

Microsoft Word:

Material adapted from Microsoft Word Help

Mail Merge, Envelopes and Labels



DIVISION *of* INFORMATION
TECHNOLOGY
VALDOSTA STATE UNIVERSITY

IT Communications and Support

A Division *of* Information Technology

Technology-related learning opportunities and support for VSU Faculty and Staff

DIVISION *of* INFORMATION TECHNOLOGY

LOCATION Pine Hall • PHONE 229.333.5974 • FAX 229.245.4349 • WEB www.valdosta.edu/it • ADDRESS 1500 N. Patterson St. • Valdosta, GA 31698-1095

Table of Contents

What is Word Mail Merge?	3
Step 1: Set Up the Main Document	4
Step 2: Select a Data Source	4
Type a New List.....	4
Use an Existing List.	5
Choose from Outlook Contacts.	5
Step 3 (Optional): Refine the List of Recipients or Items.....	5
Step 4: Type Document & Insert Merge Fields	6
Step 5: Preview the Merged Documents.....	7
Click Preview Results.....	7
Step 6: Complete the Merge	7
Edit Individual Documents:	7
Print Documents:.....	8
Send Email Message:	8
Optional: Save the main document and/or merged documents.....	8
File > Save As.....	8
Print Envelopes (sans Mail Merge)	9
Optional: Change the size, font, or layout	10
Print Labels (sans Mail Merge).....	11

What is Word Mail Merge?

Use mail merge when you want to create a set of documents, such as a form letter or custom email that is sent to many people. Each document has the same kind of information, yet some of the content is unique. For example, in letters to your students, you can personalize each letter to address each student by name. The unique information in each letter comes from entries in a data source.

The mail merge process entails the following overall steps:



Step 1: Set up the main document. The main document contains the text and graphics that are the same for each version of the merged document — for example, the return address in a form letter.

Step 2: Connect the document to a data source. A data source is a file that contains the information to be merged into a document. For example, the names and addresses of the recipients of a letter.

Step 3: Refine the list of recipients or items. Microsoft Word generates a copy of the main document for each recipient or item in your data file. If you want to generate copies for only certain items in your data file, you can choose which items (or records) to include.

Step 4: Insert merge fields to the document. When you perform the mail merge, the mail merge fields are filled with information from your data file.

Step 5: Preview the merged document. You can preview each copy of the document before you print the whole set.

Step 6: Complete merge. You can print, email, or save the merged documents.

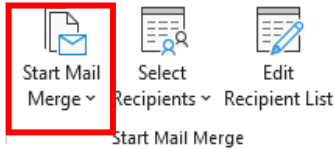
Note: You can also use the Step-by-Step Mail Merge Wizard:

Click **Mailings** > click **Start Mail Merge** > click **Step-by-Step Mail Merge Wizard**.



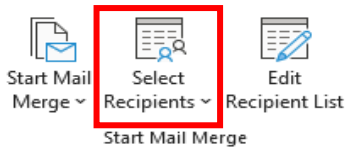
Step 1: Set Up the Main Document

1. **Start Microsoft Word.** A blank document opens by default. Leave it open. If you close it, the commands in the next step are not available.



2. Click **Mailings > Start Mail Merge dropdown** and select one of the following:
 - **Letters.** Type the information that is mostly the same for all recipients.
 - **E-mail Messages.** The basic content is the same in all the messages, but each message goes to the individual recipient and each message contains information that is specific to that recipient, such as the recipient's name or other pieces of information.
 - **Envelopes.** The return address is the same on all the envelopes, but the delivery address is unique on each one.
 - **Labels.** Each label shows a person's name and address, but the name and address on each label is unique
 - **Directory.** The same kind of information, such as name and description, is shown for each item, but the name and description in each item is unique. Click Directory to create this type of document.

