

MS Office 2010



Word Mail Merge

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Mail Merge

Create Letters and Other Documents

You use Mail Merge when you want to create a set of documents, such as a form letter that is sent to many customers or a sheet of address labels. Each letter or label has the same kind of information, yet the content is unique. e.g. in letters to your customers, each letter can be personalized to address each customer by name. The unique information in each letter or label comes from entries in a data source.



Main Steps

The mail merge process entails the following overall steps:

- 1. SET UP THE MAIN DOCUMENT**

The main document contains the text and graphics that are the same for each version of the merged document. e.g. the return address or salutation in a form letter.
- 2. CONNECT THE DOCUMENT TO A DATA SOURCE**

A data source is a file that contains the information to be merged into a document. e.g., the names and addresses of the recipients of a letter.
- 3. ADD PLACEHOLDERS**

These are known as mail merge fields, to the document. When you perform the mail merge, the mail merge fields are filled with information from your data file.
- 4. REFINE THE LIST OF RECIPIENTS OR ITEMS**

Word generates a copy of the main document for each item, or record, in your data file. If your data file is a mailing list, these items are probably recipients of your mailing. If you want to generate copies for only certain items in your data file, you can choose which items (records) to include.
- 5. PREVIEW AND COMPLETE THE MERGE**

You can preview each copy of the document before you print the whole set.

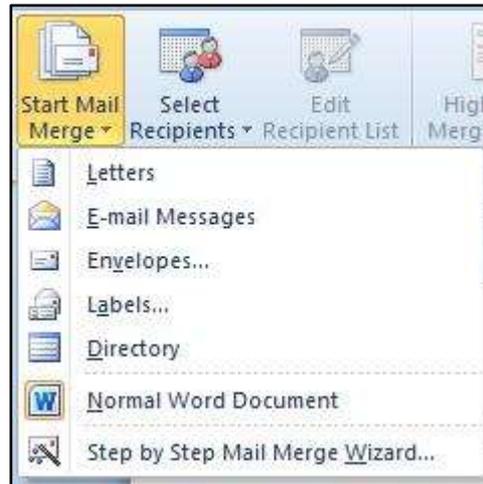
You use commands on the MAILINGS ribbon to perform a mail merge.

You can also perform a mail merge by using the MAIL MERGE task pane, which leads you step by step through the process. To use the task pane, in the START MAIL MERGE group on the MAILINGS ribbon, click START MAIL MERGE, and then click STEP BY STEP MAIL MERGE WIZARD.

Set Up the Main Document

To set up main document.

- Open or create a document and leave it open. If you close it, the commands in the next step are not available
- On the **MAILINGS** ribbon, in the **START MAIL MERGE** group, click **START MAIL MERGE**
- Click the type of document that you want to create



Envelopes	The return address is the same on all the envelopes, but the destination address is unique on each one. Click ENVELOPES , and then specify your preferences for envelope size and text formatting on the ENVELOPE OPTIONS tab of the ENVELOPE OPTIONS dialog box.
Labels	Each label shows a person's name and address, but the name and address on each label is unique. Click LABELS , and then specify your preferences for the type of label in the LABEL OPTIONS dialog box.
Form Letters or E-mail messages	The basic content is the same in all the letters or messages, but each contains information that is specific to the individual recipient, such as name, address, or some other piece of information. Click LETTERS or E-MAIL MESSAGES to create these types of documents.
A catalog or directory	The same kind of information, such as name and description, is shown for each item, but the name and description in each item is unique. Click DIRECTORY to create this type of document.

To resume a mail merge

If you need to stop working on a mail merge, you can save the main document and resume the merge later. Microsoft Office Word retains the data source and field information. If you were using the **MAIL MERGE** task pane, Word returns to your place in the task pane when you resume the merge.

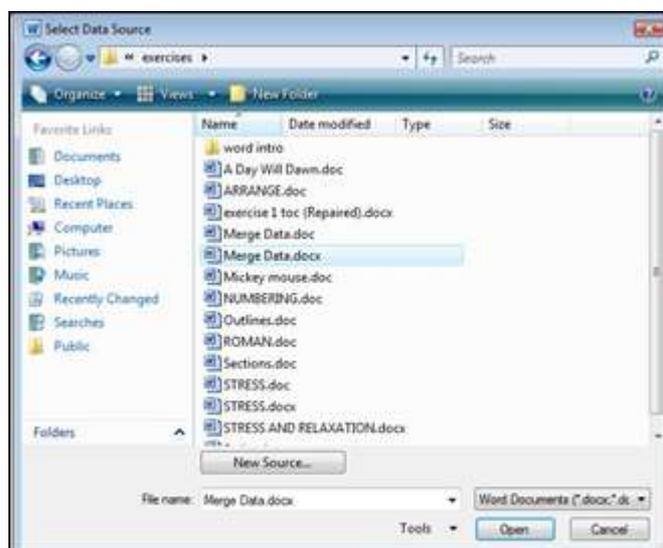
- When you're ready to resume the merge, open the document. Word displays a message that asks you to confirm whether you want to open the document, which will run a SQL command to reconnect you to your data source.
- Because this document is connected to a data source and you want to retrieve the data, click **YES**. If you were opening a document that you did not realize was connected to a data source, you could click **NO** to prevent potentially malicious access to data.
- The text of the document, along with any fields that you inserted, appears.
- Click the **MAILINGS** ribbon, and resume your work.

