



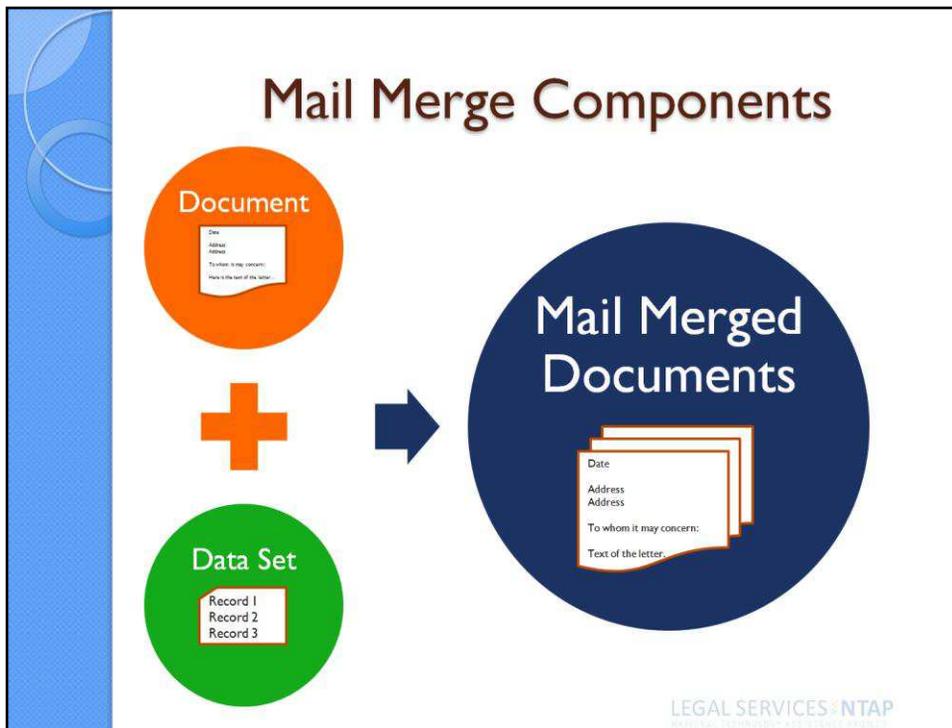
# Mail Merge and More!

June 16, 2010

- Rachel Medina, NTAP

# Agenda

- Mail Merge Components
- The Mail Merge Wizard
- Setting up the Document
- Setting up the Envelopes and Labels
- Questions



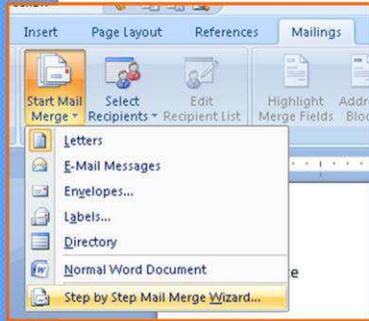
A mail merge is made up of two components a document (which can be a letter, envelope, or label) and a data set. Putting the two together using a mail merge results in producing several letters, envelopes, or labels for a group of people or organizations.

Obvious reason for using a mail merge then is to save time in drafting a form document which needs to be sent to multiple folks.

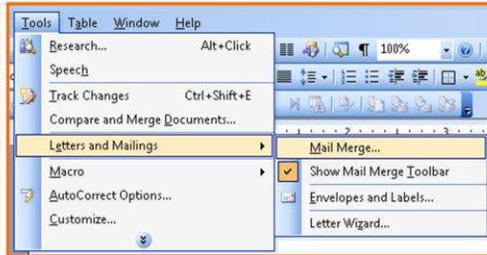
# Mail Merge Wizard

- Use the wizard!

2007



2003



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# Mail Merge Steps

- Step #1 – Select Document Type

2007



2003



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Step #1 – Select Document Type.

A Mail Merge can be used to produce multiple letters, e-mail messages, envelopes, labels, or a directory. Select the appropriate type of project and then “Next” (which appears at the bottom right-hand corner of the screen) to get started.