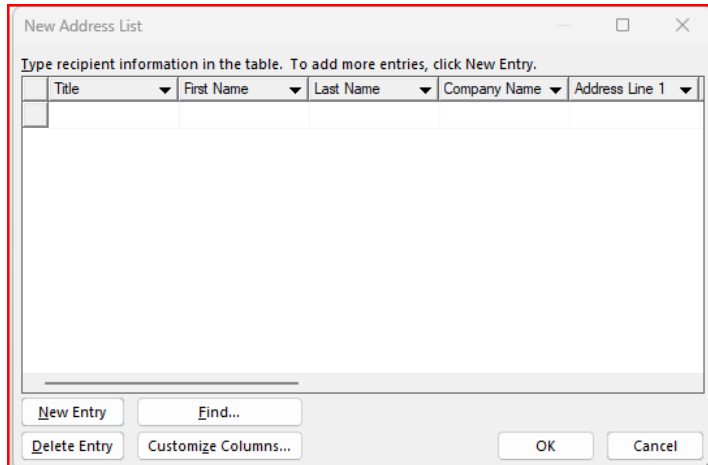
Step 2: Select a Data Source



On the **Mailings tab** > click **Select Recipients** and select one of the following:

[Type a New List](#). Create a new data file directly in Word:

- a. In the **New Address List dialog box**, type the information for the first record that you want to include in your mail merge.
- b. Click **New Entry** to type the subsequent records.
- c. Click **Customize Columns** to modify column headers and to add and delete columns.
- d. **Click OK** when your new list is complete. In the **Save Address List dialog box**, type a name for your new list, and then **click Save**. The list is saved as a database (.mdb) file that you can reuse.



[Use an Existing List](#). If you have an existing data source file such as a Microsoft Excel worksheet, a Microsoft Access database, or another type of data file, locate the file in the **Select Data Source dialog box**. Ensure it contains column headers and all the records you want to include.

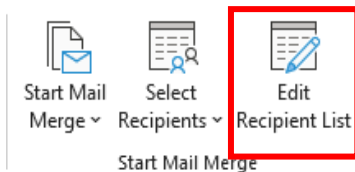
[Choose from Outlook Contacts](#). If you want to use your Contacts list in Microsoft Outlook. **Note:** If you plan to use custom contact fields with the Contacts list in Microsoft Outlook or if you plan to use a Public Folders Contacts folder, you must begin the mail merge process in Outlook.

Step 3 (Optional): Refine the List of Recipients or Items

If you plan to use your entire list, skip ahead to Step 4.

To narrow the list of recipients or use a subset of the items in your data file, do the following:

1. On the **Mailings tab** > **click Edit Recipient List**.



2. In the **Mail Merge Recipients dialog box**, do any of the following:
 - a. **Select individual records.** This method is most useful if your list is short. Select the check boxes next to the recipients you want to include or clear the check boxes next to the recipients you want to exclude.
 - b. **Sort records.** Click the column heading of the item that you want to sort by. The list is sorted in ascending alphabetical order (from A to Z). Click the column heading again to sort the list in descending alphabetical order (Z to A).
 - c. **Filter records.** This is useful if the list contains records that you don't want to see or include in the merge. After you filter the list, you can select or clear the check boxes to include or exclude records.

NOTE: Depending on the type of data source that you use, some options might not be available.

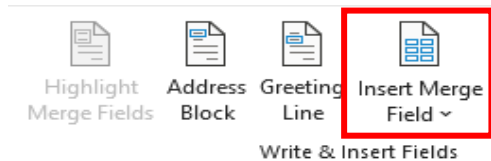
Step 4: Type Document & Insert Merge Fields

After you connect your main document to a data file, begin typing the content of your document, leaving space where your unique information (Fields) will appear. **Note:** The field name is surrounded by chevrons (« »). These chevrons do not show up in the merged documents. They help to distinguish the fields <<placeholders>> from the “regular” typed text.

