

## **Mail Merge Components**

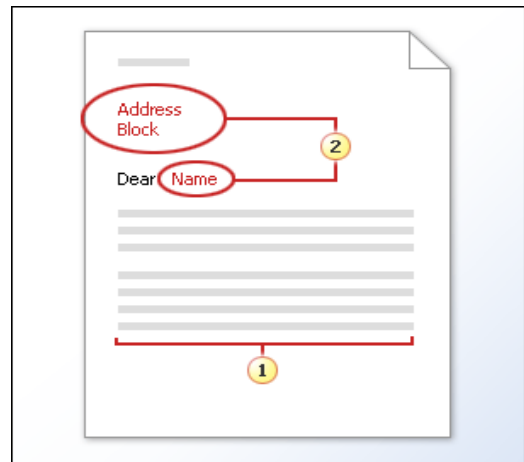
In order to understand how mail merge works you need to examine the elements involved in the process. In any mail merge, you'll deal with three different elements:



- **Main Document** – form letter, mailing label, envelope, or directory (a single document that stores addresses)
- **Data Source** – information such as names and addresses
- **Finished Documents** – mail merge documents that can serve as templates for future mailings.

The **Main Document** consists of: Information that is identical in each copy, such as the main body text of a form letter. You only have to type this information once regardless of how many letters you intend to print.

- Placeholders for unique information. For example, in a form letter, the address block and greeting name would be unique in each copy.



The **Data Source** consists of: Files or tables that contain the data (information) that you will use to merge data into a merge document. The data will be the parts of the document that varies (names, addresses, etc.). Some examples of data sources are Microsoft Word tables, Microsoft Outlook contact list, Microsoft Excel worksheet, Microsoft Access database, or text files.

**Finished Documents** consist of: Merged main documents and data sources that create your final products (i.e. labels, letters, and envelopes). They can then be used as templates for your future mail merge needs.

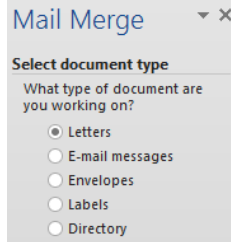
## **Mail Merge Wizard**

In Microsoft Office 2013, there are two different ways to complete the Mail Merge process. There is a wizard which can assist with the mail merge process, or you can use the buttons on the ribbon. First we will walk through the wizard. Then we will try it with the buttons on the ribbon.

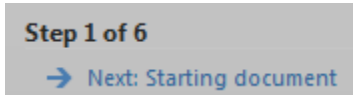
### **To get started creating letters:**

- Open a New Blank word document.
- Click on the **Mailings** tab.

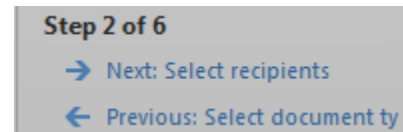
- Click on the **Start Mail Merge** button.
- Click Step by **Step Mail Merge Wizard**.
- The wizard will open in the task pane to the right.
- The letter radio button is already selected in the task pane.



- Click **Next: Starting document**.



- You can choose a document you displayed in the main Word window, start from a template, or choose an existing document file. **For class**, select the **Start from existing document** and the start from existing documents option will become available. Click the **Open** button. Select the [MailMergeLetter.doc](#) from the **Mail Merge** folder in the **Documents** folder.

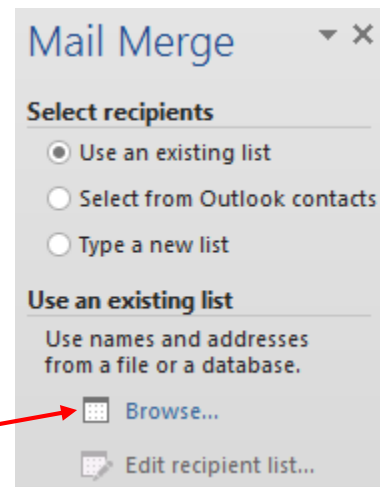


- Then click on **Next: Select recipients** from the bottom of the task pane. (**Note:** You can always go backwards by clicking on the **Previous** links.)

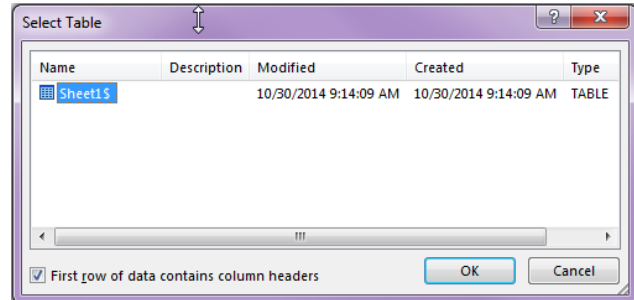
- You will then be prompted to select your mail merge recipients. You can choose an **existing list**, use your **Outlook mail contacts\***, or **type a new list**.

