

Mail Merge in Office XP

With Microsoft Office XP, many common tasks have been simplified, not the least of which is that of performing a mail merge. Using the Mail Merge Wizard in Word 2002 lets you create and merge a form letter in minutes. Here's how:

Step One:

- Start with a blank document, then if your Task Pane isn't 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'll 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 a choice as to your 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:

Next, you need to select your recipients:

- If you have an existing database, click **Use an existing list**, and then click **Browse** to find it.
- If you wish to use your Outlook contacts, click **Select from Outlook contacts**, then click **Choose Contacts folder**. Select the folder you wish to use and click **OK**.
- If you don't 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're done with an individual entry, click **New Entry**. When you're 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 haven't 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're happy with your letter, click **Next: Preview your letters**.

Step Five:

- Browse through your letters using the back and forward buttons.
- When you're satisfied, click **Next: Complete the Merge**.

Step Six:

- Now 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're 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**.

With Office XP, creating a mail shot couldn't be simpler.