Connect the Document to a Data Source

To merge information into your main document, you must connect the document to a data source, or a data file. If you don't already have a data file, you can create one during the mail merge process.

To choose a data file from outlook

- On the **MAILINGS** ribbon, in the **START MAIL MERGE** group, click **SELECT RECIPIENTS**
- Choose **EXISTING LIST** The **SELECT DATA SOURCE** dialog opens.
- Locate the file with your data and click on **OPEN**



We will use a word document but you may use any of the data sources listed in the table below.

Our word data is laid out in a table as in the following picture (there is no need to open the document just connect to it).

Title	FirstName	LastName	Company	Address1	City	State	Zip
Mr.	Tim	Granus	Virginia Conservation	354 Saw Mill Road	Alexandria	VA	22311
Mr.	Carlos	Santos	Santos Inc.	145 Windsor Dr.	Alexandria	VA	22314
Ms.	Rachel	Tagon	EGS	112 Perry Street	Aurora	CO	80015
Mr.	William	Moore	Diversified Corporation	561 Third Street	Austin	TX	78728
Mrs.	Anne	Smolkovich	Shelburne Schools	693 Northcutt Drive	Burlington	VT	05401
Mr.	Ben	Willenbecher	McCooey & Sons	87 Country Lane	Charlottesville	VA	22054
Ms.	Samantha	MacFall	W. Mercer and	9 Robinwood Trail	Chicago	IL	60616

You May use data from any of these sources:

Excel file	If you have a Microsoft Office Excel worksheet, a Microsoft Office Access database, or another type of data file, click USE EXISTING LIST , and then locate the file in the SELECT DATA SOURCE dialog box you can select data from any worksheet or named range within a workbook. For Access, you can select data from any table or query that is defined in the database. For another type of data file, select the file in the SELECT DATA SOURCE dialog box. If the file is not listed, select the appropriate file type or select ALL FILES in the FILES OF TYPE box. In a mail merge, you can use the following types of data files:
Database.-	Files from single-tier, file-based database programs for which you have installed an OLE DB provider or ODBC (Open Database Connectivity): A standard method of sharing data between databases and programs. ODBC drivers use the standard Structured Query Language (SQL) to gain access to external data driver (a number of which are included with Microsoft Office).
CSV (delimited text file)	Click the USE AN EXISTING LIST option, and browse to locate the .csv file that you have exported or any text file that has data separated (or delimited) by tab characters or commas and data records separated by paragraph marks.. Before the file opens, you may be asked to select which separator character will separate one column from another in your address list. Click COMMA for CSV files, and then click OK .
Contacts (outlook)	If you want to use your Contacts list in Outlook, click Select from Outlook Contacts. Any similar address lists that were created with a MAPI-compatible messaging system.
Microsoft Word document.	The document should contain a single table. The first row of the table must contain headings, and the other rows must contain the records that you want to merge. You can also use a header source (header source: A document that contains the header row (or header record) to be used with the data source specified for a mail-merge main document.) as a data source.