	A	B	C
1	Name	Last Name	Street Address
2	Nancy	Anderson	123 Main St.
3	Ann	Beebe	567 Country Rd.
4			
5			
6			
7	Nancy Anderson 123 Main St.		
8	Dear Nancy,		
9			

Type the Content and Add the Fields:

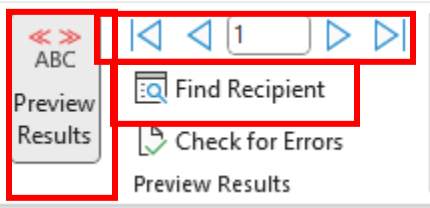
1. In the main document, type any content that you want to appear on every copy of the document.
2. Click in the document where you want to insert the Field <<placeholder>> and add any of the following:



- a. **Address Block.** A combination of several fields, including first name, last name, street address, city, and postal code.
 - b. **Greeting Line:** Includes one or more name fields, depending on your chosen salutation.
 - c. **Insert Merge Field:** Insert information from **individual fields (column headers) from your data source**, such as Name, Last Name, or Street Address. You can combine fields and separate them by punctuation marks and spaces.
3. To remove an inserted field, **select it (including the chevrons)** and press the **Delete key on your keyboard**.
 4. To format the inserted field, **select it (including the chevrons)**, and click the **Home tab and Font group**.

Step 5: Preview the Merged Documents

After you add fields to your main document, you can preview your merged documents and make changes before you complete the merger.



Do any of the following in the **Preview Results** group of the **Mailings** tab:

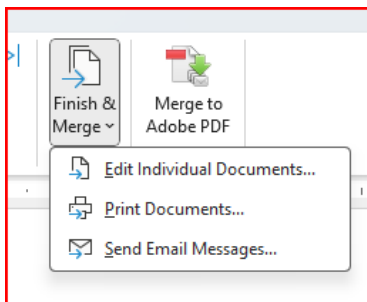
Click [Preview Results](#). Page through each merged document by using the **Next Record** and **Previous Record** buttons.

Click [Find Recipient](#). Preview a specific document.

NOTE: Click **Edit Recipient List** in the **Start Mail Merge** group to open the **Mail Merge Recipients dialog box**, where you can filter the list or clear recipients if you see records that you don't want to include.

Step 6: Complete the Merge

Select how you want to merge your document:



[Edit Individual Documents](#):

1. On the **Mailings** tab > click **Finish & Merge** > click **Edit Individual Documents**.
2. Choose to **Merge All**, **Current Record**, or **From: To:** which you specify by record number > click **OK**.
3. Word compiles the copies that you want to edit into a single file, with a page break between each copy of the document.
4. After you finish editing the new file of documents, you can print the documents by clicking the **File** tab, clicking **Print**, and then clicking the **Print** button.
5. You can also select to **Save** each document.

Print Documents:

1. On the **Mailings tab** > click **Finish & Merge** > click **Print Documents**.
2. Choose to **Print All, Current Record**, or **From: To:** which you specify by record number > click **OK**.
3. Your printer dialog box should display. Click **OK** to print.

Send Email Message:

You must have included an email address field in your data source. Word sends an individual message to each recipient. Natively, you cannot Cc or Bcc other recipients. You also cannot add attachments to the email merge message.

1. Click **Mailings** > **Finish & Merge** > **Send E-mail Messages**.
2. In the **To** box, **select the email address field** from your list.
3. In the **Subject line** box, type a subject line for the message.
4. In the **Mail format** box, click **HTML** or **Plain text** (*message will not include any text formatting or graphics*) to send the document as the body of the email message.
5. Choose to **Send All, Current Record**, or **From: To:** which you specify by record number > click **OK**.

Optional: Save the main document and/or merged documents

Merged documents that you save are *separate* from the main document. **It's a good idea to save the main document itself if you plan to use it for another mail merge.**

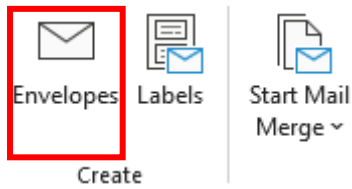
File > Save As

When you save the main document, you also save its connection to the data file. The next time that you open the main document, you are prompted to choose whether you want the information from the data file to be merged again into the main document:

- If you click **Yes**, the document opens with information from the first record merged in.
- If you click **No**, the connection between the main document and the data file is broken. The main document becomes a standard Word document. Fields are replaced with the unique information from the first record.

