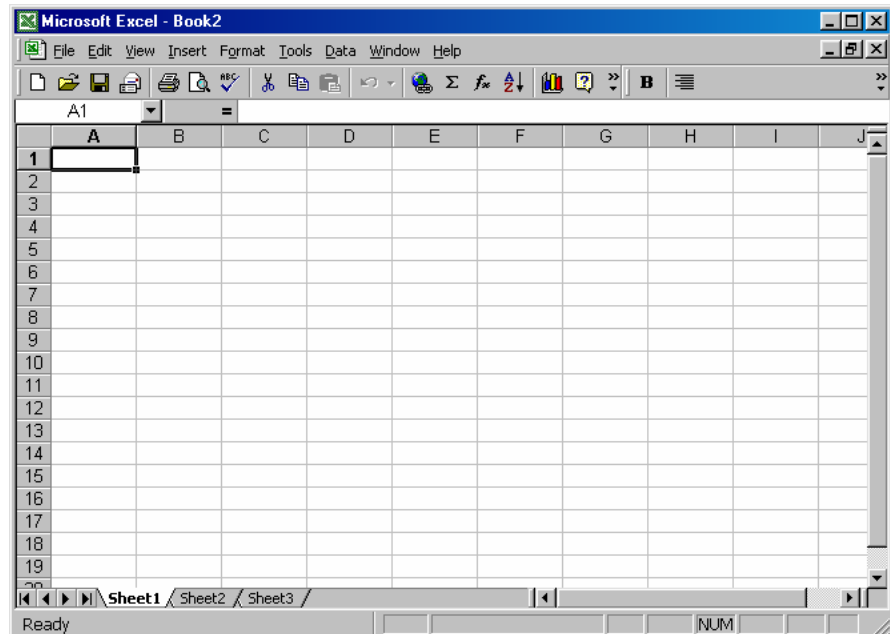
Make sure you leave space for the name and address of your recipient before the salutation!

# Creating your Data Source in Microsoft Excel

Why are we using Microsoft Excel? Well, because it is easy. Even if you have NEVER used Excel before, the simple steps needed to create the Data Source is worth learning. If you have ever tried to create tables in Microsoft Word, you probably understand why we are using Excel.

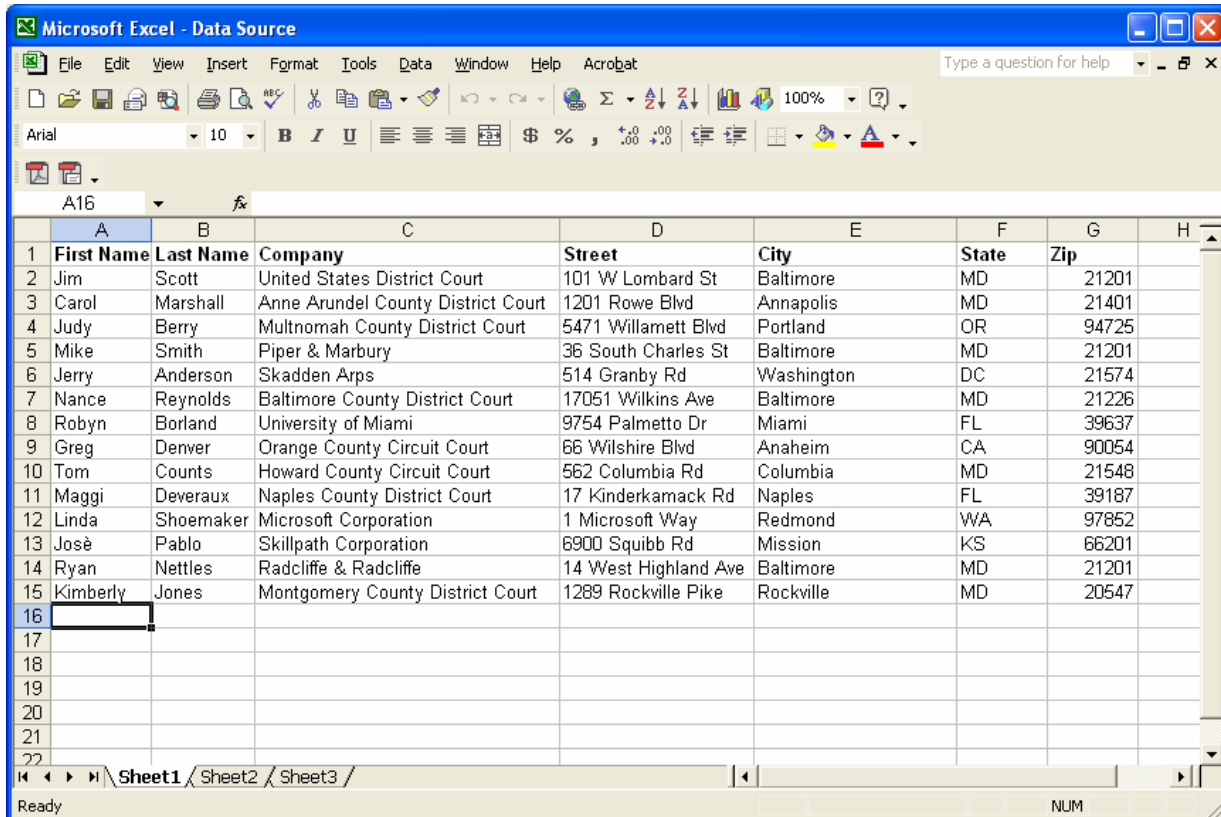
The key to making a useful Data Source for your Mail Merge is planning. At this point, you should already have your Main Document created, and you have some idea as to where you would like the merged data to be in your Main Document. And planning your Data Source has a lot to do with that.