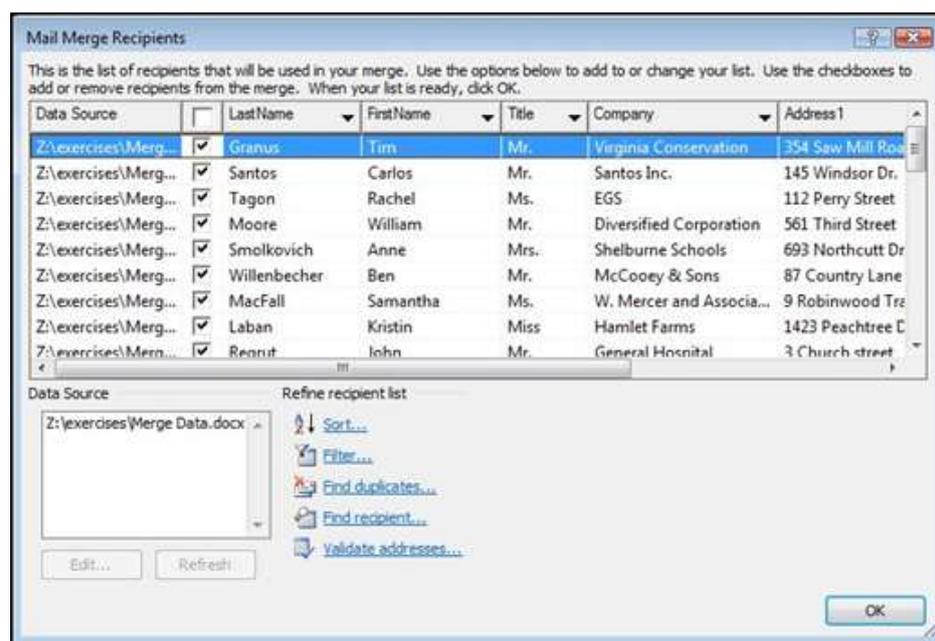
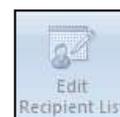
HTML File.	An HTML file that has a single table. The first row of the table must contain column names, and the other rows must contain data.
Microsoft Schedule+	7.0 Contact List

To Sort or Filter the List of Recipients

When you connect to a certain data file, you might not want to merge information from all the records in that data file into your main document.

To refine list of recipients

- On the **MAILINGS** Ribbon, in the **START MAIL MERGE** group, click **Edit Recipient List**.
- In the **MAIL MERGE RECIPIENTS** dialog box Select individual records to filter your list. This method is most useful if your list is short. Select the check boxes next to the recipients you want to include, and clear the check boxes next to the recipients you want to exclude.



If you know that you want to include only a few records in your merge, you can clear the check box in the header row and then select only those records that you want. Similarly, if you want to include most of the list, select the check box in the header row, and then clear the check boxes for the records that you don't want to include.

To Sort records

- Click the column heading of the item that you want to sort by. The list sorts in ascending alphabetical order (from A to Z). Click the column heading again to sort the list in descending alphabetical order (Z to A).

*If you want more complex sorting, click **SORT** under **REFINE RECIPIENT LIST** and choose your sorting preferences on the **SORT RECORDS** tab of the **FILTER AND SORT** dialog box.*

e.g. you can use this type of sorting if you want recipient addresses to be alphabetized by last name within each post code and the post codes listed in numerical order.

*If you have installed address validation software, you can click **VALIDATE ADDRESSES** in the **MAIL MERGE RECIPIENTS** dialog box to validate your recipients' addresses.*

To sort records by dialog

- Under **REFINE RECIPIENT LIST**, click **SORT**.
- On the **SORT RECORDS** tab of the **FILTER AND SORT** dialog box, choose the fields you want to sort by you can sort by up to three levels.
- Click **OK** to apply the sort

To Filter records by dialog

This is useful if the list contains records that you know you don't want to see or include in the merge. After you filter the list, you can use the check boxes to include and exclude records.

- Under **REFINE RECIPIENT LIST**, click **FILTER**.
- On the **FILTER RECORDS** tab of the **FILTER AND SORT** dialog box, choose the criteria you want to use for the filter.

The screenshot shows the 'Query Options' dialog box with the 'Sort Records' tab selected. The dialog has three columns: 'Field:', 'Comparison:', and 'Compare to:'. The first row is populated with 'Title' in the 'Field:' column, 'Equal to' in the 'Comparison:' column, and 'Ms|' in the 'Compare to:' column. Below this, there are four empty rows for additional criteria. On the left side, there is an 'And' dropdown menu. At the bottom, there are 'Clear All', 'OK', and 'Cancel' buttons.

	Field:	Comparison:	Compare to:
And	Title	Equal to	Ms

*e.g. to generate copies of your main document only for the people titled "Ms" that list shows as the Title, you would click **Title** in the **Field** list, **Equal to** in the **Comparison** list, and shows "Ms" in the **Compare to** list.*

- To refine the filter further, click **AND** or **OR**, and then specify more criteria

Merge Fields

After you connect your main document to a data file and have refined your list of recipients you are ready to type the text of the document and add placeholders that indicate where the unique information will appear in each copy of the document.

The placeholders, such as address and greeting, are called mail merge fields. Fields in Word correspond to the column headings in the data file that you select.

