Mail merge has always been moderately awkward, to say the least. Microsoft Office XP, the latest release of Office, offers a variety of mail merge options. You will find a built-in mail merge wizard to guide you through all of the steps. If you prefer to work outside the wizard, you can use the Mail Merge toolbar. (see page two for toolbar instructions)

Step One:
Start with a blank document, if your Task Pane is not showing, go to the View menu and select Task Pane. Click the arrow at the top of the Task Pane and select Mail Merge. You will be asked to select a Document Type. Select Letters. Click Next: Starting Document at the bottom on the task pane.

Step Two:
Now you have an opportunity to select a starting document: If you are starting from scratch, click Use the current document. If you wish to start from a template, click Start from template and select a template. If you have already prepared your letter, click Start from existing document, then find and open the document you plan to use.

Step Three:
Select your recipients:
If you have an existing database, click Use an existing list, and then click Browse to find it. If you do not have a database of recipients and wish to start from scratch, click Type a new list, and then click Create. Enter each contact's information into the fields provided. When you are done with an individual entry, click New Entry. When you are done with your database, click Close. Give your data source a name and click Save. Now you have the opportunity to edit your recipient list. If you wish to do so, click Edit recipient list. If you wish to exclude any of the contacts on your list, you can do so by deselecting the ticked box on the left. When you're done, click OK.

Step Four:
Click Next: Write your letter.
If you have not already done so, type your letter. Next, click on the place in your document where you wish your address block to appear. Click Address Block to select the format of your recipients' names. Select whether you would like to include company names and postal addresses. When you're done, click OK. Now click on your document where you want your greeting line to appear and click Greeting Line. Select your greeting line format and click OK.

When you are happy with your letter, click Next: Preview your letters.

Step Five:
Browse through your letters using the back and forward buttons. When you are satisfied, click Next: Complete the Merge.

Step Six:
You can either choose to print your letters, or if you wish you can edit individual letters by clicking Edit individual letters. In the Merge to New Document dialog box, select the letters you wish to merge. Click OK. A new document will open containing all the letters. Use this document to make changes to individual letters. Your original document will remain open in the background. Use this if you wish to make changes to all your letters simultaneously. When you are done, print or save your document. Now that your letters are done, think about how much time it would save you to merge your envelopes: Press Control N to start a new document. This time, select Envelopes as your document type. Click Next: Starting Document. Select Change document layout, then click Envelope options. Select the size that matches the envelopes you plan to use.

Make any desired changes to your layout, then click OK. Click Next: Select recipients, and follow the instructions in Step Three above. Click Next: Arrange your envelope. Click the place on the envelope where you wish the name and address to appear and click Address Block. Select your desired format and click OK. Click Next: Preview your envelopes. Flip through your envelopes to check that everything is in order. Click Next: Complete the merge. Click Print. Select the envelopes that you wish to merge and click OK.

Please feel free to contact me if you have any questions.
HOW TO ADD MAIL MERGE HELPER TO LETTERS AND MAILINGS MENU

To use Word 2002 mail merge with similar functionality of earlier versions of Word, use either of the following methods.

• Use the Mail Merge toolbar. To display the Mail Merge toolbar, point to Toolbars on the View menu, and then click Mail Merge. NOTE: The options on the Mail Merge toolbar offer similar behavior to that of earlier versions of Word.-or-

• Use the Mail Merge Helper. To make it easy to use, add the Mail Merge Helper command to the Letters and Mailings submenu of the Tools menu. To do this, follow these steps:

  Method 1: Use Toolbar Options
  1. On the View menu, click Toolbars. The Toolbar Options button is a down—arrow button and is located on the right side of the Mail Merge toolbar.
  2. On the list that appears, point to Add or Remove Buttons.
  3. On the list that appears, point to Mail Merge, click to select Insert Merge Field button to your Mail Merge toolbar.

