

Mail Merge Basics

6 Steps to Follow

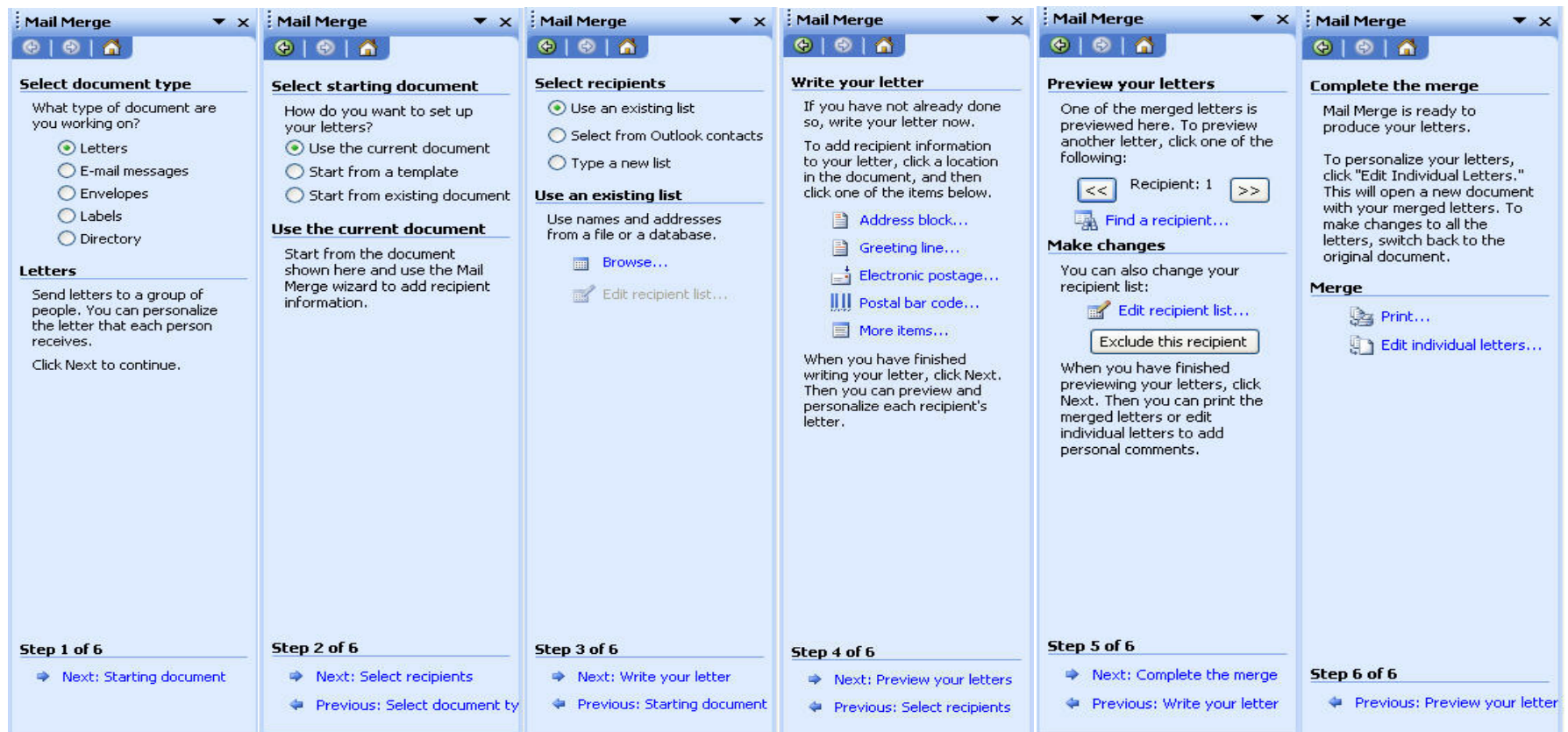
A mail merge is the process of merging a list of names and addresses with another document. You can begin a mail merge in Microsoft Outlook, Word, or Access, but you **MUST COMPLETE THE MAIL MERGE IN WORD**.

There are six major steps in every mail merge:

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

The Mail Merge Task Pane

The Mail Merge task pane allows you to follow step-by-step instructions provided by the Mail Merge Wizard. Your document remains open and visible while you use the wizard. To display the Mail Merge task pane, select Letters and Mailings from the Tools menu, and select Mail Merge from the resulting menu.



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Creating Form Letters

Starting Mail Merge

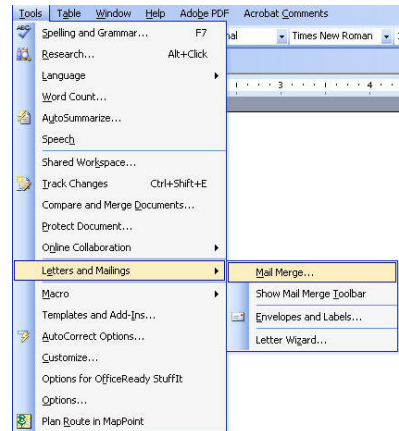
1. Open Microsoft Word.
2. Select **Letters and Mailings** from the **Tools** menu.
3. Select **Mail Merge** from the resulting menu.
4. Select **Letters** under **Select document type**.