Start with a  
blank  
spreadsheet.



When you are creating your spreadsheet, make sure you start out logically, right from the start. If not, you will find it much more difficult than it really has to be.

Make a column for each bit of information that would logically be separated by a space if you were typing the letter individually by hand. Labeling the top cell of each column will be VERY helpful when you actually merge your data



The screenshot shows a Microsoft Excel spreadsheet titled "Data Source". The spreadsheet has a table with the following data:

	A	B	C	D	E	F	G	H
1	First Name	Last Name	Company	Street	City	State	Zip	
2	Jim	Scott	United States District Court	101 W Lombard St	Baltimore	MD	21201	
3	Carol	Marshall	Anne Arundel County District Court	1201 Rowe Blvd	Annapolis	MD	21401	
4	Judy	Berry	Multnomah County District Court	5471 Willamett Blvd	Portland	OR	94725	
5	Mike	Smith	Piper & Marbury	36 South Charles St	Baltimore	MD	21201	
6	Jerry	Anderson	Skadden Arps	514 Granby Rd	Washington	DC	21574	
7	Nance	Reynolds	Baltimore County District Court	17051 Wilkins Ave	Baltimore	MD	21226	
8	Robyn	Borland	University of Miami	9754 Palmetto Dr	Miami	FL	39637	
9	Greg	Denver	Orange County Circuit Court	66 Wilshire Blvd	Anaheim	CA	90054	
10	Tom	Counts	Howard County Circuit Court	562 Columbia Rd	Columbia	MD	21548	
11	Maggi	Deveraux	Naples County District Court	17 Kinderkamack Rd	Naples	FL	39187	
12	Linda	Shoemaker	Microsoft Corporation	1 Microsoft Way	Redmond	WA	97852	
13	Josè	Pablo	Skillpath Corporation	6900 Squibb Rd	Mission	KS	66201	
14	Ryan	Nettles	Radcliffe & Radcliffe	14 West Highland Ave	Baltimore	MD	21201	
15	Kimberly	Jones	Montgomery County District Court	1289 Rockville Pike	Rockville	MD	20547	
16								
17								
18								
19								
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21								
22								

O.K. Now you have the two most important pieces of the mail merge puzzle. You have the Main Document and your Data Source.