  Method 2: Use the Customize Dialog Box
  1. On the Tools menu, click Customize.
  2. Click to select the Commands tab.
  3. In the Categories list, click to select All Commands.
  4. In the Commands list, click to select InsertMergeField.
  5. While holding the mouse on the selected InsertMergeField command, drag the command to the Mail Merge toolbar, and drop it where you want the drop—down list to appear. (For example, drop the InsertMergeField command to the left of the Insert Word File list button on the Mail Merge toolbar.)
  6. In the Customize dialog box, click Close.

HOW TO ADD THE INSERT MERGE FIELD BUTTON TO THE MERGE TOOLBAR

A major obstacle to using Mail Merge in Word 2002 is that a merge field cannot be inserted without using the dialog box. It seemed unreasonable to repeatedly open and close the dialog box when inserting each of the fields. This is one of the first setbacks I looked to correct. The solution was found in Microsoft’s Knowledge Base. To work around this problem, add the Insert Merge Field button to your Mail Merge toolbar.

To do this, follow these steps:

1. On the Tools menu, click Customize.
2. Click to select the Commands tab. In the Categories list, click All Commands.
3. In the Commands list, click Mail Merge Helper.
4. Drag the Mail Merge Helper command to the Letters and Mailings submenu on the Tools menu. NOTE: When you rest the pointer over the Letters and Mailings submenu, you will see a horizontal black bar. This bar indicates the location where the command will appear on the menu when you release the mouse button.
5. In the Customize dialog box, click Close.

HOW TO ADD A GRAPHIC OBJECT TO LABELS USING MAIL MERGE

To add a graphic object to a group of labels, follow these steps:

1. Start Word.
2. On the Tools menu, point to Letters and Mailings, and then click Mail Merge Wizard.
3. In the Mail Merge task pane, click Labels under Select document type.
4. Near the bottom of the Mail Merge task pane, click Next: Starting document.
5. Follow the instructions in the Mail Merge Wizard until you get to step 4 of 6.
6. In step 4 of 6 of the Mail Merge Wizard, select the first label.
7. On the Insert menu, point to Picture, and then click into your word document.
8. The Insert Merge Field button appears to the left of the Toolbar Options button on the Mail Merge toolbar.

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To do this, use one of the following methods.

• Method 1: Use Toolbar Options
  1. On the Mail Merge toolbar, click Toolbar Options. The Toolbar Options button is a down—arrow button and is located on the right side of the Mail Merge toolbar.
  2. On the list that appears, point to Add or Remove Buttons.
  3. On the list that appears, point to Mail Merge, click to select Insert Merge Field, and then click into your word document.

The Insert Merge Field button appears to the left of the Toolbar Options button on the Mail Merge toolbar.

• Method 2: Use the Customize Dialog Box
  1. On the Tools menu, click Customize.
  2. Click to select the Commands tab.
  3. In the Categories list, click to select All Commands.
  4. In the Commands list, click to select InsertMergeField.
  5. While holding the mouse on the selected InsertMergeField command, drag the command to the Mail Merge toolbar, and drop it where you want the drop—down list to appear. (For example, drop the InsertMergeField command to the left of the Insert Word File list button on the Mail Merge toolbar.)
  6. In the Customize dialog box, click Close.

To add a graphic object to a group of labels, follow these steps:

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5. Follow the instructions in the Mail Merge Wizard until you get to step 4 of 6.
6. In step 4 of 6 of the Mail Merge Wizard, select the first label.
7. On the Insert menu, point to Picture, and then click the graphic object type that you want.
8. After you insert the graphic object, click on the back arrow button on the top left corner of the task pane to get back to the Mail Merge task pane.
9. Click Address block under Arrange your labels.
10. Arrange the contents of the first label to appear the way that you want all of your labels to appear.
11. After you arrange the first label, click Update all labels under Replicate labels.
12. Complete the remaining steps in the Mail Merge Wizard.

Questions, comments, tips—contact Melanie—mmills@bloomu.edu
Information in this article was compiled from various sources; Rachelle Benson (http://www.bcentral.co.uk/technology/office/tips/word/mailmergeword2002.asp), Microsoft Knowledge Base Articles 276005, 290408, 294685

Thank you
Crystal, Janet, and Joyce!