# Mail Merge Steps

- Step #2-Select Starting Document



## Step #2 – Select Starting Document.

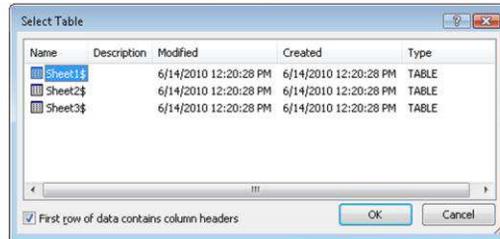
You have three options from which to choose your starting document. You can use the document which is presently open in your screen. Or, if you have a template document saved elsewhere, you can choose to start with it instead. Or, you can choose to open any existing document. Highlight “(More files...)” and select “Open” to find an existing template or document.

# Mail Merge Steps

2007

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- Step #3-  
Select  
Recipients



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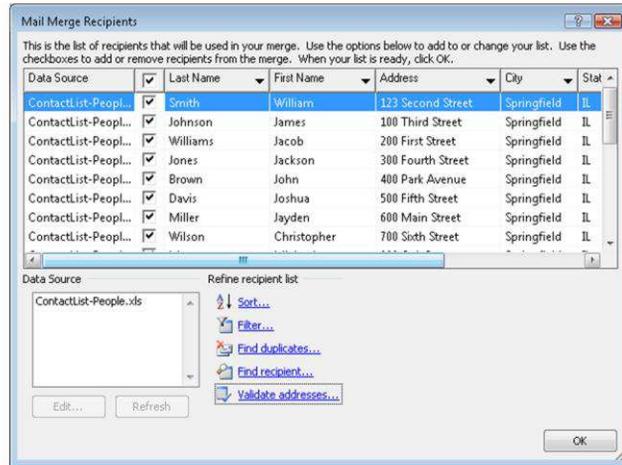
## Step #3 - Select Recipients.

Recipients can be selected from an existing list, such as an Excel file. They can also be selected from Outlook contacts. Or, you can type up a new list entirely.

To use an existing list, select Browse to find the appropriate file. When selecting an Excel file, be sure to indicate which Sheet the list appears on and determine whether the list contains column headers. If it does, you'll need to check the box so that the header row is not included as a "record."

# Mail Merge Steps

- Step #3-Select Recipients

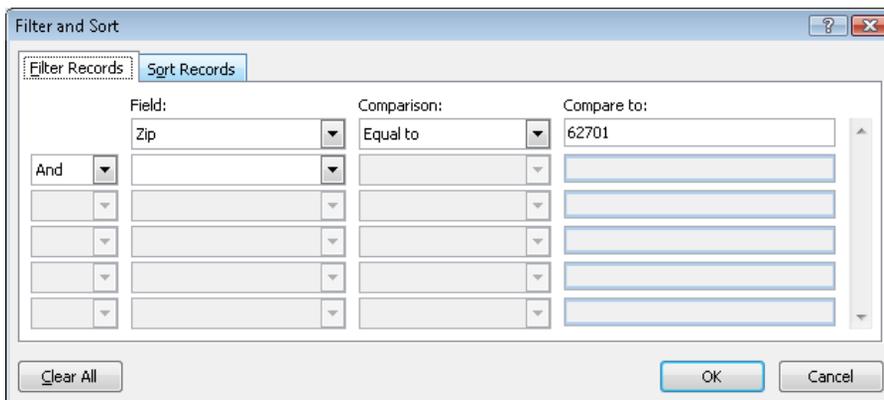


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## Step #3 – Select Recipients (cont'd)

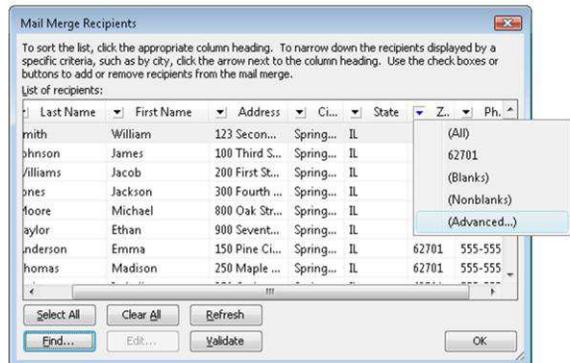
Continue Step 3 by weeding out duplicate contacts or unchecking contacts you want excluded from the mail merge. (Note: De-selecting the contacts does not remove the contact from your original Excel file or database. You can also Filter the recipient list to narrow your mail merge by any given factor, such as zip code or city.

