

Mail Merge Madness

Dealing with the way Mail Merge changed in MS Word 2003

Go From This:



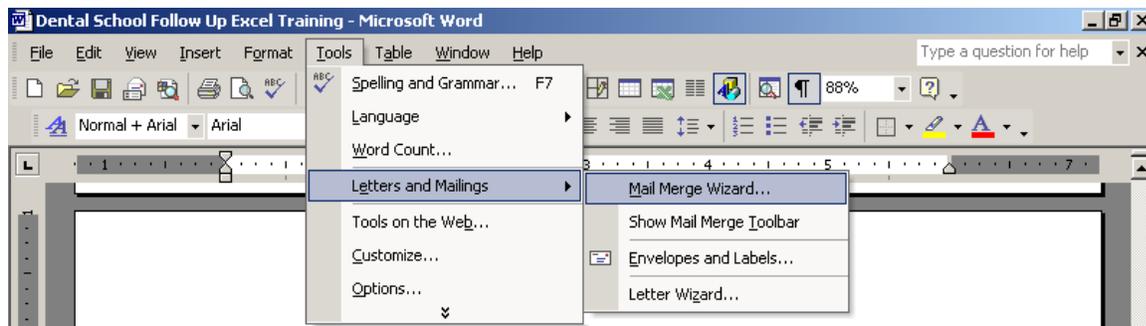
To This:



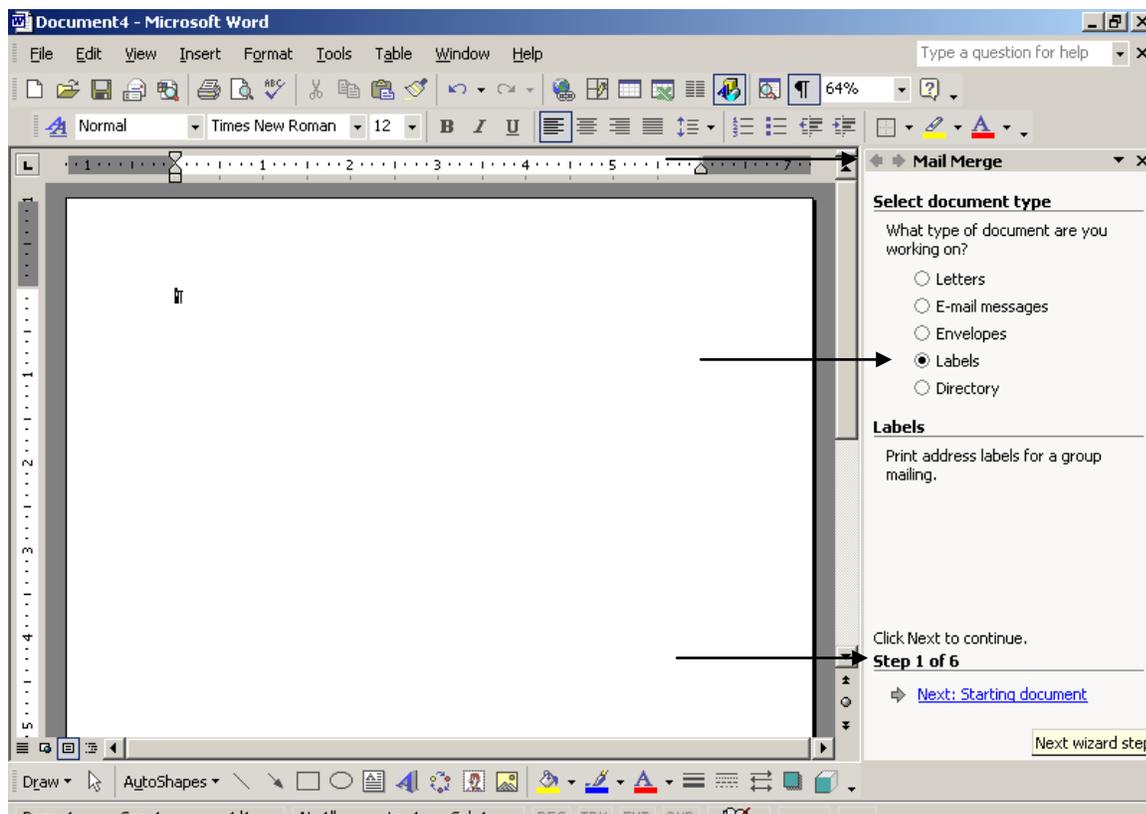
The “New and Improved” Mail Merge

Mail Merge has changed dramatically from the older versions of Word. They just forgot to tell anyone!

