



Overview

A mail merge is performed when a personalized form letter is sent to different people. Mail merge is also used to generate mailing labels or envelopes for a group of people. There are two parts of a mail merge: (1) the recipient list and (2) the letter or labels/envelopes. A recipient list can be created in Word, Excel, Access, or another application. The letter, labels and envelopes must be created in Word. All of the mail merge commands and buttons can be found on the Mailings ribbon.

Letter with Recipient List Created in Word


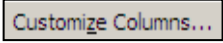

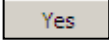
Start a Mail Merge

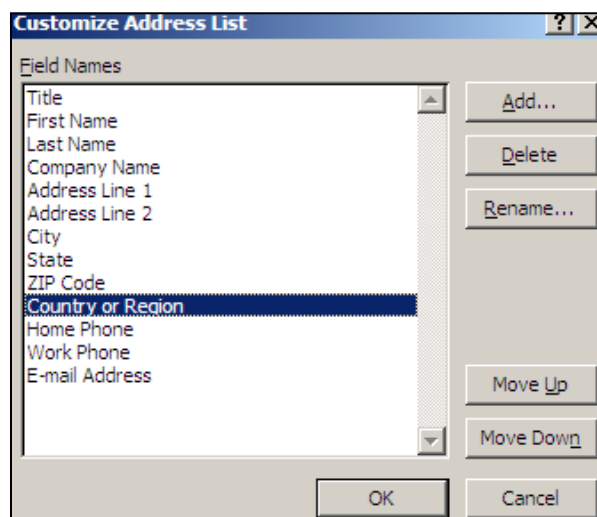
1. Open a new document in Microsoft Word.

NOTE: If reusing a letter, open the Word file.

2. On the **Mailings** tab, in the **Start Mail Merge** group, click the  button. Select *Letters*.

Create a Recipient List

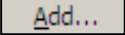
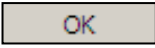
1. On the **Mailings** tab, in the **Start Mail Merge** group click the  button. Select *Type New List*. The *New Address List* dialog box displays.
2. Click the  button to customize the fields in the recipient list. The *Customize Address List* dialog box displays with thirteen predefined *Field Names*.
3. To remove a field, click on the *Field Name* then click the  button.
4. Click the  button to permanently remove the field. Repeat for each field that should be removed.

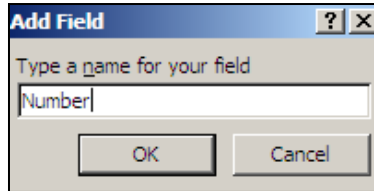


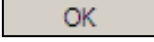
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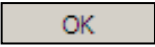


Create Mail Merges

5. To add a field, click the  button.
6. Type the name of the field in the *Add Field* dialog box then click the  button.



7. When finished customizing the fields, click the  button. The *New Address List* dialog box displays again.
8. Enter each record.
 - a. Use the **[TAB]** key to move from field to field.
 - b. Press the **[TAB]** key when in the last field (column) to move to a new record.

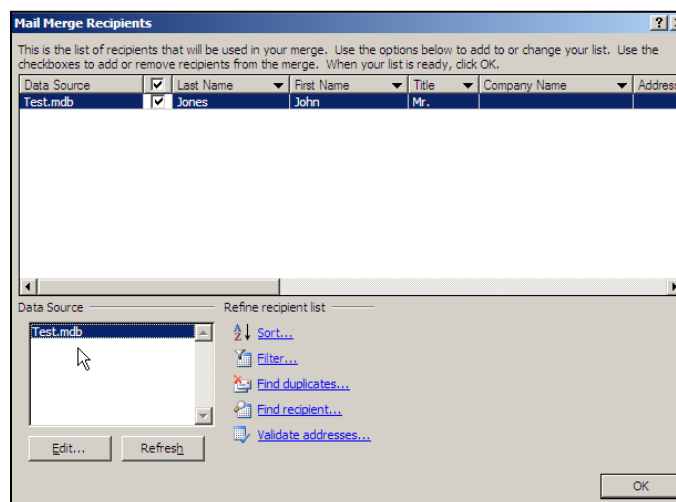
9. Click the  button when finished. The *Save Address List* dialog box displays.

NOTE: Word defaults to the *My Data Sources* folder. Save to a different folder if desired. The default file type is *.mdb* (Microsoft Office Address List).

10. Type a name for the recipient list file then click the  button.

Edit a Recipient List

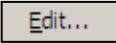
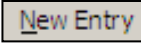
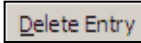
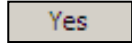
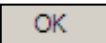

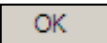
1. On the **Mailings** tab, in the **Start Mail Merge** group click the  button. The *Mail Merge Recipients* dialog box displays.




