

# Mail Merge

---

## Overview

The mail merge process allows you to merge a list of data records with a letter, an e-mail message, address labels, envelopes, or directories. You can create your own data records directly in Word, or you can use records from Microsoft Excel, Access, or Outlook.

## Objectives

### Participants in this workshop will:

- Create a standard Mail Merge from a Selected Document
- Create a standard Mail Merge from Pre-Created recipients
- Add a new field to the Mail Merge letter
- Create Labels



## Table of Contents

---

### Contents

Mail Merge .....	1
Table of Contents .....	2
Contents .....	2
What is Mail Merge .....	3
Step 1. Select Document Type.....	3
Step 2. Select Starting Document .....	4
Step 3. Select Recipients .....	5
Use an existing list .....	5
Step 4. Write your Letter .....	7
Step 5. Previewing Your Letter .....	9
Step 6. Complete the Merge.....	9
Envelopes.....	10
Mailing Labels .....	11

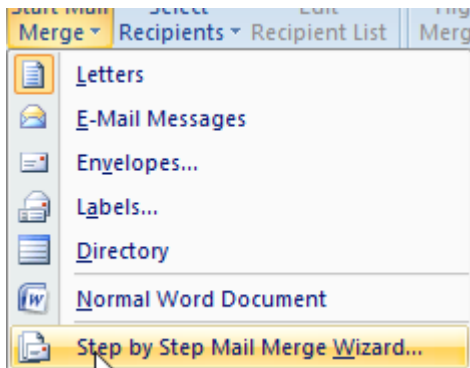
## What is Mail Merge

The mail merge process allows you to merge a list of data records with a letter, an e-mail message, address labels, envelopes, or directories. You can create your own data records directly in Word, or you can use records from Microsoft Excel, Access, or Outlook.

The mail merge process contains three main components:

1. The Main Document
2. The Data Source containing recipient information
3. The final merged document

To begin the mail merge process in Word using the familiar Wizard go to the Mailings Tab > Start Mail Merge and use the drop down to find the Wizard



The mail merge Wizard will open on the right side of your window.



### Step 1. Select Document Type

You can create the following types of merged documents:

- Basic letter
  - This feature will send the same letter to a group of people. You can personalize each letter if necessary.
- E-mail message



- This feature will send the same e-mail message to a group of people. You can also personalize these messages.
- Envelopes
  - This feature prints addressed envelopes for a group mailing
- Labels
  - This feature prints address labels for a group mailing.
- Directory
  - This feature prints a single document containing a catalog or printed list of addresses.

Select **Letters** to create a basic letter mail merge. Click the Next: Starting Document link at the bottom of the task pane.

Click Next to continue.

**Step 1 of 6**

➔ [Next: Starting document](#)

## Step 2. Select Starting Document

Specify how you want to set up the letters. You have the following options when creating your merged letter.



### Use the current document

If you select this option, your letter will be based on the document currently open. (If a blank document is open, you can create the body of the letter at a later point.)

### Start from a template

If you select this option, click on the **Select Template** link within the task pane to open the template dialog box and select the template you wish to use for your letter.

### Start from existing document

If you select this option, click the **Open** button within the task pane to browse and locate the document you wish to use as your main document.

After specifying the document you wish to use, click the **Next: Select recipient's** link at the bottom of the task pane.

### Step 3. Select Recipients

Within this window, you will specify the source of your recipient list. You can use an existing list in Word, Excel, Access, your Outlook contacts, or you can type a new list.

### Use an existing list

If you select this option, click the Browse link to locate your existing data source containing your recipient information.

#### Select starting document

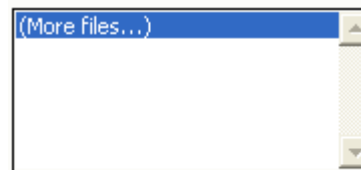
How do you want to set up your letters?

- Use the current document
- Start from a template
- Start from existing document

#### Start from a template

Start from a ready-to-use mail merge template that can be customized to suit your needs.

 [Select template...](#)



[Open...](#)