It is now listed under **Tools, Letters and Mailings, Mail Merge Wizard**.



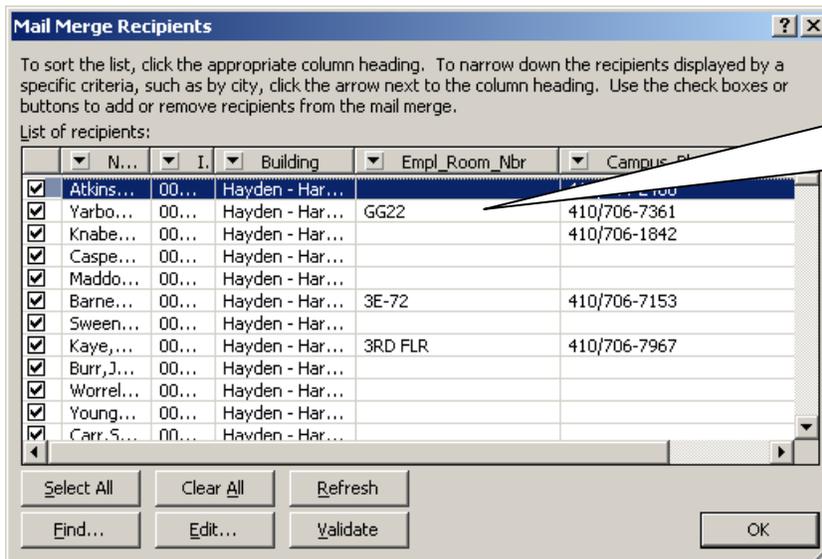
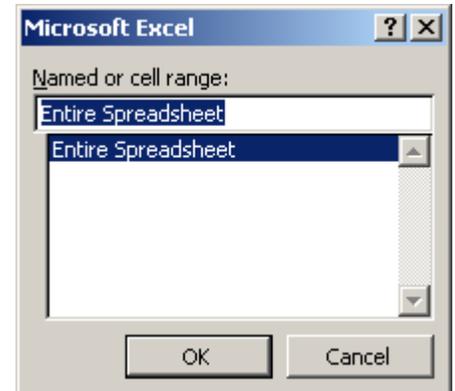
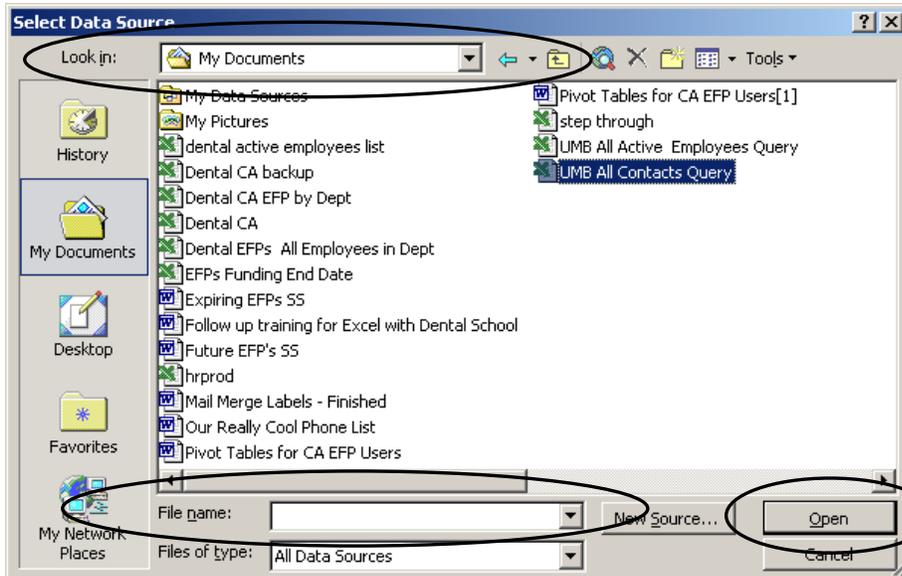
It uses Microsoft’s new **Task Pane** feature. The Wizard opens in the Task Pane (on the right side of the window) and displays Steps 1-6.