(\*If your Outlook mail is not configured, then you will not be able to use this option.)

- Choose **Use an existing list** and click on **Browse...**

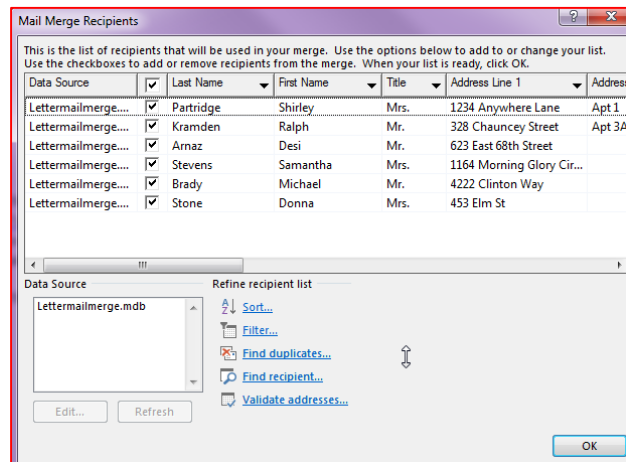


- The **Select Data Source** window will open. Choose your list from its location on your computer. You can use an Excel document, an Access table, or a list created in Word (which we will cover later). For class, click on the **Documents** folder, open the **mail merge** folder, and select the **lettermailmerge.mdb**. (If you would like to know how to create your own Excel address list at home, see Appendix A.)

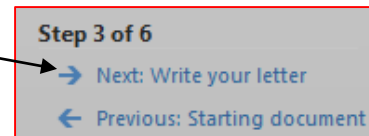


- Because we opened an access database, sometimes a dialog box will appear that will ask which worksheet tab the information is located on. Make sure you are on the correct sheet and click on **OK**.

- The **Mail Merge Recipients** window will open, asking which people on your list you wish to include in this mailing. Uncheck anyone you want to exclude. Then click on **OK** to close the dialog box.

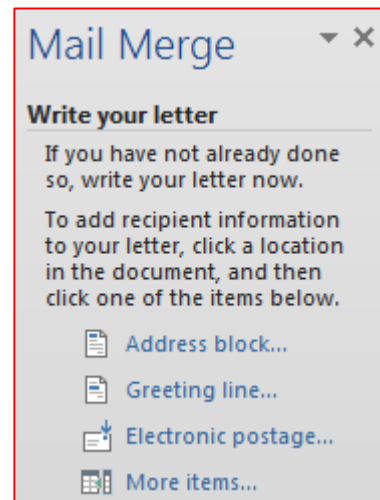


- Once you have chosen your data source you must click on the **Next: Write your letter** link at the bottom of the task pane.

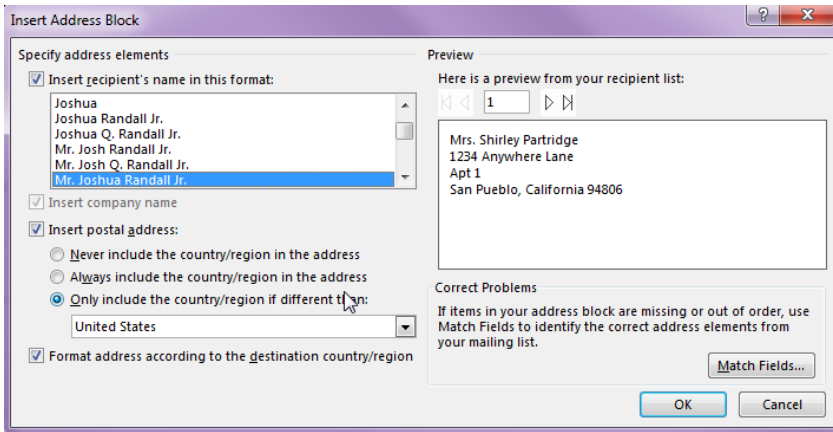


- Now we are going to insert the address block, greeting line, first name, donation amount and organization. Click on an empty spot of your document where you would like the recipient's address to appear.

- Then click on **Address Block...** from the task pane to the right.