Once you have narrowed down your recipient list, select OK in the Mail Merge Recipients screen. Select Next in the Mail Merge Wizard to move to Step #4.



# Mail Merge Steps

- Step #3-Select Recipients (2003)



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In version 2003, you can continue Step 3 by weeding out duplicate contacts or unchecking contacts you want excluded from the mail merge. (Note: De-selecting the contacts does not remove the contact from your original Excel file or database. You can also Filter the recipient list to narrow your mail merge by any given factor, such as zip code or city, by selecting the drop down arrow at the top of any column, selecting advanced and setting up a custom filter.

# Mail Merge Steps

- Step #4- Write Your Letter  
(add merge fields)

2007



2003



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## Step #4 – Write Your Letter (add merge fields)

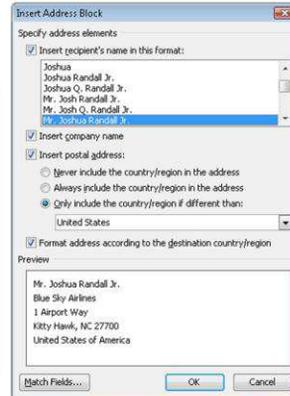
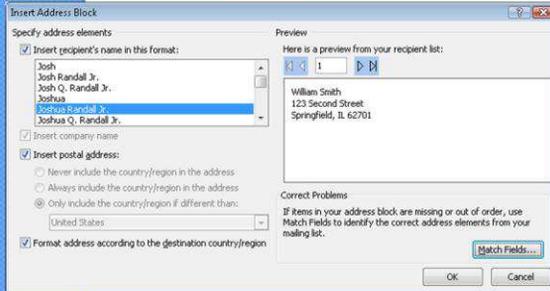
Word provides a shortcut to inserting the entire address into a letter called the “Address Block.” Simply place your cursor in the letter where you want the address to appear and select Address Block. Note: The address is going to be formatted according to the paragraph formatting for the space you highlighted. So, you may want to check your paragraph formatting first before inserting the Address Block to be sure it is single-spaced, etc. There is also an automated option for inserting a greeting line to a letter. And, individual fields can be added to the letter from your data set by selecting “More Items...”

# Mail Merge Steps

- Step #4- Write Your Letter  
(add merge field)

2003

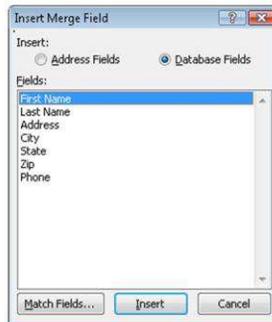
2007



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## Mail Merge Steps

- Step #4- Write Your Letter  
(add merge field)

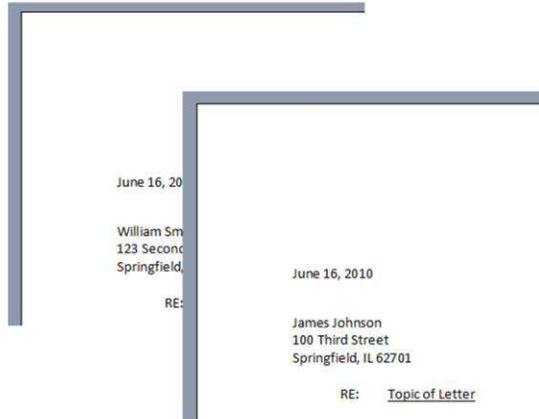


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Adding “More Fields” brings up the “Insert Merge Field” dialog box which appears the same in version 2007 as in version 2003 of Word.

# Mail Merge Steps

- Step #5- Preview Your Letters



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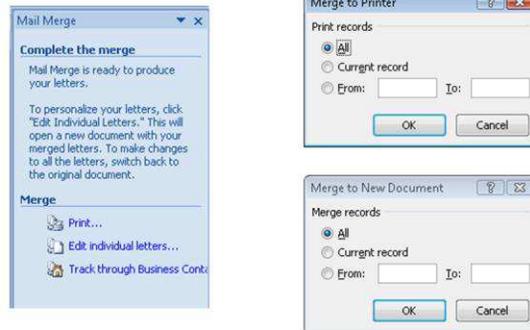
## Step #5 – Preview Your Letters

Using the double-arrow button, page through each letter to determine that the letters look okay. If you find that a document has been created for an unintended record, then simply select the “Exclude this recipient” button to delete that document from the group.