Step 1 is Select document type. Choose (click) the document type (e.g., labels). then click **Next** to go to **Step 2 - Starting your document.** This opens the **change document layout** pane where you can choose the *type* of labels. Choose (click) **Label Options** to select the brand and size of labels. Then, click **Next** again to use the current document and to navigate to **Step 3 – Select recipients.**

Select Your Recipients

In **Step 3 – Select recipients**, click **Browse** to select the location and the name of the file to use as your Recipient List (e.g., your Excel document). You will be prompted to choose either the Entire Spreadsheet or one of the Excel sheet tabs that contains your data.



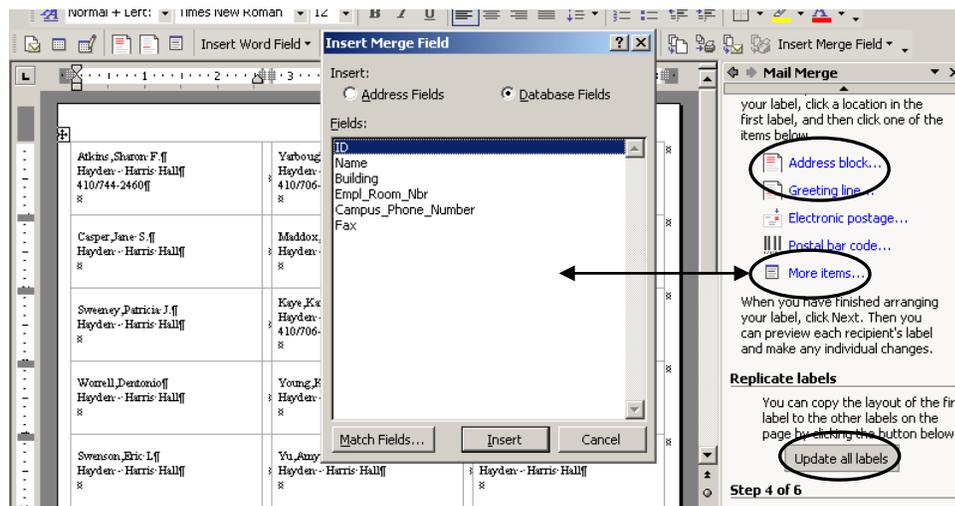
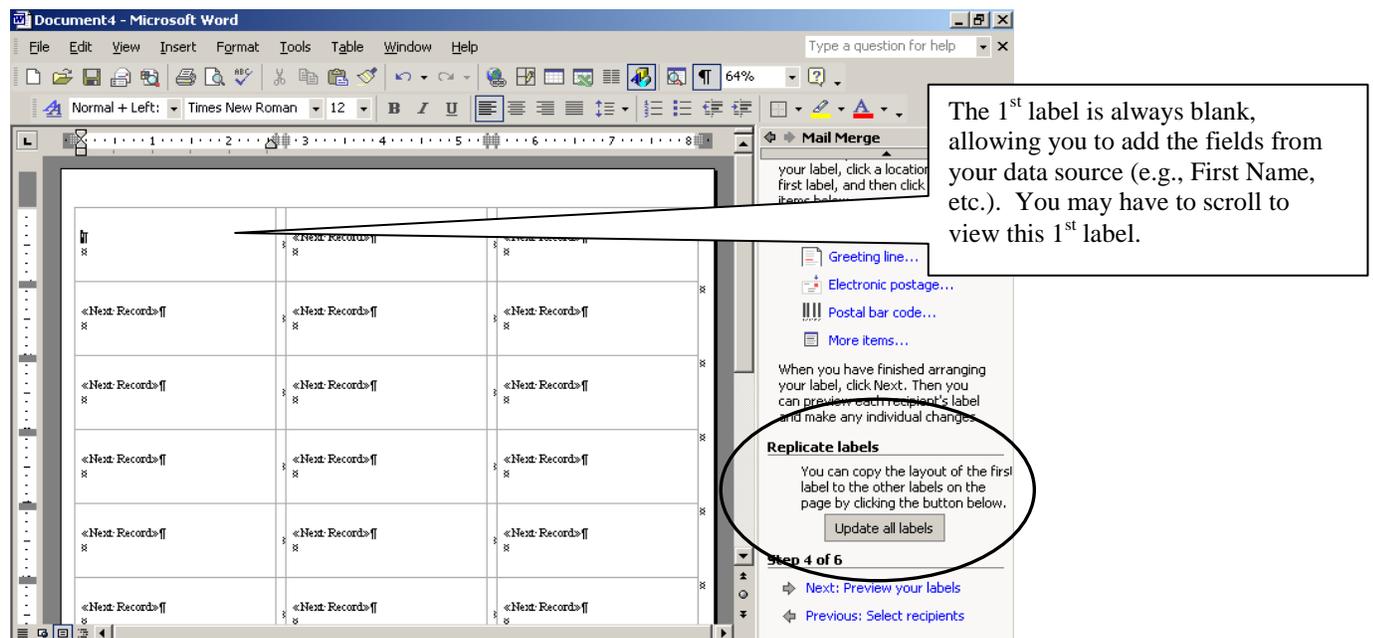
As you can see, there are several new tools available: checkmarks to include/exclude recipients, drop down arrows for filtering, and sorting. Clicking on a column name sorts your list by that field!

