



**SCIP TRAINING**  
**Internet skills in your community**

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## **Mail Merge with Word 2003**

SCIP [Sussex Community Internet Project] was founded in 1996 to provide IT support and training to staff and volunteers from charities and community organisations. Our services include:

Training- specialist training courses and workshops in web design, email, ICT planning and related skills

IT Support - we can help when things go wrong and we can help you choose, install and maintain the right equipment

Design & Databases - helping you manage your information and put it online

Partnership - using computers and the internet in community projects

SCIP is a not for profit limited company and is supported by Brighton & Hove Regeneration Partnership, Brighton & Hove City Council, Sussex LSC, Government Office of the South East and ChangeUp. Our training courses are run in partnership with Friends Centre, Brighton.

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## 1 Course Overview

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### a. What you're going to learn on the course

- Theory of simple databases
- Theory of merging two documents
- Creation of data files
- Use of existing data files
- Merging to print
- Merging to email



### b. Course Structure

- 1 Course Overview
- 2 Getting started
- 3 Theory of mail merge
- 4 creation of a data file
- 5 Creation of a main file
- 6 Completion of merge to printer
- 7 Completion of merge to email

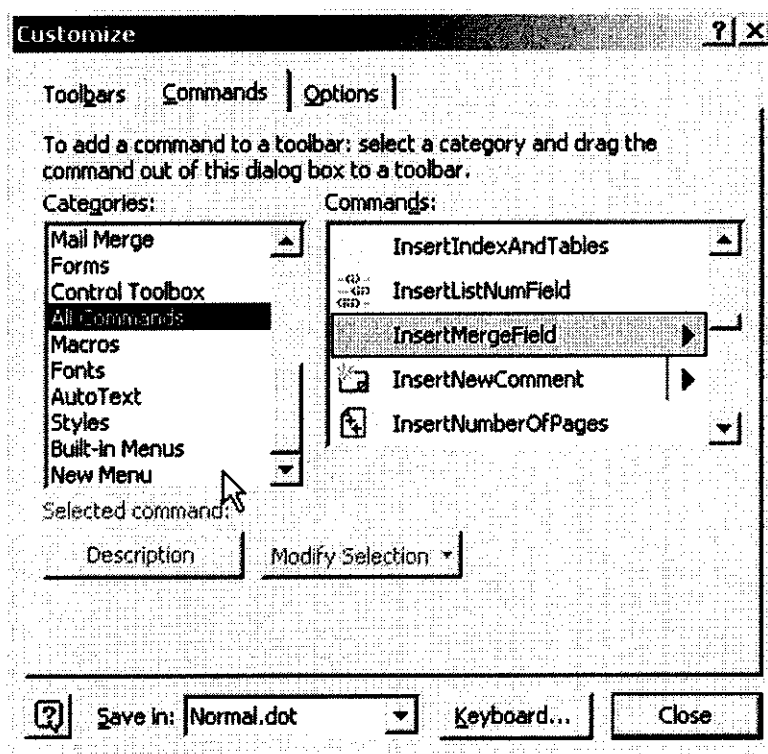
## 2 Performing a Mail Merge in Windows 2002

### Before you start:

If you cannot see the 'Insert Merge Field' button on the toolbar ... do the following:

 Insert Merge Field ▾

1. From the **View** menu, choose **Toolbar → Customise**
2. From the **Commands** tab, choose **All Commands** in the left pane, and **InsertMergeField** in the right pane.



Drag **InsertMergeField** on to the toolbar and drop it at your preferred location.

It should only be necessary to do this once. Thereafter, the button will be available, exactly where you placed it, each time you start up Word 2002.

### 3 Opening the Main and Data files

With your **Invitation** letter open, choose the following from the menu bar:

Tools → Letters and Mailings → Mail Merge Wizard

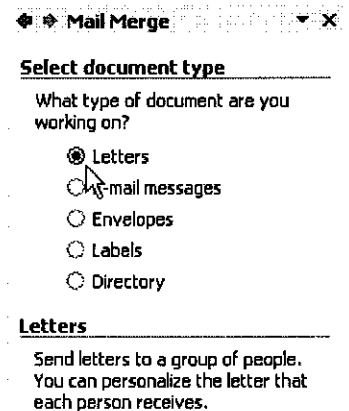
A new pane will appear to the right of your screen. →  
 Make an appropriate selection and click 'Next' at the bottom of the pane to move on to the next dialogue.

To create a mail-merged letter where a data source has been prepared in advance, your choices would be as follows:

- Letters
- Use the current document
- Use an existing list

Once 'Use an existing list' is chosen, clicking the 'Next' button generates the 'browse' feature. Use this to find the file containing addresses for your mail merge.