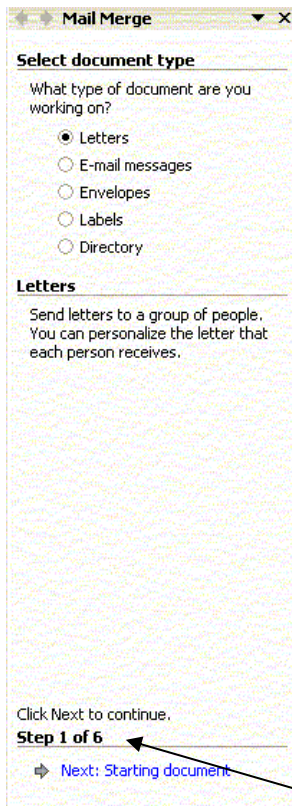
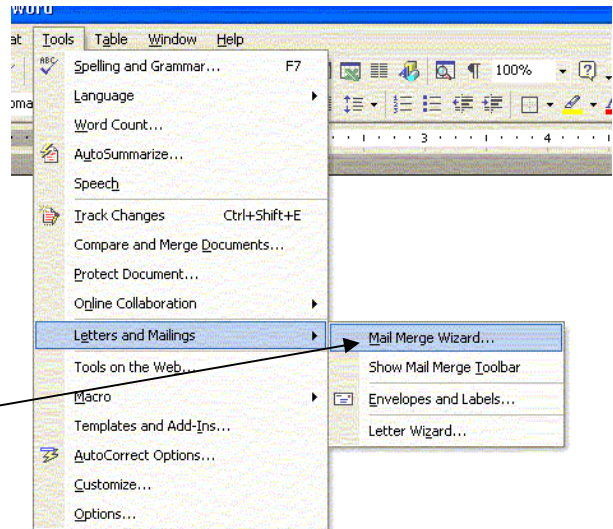


Another advantage to using Excel for your Data Source: You can sort your data much easier than if you used a table in Word.


# Merging your data with your document

Here is where all of the planning pays off. A smooth and easy merger of your data with your form letter.

To begin your Mail Merge, within Microsoft Word click on **Tools, Letters and Mailings, then Mail Merge Wizard.**

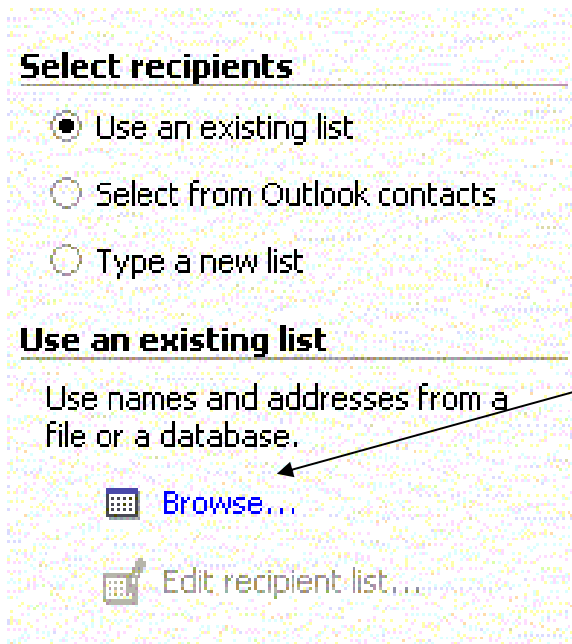
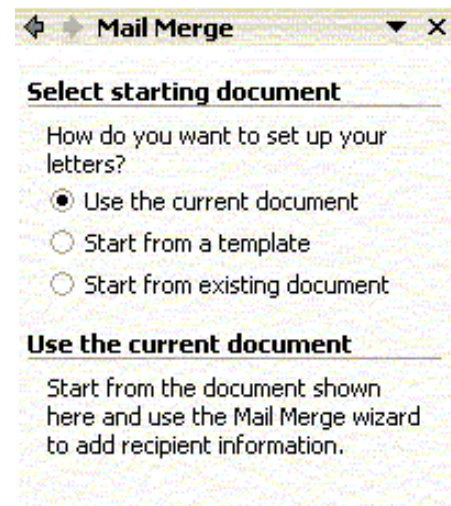


As the Mail Merge Wizard begins, you will see the task pane open, and the wizard options will appear. You will notice that you have quite a few choices. Mail merges are not just for form letters. You can create envelopes, mailing labels and other publications. For our purposes here, we will be choosing **Letters**.

 As you can see, Microsoft Word breaks down the Mail Merge process into six easy steps. It is really difficult to make a mistake.

