

Appendix B - Word™ Mail Merge

This chapter covers instructions for mail merge in Microsoft Word 2003/2002, and for Microsoft Word 2000/97, and is provided as a courtesy for our customers. Auction Systems, Inc. does not provide feature instruction for Microsoft™ Office products.

Tip

Mail-Merge in word processing programs is not inherently difficult; it does require meticulous attention to completing each step correctly. It is often helpful to read the steps out loud as you proceed.

To determine the version of MS Word™ you're using, start Word™, and click **Help, About Microsoft Word**.

If these instructions are not sufficient, please check Help in your copy of Word™, or contact Microsoft Corporation for assistance.

Export desired **Names, Items, or Transactions** as explained in *Exporting to Plain-Text Files, Exporting to Excel, and Exporting to Word Tables*.

When you export to a Word Table, proceed to *Creating the Template Letter for Mail Merge*.

Creating the Source Document for Mail Merge from a Plain Text File

- a. Start Microsoft Word™ 2003, 2002, 2000, or 97 to view and work with the exported text file.
- b. Choose **File, Open**. Near the lower edge, select **Files of Type:** and **change** the type of file to be opened to Text Files(*.txt).
- c. **Double-click** to open the data exported from *Auction!* named YOURFILENAME.txt. Your data is on screen; don't worry if it looks messy and unformatted.
- d. Choose **Edit** menu, **Select All**, or **press CTRL + A**. Your text is highlighted.

- e. Choose **Table, Convert, Text to Table**. Word™ assesses how many columns and rows are in your data. Click **OK** to continue, or revise the count and click **OK**.
- f. The data is displayed in a table of columns and rows.
- g. Choose **File, Save As** (not **Save**).
- h. Near the lower edge, select **Files of Type:** and **change** the type of file to be saved to Word Document(*.doc).
- i. **Change** the location and the file name, if desired. The file is named YOURFILENAME.doc. This is the data source for Mail Merge.
- j. **Close** the document, and proceed to Mail Merge.

Word™ 2003/2002 Mail Merge

There are a number of ways to accomplish mail merge in Word™. Instructions here are provided for merging with the assistance of the mail merge wizard. Users with other experience may choose an alternate method.

Step 1 of 6: Document Type

- a. Start MS Word™. Choose **Tools, Letters & Mailings, Mail Merge**. The Task Pane is displayed on the right-hand side of the screen.
- b. Select **Letters** at upper-right, and click **Next: Starting Document**.

Step 2 of 6: Starting Document

- a. Select **Use Current Document** to start a new letter or you can **Start from Existing Document** if you have already drafted a letter.
- b. Click **Next: Select Recipients**.

Step 3 of 6: Select Recipients

- a. Select **Browse** to find your exported .doc file. Files of type should be **All Data Sources**.
- b. Navigate to the location where your data is stored. Click on the data source document and click **Open**. Your data is displayed on the **Mail Merge Recipients** preview screen.
- c. All lines have check marks indicating selection. Remove a line by unchecking to exclude it and click **OK**.
- d. Click **Next: Write your Letter**.

Step 4 of 6: Writing the Letter

- a. Select **More Items**.
- b. Insert field names by highlighting the desired field and clicking **Insert**, or double-clicking the field name. You may insert more than one field before closing **Insert Merge Field**. Re-open the field list for insertion by clicking **More Items** as needed.
- c. Type your letter, and arrange fields, layout and fonts to meet your needs. Be sure to create spaces around field names and add punctuation.
- d. When you complete typing the letter, click **File, Save**. Name the letter something like **2005 Thank You Letter Format**.

Note

Word™ uses special “wavy” brackets around merge fields. These brackets cannot be simply typed. Be sure to keep the wavy brackets WITH the field names when moving fields around in your documents.

Step 5 of 6: Previewing Letters

- a. Click **Next, Preview your Letters**. Carefully examine the layout and wording, with real information now inserted in place of field names. To revise the format, click **Previous, Write your Letter**.
- b. Click **Next, Complete the Merge**.