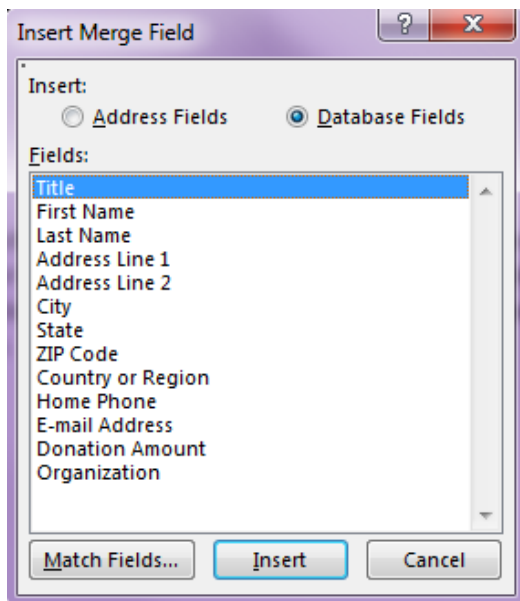
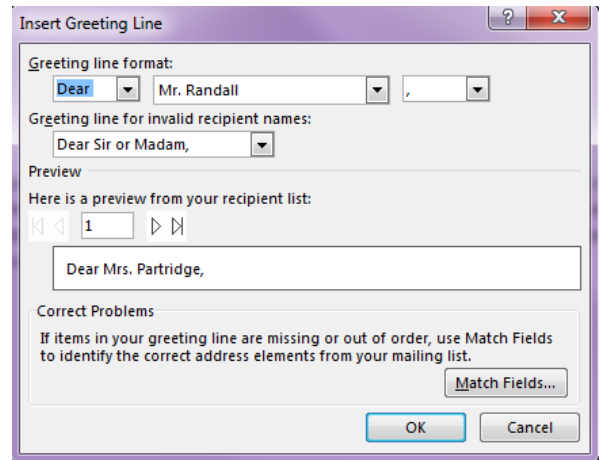


- The **Insert Address Block** window will open and you can choose the format of the name and address.



- After you click **OK**, you will see a place holder on the page that says «Address Block». Once we get to the next step you will see actual names and addresses in that space.
- Click in an empty space a few lines down so that we can insert a greeting line.

- Click on **Greeting line...** from the task pane on the right. Select the format for the name and the greeting. If you don't like the options they have given you, you can always type your own greeting in the box that says "Dear" and your own punctuation in the appropriate box.
- Then click **OK**.
- You will see a place holder that says «Greeting Line».



- The **More Items** field allows you to insert additional fields or match fields from an existing database or spreadsheet file. Replace the question marks with **First Name, Donation Amount and Organization**. Highlight each question mark (?) and change it to the appropriate field.
- Be sure to have the appropriate spaces before and after your entries.

- Once the appropriate fields have been added to your letter it will resemble the example below:

«AddressBlock»

«GreetingLine»

Thank you «First\_Name» for your contribution of «Donation\_Amount» through this year's campaign. Your tax-deductible contribution to «Organization» year-round will help solve our community's most pressing problems. No goods or services were provided in exchange for this contribution. Please keep a copy of this for your tax records. Consult your tax advisor for more information.

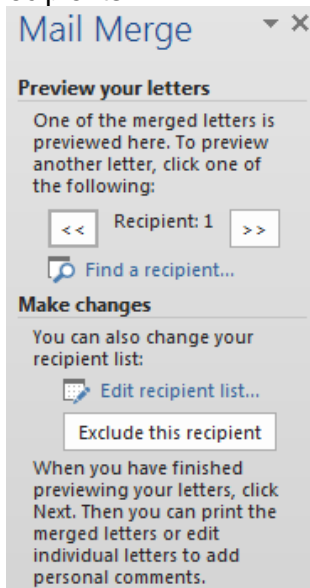
Sincerely,

- Then click on the **Next: Preview your letters** link at the bottom of the task pane.
- Once the recipient fields have been set you can then preview your letter with the fields populated. You have the option to click back and forth from recipient to recipient and can even edit out selected recipients.

**Step 4 of 6**

→ [Next: Preview your letters](#)

← [Previous: Select recipients](#)



- Notice that the fields are populated with your recipients.
- Once you have finished previewing your letters you must click on the **Next: Complete the merge** link at the bottom of the task pane.