Click OK to continue.

Note: Prior to beginning your Mail Merge, it is recommended that you open your Excel document (what used to be called the Data Source) and make sure the 1st row contains the names of the fields to be used in the merge. Do this by deleting all rows up to the 1st row that contains the names of the fields (column names). If you have to, copy and rename the sheet first. Then, save the Excel document. Word will need this so it can easily identify the names of the columns in your recipients list.

Arrange Your Labels

After you have selected your recipients or sorted them, etc, click **Arrange Your Labels** in the Wizard.



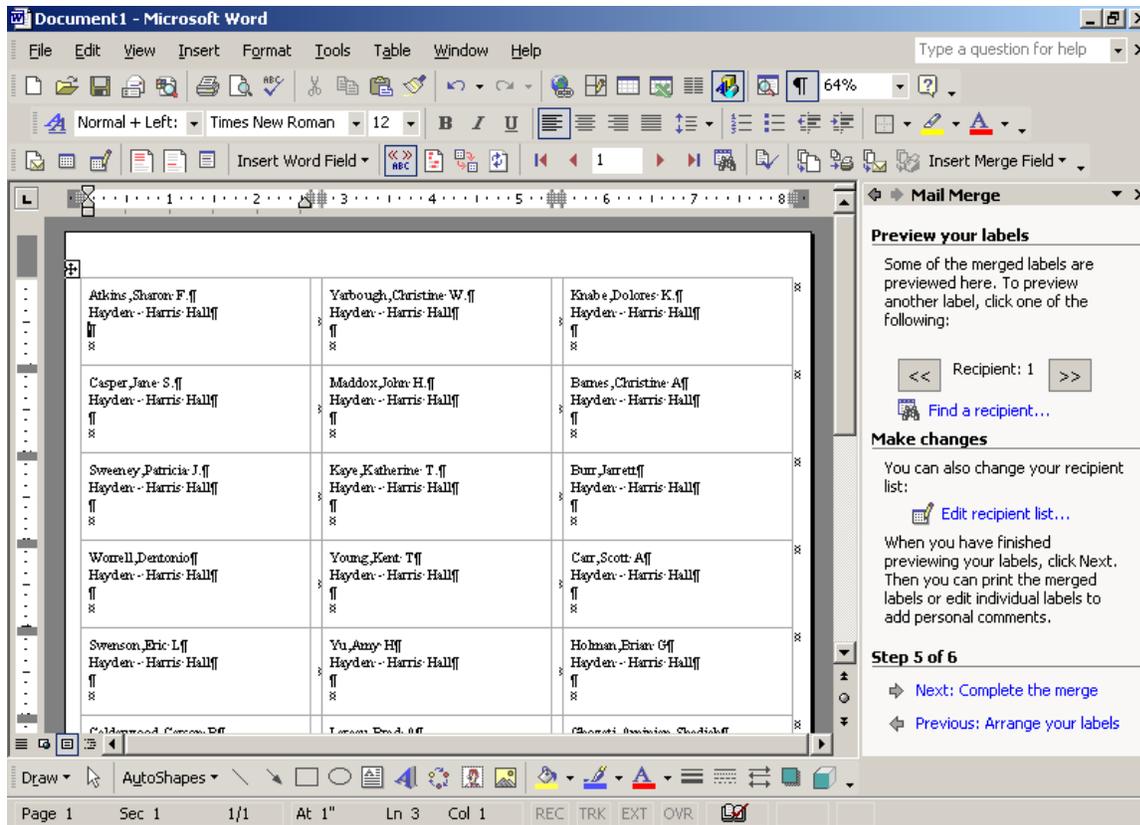
Add the fields to your sample label (Word will give the 1st one as your sample). Do this clicking the **More Items** link in the Wizard. If you use this tool, you will need to click **Insert** and **Close** in between pressing the **Enter** key. This will allow you to have name and address lines.