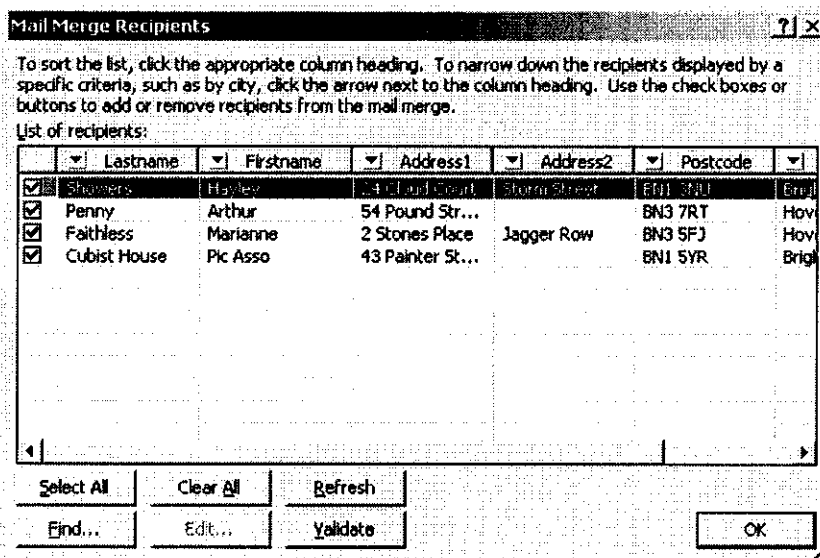
Once your data source has been selected, a new window will appear. If your data source is a spreadsheet, you will be asked to specify the worksheet required before Word displays the contents of your data source file:



Click Next to continue.

**Step 1 of 6**

Next: Starting document



At this point, you have some choices. For example, you might want to restrict data to addressees who live in Brighton, or in a particular street. Your data source might have been set up to include other information, allowing you to target a mailshot to customers who have bought a particular product or service in the past.

In order to restrict the data used in your click on the dropdown arrow next to the field, and make your selection, e.g: Here, choose Brighton to restrict the data set to addresses. →

Address2	Postcode	T...
Storm Street	BN1 3PL	(All)
	BN3 7RT	Brighton
Jagger Row	BN3 5FJ	Hove
	BN1 5YR	(Blanks)
		(Nonblanks)
		(Advanced)

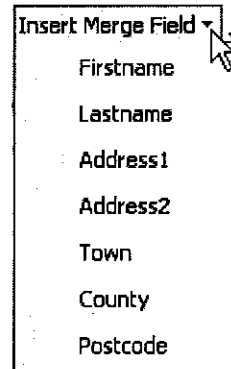
mail merge, relevant you might Brighton-only

Once your criteria has been set, you can step 3 'Write your letter'. Here, you will merge fields that will store details from source.

move on to set up the your data

## 4 Setting up your Merge Fields

1. Find the **Insert Merge Field** button on the toolbar, and click on its down-pointing arrow. The fields revealed are taken from the data source you have already named. This means that they will insert perfectly to the data you have 'requested'.



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2. It is crucial that you lay out the merge fields in exactly the format required for the final output. For example, **if you position them as follows:**

```
<<Firstname>> <<Lastname>>  
<<Address1>>  
<<Address2>> <<Town>>  
<<County>><<Postcode>>
```

Address and town on same line

No space between 'county' and 'postcode'

**Your output will look like this:**

```
Hayley Showers  
24 Cloud Court  
Storm Street Brighton  
East SussexBN1 3NU
```

Address and town on same line

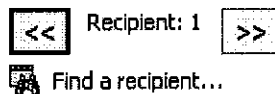
No space between 'county' and 'postcode'

..so make sure that every space, line break and piece of punctuation is precisely as you want it when you set up your merge fields.

Now... click on the **Firstname** merge field and you will see the merge field appear in your document. Press the **spacebar** and choose the **Insert Merge Field** button again. Now choose **Lastname** and press the **Enter** key. Carry on until you have inserted all desired merge fields.

3. Click on **Next: Preview your letters** and check for any inaccuracies. You can always click on **Previous: Write your letter** to step back a stage and make changes.

To check each page of output, click on the preview buttons in the right-hand pane.



4. Click **Next: Complete the merge** and you are offered the opportunity to edit your letters or to send the merge directly to the printer. If you want to make any changes to individual letters or to double-check each one before finally sending the whole document to the printer, choose **Edit individual letters**. You are then asked whether you want to edit **All** or to choose which pages you wish to view/edit. Make your selections and choose **OK**.

Your pages are displayed, and you can print them when you are ready.