**Step 5 of 6**

→ [Next: Complete the merge](#)

← [Previous: Write your letter](#)

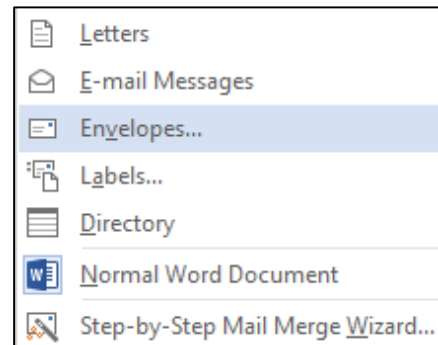
- The last step allows you to either print your letters or edit individual letters as needed.

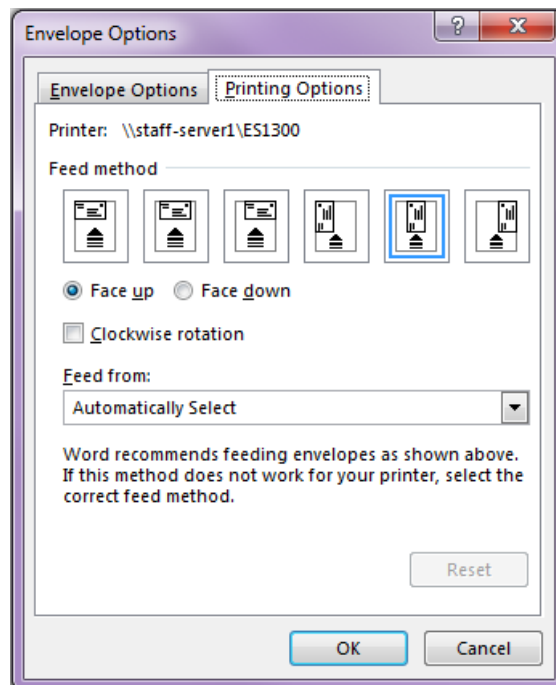
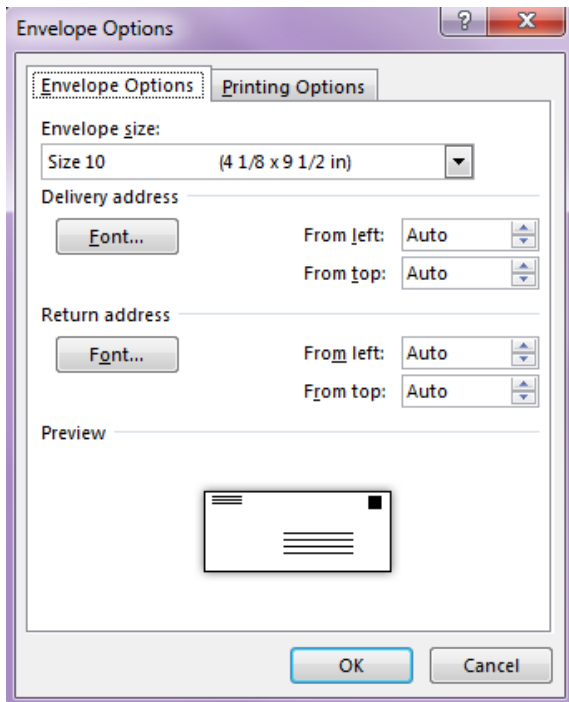
**NOTE:** For class the entries are red but when printing you will want to change the font color to match the rest of your letter.

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### To get started creating envelopes:

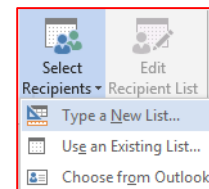
- Click on the **New** button on the **Quick Access Toolbar** or open a blank word document under **File**.
- Click on the **Mailings** tab.
- Click on the **Start Mail Merge** button and select **Envelopes...**
- In the **Envelope Options** dialog box, select the options you want, such as envelope size, font size, printer feed method, rotation, and printer tray feed. Then click **OK**.



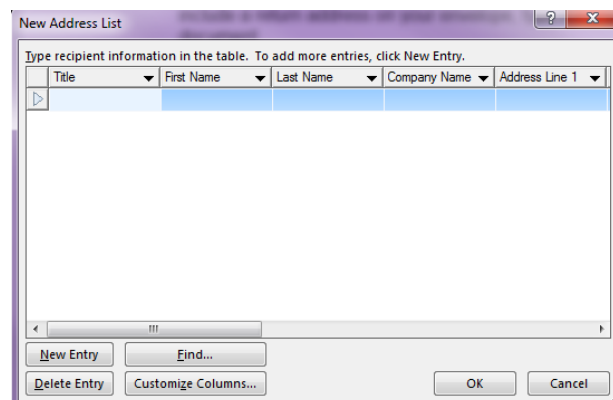


- Your page will become the same dimensions as an envelope. If you want to include a return address on your envelope, type it in the upper-left corner of the document.
- Now we need to choose a recipient list. See the next page for creating a list using Microsoft Word.