#### Step 2 of 6

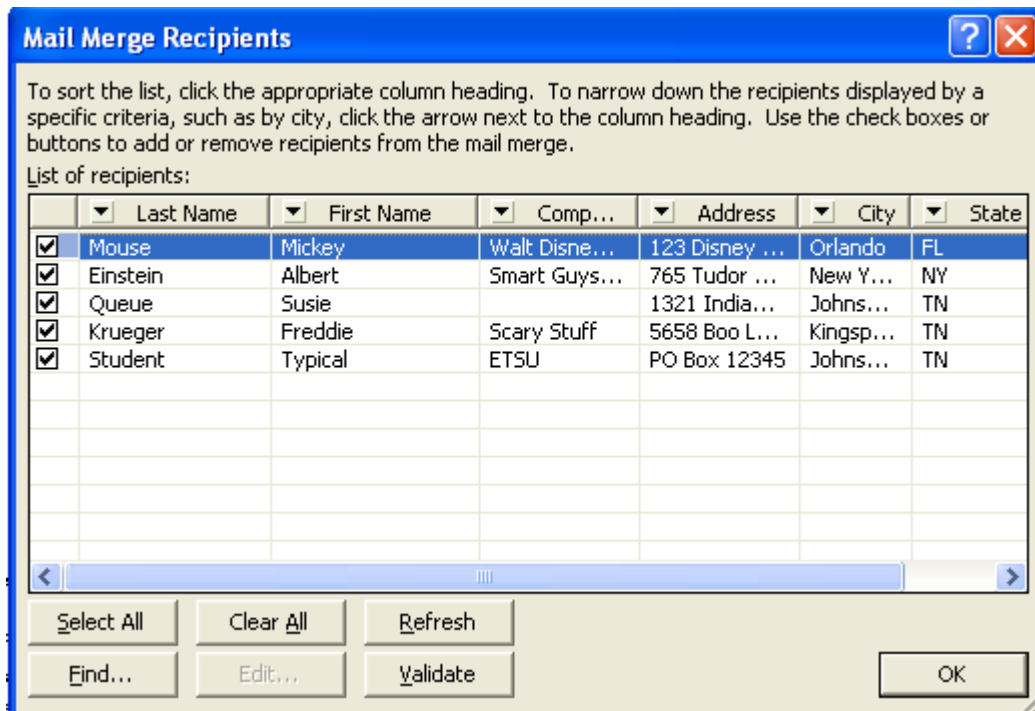
- [Next: Select recipients](#)
- [Previous: Select document type](#)

If you are using an Excel file, locate the file and select **Open**.

1. The “Select Table” dialog box will be displayed  
Select the sheet containing your data and specify whether the first row of data contains column headers by placing a check mark in the box “First row of data contains column headers.”

2. Click **OK**

The “Mail Merge Recipients” dialog box will be displayed.



To edit the list:

Click inside the record you wish to edit and click the **Edit** button within the dialog box.

Make your changes to the record and click **OK**.

To sort the list:

1. Click the column heading of the field you wish to sort by. The first click will sort the field in ascending order. The second click will sort the field in descending order.
2. To create a multiple sort on several fields, click the drop-down arrow beside the first field you wish to sort by and select **Advanced**.



3. Click the **Sort Records** table.
4. Specify the first field you wish to sort by and whether it should be in ascending or descending order. Then select the second and third fields you wish to sort by.
5. Click **OK** to sort the list.

To filter the list:

1. Click the drop-down arrow beside any of the fields within the "Mail Merge Recipients" dialog box and select **Advanced**.
2. Select the **Filter Records** tab.
3. In the Field text box, click the drop-down arrow to display all available fields and select the field that you wish to filter by. (For example, if you want to send letters only to the people in Tennessee, select the state field.)
4. Click **OK** to apply the filter.

The task pane will then specify the name of the file you selected as your data source, as well as the sheet name.

Currently, your recipients are selected from:

["Merge Data\$"] in "Merge Data.xls"

 [Select a different list...](#)

 [Edit recipient list...](#)

To choose a different list, click the link **Select a different list**.

To edit the list, and return to the filter and sort options, click the **Edit recipient list** link.

Click on **Next: Write your letter** within the task pane and proceed to Step 4.

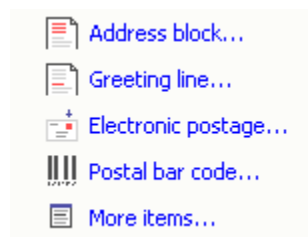
#### Step 3 of 6

 [Next: Write your letter](#)

 [Previous: Starting document](#)

### Step 4. Write your Letter

Within the document, begin to compose your letter. To add a field from your data source, click a location in your document where you want to input the information and then click one of the following items within the task pane:



**Address block.** Click this link to insert fields for the name and address block. Within the Address Block dialog box, specify the format for inserting the recipient's name, specify if you want the company name to appear and how the postal address should appear.

**Greeting line.** Click this link to insert your greeting line. Within the Greeting Line dialog box, specify how the salutation and punctuation should appear.

**Electronic Postage** (you must have the software installed from the Microsoft Office Web site to use this feature.)

**Postal Bar Code.** Use this link to insert a postal bar code in the document.

**More Items.** Click on **More Items** to display the fields listed within your custom database. Use this option if you do not want to use Microsoft's standard Address Block, Greeting Line, etc. Select the field you wish to insert and click the **Insert** button.

If you selected the Address Block, Greeting Line or More Items option, you will need to "match" the fields in order for the mail merge to work correctly. In other words, your field names must match Microsoft's field names. To verify this:

1. Click the **Match Fields** button [Match Fields...](#) within the dialog box of the Address Block, Greeting Line or More Items Options.
2. For each field listed on the left-side of the "Match Fields" dialog box, make certain that the appropriate field from your database is displayed to the right.
3. If your database field is not displayed to the right, click the drop-down arrow beside the field names and select the appropriate field.
4. Click **OK**.