You can also use the **Address Block** link to choose the fields.

Note: Make sure you then select the button called “**Update All Labels**” after you have added your fields. This will add the word fields to each label. Click **Next** to go to step 5.

Preview Your Labels

After you clicked **Update All Fields**, Word has already merged your document and the recipients – temporarily! It is not final until you have completed Step 6. However, this view allows to “try it before you buy it”.



Click **Next** to go to **Step 6 - Complete the Merge**.

Complete the Merge

Now you can print the labels, save them, and/or edit individual labels.

The screenshot shows the Microsoft Word Mail Merge dialog box. The main area displays a table with 15 rows and 3 columns of names and addresses. The 'Complete the merge' section on the right provides instructions and options to print or edit individual labels. The status bar at the bottom indicates 'Page 1', 'Sec 1', '1/1', 'At 1"', 'Ln 3', 'Col 1', and 'REC TRK EXT OVR'.

Atkins, Sharon F. { Hayden - Harris Hall { { }	Yarrough, Christine W. { Hayden - Harris Hall { { }	Knabe, Dolores K. { Hayden - Harris Hall { { }
Casper, Jane S. { Hayden - Harris Hall { { }	Maddox, John H. { Hayden - Harris Hall { { }	Bames, Christine A. { Hayden - Harris Hall { { }
Sweeney, Patricia J. { Hayden - Harris Hall { { }	Kaye, Katherine T. { Hayden - Harris Hall { { }	Burr, Jarrett { Hayden - Harris Hall { { }
Worell, Dentonio { Hayden - Harris Hall { { }	Young, Kent T. { Hayden - Harris Hall { { }	Carr, Scott A. { Hayden - Harris Hall { { }
Swenson, Eric L. { Hayden - Harris Hall { { }	Yu, Amy H. { Hayden - Harris Hall { { }	Holman, Brian G. { Hayden - Harris Hall { { }
Colburn, Corey D. { Hayden - Harris Hall { { }	Loren, Brad B. { Hayden - Harris Hall { { }	Shaw, Jessica S. { Hayden - Harris Hall { { }

Complete the merge

Mail Merge is ready to produce your mailing labels.

To personalize your labels, click "Edit Individual Labels." This will open a new document with your merged labels. To make changes to all the labels, switch back to the original document.

Merge

- Print...
- Edit individual labels...

Step 6 of 6

Previous: Preview your labels

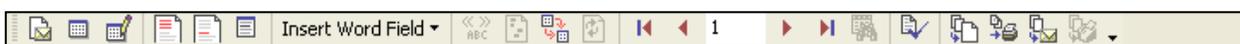
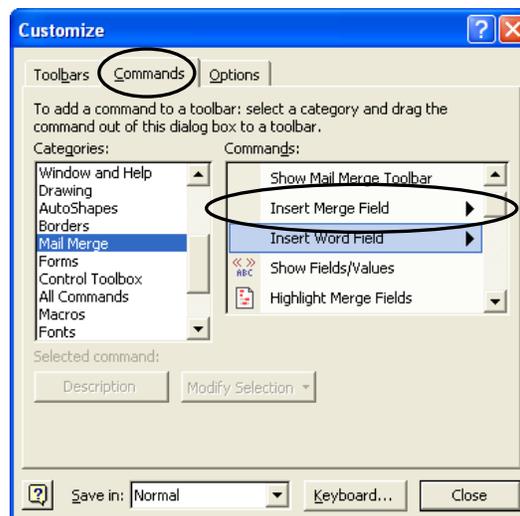
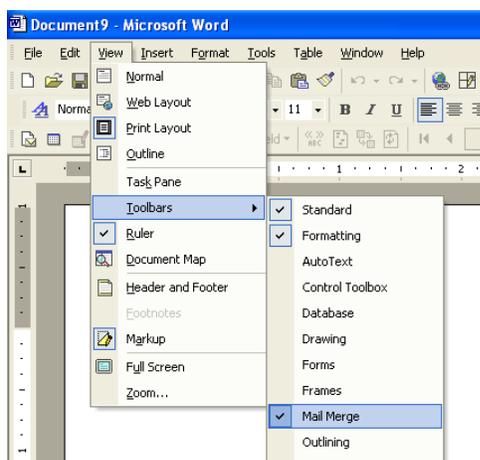
Adding the Insert Word Field Toolbar Button to the Mail Merge Toolbar Insert Merge Field ▾