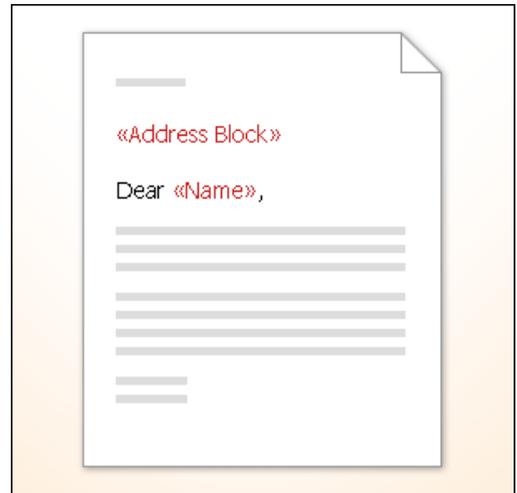
	A	B	C
1	Name	Last Name	Street Address
2	Nancy	Anderson	123 Main St.
3	Ann	Beebe	567 Country Rd.
4			
5			
6			
7			
8			
9			

COLUMNS in a data file represent categories of information. Fields that you add to the main document are placeholders for these categories.

ROWS in a data file represent records of information. Word generates a copy of the main document for each record when you perform a mail merge.

By putting a field in your main document, you indicate that you want a certain category of information, such as name or address, to appear in that location.

When you insert a mail merge field into the main document, the field name is always surrounded by chevrons (« »). These chevrons do not show up in the merged documents. They just help you distinguish the fields in the main document from the regular text.



What happens when you merge

When you merge, information from the first row in the data file replaces the fields in your main document to create the first merged document. Information from the second row in the data file replaces the fields to create the second merged document, and so on.

Examples

You can add any column heading from your data file to the main document as a field. This gives you flexibility when you design form letters, labels, e-mail messages, and other merged documents. e.g. Suppose you are creating a letter to notify local businesses that they have been selected for inclusion in your annual city guide. If your data file contains a Company column with the name of each business that you want to contact, you can insert the «Company» field instead of typing the name of each individual company.

	A	B	C
1	Name	Last Name	Street Address
2	Nancy	Anderson	123 Main St.
3	Ann	Beebe	567 Country Rd.
4			
5			
6			
7			
8			
9			

Imagine that you send quarterly e-mail messages to your customers alerting them to new products and special deals. To personalize those messages for your best customers, you can add a "PersonalNote" column to your data file where you can type notes such as "Miss Miller, the new widget is exactly what you have been looking for." By placing a «PersonalNote» field in the main document, you can include those notes at the bottom of certain messages.

Suppose that your mailing list is for subscribers to your newsletter, and your data file includes a column, called ExpireDate, for storing the date that each subscription expires. If you place an «ExpireDate» field in the label main document before you run the merge, subscribers will each see their own expiration date on their mailing label.

You can combine fields and separate them by punctuation marks. e.g. to create an address, you can set up the fields in your main document like this:

«First Name» «Last Name»

«Street Address»

«City», «State» «Postal code»

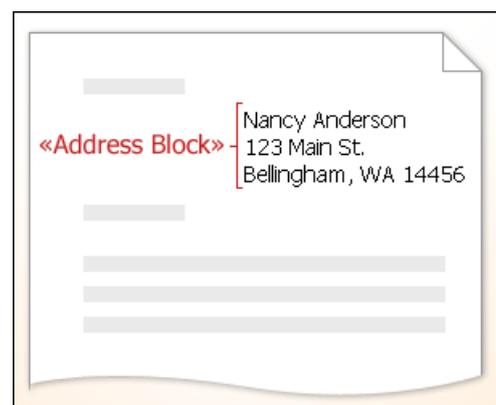
Address Blocks

For things that you use frequently, like address blocks and greeting lines, Word provides composite fields that group a number of fields together. e.g.:

The Address Block field is a combination of several fields, including first name, last name, street address, city, and postal code.

The Greeting Line field can include one or more name fields, depending on your chosen salutation.

You can customize the content in each of these composite fields. e.g. in the address, you may want to select a formal name format (Mr. Joshua Randall Jr.); in the greeting, you may want to use "To" instead of "Dear."



To create address blocks

To make sure that Word can find a column in your data file that corresponds to every address or greeting element, you may need to map the mail merge fields in Word to the columns in your data file.