Note: At any time, click on **Previous** at the bottom of the task pane to go back to the previous step.

Selecting the Starting Document

The starting document should be the same type as the mail merge document that you want to create.

1. Click on **Next: Starting document** at the bottom of the task pane.
2. Select one of the following under **Select starting document**:
 - Click on **Use the current document** to use the active document.
 - Click on **Start from a template** to use a template.
 - Click **Select template**.
 - Select a template from the **Select Template** dialog box.
 - Click **OK**.
 - Click on **Start from existing document**.
 - Select a file from the box under **Start from existing**.
 - Click **Open**.
 - *Optional:* If the document you want to use is not shown, click on **More Files**, and then click **Open**. Select the document, and then click **Open**.



Selecting the Recipients

1. Click on **Next: Select recipients** at the bottom of the task pane.
2. Select one of the following under **Select recipients**:
 - Click on **Use an existing list** to use names and addresses from a file or database. Click on **Browse**, and in the **Select Data Source** dialog box, select a data source. Click the **Open** button.
 - Click on **Select from Outlook contacts** to select recipients from a list of contacts. Click on **Choose Contacts Folder**. Select a folder name and click the **OK** button.
 - Click on **Type a new list** to create a new list.
 - Click on **Create**.
 - Enter the information you want to include, such as title, name, and address in the **New Address List** dialog box.
 - Click the **New Entry** button to move on to the next entry.
 - Click the **Close** button when you are finished.
 - Enter a name for the address list in the **File name** box.
 - Click the **Save** button.
3. In the **Mail Merge Recipients** dialog box, select the recipients you want to include.
4. *Optional:* To sort the list, click on the column heading of the item you want to sort by.
5. Click the **OK** button when you are finished.

Inserting Merge Fields

1. Click on **Next: Write your letter** at the bottom of the task pane.
2. In the main document, enter the text that you want to appear on every letter.
3. To insert the merge fields, click on the appropriate location in the document, and click on one of the following items:

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- Click on **Address block** to insert a formatted address. *(To insert address block merge fields, you can also press Alt + Shift + F. Select the field and click the OK button.)*
 - Click on **Greeting line** to insert a formatted salutation.
 - Click on **Electronic postage** to insert electronic postage. *(You must install electronic postage software in order to use this feature.)*
 - Click on **Postal bar code** to insert a US postal bar code.
 - Click on **More items** for a list of additional fields. *(If you click on More items, select the merge fields to insert, and click the Insert button.)*
4. In the resulting window, select options, and click the **Match Fields** button. If any merge fields that you require are listed as “not available,” click the arrow and select the appropriate field from the list. Then, click the **OK** button.

Previewing the Merged Document

1. Click on **Next: Preview your letters** at the bottom of the task pane.
2. *Optional:* To scroll through the merged letters, click the **Back** and **Forward** buttons on the task pane.
3. *Optional:* Click on **Find a recipient** or click the **Find Entry** button on the Mail Merge toolbar to find a specific recipient. Enter the recipient’s name, select a location to search, and click the **Find Next** button.
4. *Optional:* To make changes to your recipient list, click on **Edit recipient list**. Make changes in the **Mail Merge Recipients** dialog box, and click the **OK** button.
5. *Optional:* Click on **Exclude this recipient** to remove the recipient.

Completing the Merge

1. Click on **Next: Complete the merge** at the bottom of the task pane.
2. Click on one of the following:
 - Click on **Print** to merge to a printer. Select all records, the current record, or a series of records and click on **OK**.
 -
 - Click on **Edit individual letters** to personalize your letters or to save them for future use. Select all, the current record, or a series of records, and click the **OK** button. This will open a new document with your merged letters. Save, print, or edit the new document just as you would with any Microsoft Word document.

Note: To make changes to all the letters, go back to the original main document.

Mail Merge Documents

Chances are that you usually need to print labels or envelopes to go with your form letters. When you merge addresses onto labels or envelopes, the six basic steps of the Mail Merge wizard stay the same. However, you will see different options as you run through the wizard specific to envelopes or labels as opposed to letters.

Printing Labels

1. Open the **Mail Merge** task pane.
2. Select **Labels** under Select document type.
3. Click on **Next: Starting document**.
4. Select one of the following:
 - **Change document layout** to create a new sheet of labels
 - Click **Label** options
 - Select the options you want, such as printer options and label type and size.
 - Click **OK**.
 - Click on **Start from an existing document** to start with an existing sheet of labels. Select a file from the box and click **Open**. If the document you want is not shown, click **More Files**.
5. Click **Next: Select recipients**.

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6. Click **Next: Arrange your labels**.
7. Insert the merge fields.
8. *Optional:* Click the **Update all labels** button to copy the layout of the first label to all other labels on the page.
9. Click **Next: Preview your labels**.
10. Click **Next: Complete the merge** at the bottom of the task pane. Follow the wizard to complete the merge.

