

How to....

Create form letters using Mail Merge with the Roster download

(for Microsoft Word 2000)

Step 1: Open or create the main document

1. Do one of the following:
 - Open an existing letter
 - Create a new letter
2. On the **Tools** menu, click **Mail Merge**.
3. Under **Main document**, click **Create**, and then click **Form Letters**.
4. Click **Active Window**.

Step 2: Open or create the data source

1. In the **Mail Merge Helper** dialog box, do the following:
 - Use data in an existing data source. Under **Data source**, click **Get Data**, and then click **Open Data Source**. Next to **Files of types**: select **All Files (*.*)**. Find and select the downloaded roster (.csv file) and then click **Open**.
 - When prompted to: **Choose the encoding to use for loading this file** click next to **Plain Text** and then click **OK**. Click **Edit Main Document**.

Step 3: Edit the main document and insert merge fields

1. In the main document, type the text that you want to appear in every form letter.
2. Insert **Merge Fields** where you want to merge names, addresses, and other data from the data source. To insert a merge field, click in the main document, click **Insert Merge Field** on the **Mail Merge** toolbar, and then click the field name you want.

****After you complete the main document and insert all of the merge fields, click **Save As** on the **File** menu. Name the document, and then click **Save**. ****

Step 4: Merge the data into the main document

1. On the **Tools** menu, click **Mail Merge**.
2. If you want to specify the order in which data is merged, or to merge only part of the data, then click **Query Options**.
3. In the **Mail Merge Helper** dialog box, click **Merge** under **Merge the data with the document**.
4. If you want to check the data source for errors before you merge, click **Check Errors**. Choose an option, and then click **OK**.
5. Do one of the following:
 - Send the merged letters directly to a printer. In the **Merge to** box, click **Printer**, and then click **Merge**.
 - **New Document**, so you can review, edit, and print them later.
 - **Electronic Mail**, so you can distribute the merged letters to e-mail addresses or fax numbers.