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I. Mail Merging

Mail Merging can be used to quickly produce a personalized letter to several people at the same time. In order to do a mail merge you need 2 different documents.

- ❖ Create a main document letter
- ❖ Create a data source
- ❖ Merge the 2 documents to create only one

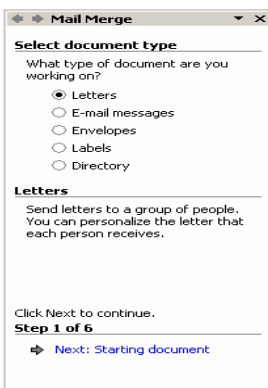
The easiest way to mail merge, is to use the Mail Merge Wizard.

II. Mail Merge Wizard

Select **Tools, Letters and Mailing, Mail Merge Wizard** to display the *Mail Merge Task Pane* on the right side of the document

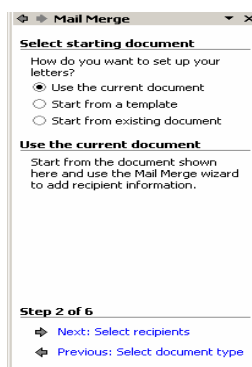
1. Creating a New Letter and Data list

The wizard will walk you through 6 steps creating a merged document.



Step 1: Select document type:

- Letters
- Email messages
- Envelopes
- Labels
- Directory – information list



Step 2: Click on Next: *Starting Document* and select one of the options below

How do you want to set up letters?

Current Document- current window

Template – preset word design

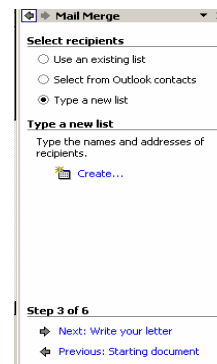
Existing document : a file that already has been created and saved

Step 3: Click on Next: Select Recipients

From an **Existing file** – if you are using an existing list, click on **Browse** and locate the file.

From **Outlook Contacts** – Use Outlook Contact list

Type a **New list** - Create a new list of records.



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Step 4: If you are creating a New List, select **Type a New List** and click on **Create**

The mail merge wizard will open the New List screen so that new data records can be entered.

Enter person's name and complete the information on the designated fields provided.

Click on **New Entry** button after each person to create each entry separately. The bottom of the dialog box will show you the number of records.

Set all the other options you would like to set and click before clicking on **Close** on this dialog box.



NOTE: You can **create, delete, rename, and move** fields. Click on the **Customize** button. Highlight the field, click on delete, or rename. If you would like to Move fields, highlight it and click on Move Up or Move Down buttons, To **add** a field, click on the Add button and type the field name.

The deleted/removed fields will not show on the **New Address List** screen after you have customized the list fields.

To **Sort Fields**, click on the **Filter and Sort** button, select the **Sort** tab and set sorting options. When you're done, click OK and click **CLOSE**.

When you click on Close, Word will ask you to save the document, name and save the document.

This will display the Mail Merge Recipients Screen. Not all the records that you have entered have to be merged. Select or deselect names to be merged.

NOTE: You can return to the back to the New Data List dialog box to add or delete other names by clicking on **EDIT** button.

Click OK when done.

Last Name	First Name	Company Name	Address Line 1	
<input checked="" type="checkbox"/>	Jones	Mary	UKMC	800 Rose St
<input checked="" type="checkbox"/>	Jones	Sam	UKMC	800 Rose St
<input checked="" type="checkbox"/>	Drummond	Ed	UKMC	800 Rose st
<input checked="" type="checkbox"/>	Dickey	Carol	Staff Education	800 Rose st

Step 5: Click on **Next: Write your Letter** at the bottom of the screen.

Type the letter

Use one of the following items to insert records or names of people

Address Block—Specifies and enters all the fields entered in each record

Greeting line - inserts a greeting line on the letter to personalize the letter

More items – inserts additional fields

The Address Block option will automatically insert all the fields in the record(s) selected. Select Address Block. This will display the **Select Address Block** dialog box. Highlight the naming convention you prefer and click on **OK**.

Click on **Next: Preview Your letters** at the bottom of the screen

This will display your letters. To preview all letters before printing, click on the arrows Previous/Next.

Step 6 Click on **Next: Complete the Merge**. Once the merge is complete, you can print the letters. You can edit the letter before you print.

Save the letter if needed.