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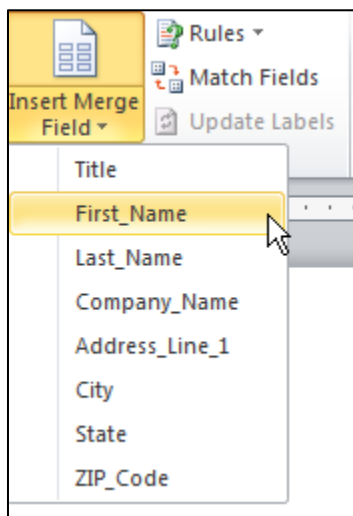
Create Mail Merges

- Highlight the name of the recipient list in the Data Source area then click the  button. The *Edit Data Source* dialog box displays.
- To correct text in a record, retype it.
- To add a new record, click the  button and type the record.
- To delete a record, first highlight the row by clicking into the empty square to the left of the record. Click the  button and, when prompted, click the  button.
- To save the changes, click the  button. Click the  button. Then click the  button once again.

Type a Letter

- Type the letter until a merge field is reached.
- On the **Mailings** tab, in the **Write and Insert Fields** group, click the bottom of the  button.
- Select a merge field to insert it in the letter. Repeat to insert each merge field as needed.







NOTE: Spacing and other characters must be manually inserted and/or typed.




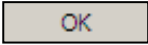
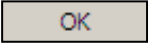
- Save the letter when complete.



Preview a Merge


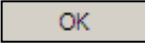
1. On the **Mailings** tab, in the **Preview Results** group click the  button. The first letter/record displays.
2. Navigate to other records as needed.
 - a. Click the  button to move to the next letter/record.
 - b. Click the  button to move to the last letter/record.
 - c. Click the  button to move to the previous letter/record.
 - d. Click the  button to move to the first letter/record.
3. When finished previewing your letters, click the  button again.
4. Correct/edit the letter at this point if needed.

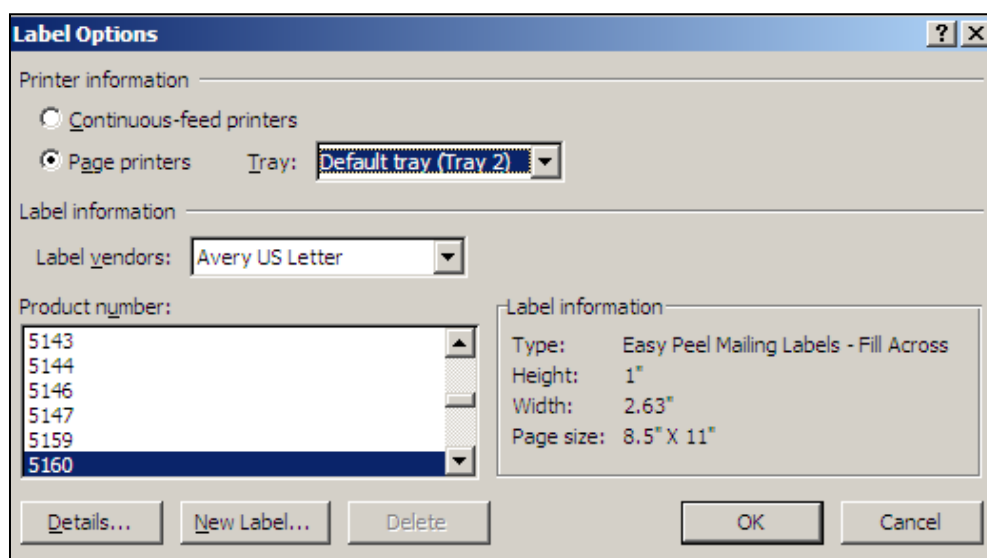
Complete/Print a Merge Document


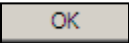

1. On the **Mailings** tab, in the **Finish** group click the  button. Select *Print Documents*. The *Merge to Printer* dialog box displays.
2. Select **All** (to print every letter) then click the  button.
3. In the *Print* dialog box, click the  button to print the merge letters.



Labels with Recipient List Created in Excel

1. Open a new document in Microsoft Word.
2. On the **Mailings** tab, in **Start Mail Merge** group, click the  button. Select *Labels*. The *Label Options* dialog box displays.
3. Set the label parameters:
 - a. Select *Page printers*
 - b. Choose the specific tray of the printer from the *Tray* drop-down list.
 - c. Select the *Label vendor* (Example: Avery US Letter) from the drop-down list
 - d. Choose the label *Product number*
4. Click the  button.

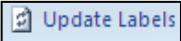


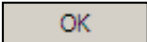
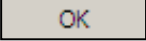


5. On the **Mailings** tab, in the **Start Mail Merge** group click the  button. Select *Use Existing List*. The *Select Data Source* dialog box displays.
6. Locate and open the spreadsheet. Highlight the sheet that contains the data and click the  button.
7. On the **Mailings** tab, in the **Write and Insert Fields** group click the bottom portion of the  button to insert each merge field on the first label.
8. Insert any spacing or commas between the merge fields. Format or align the text.

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9. Click the  button to insert the merge fields on all labels.
10. On the **Mailings** tab, in the **Preview Results** group click the  button. The first sheet of labels displays.
11. On the **Mailings** tab, in the **Finish** group click the  button. Select *Print Documents*. The *Merge to Printer* dialog box displays.
12. Select **All** (to print all of the labels) then click the  button.
13. In the *Print* dialog box, click the  button to print the labels.