

About Using Mail Merge

Use the Mail Merge Wizard to create form letters, mailing labels, envelopes, directories, and mass e-mail and fax distributions.

Mail Merges are comprised of **three** parts:

1. Main document with merge fields that are placeholders for recipient information.
2. Data source with recipient information, such as names and addresses.
3. Resulting merged document.

To complete the basic process:

- ★ Open or create a main document.
- ★ Open or create a data source with individual recipient information.
- ★ Add or customize merge fields in the main document.
- ★ Merge data from the data source into the main document to create a new, merged document.

There are **six** major steps in every mail merge, the **Mail Merge Wizard** using the Mail Merge Task Pane guides you through all of these steps:

1. Select the document type
2. Select the starting (main) document
3. Select or enter the recipients
4. Insert merge fields
5. Preview the documents, and
6. Complete the merge

If you prefer to work outside the wizard, you can use the **Mail Merge toolbar**. Either way, the end result is that each row (or record) in the data source produces an individual form letter, mailing label, envelope, or directory item.



Using Mail Merge - Step by Step

In this set of steps we are going to create form letters from scratch using the Mail Merge Wizard – with no preexisting main document or data source.

1. Start with a blank new document in Word.



Note: If the text of your letter already exists, open it first, **then** start the Mail Merge Wizard.

2. Choose **Tools > Letters and Mailings**, then choose **Mail Merge Wizard...**
3. Your Mail Merge Task Pane will open on the right side of your screen

★ At the bottom of the Task Pane we will always find the step we are on and a next and/or previous selection through the steps of the wizard.

★ At the top we find the choices we need to complete for this step of the wizard.

4. Notice in **Step 1** we are asked - **what type of document are you working on?**
- ★ Be sure **Letters** is selected at the top and
 - ★ Choose **Next: Starting document** at the bottom
5. In **Step 2** we are asked – **how do you want to set up your letters?**
- ★ Select **Use the current document** at the top and
 - ★ choose **Next: Select recipients** at the bottom
6. In **Step 3** we will – **Select recipients**
- ★ Since we do not have the recipients entered yet, we will choose **Type a new list** at the top and
 - ★ Choose **Create...**
 - ★ We will use this **New Address List** dialog box to enter each of our recipients into our data source:
 - Each line in this screen is called a field.
 - Skip past fields that you do not wish to use.
 - Use tab or enter to move from field to field.
 - Choose the Close button once all the recipients are entered.
 - Save Address List dialog box will appear – choose a location for our data source to be saved. The file type will automatically occur as a Microsoft Office Address List (which is really an Access database with one table.)
 - Next the Mail Merge Recipients dialog box will appear, here we can alter our data source by:
 1. sorting the list
 2. editing the entries
 3. deleting any entries
 4. selecting/deselecting entries
 - Once we are finished finalizing the data source choose **OK**



Tip: Be careful not to add spaces or extra punctuation after an entry in a field, or these will appear when the data is merged.

- ★ choose **Next: Write your letter** at the bottom



Note: Data sources can be reused with other main documents. For example: you can create a recipient list for form letters that is used to create accompanying envelopes and/or labels.

7. In **Step 4** we will – **Write your letter**

- ★ Here we will write out our letter and include field codes where our data source information should display. Notice the sample letter below:

June 10, 2004

««AddressBlock»»

««GreetingLine»»

Field Codes added
using Task Pane in step 4

You've recently attended the Excel Fundamentals class are you ready to learn more?

If you haven't already registered, we have openings in the following Advanced Excel class. Go to the Computer Education Website (www.cmu.edu/computing/education) for more class details and to register.

Advanced Excel – 1/1/2005 (9 am - NOON)

Thanks and we hope to see you in class!

Sincerely,

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Training Specialist/Consultant
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- ★ choose **Next: Preview your letters** at the bottom

8. In **Step 5** we will – **Preview your letters**

- ★ Here we can see what our letters will look like prior to completing the merge. Use the << or >> buttons in the Task Pane to move through the recipient list (data source) and preview each letter.
- ★ This allows us the flexibility to go back and edit the recipient list
Edit recipient list...
- ★ Or remove particular recipients from being included in this merge by using the **Exclude this recipient** button in the Task Pane.
- ★ choose **Next: Complete the merge** at the bottom

9. In **Step 6** we will – **Complete the merge**

- ★ Here we have two choices for producing our letters:
 1. **Print...** Send our completed letters directly to the printer
 2. **Edit individual letters...** Create a separate document containing letters
- ★ When completing the merge – we can choose all the records, the current record or a group (from/to)

**Envelopes - Step by Step**

Now we will create envelopes to go with our letters – here we will use the same data source created for the letters.

1. Start with a blank new document in Word.
2. Choose **Tools > Letters and Mailings**, then choose **Mail Merge Wizard...**
3. **Step - what type of document are you working on?**
 - ★ Choose **Envelopes, Next step**
4. In **Step 2** we are asked – **how do you want to set up your envelopes?**
 - ★ Select **Change document layout** at the top and **Envelope options...**
Here, choose the envelope size, fonts for return and delivery addresses and printing options
 - ★ choose **Next: Select recipients** at the bottom
5. In **Step 3** we will – **Select recipients**
 - ★ Since we already have the recipients entered, we will choose **Use an existing list** at the top and
 - ★ choose **Browse...**
*We will now locate our data source and choose **OK***
 - ★ choose **Next: Arrange your envelope** at the bottom
6. In **Step 4** we will – **Arrange your envelope**
 - ★ Type your return address (if needed)
 - ★ Click inside the text box in the bottom middle of the envelope
 - ★ Click on **Address Block...**
 - ★ choose **Next: Preview your envelopes** at the bottom

7. In **Step 5** we will – **Preview your envelopes**

- ★ Here we can see what our envelopes will look like prior to completing the merge. Use the << or >> buttons in the Task Pane to move through the recipient list (data source) and preview each envelope.
- ★ This allows us the flexibility to go back and edit the recipient list
Edit recipient list...
- ★ Or remove particular recipients from being included in this merge by using the
Exclude this recipient button in the Task Pane.
- ★ choose **Next: Complete the merge** at the bottom

8. In **Step 6** we will – **Complete the merge**

- ★ Here, we have two choices for producing our envelopes:
 1. **Print...** Send our completed envelopes directly to the printer
 2. **Edit individual envelopes...** Create a separate document containing envelopes
- ★ When completing the merge – we can choose all the records, the current record or a group (from/to)



Labels - Step by Step

Now we will create labels – here we will use the same data source created for the letters and envelopes. Now that we are more familiar with the steps in the wizard, we will see abbreviated steps below:

1. Start with a blank new document in Word.
2. **Tools > Letters and Mailings**
3. **Mail Merge Wizard...**
4. **Labels, Next: Starting document**
5. **Change document layout**
6. **Label options...**
7. Choose the correct Product Number for the Labels



Note: Be sure to match up the label manufacturer, type and number from the outside of the box and the choices available in the Label options.

8. **Next: Select recipients**
9. **Use an existing list**
10. **Browse...**
11. Locate the data source and choose **OK**
12. **Next: Arrange your labels**
13. Click on **Address Block...**
14. **Update all labels**
15. **Next: Preview your labels**
16. Check over labels
17. **Next: Complete the merge**

NOTES:
