Mail Merge Guide

Any type of Mail Merge has two components, the main document and the data file.   The main document contains the body of the text, plus any graphics, photos, etc. It is usually composed in a Word Processing program. The data file contains a list of names, addresses, phone numbers, and more. The data file is often created in a spreadsheet program, or uses a list of contacts from an e-mail program such as MS Outlook. Selected components from the data file are inserted into the main document, and then two files are merged to create one seamless document.

Using a Spreadsheet program like MS Excel to Create a Data File

1. **Open Your Spreadsheet Program**
2. **Create Header Row Labels for all components of the mail merge (e.g. name, address, zip code, etc.). They do not need to be in any particular order.**

C	D	E	F	G	H	I
LAST NAME	FIRST NAME	ADDRESS	CITY	STATE	ZIPCODE	START DATE

3. **Enter all data into the data file. Watch Your Spelling! If it's wrong in the data file, it will be wrong in the main document.**

> • **Note:** Many zip codes on the east coast begin with a 0 (e.g. 07924). Excel often does not recognize the zero and will remove it from the zip code (e.g. 7924). To correct this, **right-click on the zip code column → Format Cells**. In the number tab, select *Special* in the list of *Categories.* Under *Type*, select *Zip Code*, or *Zip Code + 4*, and then click OK. The 0s should appear at the beginning of the zip code.

Creating the Mail Document Using the Mail Merge Wizard in MS Word

To Access Mail Merge, go to Tools → Letters and Mailings → Mail Merge

1. **Step 1 of 6 – Select Document Type**
    *   **Letters** – send a letter to many people. You can use mail merge to insert addresses and greeting lines, among other things.
    *   **E-Mail Messages**
    *   **Envelopes** – print a stack of envelopes instead of typing them individually.
    *   **Labels** – create mailing labels to be printed
    *   **Directory** – a printed list of addresses (like a phone book)
2. **Step 2 of 6 – Select Starting Document**
    *   **Letters, E-Mail Messages, and Directory**
        o   *Use the Current Document* – creates the merge in the file you currently have open
        o   *Start from a Template* – Templates insert merge fields into preset documents.
        o   *Start from Existing Document* – opens a file where a merge has previously been created.
    *   **Envelopes and Labels**
        o   *Change Document Layout* – envelopes and labels have different dimensions than an 8.5 x 11 piece paper. In a new merge, you will need to change your layout to accommodate these dimensions.
        o   *Start from Existing Document* - a file where a merge has previously been created.
        o   *Envelope or Label Options* – most labels and envelopes are assigned a number (e.g. #10, or Avery 5160). You need to tell Word the type of label or envelope you are using. Otherwise, the merge will not print correctly.

3. Step 3 of 6 – Select Recipients
- **Use an Existing List** – this refers to a data file such as one created in MS Excel or Access
  - o *Browse* – find the data file on your computer
  - o When you select the file, you have the option to "Edit Recipient List". This allows you to keep the Data File intact, while still providing the flexibility to remove irrelevant names from your merge.
- **Select from Outlook Contacts**
- **Type a New List** – Word has a limited capacity for storing names and addresses. If you do not have MS Excel or any other type of spreadsheet program, this can be a good alternative.
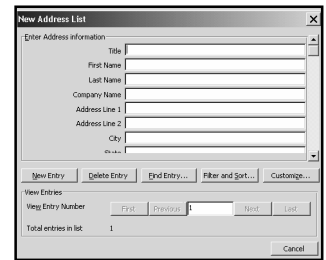
4. Step 4 of 6 – Write or Arrange Your Information
- Address Block (Wheaton Public Library; 225 North Cross St.)
- Greeting Line (Dear Wheaton Public Library)
- Electronic Postage (needs extra software)
- Postal bar code (makes the zip code machine readable) e.g.

- More items (allows the user to select individual fields)
- **Note**: When using Labels, it is vital to click *Update All Labels* in this step. Skipping this step results in a single label printing.

5. Step 5 of 6 – Preview Your Letters
- Browse through the recipients to ensure that names are spelled correctly, that addresses are aligned properly, etc.
- In this step, you have another opportunity to include or exclude recipients.

6. Step 6 of 6 – Complete the Merge
- This is the final menu. Click the *Print* link to print the entire merge. To make changes to individual letters within the merge, click the *Edit individual letters* link.

The Mail Merge Toolbar – Go To View → Toolbars →Mail Merge to Activate

| **A** | **B** | **C** | **D** | **E** | **F** |
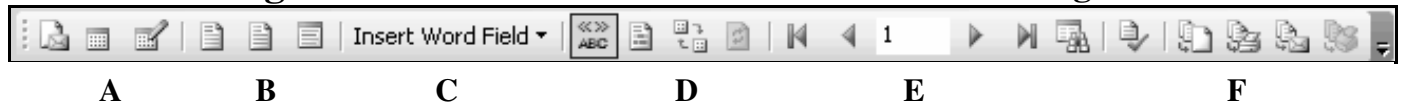
A
1. Main Document Setup
2. Open Data Source
3. Mail Merge Recipients

B
4. Insert Address Book
5. Insert Greeting Line
6. Insert Merge Fields

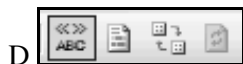C   Insert Word Field ▾ Inserts information not included in your data file.

D
7. View Merged Data
8. Highlight merge Fields
9. Match Fields

10. Propagate Labels

E
11. First Record
12. Previous Record
13. Go to Record
14. Next Record
15. Last Record
16. Find Entry

F
17. Check for Errors
18. Merge to New Document
19. Merge to Printer
20. Merge to E-Mail
21. Merge to Fax