- To map the fields, click **MATCH FIELDS** in the **WRITE & INSERT FIELDS** group of the **MAILINGS** ribbon. The **Match Fields** dialog box opens



- The elements of an address and greeting are listed on the left. Column headings from your data file are listed on the right
- Word searches for the column that matches each element. In the illustration, Word automatically matched the data file's **SURNAME** column to **LAST NAME**. But Word was unable to match other elements. From this data file, e.g. Word can't match **FIRST NAME**
- In the list on the right, you can select the column from your data file that matches the element on the left. In the illustration, the **NAME** column now matches **FIRST NAME**. It's okay that **COURTESY TITLE, UNIQUE IDENTIFIER, and MIDDLE NAME** aren't matched. Your mail merge document doesn't need to use every field. If you add a field that does not contain data from your data file, it will appear in the merged document as an empty placeholder — usually a blank line or a hidden field

Type Content and Add Fields

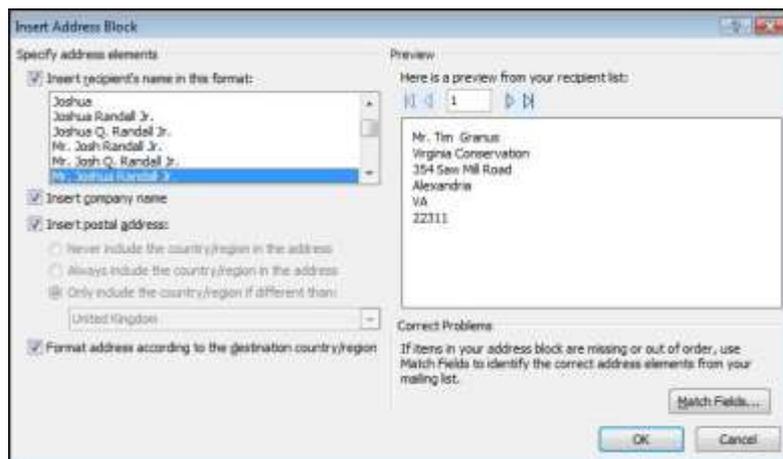
To insert fields

- In the main document, click where you want to insert the field.
- Use the **WRITE & INSERT FIELDS** group on the **MAILINGS** ribbon.



To add Address block with name, address, and other information

- Click **ADDRESS BLOCK**.
- In the **INSERT ADDRESS BLOCK** dialog box, select the address elements that you want to include and the formats that you want, and then click **OK**.



- If the **MATCH FIELDS** dialog box appears, Word may have been unable to find some of the information that it needs for the address block. (See previous how to match fields.)

To insert Greeting line

- Click **GREETING LINE**.
- Select the greeting line format, which includes the salutation, name format, and following punctuation.



- Select the text that you want to appear in cases where Word can't interpret the recipient's name, e.g. when the data source contains no first or last name for a recipient, but only a company name.
- Click **OK**.
- If the **MATCH FIELDS** dialog box appears, Word may have been unable to find some of the information that it needs for the address block. (See above how to match fields.)

To insert Individual fields

You can insert information from individual fields, such as first name, telephone number, or the amount of a contribution from a list of donors. To quickly add a field from your data file to the main document, click the arrow next to **INSERT MERGE FIELD**, and then click the field name.

- On the **MAILINGS** ribbon, in the **WRITE & INSERT FIELDS** group, click the arrowed part of the **INSERT MERGE FIELD** button.
- Select a field from the drop down list for it to be inserted.

Or

- On the **MAILINGS** ribbon, in the **WRITE & INSERT FIELDS** group, click the **INSERT MERGE FIELD** button. To open the insert merge field dialog
- In the **INSERT MERGE FIELD** dialog box, (To select address fields that will automatically correspond to fields in your data source, even



if the data source's fields don't have the same name as your fields), click **ADDRESS FIELDS**.



- To select fields that always take data directly from a column in your data file, click **DATABASE FIELDS**.
- In the **FIELDS** box, click the field you want.
- Click **INSERT**, and then click **CLOSE**.
- If the **MATCH FIELDS** dialog box appears, Word may have been unable to find some of the information that it needs for the address block. (See previous how to match fields.)

*If you insert a field from the **DATABASE FIELDS** list and then later switch to a data source that doesn't have a column with the same name, Word won't be able to insert that field information into the merged document.*

Format Merged Data

Database and spreadsheet programs, such as Microsoft Office Access and Microsoft Office Excel, store the information that you type in cells as raw data. Formatting that you apply in Access or Excel, such as fonts and colours, isn't stored with the raw data. When you merge information from a data file into a Word document, you are merging the raw data without the applied formatting.

To format the data in the document, select the mail merge field and format it, just as you would format any text. Make sure that the selection includes the chevrons (« ») that surround the field.

Preview the Merge

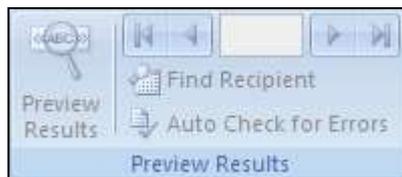
After you add fields to your main document, you are ready to preview the merge results. When you are satisfied with the preview, you can complete the merge.

To Preview the merge

You can preview your merged documents and make changes before you actually complete the merge.