Printing Envelopes

1. Select **Print Layout** from the **View** menu.
2. Open the **Mail Merge** task pane.
3. Select **Envelopes** under **Select Document type**.
4. Click **Next: Starting document**, then either
 - **Change document layout** to create a new envelope.
 - Click on **Envelope options**.
 - Click the arrow on the **Envelope size** box and select the appropriate size. If the size is not listed, click **Custom size**, enter the **Width** and **Height**, and click **OK**.
 - *Optional:* To change the font of the delivery or the return address, click the **Font** button under **Delivery address** or **Return address**.
 - *Optional:* To change the position of the delivery or the return address, click the arrows on the **From left** and **From top** boxes. Click **OK**.
 - Click on **Start from existing document** to start from an existing envelope. Select the file and click **OK**.
5. Click **Next: Select recipients**.
6. Click **Next: Arrange your envelope**.
7. *Optional:* Enter the return address on your envelope in the upper-left corner.
8. Click in the center of the return address on your envelope to select the address text box.
9. Insert the merge fields.
10. Click **Next: Preview your envelopes**.
11. Click **Next: Complete the merge**. Follow the wizard to complete the merge.

Creating a Directory

In addition to letters, envelopes, and labels, you can also choose to create a directory. A directory is different from a letter in that it places information from multiple records in your data source on the same page. This type of main document is very useful for printing a nicely formatted list of the names and addresses in your data source.

Depending on the kinds of information you have in your data source, you might also use it to print a phone list, a catalog, a list of people and their job titles and occupations, and so on.

1. Open the **Mail Merge** task pane.
2. Under **Select document type**, click **Directory**.
3. Click **Next: Starting document**.
4. Click **Next: Select recipients**.
5. Click **Next: Arrange your directory**.
6. *Optional:* If you have not already done so, enter text, such as labels, that you want to appear on each record in the directory.
7. Insert the merge fields.
8. Click **Next: Preview your directory**. (Word will display a single entry at a time).
9. Click **Next: Complete the merge**.
10. Click on **To New Document**.
11. Select all records, the current record, or a series of records, and click the **OK** button. Word will open a new single document that contains all of the records.
12. Make changes, save, and print the directory just as you would any other Word document.

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Sending Merged E-mail Messages

You can use the **Mail Merge Wizard** to create and distribute group e-mail messages. This allows you to send e-mails to a group of people and personalize the message that each person receives. Your system must have a MAPI-compatible e-mail program, such as Outlook, in order to use this feature.

1. Open the **Mail Merge** task pane
2. Select **E-mail messages** under **Select document type**.
3. Click on **Next: Starting document**.
4. Click on **Next: Select recipients**.
5. Click on **Next: Write your e-mail message**.
6. If you have not already done so, write your e-mail message.
7. Insert the merge fields.
8. Click on **Next: Preview your letters**.
9. Click on **Next: Complete the merge**.
10. Click on **Electronic Mail** to send your e-mail messages.
11. Enter a subject in the **Subject** line box.
12. *Optional:* In the Mail format box, select a mail format.
13. Under **Send records**, select all records, the current record, or a series of records.
14. Click **OK** to complete the merge and send the e-mail messages using your default e-mail program.

Note: The Mail Merge Wizard will automatically send your e-mail messages without a preview. Make sure your recipient list is correct before proceeding with the final merge step.

Starting a Mail Merge from Outlook

1. Open **Microsoft Outlook**.
2. Click on **Contacts** on the **Outlook Bar**.
3. Select the contacts you want to use for the mail merge in one of the following ways:
 - Hold down the **CTRL** key while clicking on each contact.
 - Create a separate contacts folder and copy on the needed contacts into that folder.
 - Create a custom view of the **Contacts** folders, such as a view that contains your contacts from a specific state.
(*You can only export contacts from one folder at a time. To export contacts from multiple folders, copy all contacts into a new folder or perform a mail merge for each folder.*)
4. Select **Mail Merge** from the **Tools** menu.
5. Under **Contacts**, click on **All contacts in current view** or **Only selected contacts**.
6. Under **Fields to merge**, click on **All contact fields** or **Contact fields in current view**.
7. Under **Document file**, select one of the following:
 - Click on **New document** to create a new document for the mail merge.
 - Click on **Existing document** to merge fields to an existing document. Click the **Browse** button, select the desired document, and click **OK**.
8. *Optional:* To save the list of contacts for future use, check the **Permanent file** box. Enter a name for the file in the text box.
9. In the **Document type** box, select the type of mail merge you want to create. You can select form letters, mailing labels, envelopes or a catalog (directory).
10. In the **Merge to** box, select **New Document**, **Printer**, or **E-mail** to export the contacts to a temporary merge source file.
(If you select **E-mail**, enter a subject the **Message subject line** box.)
11. Click **OK**.
12. Your new document will open in **Word**. Open the **Mail Merge** task pane.
13. Follow the wizard to complete the merge.

Note: Mail Merge cannot read addresses in personal distribution lists. Outlook ignores personal distribution lists from your Contacts and will not export them in the mail merge.