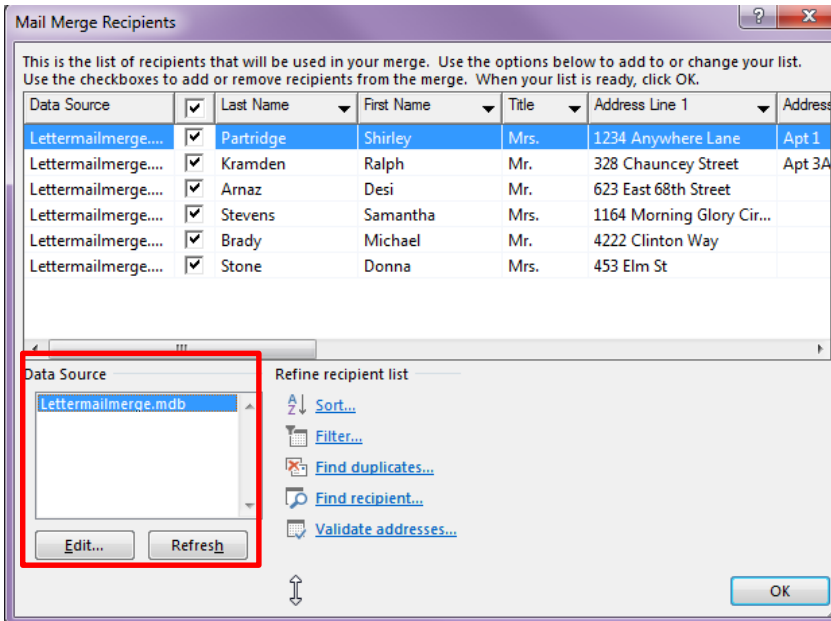
## To get started creating a Data Source within Mail Merge



- Click the **Select Recipients** button and then on **Type New List...**
- Enter the information for your recipients across the row and click **New Entry** to proceed to the next recipient.
- By selecting **Customize Columns...** you can add fields relevant to your recipients like spouse's name or suffix.
- The Customize Address List dialog box will appear. You can add or delete fields and change the order in which they appear.
- When you are done creating/editing your address list, click on the **OK** button.
- Give your list a name and click on **Save**.
- To edit your list in the future, click on the **Edit Recipient List** button once it has been selected as the list to use for that document.



- In the window that opens, click on the name of the list from the box in the lower left corner then click on the **Edit** button.

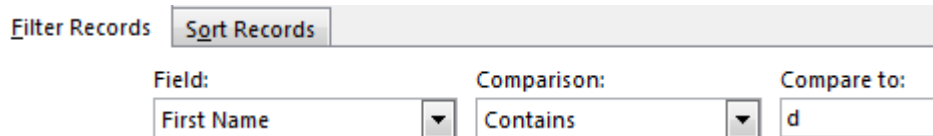


### Sorting

- Click the **Edit Recipient List** form the Start Mail Merge group.
- Click on **Sort...**
- Choose what column you want to sort by.
  - For class, choose **Zip Code**.
- Then, click **OK**.
- Click **OK** again.

### Filtering

- Click the **Edit Recipient List** form the Start Mail Merge group.
- Click on **Filter...**
- Choose what column you want to sort by.
  - For class, choose **First Name**.
  - Choose contains
  - Type **D**.
  - Click **OK**.

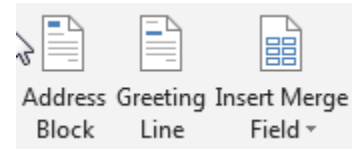


- You will see a list of only recipients with the letter D in their first name.
- Click **OK** again to use these recipients only.



## Back to Envelopes

- Click in the center of the envelope towards the bottom and a text box will appear. (Click around until you find it.)



- Make sure your cursor is blinking inside the text box and insert the appropriate merge fields (Address block, Postal bar code, etc.) by clicking on the buttons in the ribbon **or** select individual fields just like you want them to appear on the envelope from the **Insert Merge Field** button in the Write and Insert Fields group.

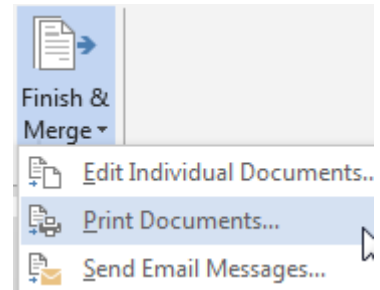


- Once you have inserted the appropriate merge fields you must click on the **Preview Results** button from the Ribbon.