2. Creating a New Letter Using an Existing Data list

Step 1: Click on **Tools, Letters and Mailings**, and select **Mail Merge Wizard**

Step 2: At the Mail Merge task pane, click on **Letters** and choose **Next: Starting Document**

Step 3: Select the **Use Current Document** option and click on **Next: Select Recipients**

Step 4: Click on **Use and Existing List** and click on **Browse** to find your document

Step 5: At the Mail Merge Recipients dialog box, click on
Select All to include all the recipients
Clear All to deselect all records
Find to find a specific record
Edit to add new records or delete existing ones
Validate to check all the addresses (must have an additional software)
Refresh to include the edits you made on the Mail Merge

Step 6: Click on **Next: Type your Letter**

Step 7: After writing your letter, click on the location and click on Address Block (or other option such as a Greeting Line)

Step 8: Click on **Next: Preview Your Letters**

Step 9 Preview your letters by click the Next and Previous Arrows

Step 10: Click on **Next: Complete the Merge**

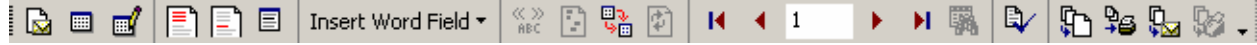
Step 11: Click on Print

III. Mail Merge Toolbar

The Mail Merge toolbar can be used as a shortcut in Mail Merging.

To open the Mail Merge Toolbar, select View, Toolbars, and Mail Merge.

The Mail Merge toolbar allows you to merge documents without using the wizard.



This tool bar includes all the merging icons. Instead of using the wizard, use the icons to create the letter, data and merge the 2 documents.

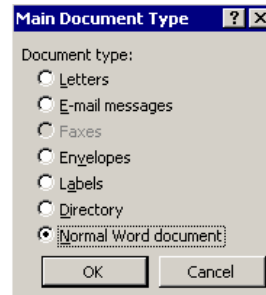
Merging Existing Records Using the Mail Merge Toolbar

Once a data file and a main document have been created, you can merge as many times as you want. Follow the steps below:

1. Display the **Mail Merge toolbar**
2. Click the first icon on the Mail Merge Toolbar labeled **Main Document Setup**

This will open the Main Document dialog box

Select document type



3. Click on the second icon on the Mail Merge Toolbar labeled Open Data Source and find your data file and click Open

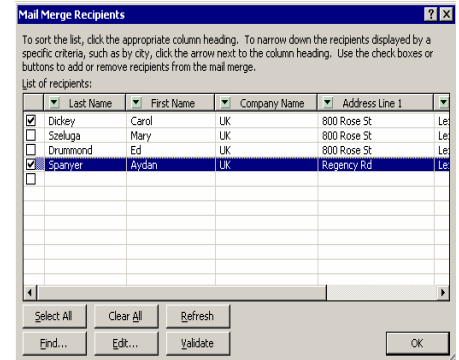
If you would like to merge only certain records, click on the third icon labeled Mail Merge Recipients

On the Mail Merge Recipients Dialog box deselect any names that will not be merged and click OK

Notice that the record display on the Mail Merge Bar lists only the records you have selected (by number)



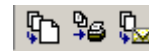
Use the arrow keys to check for the record numbers. If you would like to display the records, click on the third icon labeled Mail Merge Recipients again.



4. Click on the fourth icon to insert the <<Address Block>> field.

5. Click on the checkmark icon on the Mail Merge  Menu bar to check for errors

6. Click on one of these icons to merge to a document, to print or to merge to email.



IV. Printing Labels and Envelopes

I

The Mail Merge feature can also be used to print envelopes and labels. You can either use the Merge Wizard or the toolbar to do this.

1. Creating, Merging, and Printing Labels using Mail Merge Wizard

1. Click on **Tools, Letters and Mailings, Mail Merge Wizard**
2. The Mail Merge Wizard Task pane will be displayed on the right side. Select **Labels**
3. Click on **Next: Starting Document** at the bottom of the task pane to open the **Select Starting Document** Task Pane
4. Select the **Change Document Layout** option
5. Click on **Label Options** to select type of label (the label type # can be found on the label packaging)
6. Click OK to return back to the task pane and click on **Next: Select Recipients**
7. From the **Select Recipients** task pane, choose **Type a New List Find** and click on **Create**
8. On the New Address list following instructions from **Step 4 of Creating a new letter merge** (page 2)
9. When you have entered all the records, click **OK**
10. **Save** the file
11. A list of all of the new records will be displayed. The default shows all of the recipients selected. Deselect any you will not use on the merging
12. Click on **Next: Arrange the recipients** at the bottom of the task pane
13. Make sure that the cursor is on the exact spot you want to label text to begin. Click on **Address Block** and choose the address block elements
14. Your first label should have «**AddressBlock**» and the rest should have «**Next Record**»
15. Click on Update All Labels to match the rest of your labels to the first one.

2. Merging and Printing Labels using Mail Merge Toolbar

1. Click on **View, Toolbars, Mail Merge** to display it
2. Click on **Main Document Setup** icon (first one on the Toolbar)
3. Select **Labels**
4. Select the **Label type** and click OK
5. Word will display the skeleton for the **labels**
6. Click on the Open Data Source Icon (second icon on the Mail Merge Toolbar)
7. Find and open your data file to display the names of the participants in your data file. Select the ones you would like to print



NOTE: If you would like to print a whole page of labels for the same person, uncheck all names except for the one to be printed out.

