

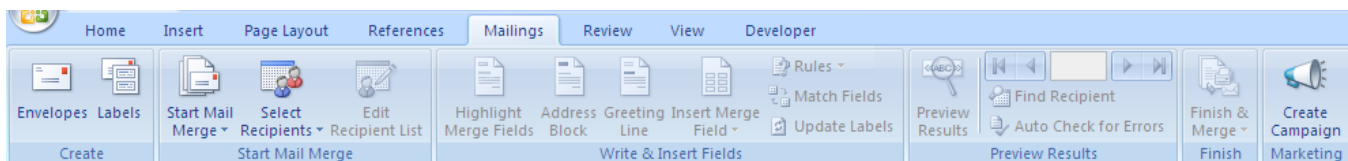


A mail merge is performed when you want to create and send a form letter (containing the same basic information) to different people but want it to be personalized. Mail merge is also used when you need a set of mailing labels or envelopes generated for a group of people.

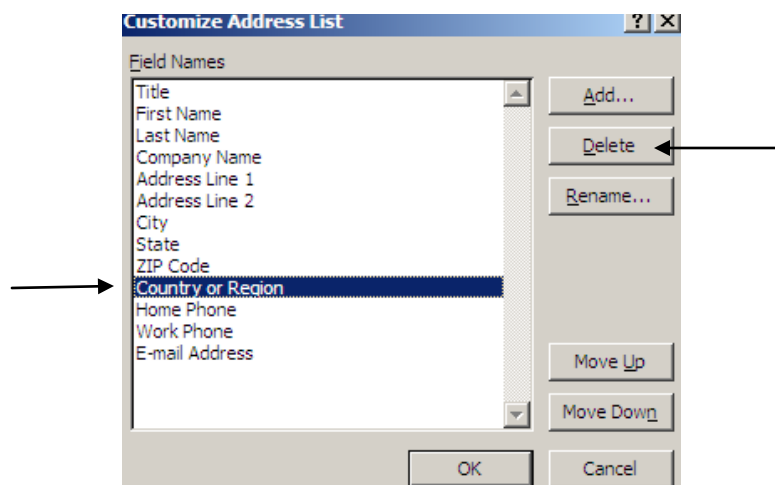
There are two parts to a mail merge: (1) the data source (names, addresses, etc.) and (2) the letter—or sheet of labels. A data source can be created in Word, Excel, Access, or other applications. The letter or labels **MUST** be created in Word.

### Letter and Data Source Created in Word

1. Open Microsoft Word.
2. Click on the **Mailings** tab to display the ribbon.



3. Click **Start Mail Merge** and then click on **Letters**. Word now recognizes that you will be creating a mail merge LETTER.
4. Click **Select Recipients** and then click on **Type New List**. Word opens the *New Address List* dialog box to get you started with the data source.
5. Add and/or delete the columns before entering the records. Click **Customize Columns** to begin.
6. There are thirteen (13) commonly used columns to start you off. Highlight the one(s) you do not need then click **Delete** and then **Yes**.



7. To add a column, click the **Add** button, type the name of the field, and then click **OK**.

# HOW TO . . .

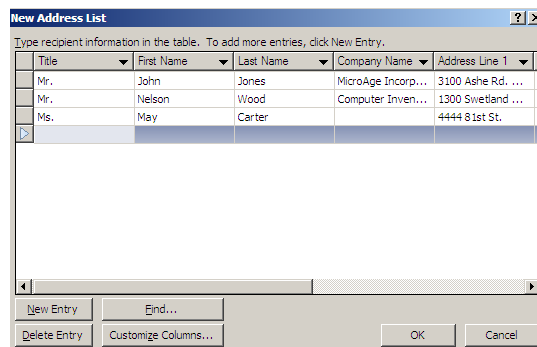


## Create Mail Merges

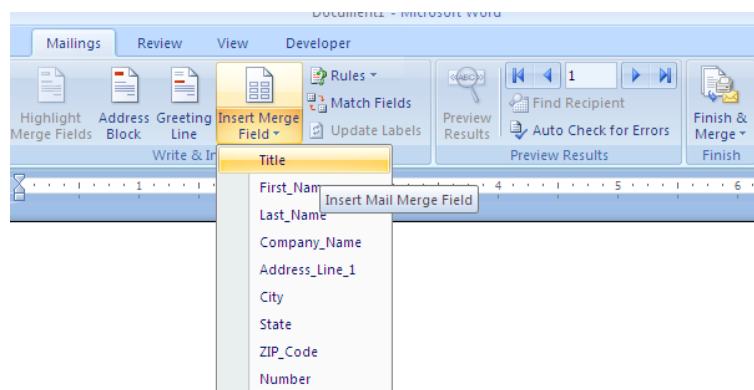
8. When you are finished adding and deleting fields, click **OK** to close the *Customize Address List* dialog box. Begin typing the records in the *New Address List* dialog box, using the **Tab** key to move from column to column.