In earlier versions of Word, the Mail Merge toolbar included a handy toolbar button called **Insert Merge Field**. For some reason, Word took that off the latest version of the Mail Merge toolbar. This tool allowed users to add fields their Main Document (letter or label) with great ease. For instance, if you wanted to add First Name, then type a space, then Last Name, then press Enter, then Address 1, etc., this button allowed you to view your document and select your fields one at a time, *while* being able to click in the document and add your spaces, enter keys, etc.

Now, when you add fields using the **Field List** toolbar button, you are *forced* to select a field and then choose **Insert**, then click to **Close** the field list, then add your space or enter key, then click the field list button again, repeating the process for each field in your letter or label. By adding the **Insert Merge Field** toolbar button, users can more easily add the fields they want, while being able to click in their document and add spaces, enter keys, comas, etc.

To add this toolbar button to your Mail Merge toolbar:

1. Activate the Mail Merge Toolbar, using **View, Toolbars** and choosing **Mail Merge**
2. Click on **View, Toolbars, Customize** and select the **Commands** tab
3. Scroll through the list of toolbars (on the left side) until you can click on Mail Merge
4. Scroll through the list of Mail Merge commands till you see the Insert Merge Field button
5. Drag this toolbar button *from* the list to somewhere along the Mail Merge Toolbar and drop it in the Mail Merge toolbar - I usually add it to the end of the toolbar
6. Click on **Close**



The **Insert Merge Field** tool will now be available anytime you use the Mail Merge Toolbar! This same technique can be used to add *any* tool to *any* toolbar.



Windows Tips and Tricks

Tips:

- As a general rule: **type it, spell check it, save it.** *Then* spend 1/10th the time you used to making it look pretty. You'll spend more time *analyzing* your data, **and** getting ready for presentations.
- **Windows loves selections:**
 - When you select something in Windows, you tell the computer to ignore everything *except* that which is selected. Select something and *then* do something **to** whatever is selected. This works in Word, Excel, PowerPoint, and Outlook.
- In Word, use the formatting toolbar, the ruler and the show/hide toolbar as a substitute for Reveal Codes (for those suffering from Reveal Codes Withdrawal). In Excel, use the formatting toolbar.

Tricks (Word, Excel, etc.)

Control + C, X, V	Copy, Cut, Paste a selection
Control + A	Select All (in a document)
Click + Shift/Click	To select a range (Excel or Word)
Shift + Arrow keys	To increase or decrease a selection
Control + Click	To select non-adjacent cells (in Excel)
Control + D	Duplicate a drawing object
Control + P	To open the print dialogue box
Control + F	To open the Find dialogue box – this works on the Internet, and eUMB as well
Control + S	Save a document (Quick Save)
Control + “	Copies the data from the cell above (Excel only)
Control + Arrow Keys	Move a drawing object (nudge)
Control + Delete	To delete the word in front of the cursor
Control + Backspace	To delete the word in back of the cursor
Control + F4	To close a document
Control + F6	Toggle between open documents
Control + Home	Go to the top of the document
Control + End	Go to the bottom of the document
F7	Starts Spellchecker
Shift + F7	Open the Thesaurus
F4	Repeat last action
Double click gray area of ruler in Word	Opens Page Setup Dialog box
Alt + Tab	Toggle between open applications
Tab or Shift + Tab	Move to the right or left between cells
Edit, Paste Special	Choose “unformatted text” to paste Internet stuff cleanly