Of course, if after looking through a few of the letters to determine that the format is okay, you probably do not need to page through the entire set of documents.

# Mail Merge Steps

- Step #6- Complete the Merge



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## Step #6 – Complete the Merge

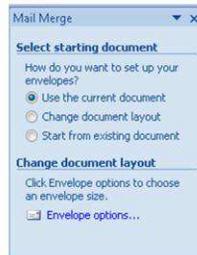
You have a couple choices when it comes to actually completing the merge. You can simply print the entire group of letters or a select few to a printer. Or, you can send the document set to a file should you decide that you may need to edit individual letters for content. To create a file of the document set, select “Edit individual letters.” This will create a new file that includes a copy of each completed document. From there you can save the file with a new name and further edit the documents if necessary.

# Demo

- Mail Merge Wizard

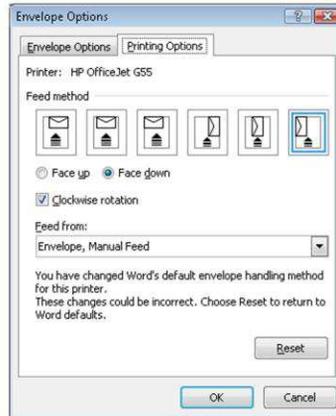
## Envelopes – Use the Wizard

- In Step #2, be sure to set up your Envelope Options



# Envelopes – Use the Wizard

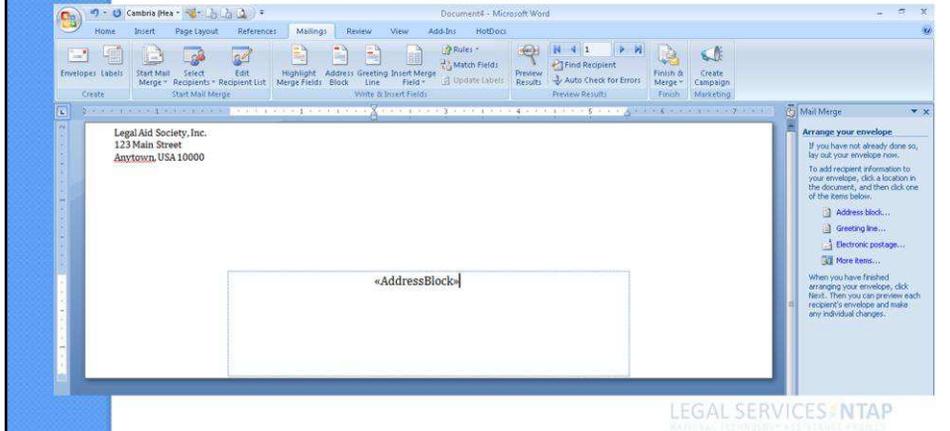
- Select appropriate size of envelope
- Set up printing method



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## Envelopes – Use the Wizard

- In Step #4, click in the center of the envelope space when inserting the Address Block field