Mr.	Mr.	Ms.
John	Nelson	May
Jones	Wood	Carter
MicroAge Incorporated	Computer Inventory Control	
3100 Ashe Rd.	1300 Swetland Ave.	4444 81 <sup>st</sup> St.
Portland	Scranton	Joliet
OR	PA	IL
17635	18509	60435
20	11	7

9. When you have entered all of the records, click **OK**.



10. You will be prompted to save the data source as a separate file. You can change the location (from the *My Data Sources* folder) to another folder you have created. Also note, the file will be saved as a .mdb (Microsoft database) file and not a Word file.
11. Once the data source has been saved you can begin to type the letter. Each time you come to a merge field, click on the **Insert Merge Field** button (bottom part of the button on the “arrow”) and then click on the field you need to insert.



**NOTE:** You can also click on the **Address Block** or **Greeting Line** buttons and follow the instructions to insert multiple merge fields.



August 24, 2009

«Title» «First\_Name» «Last\_Name»  
 «Company\_Name»  
 «Address\_Line\_1»  
 «City», «State» «ZIP\_Code»

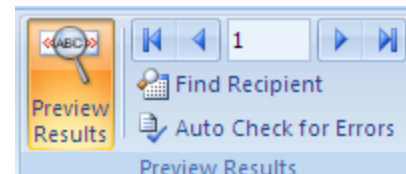
Dear «Title» «Last\_Name»:

Thank you for your generous purchase of «Number» tickets to the Goodwill Games. We greatly appreciate your support and look forward to holding this international event in our city.

Sincerely yours,

Karen Boland

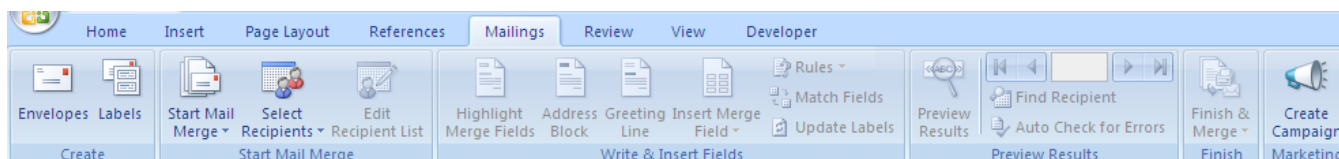
12. Once the typing of the letter is completed, save the document (you already saved the data source earlier).
13. To see the merge letters on the screen, click the **Preview Results** button.
14. You will be seeing record number 1. Click the arrow to the right of the number 1 to move to record number 2 and then 3, etc.
15. Click **Preview Results** again when finished.
16. To print the mail merge letters click on the **Finish & Merge** button and then **Print Documents**.
17. Make sure **All** is selected then click **OK**.
18. Click **OK** to print (you may have to check the *Properties* first to specify which drawer).
19. Save and close the letter.



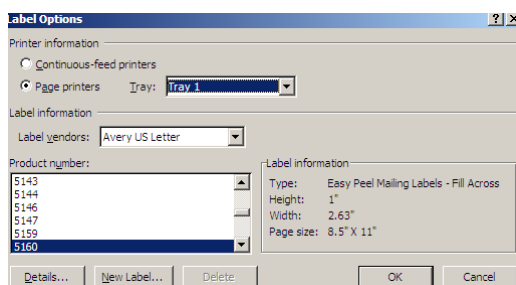


## Labels (or Envelopes) Created in Word Data Source Created in Excel

1. Open Microsoft Word.
2. Click on the **Mailings** tab to display the ribbon.



3. Click **Start Mail Merge** and then click on **Labels**. Word now recognizes that you will be creating a mail merge LABEL sheet.
4. In the Label Dialog box, choose the correct label and tray. Click **OK**.



5. Click the **Select Recipients** button. Click **Use Existing List**.
6. Locate the spreadsheet and open it. Highlight the correct Sheet (it is usually Sheet 1) and click **OK**.
7. Your cursor will be on the first label waiting for you to insert the merge fields. Click on the bottom part of the **Insert Merge Field** button and start choosing the merge fields, inserting any spacing and punctuation if needed.
8. When finished, click on **Update Labels** to apply the settings to all labels, not just the first one.
9. To see the first page of labels on the screen, click on **Preview Results**.
10. Click **Preview Results** again before printing.
11. Click **Finish and Merge** and then **Print Documents**.
12. Make sure **All** is selected then click **OK**.
13. Click **OK** to print.