To preview, do any of the following in the **PREVIEW RESULTS** group of the **MAILINGS** ribbon:

- Click **PREVIEW RESULTS**.



- Page through each merged document by using the **NEXT RECORD** and **PREVIOUS RECORD** buttons in the **PREVIEW RESULTS** group.
- Preview a specific document by clicking **FIND RECIPIENT**.

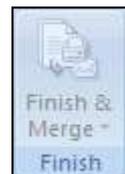
*Click **EDIT RECIPIENT LIST** in the **START MAIL MERGE** group on the **MAILINGS** ribbon to open the **MAIL MERGE RECIPIENTS** dialog box, where you can filter the list or clear recipients if you see records that you don't want to include.*

Completing the Merge

You can print the merged documents or modify them individually. You can print or change all or just a subset of the documents.

To Print the merged documents

- On the **MAILINGS** ribbon, in the **FINISH** group, click **FINISH & MERGE**, and then click **PRINT DOCUMENTS**.
- Choose whether to print the whole set of documents, only the copy that's currently visible, or a subset of the set, which you specify by record number.



To Change individual copies of the document

- On the **MAILINGS** ribbon, in the **FINISH** group, click **FINISH & MERGE**, and then click **EDIT INDIVIDUAL DOCUMENTS**.
- Choose whether you want to edit the whole set of documents, only the copy that's currently visible, or a subset of the set, which you specify by record number. Word saves the copies that you want to edit to a single file, with a page break between each copy of the document.

Save the main document

Remember that merged documents that you save are separate from the main document. It's a good idea to save the main document itself if you plan to use it for another mail merge.

When you save the main document, you also save its connection to the data file. The next time that you open the main document, you are prompted to choose whether you want the information from the data file to be merged again into the main document.

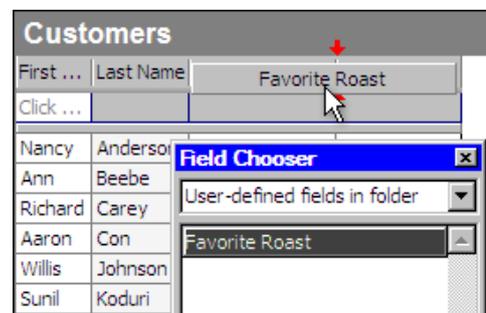
1. If you click **Yes**, the document opens with information from the first record merged in.
2. If you click **No**, the connection between the main document and the data file is broken. The main document becomes a standard Word document. Fields are replaced with the unique information from the first record.

Custom Fields from Outlook Contacts

The only way to include custom contact fields in your main document is to start the mail merge from within Outlook. First, set up a view of your contacts with the fields that you want to use in the merge. Then, start the mail merge. After you choose the settings that you want, Word will automatically open, and you can complete the merge.

To Set up a view of your contacts that includes custom fields

- In **OUTLOOK CONTACTS**, on the **VIEW** menu, point to **CURRENT VIEW**, and then click **PHONE LIST**.
- Right-click a column heading, and then click **FIELD CHOOSER**.
- In the drop-down list at the top of the **FIELD CHOOSER** dialog box, select **USER-DEFINED FIELDS IN FOLDER**
- Drag the field that you to add from the dialog box to the column headings. A little red arrow helps you place the field in the location that you want.
- You can add a new field in the **FIELD CHOOSER** dialog box by clicking **NEW** at the bottom.
- After you add all of your custom fields to the view, close the **FIELD CHOOSER** dialog box.
- To remove a field that you do not want included in the mail merge, click the field name in the column heading in Phone List view, and drag it off of the column heading.

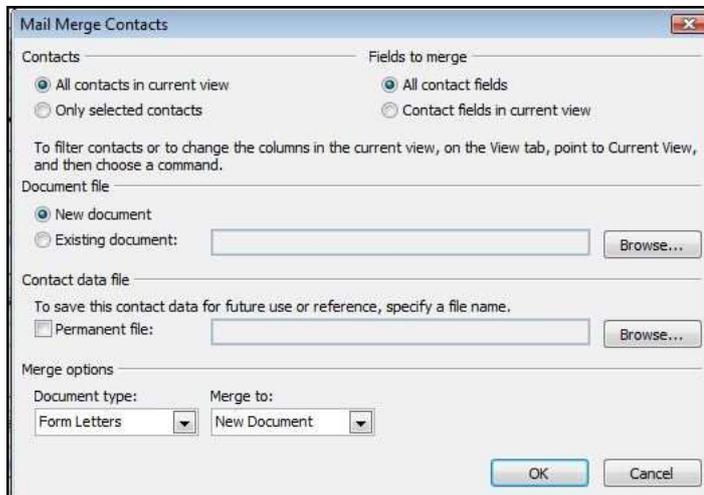


Run Mail Merge from Outlook

In Outlook Contacts, select individual contacts by pressing **SHIFT** and clicking to select a range or by pressing **CTRL** and clicking to select individuals. If you want to include all the contacts currently visible in the view, do not click on any contacts.