Upon insertion, the fields will be placed inside brackets to easily identify them as fields.





Click **Next: Preview your letters** on the task pane to preview the letter and continue to Step 5.

**Step 4 of 6**

➔ [Next: Preview your letters](#)

⬅ [Previous: Select recipients](#)

## Step 5. Previewing Your Letter

The first merged letter will be displayed on your screen. Click the **Show Next** button  in the task pane to view subsequent letters. Click the **Show Previous** button  to view previous letters.

To make changes to your recipient list, click the **Edit recipient list** link. The "Mail Merge Recipient" window will open in which you can sort or filter the data following the instructions in the window. Click **OK**.

To exclude a recipient from receiving a letter, click the **Exclude this recipient** button from the task pane.

Click Next: Complete the merge to go to Step 6.

## Step 6. Complete the Merge

To print the letters without customizing any individual letters, click the **Print** link within the task pane. The "Merge to Printer" dialog box will appear. Specify if you wish to print all letters, just the current letter or specific letters. For example, you could specify to print records From 3 To 6.

To customize an individual letter, click the **Edit individual letters** link. Again, you must specify if you wish to merge all records, just the current record or specific records. This will open a new document housing all your merged letters. Each letter is on a separate page. Navigate through the document and begin making modifications to the individual letters.

You can then print the letters from this window.



## Envelopes

Before creating your envelope mail merge, you may want to first set the default return address settings on your PC so that all envelopes will automatically display a return address. To display a return address on all envelopes:

1. Go into the **Mailings Tab** > Select Envelopes.
2. Input your return address in the Mailing Address box  
The envelope mail merge can be created following similar steps to those listed above for a basic letter.
1. Access the Mail Merge Helper by going into the **Mailings Tab**.
2. Select the **Mail Merge Wizard** found as a drop down option under **Start Mail Merge**.
3. In Step 1, select the **Envelopes** option.
4. Click **Next: Starting document**.
5. In Step 2, select **Change the document layout**.
6. Click on the link to **Envelope Options** and specify the size of envelope you will be using, the font of the delivery and return address and the distance they will appear from the left and top of the envelope.
7. Click on **OK** when you have specified the options. (Your document should change into the shape of an envelope.)
8. Click on **Next: Select recipients**. Follow the instructions printed earlier in the handout for Step 3 to use an existing list, select Outlook contacts or type a new list.
9. Click **Next: Arrange your envelope**.

To place the address in the center of the envelope, click anywhere in the center of the envelope. A box or placeholder will appear in the center of the envelope. Click inside the box and then click on **Address Block** from the task pane. Specify the Address elements within the "Insert Address Book" window.

Before clicking on "OK", you will need to "match" the fields so that the mail merge to work correctly. In other words, your field names must match Microsoft's field names. To verify this:



1. Click the **Match Fields** button **Match Fields...** within the dialog box of the Address Block, Greeting Line or More Items Options.
2. For each field listed on the left-side of the "Match Fields" dialog box, make certain that the appropriate field from your database is displayed to the right.
3. If your database field is not displayed to the right, click the drop-down arrow beside the field names and select the appropriate field.
4. Click **OK**.
5. Click on **Next: Preview your envelopes**. Within the preview window, you can make modifications in the same way described earlier in the handout within Step 5.
6. Click on **Next: Complete the merge**.
7. Select **Print** or **Edit individual envelopes** as described earlier in the handout for Step 6.

## Mailing Labels

To create mailing labels, you will again follow many of the same options as initially described in this handout for generating a basic letter.

1. Access the Mail Merge Helper by going into the **Mailings Tab**.
2. Select the **Mail Merge Wizard** found under the drop-down.
3. In Step 1, select the **Labels** option.
4. Click the link to **Next: Starting document** within the task pane.
5. Select **Change document layout** from the task pane.
6. Click the link to **Label Options** to specify the label size.

In the "Label Options" dialog box, specify all options related to the label. To create your own custom label, click on the **New Label** button. To customize an existing label, click the **Details** button.

1. Click **OK**. Blank labels will appear outlined on the page.
2. Click on **Next: Select recipients**. Follow the instructions listed previously in the handout for Step 3.
3. Click **Next: Arrange your labels**.
4. Select the first label in the document and click **Address Block** within the task pane to insert the mailing address in the labels. To insert other fields, follow the steps outlined earlier in the handout for Step 4.



5. To copy the layout of the first label to all other labels on the page, click the **Update all labels** button on the task pane.
6. Click Next: Preview your labels. You can make modifications in this window in the same way described in the handout for Step 5.
7. Click Next: Complete the merge.
8. Select **Print** or **Edit individual labels** as described earlier in the handout for Step 6.