Step 6 of 6: Complete the Merge

- a. Click **Edit Individual Letters**.

- b. **Merge to a New document** is displayed.
- c. Select **ALL** or enter a range to merge and click **OK**.
- d. Name and **Save** your document, with a name such as **2005 Donor Thank You Letters**.
- e. Review and print desired letters.

Tip

*Each page or letter in a mail merge document is a Section. To print the 11th through 20th letters, click **File, Print**, and enter **s11 - s20** in **Range**.*

Word™ 2000/97 Mail Merge

Part 1 of 3: Creating the Source Data File for Mail Merge

When data is already in Word table format, you can proceed to **Creating the Template Letter for Mail Merge**. If not, see *Creating the Source Document for Mail Merge from a Plain Text File*.

Part 2 of 3: Creating the Template Letter for Mail Merge

- a. In MSWord™, select **File, New**.
- b. Select **Tools, Mail Merge**.
- c. At **Step 1: Main Document**, click **Create, Form Letters**, and choose **New Main Document**.
- d. On **Step 2: Data Source**, click **Get Data**.
- e. Choose **Open Data Source**, then locate the data file created previously, named YOURFILENAME.doc. You may need to change **Files of Type** to **Word Documents**. Select the file and click **Open**.
- f. A message is displayed; choose **Edit Main Document**.
- g. **Type** your letter, using the **Insert Merge Field** toolbar added at upper-left in Word's document window to insert merge fields for name, address, items donated, etc into the proper places in your letter.

Note

Word™ uses special “wavy” brackets around merge fields. These brackets cannot be simply typed. Select **Insert, Merge Field** from the drop-down list on the merge toolbar to create these characters with field names.

- h. **Format** your letter, using Word’s capabilities for fonts, margins, etc.
- i. When the letter design is satisfactory, save the letter. Click **File, Save As** and type a name for your letter, such as **Thank You Letter Template.doc**. See *Sample Thank You letter*.

Part 3 of 3: Creating Letters with Mail Merge Information

- a. In MS Word™, open the designed thank you letter template, if it is not already open.
- b. Select **Tools, Mail Merge**.
- c. Click **Step 3, Merge**.
- d. Click **Merge** on **Mail Merge Helper**.
- e. A letter is created for each record, joining the records with the thank you letter template.
- f. **Preview** the letters and **edit** if necessary. You may need to tidy up the names, addresses, and donated items fields on some of the letters.
- g. Save the entire file of letters with merged data before printing. Name the file something like **Donor Thank You Letters 2005.doc** to differentiate it from your template document.
- h. Review and Print desired letters.

Tip

In Word, each page of a Mail Merge document is a **section**. To print specific pages, Click **File, Print** and type **s3** (section 3), or **s11-s20** (sections 11 to 20) in **Range**.

Tip

Print a limited quantity of letters each time, by selecting sections, e.g. **s100 - s150**. Printing hundreds of pages and having a paper jam or depleted cartridge will result in time wasted and damaged letterhead stationery.

Sample Thank You Letter

«First_Name» «Last_Name»
«Company»
«Address»
«City», «State» «Zip_Code»

Dear «First_Name»,

Thank you for your donation to St. Isidore of Seville School's Pikes Peak SnowBall dinner auction. Your gift of «Items_Donated» is very much appreciated.

Our auction is a community-building event that assists us in keeping tuition affordable and provides enrichment to the mental, physical, and spiritual education of our students. Your generosity contributes to our success.

Per tax regulations, your donation may be completely tax-deductible, as no goods or services have been provided in return by St. Isidore of Seville School. A listing of your donations is provided below for your tax records.

We are truly blessed by the parents, parishioners, clergy, and business people who have given of their time, talent, and treasure to our school!

Thank you and may God bless you,

St. Isidore of Seville parent volunteer

St. Isidore of Seville School Auction, Pikes Peak SnowBall, 6 December 2005
Non-profit Tax ID # 72-0404200
Items Donated: «Items_Donated»