To Mail Merge from Outlook

- While in Outlook go to the **CONTACTS** folder
- On the **HOME** ribbon in the **ACTIONS** group, click **MAIL MERGE**. The following dialog will open.



- If you have selected individual contacts to include in the merge, click **ONLY SELECTED CONTACTS**.
- If you want to include all the contacts currently visible in the view, click **ALL CONTACTS IN CURRENT VIEW**.
- If you have configured the Phone List view so that it displays exactly the fields you want to use in the merge, click **CONTACT FIELDS IN CURRENT VIEW**. Otherwise, click **ALL CONTACT FIELDS** to make all of the contact fields available in the merge.
- If you want to generate a new main document for the merge, click **NEW DOCUMENT**. Otherwise, click **EXISTING DOCUMENT**, and click **BROWSE** to locate the document to use as the main document.
- If you want to save the contacts and fields that you have selected, so that they can be reused, select the **PERMANENT FILE** check box, and then click **BROWSE** to save the file. The data is saved in a Word document as comma-delimited data.

Select any merge options you want:

1. **FORM LETTERS** Prepare a batch of letters for a mass mailing.
 2. **MAILING LABELS** Set up address labels for a mass mailing.
 3. **ENVELOPES** Set up envelopes for a mass mailing.
 4. **CATALOGUE** Create a single document that contains a catalogue or address list.
 5. **NEW DOCUMENT** Generate merged documents, which you can edit individually in Word.
 6. **PRINTER** Send merged documents directly to the default printer.
 7. **E-MAIL** Generate merged documents designed to be e-mail messages. When you are ready to complete the merge in Word, on the **MAILINGS** ribbon in the **FINISH** group, click **FINISH & MERGE**, and then click **SEND E-MAIL MESSAGES**. The **SUBJECT** line is filled with the text you typed in the **MAIL MERGE CONTACTS** dialog box in Outlook.
- Click **OK**. When the document opens in Word, on the **MAILINGS** ribbon, in the **WRITE & INSERT FIELDS** group, click the arrow next to **INSERT MERGE FIELD**, and then click the fields that you want to add to the document.

*You can't type merge field characters («« »») manually or use the **SYMBOL** command on the **INSERT** ribbon. You must use Mail Merge.*

*If the merge fields appear inside braces, such as { **MERGEFIELD CITY** }, then Microsoft Word is displaying field instead of field. This doesn't affect the merge, but if you want to display the results instead, right-click the field code, and then click **TOGGLE FIELD CODES** on the shortcut menu.*

Troubleshooting

Tips for working with Microsoft Outlook Contacts List

Connecting to your Outlook Contacts folder is usually a straightforward process, but sometimes you may encounter a problem. Here are solutions to common problems that you may encounter:

- I can't find my Outlook Contacts folder to connect to it.
- I get error messages about mail clients and tables.
- I can't connect to an Outlook Contacts folder in Public Folders.
- I want to use my Outlook Express address book as my Contacts folder, but I can't connect to it. **Turn on the “Show this folder as an e-mail Address Book” property**
 - In Microsoft Office Outlook, **GO** to **CONTACTS**.
 - Right-click the **CONTACTS** folder that contains the information that you want to use for a mail merge, and then click **PROPERTIES**
 - On the **OUTLOOK ADDRESS BOOK** tab, make sure that the **SHOW THIS FOLDER AS AN E-MAIL ADDRESS BOOK** check box is selected, and then click **OK**.



To change your Outlook user profile

An Outlook user profile is a group of e-mail accounts and address books. Usually, you need only one profile — but if you share your computer with other people or use different address books for different purposes, you can set up more than one profile. If, when you start your mail merge, you're using a profile that doesn't include the Contacts folder that you want to use, that folder won't be available.

To switch to a different user profile, restart Outlook. When you're prompted for a profile, choose the profile that includes the Contacts folder that you want to use in the mail merge.

If you aren't prompted for a profile and you know that you have more than one, you may want to set up Outlook so that it prompts you. To do this:

- Close Outlook.
- In **CONTROL PANEL**, switch to **CLASSIC VIEW**, and then click **MAIL**.
- Click **SHOW PROFILES**.
- To be prompted to select a profile each time you start Outlook, click **PROMPT FOR A PROFILE TO BE USED**, and then click **OK**.