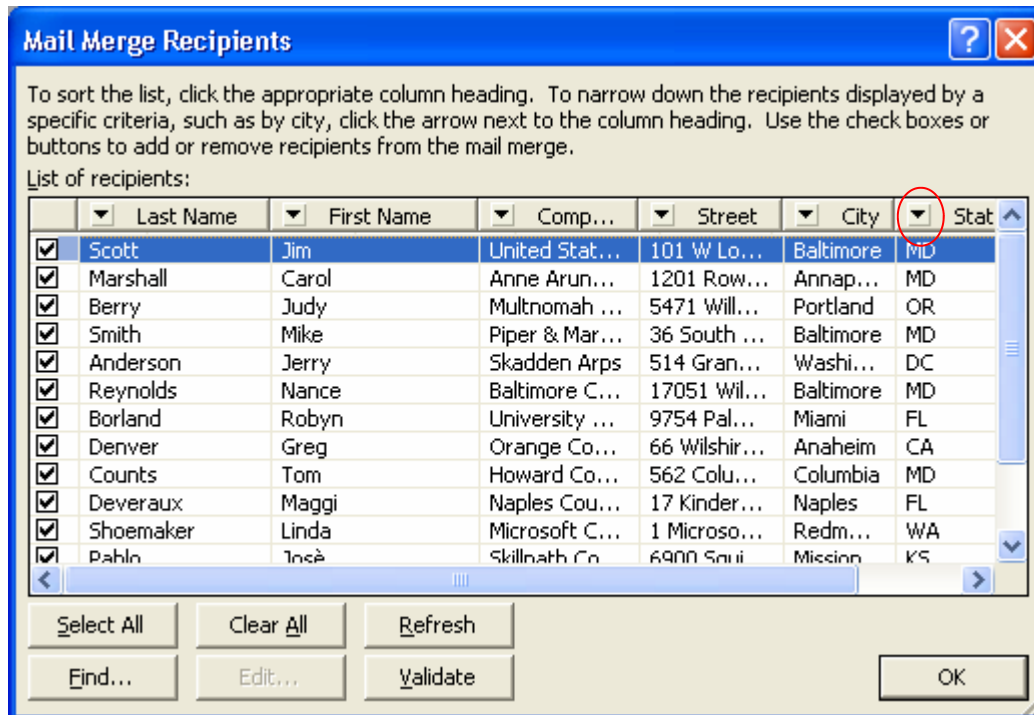
# Merging the document, Cont.

After you choose Letters, The task pane changes. You have the choice to start from a **Template**, an **Existing Document**, or the **Current Document**. Since we already have our main document open, we will use the **Current Document**. Then Click **Next:Select recipients**.



Next, you will need to indicate where your data will be coming from. You will see that you can use many different sources for your data. If you use Microsoft Outlook for your e-mail program, you can even use your address book. Since we are using an Excel Spreadsheet for our data source, we need to click **Browse** to find our Excel file. When you do, you will get the same dialog box that you would get if you were opening or saving a document. Just choose the Excel Spreadsheet you created previously. Once you have chosen the correct file, it will ask you which datasheet in your file you would like to use. In our case, we will be using **Sheet 1**.

Next, you will need to choose your Mail Merge Recipients.



Word displays what looks like a replica of your Excel Spreadsheet. Here is where you will select which recipients you would like to include in your mail merge. You can choose any and all of the records in your spreadsheet. To get a better look at the data, you can sort by any of the fields displayed in your spreadsheet by clicking the arrow next to the field indicator. Once you have chosen your recipients, click **O.K.**









# Final Thoughts...



If your mail merge doesn't turn out like you planned, No Problem! Just close the new document that your Mail Merge produced, and do not save the changes! You can then start the Mail Merge process over from the beginning.



If you really feel adventurous, you can insert a special field in your Main Document that places the date (according to your computer) in place of where you would manually add the date. This way, every time you open the Main Document, your date will always be up to date!



You will find that you might wish to use the Mail Merge feature to address your envelopes that you will be mailing your letters in. If your printer will handle envelopes, this is a smart idea. The same steps apply, just follow the dialog boxes.



Above all...if it is worth saving once, it is worth saving again. After you have spent all of this time preparing for this Mail Merge (or any other important document, for that matter...) make sure you save it in more than one place. Do not let your only copy of your document be on a floppy disk! It takes less than a penny to manufacture a floppy disk. Do you really want to trust your important documents with that?