8. Click on the Insert **Address Block** icon (fourth icon on the Toolbar)

9. Place your cursor on the first label and click on the **Propagate Labels**



icon to match all the labels

11. Click on the Merge to New Document or Merge to Printer icons on the Toolbar

NOTE: You can save the document to use it again.

3. Creating, Merging, and Printing Envelopes Using the Mail Merge Toolbar

1. Click on View, Toolbars, Mail Merge toolbar
2. Click on Main Document Setup icon and select envelopes to open Envelopes Option dialog box

Adjust the envelope size, font for both the delivery and return addresses (**Figure 1**).

3. Click on the Printing Options to set feeding method. (**Figure 2**)

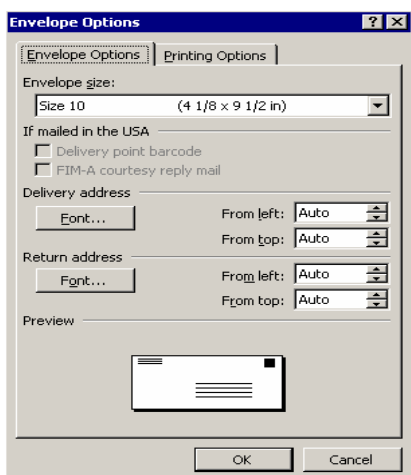


Figure 1

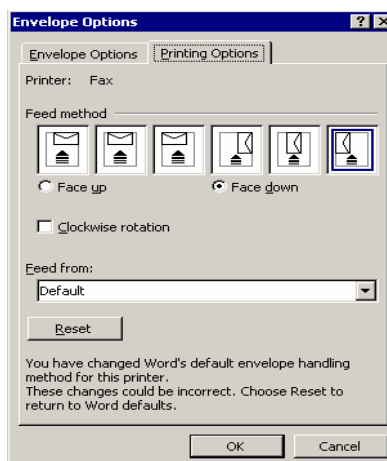
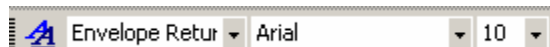


Figure 2

Click OK and this will display the new document in the shape of an envelope

4. You will see that there is an Envelope Style box on the Formatting Menu

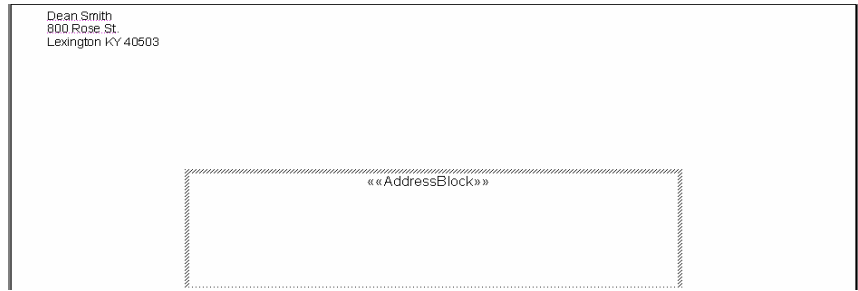


5. Type the return address

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6. Click on the Drop Down Menu and select Envelope Address
7. The cursor will jump down to the middle of the envelope displaying a text box

8. Click on the **Open Data Source icon** on the Mail Merge tool bar, find and open your data file
9. Make sure your cursor is still inside the text box on the envelope and click on the Address Block icon to insert <<**Address Block**>> field



10. Click on the **Merge to New Document icon**
11. Preview and **Print**

4. Creating, Merging, and Printing Envelopes using Mail Merge Wizard

1. Click on **Tools, Letters and Mailings, Mail Merge Wizard**
2. The Mail Merge Wizard Task pane will be displayed on the right side. **Select Envelopes**
3. Click on **Next: Starting Document** at the bottom of the task pane to open the **Select Starting Document** Task Pane
4. Select **Change Document Layout** option
5. From the **Envelope Options** dialog select envelope size, font and direction of text
6. Go to the **Printing Options** Tab and select envelope feed method
7. Click on **Create** and enter all the new record information, click **OK**
8. Save the file
9. A list of all of the new records will be displayed. The default shows all of the recipients selected. Deselect any you will not use on the merging
10. Click on **Arrange your Envelope**
11. Click on envelope to place your cursor on the return address field and click on Block Address
12. Click on the recipient area and click on Block address
13. Click on Preview your Envelopes to display the envelop on your screen
14. Click on Next: Complete the Merge
15. Select Print

5. Creating and Printing Envelopes Using the Menu Bar

1. Click on **Tools, Letters and Mailings, Envelopes and Labels**
2. Select the Envelopes Tab
3. Type **Delivery and Return address on the envelope** (Click on Omit radio button if no return address is required)
4. Click on **Options** to adjust the Envelope Size. You can also change the Font, Font size color.
5. Click on **Printing Options** and select the Feed method
6. Click on OK and Click Print