I get error messages about mail clients and tables

If you try to connect to your Contacts folder during a mail merge in Word, and Outlook is not set up as your default e-mail program in Windows Internet Explorer, you will get an error message that says:

"Either there is no default mail client or the current mail client cannot fulfil the messaging request. Please run Microsoft Office Outlook, and set it as the default mail client."

To avoid getting this message during a mail merge:

- Exit Word.
- On the Internet Explorer **TOOLS** menu, click **INTERNET OPTIONS**, and then click the **PROGRAMS** tab.
- Under **E-MAIL**, click **MICROSOFT OFFICE OUTLOOK**, and then click **OK**.
- Start Word again, open your mail merge document, and connect to your Outlook Contacts folder.

I can't connect to an Outlook Contacts folder in Public Folders

- If you start a mail merge in Word and try to connect to an Outlook Contacts folder in **PUBLIC FOLDERS**, you get an error message that says:

"The operation cannot be completed because of dialog or database engine failures. Please try again later."

- If you try again later, you get the same error message.
- To use a Public Folders Contacts folder as the data file for your mail merge, you have to start the mail merge from within Outlook.

To use my Outlook Express address book as my Contacts folder

You can't connect to this type of address book directly during a merge. Instead, export your Outlook Express address book as a .csv text file and then connect to it in that form.

To Export your Outlook Express address book:

- Start Microsoft Outlook Express.
- On the **FILE** menu, point to **EXPORT**, and then click **ADDRESS BOOK**.
- In the **ADDRESS BOOK EXPORT TOOL** dialog box, click **TEXT FILE (COMMA SEPARATED VALUES)**, and then click **EXPORT**.
- In the **SAVE EXPORTED FILE AS** box, type a file name for your exported file, and then click **BROWSE**.
- In the **SAVE AS** dialog box, in the **SAVE IN** list, choose where you want to save the file, and then click **SAVE**. It's handy to save data files in the **MY DATA SOURCES** folder in your **MY DOCUMENTS** folder. That's where Word looks first for data files when you browse for them during a merge.
- Click **NEXT**. Select the check boxes next to the fields that you want to export, and then click **FINISH**.

When you are deciding which fields to export, think about the form letters or e-mail messages or labels that you intend to create with mail merge. e.g. if you never include nicknames or personal Web sites in your merged documents, don't export those fields.

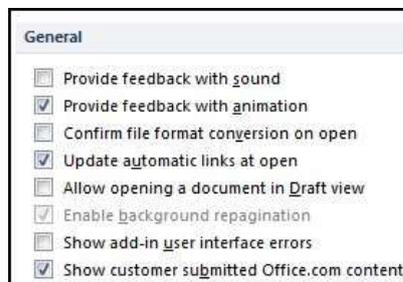
- When you receive the message that the export procedure is completed, click **OK**.
- To close the **ADDRESS BOOK EXPORT TOOL** dialog box, click **CLOSE**, and then exit Outlook Express.

Tips for Formatting Data In Excel

If your data file is an Excel worksheet that includes percentages, currency values, or postal codes, you can preserve the numeric formatting of the data by using Dynamic Data Exchange to connect to the Excel worksheet from Word. e.g. you can make sure a five-digit postal code of 07865 from your data file is not displayed as the number 7865 (without the leading zero).

Before you connect to the worksheet, do the following in Word:

- Click the **FILE TAB** , and then click **OPTIONS**.
- Click **ADVANCED**.
- Scroll to the **GENERAL** section, and select the **CONFIRM FILE FORMAT CONVERSION ON OPEN** check box.



- Click **OK**.
- With the mail merge main document open, in the **START MAIL MERGE** group of the **MAILINGS** ribbon, click **SELECT RECIPIENTS**, and then click **USE EXISTING LIST**.
- Locate the Excel worksheet in the **SELECT DATA SOURCE** dialog box, and double-click it.
- In the **CONFIRM DATA SOURCE** dialog box, click **MS EXCEL WORKSHEETS VIA DDE (*.xls)**, and then click **OK**.
- If you don't see MS Excel Worksheets via DDE (*.xls), select the **SHOW ALL** check box.
- In the **MICROSOFT OFFICE EXCEL** dialog box, for **NAMED OR CELL RANGE**, select the cell range or worksheet that contains the information that you want to merge, and then click **OK**.
 1. To prevent being prompted every time you open a data file, you can turn off the **CONFIRM CONVERSION AT OPEN** option after you have connected to the worksheet.
 2. If you don't have a data file yet, click **TYPE A NEW LIST**, and then use the form that opens to create your list. The list is saved as a database (.mdb) file that you can reuse.

If you installed 2010 Microsoft Office system (instead of installing Microsoft Word by itself), you can also use Microsoft Query to construct a query and retrieve the data you want from an external data source.