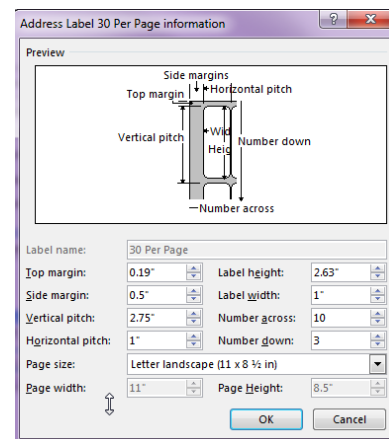
- Use the arrow keys on the Ribbon to view your recipients.

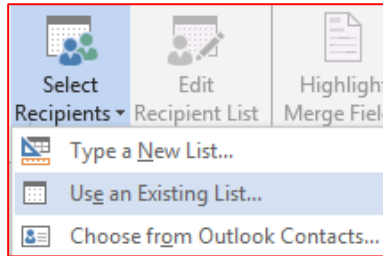
- From here you can print your envelopes by clicking on the **Finish & Merge** button and on **Print Documents...** Insert your envelopes into the printer the way you previously specified.



## To get started creating labels:

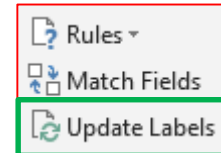
- Click on the **New** button on the **Quick Access Toolbar**.
- Click on the **Mailings** tab.
- Click on the **Start Mail Merge** button and select **Labels**.
- The **Label Options** window will open. Select your label brand and type from the list. You can modify the dimensions by clicking on the **Details...** button.
- If you do not see your label number listed in the box, click on the **New Label...** button. You can measure your labels and enter the information into the appropriate boxes.
- When all of your label options are selected, click on the OK button(s).
- Click on the **Select Recipients** button from the ribbon and select **Use Existing List...**





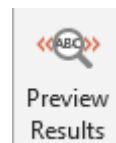
- The Select Data Source window will open and you will be able to choose by going to the Mail Merge Folder and selecting [CustomerAddressLabels.xlsx](#). Make sure you choose the sheet labeled **Adult Info**. When creating your Mail Merge labels, documents, etc. you can choose whatever list you would like by navigating to another folder to find your list.

- The individual label spaces will be marked as «Next Record» (except the first one). Click on the empty, first label. Click on the **Address Block** button from the ribbon and choose your address style (like we did on page 4.)

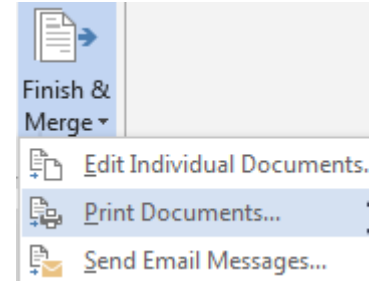


- Select the **Update Labels** button to copy the formatting of your first label to all other labels. The records will be marked as «Next Record» «AddressBlock». **DO NOT FORGET THIS STEP! IT IS VERY IMPORTANT!**

- Click on the **Preview Results** button in the ribbon.



- Click on the **Finish and Merge** button in the ribbon and then on **Print Documents...** Remember to put your label paper in the printer, first!



## Directory

A directory is a single document containing a catalog or printed list of addresses.

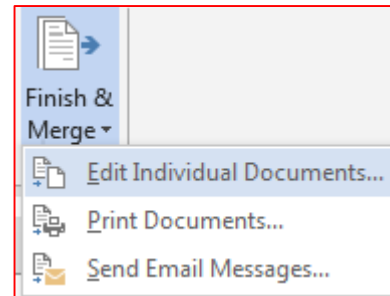
To get started:

- Click on the **New** button on the **Quick Access Toolbar** or open a new blank document under **File**.
- Click on the **Mailings** tab.
- Click on the **Start Mail Merge** button and select **Directory**.
- Click on the **Select Recipients** button and select **Use Existing List...**
- The Select Data Source window will open. Click on **Documents** and open the **Mail Merge** folder. Select the [phonedirectory.xls](#) document. Select **Sheet 1** and click on **OK**.
- Place merge fields on the page as you would like them to appear in your directory. (In a phone directory, the fields normally appearing are Last Name, First Name, Title, and Phone Number).