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# Demo

- Envelopes

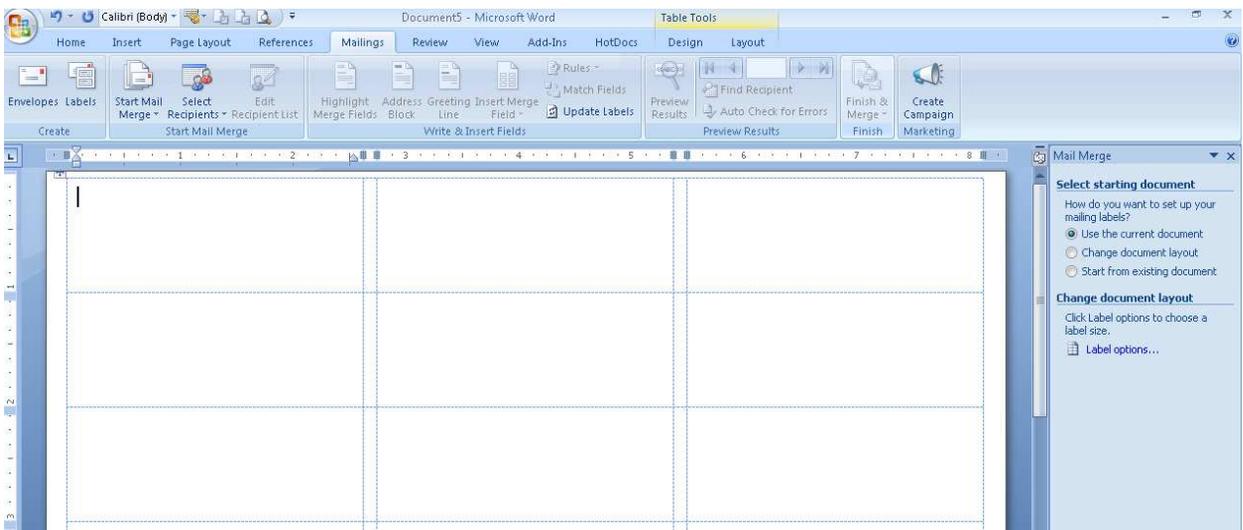
# Labels – Use the Wizard

- In Step #2, be sure to set up your Label Options



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Be sure to set up your Label Options to accord with whatever brand and type of label you will be using. In this example I have chosen to search for the Avery brand of labels and their label type (or product number) 15160 which are Mailing Labels 1 inch x 2.63 inch in size. Once you make the selection, you will notice that your document will be formatted to accommodate those labels. See screenshot below.



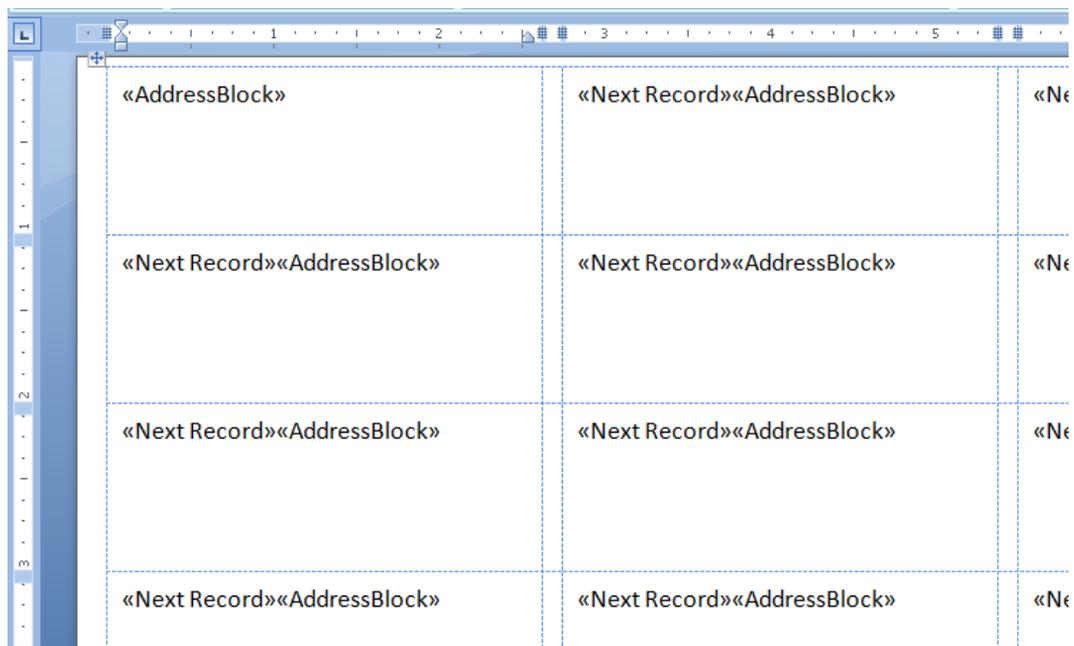
## Labels – Use the Wizard

- In Step #4, you only need to insert the Address Block in one label, then select “Update all labels”



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Once you insert the Address Block field in the first label in the upper left hand corner and select “Update all labels” from the wizard, the Address Block field will be added to all of the labels in the document.



# Demo

- Labels



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Don't forget to complete our survey 😊

**THANK YOU**