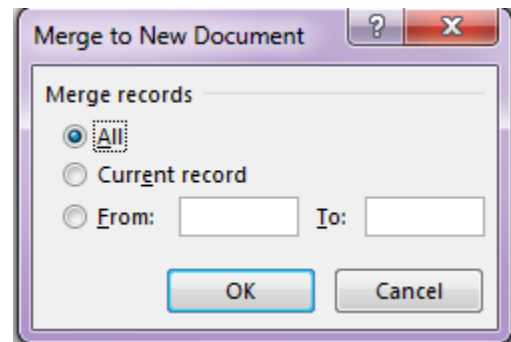
- Click **Insert Merge Field**, choose **First\_Name**.
- Press the **spacebar**.
- Click **Insert Merge Field**, choose **Last\_Name**.
- Press the **enter** key.
- Click **Insert Merge Field**, choose **Title**.
- Press the **enter** key.
- Click **Insert Merge Field**, choose **Phone\_Number**.

«First\_Name» «Last\_Name»  
«Title»  
«Phone\_Number»

- Make sure you press the enter key a few times below the last item on the page so your directory items will not be squished together.
- Once you have inserted the appropriate merge fields you must click on the **Preview Results** button from the ribbon.
- To merge your directory into one document, you will have to click on the **Finish & Merge** button and select **Edit Individual Documents...**



- A window will open, asking you which recipients you want to include in the new, merged document. If you want them all, make sure the circle next to **All** is selected. Then click **OK**.



- Your new directory will appear in the new window.
  - This is where you would type the title and make any editing changes to this document that you wish.
  - Remember to save it before closing.

Nancy Davolio  
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Andrew Fuller  
Vice President, Sales  
330-555-1234

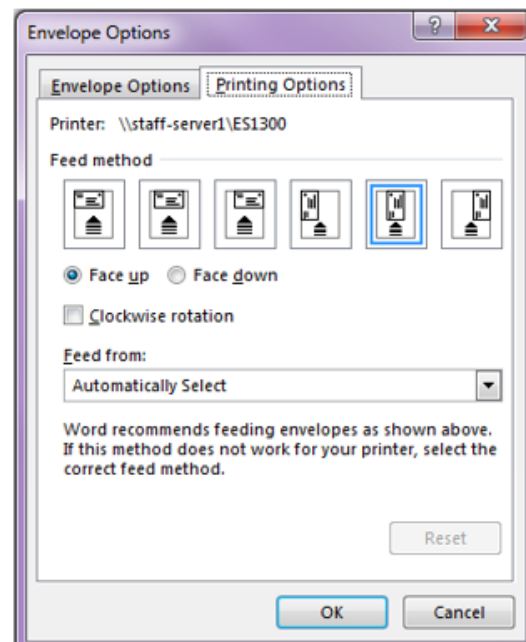
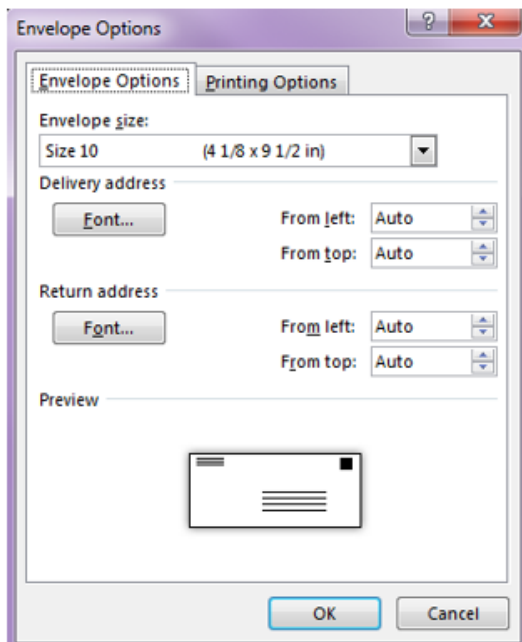
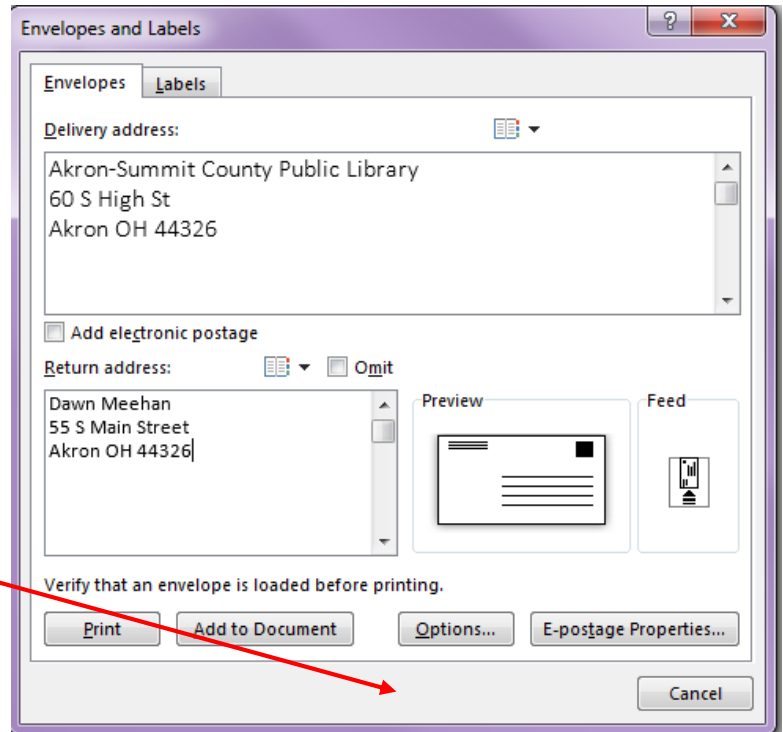
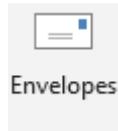
Janet Leverling  
Sales Representative  
330-555-4567

## Mail Merge Quick Tools

Microsoft Word has several quick tools that will allow you to create envelopes and labels quickly.

### Envelopes

- To access the quick tool, click on the **Mailings** tab and then on the **Envelopes** button.
- Enter the delivery and return addresses into the appropriate boxes.
- To modify the font style of the addresses or select your printing options, click on the **Options...** button.
- Do you remember the envelope options from before? It's the exact same thing.



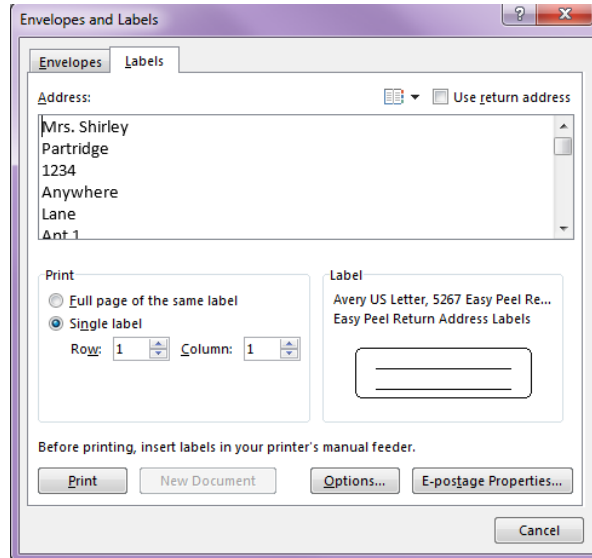
- When finished selecting your envelope options, click on the Print button.

## Labels

- To access the quick tool, click on the **Mailings** tab and then on the **Labels** button.



- Enter your address into the text box.
- Choose whether you would like a full page of the same label or just one label. If you choose one label you will need to select which row and column to print it on.
- To select the correct label type, click on the **Options...** button. The same Label Options window we saw on page 8 will appear.



- You still have the option to customize the measurements like before with the **Details...** button. Select your label type and click **OK**.
- If you want to preview your labels, click on the **new document** button. You can print from here.
- If you just want to print, you have no need to preview, click on the **Print** button to print your label(s).

## Appendix A

### To get started creating a Data Source in Microsoft Excel

- Open **Excel**.
- In cell A1, type the first heading of the information that you would like to place in the data source. For example, **"First Name"**. Note that not all information in the data source has to be included in the merged document.
- Press **Tab** key on your keyboard to move to cell B1, and type the next heading and press the **Tab** key again. For example, **"Last Name"**.
- Continue typing the headings for all of the columns of information that you need for the data source and press **Enter**. Other heading examples are **"Address"**, **"City"**, **"State"**, or **"Zip"**. Remember to separate each piece of information into another column.



- Next, type in the data under the correct heading. For example, type the document recipient's first name, press **Tab**, type the recipient's last name, press **Tab**, and continue to input each individual's information. When you are ready to go to the next individual's

	A	B	C	D	E	F
1	First Name	Last Name	Job Title	Business Name	Primary Address Line	Secondary Address Line
2	<input type="text"/>					
3						

record press **Enter**.

- Click on the **File** menu and select **Save**. Save and name the file.