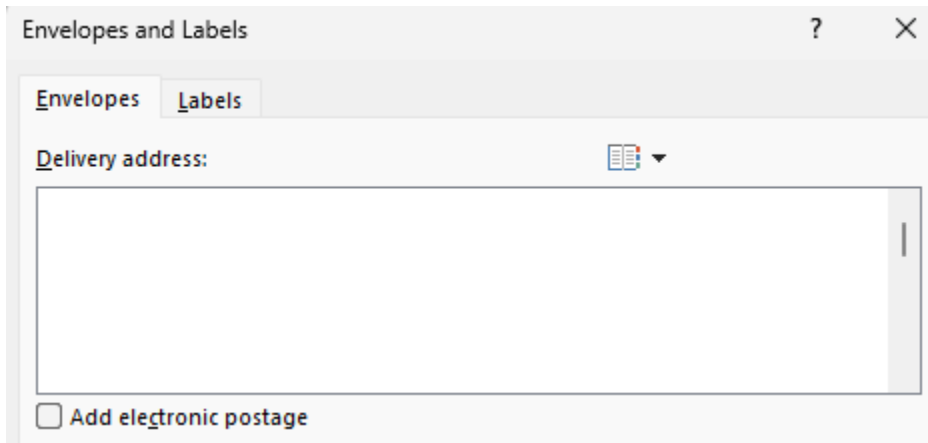
Print Envelopes (sans Mail Merge)

1. Click **File** > **New** > **Blank document**.

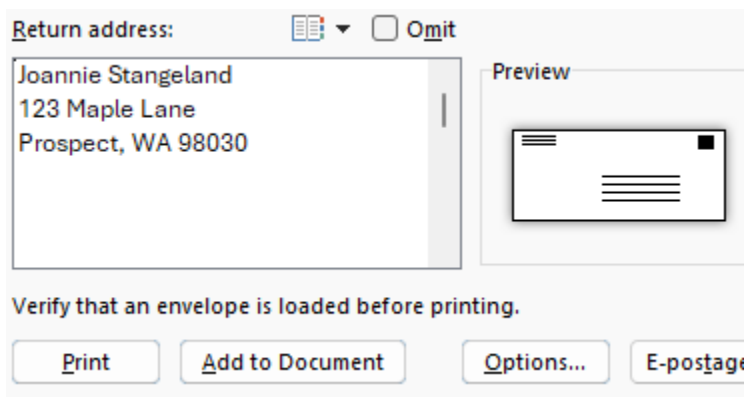


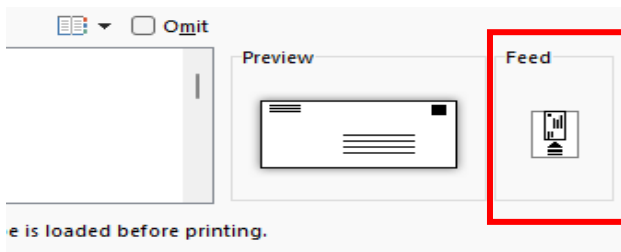
2. Click **Mailings** > **Envelopes**.

3. In the **Delivery address** box, type the address of whom you are sending the letter.



4. In the **Return address** box, type your return address.

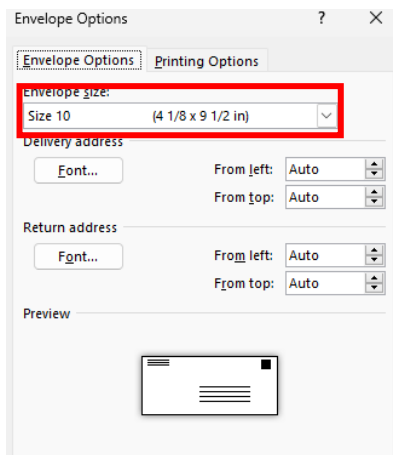




5. Load the envelope the way the picture shows under **Feed**.
6. Word gets information from your printer about how to load the envelope.
7. Click **Print**.
**To print multiple envelopes with the same address, type the number of envelopes you want.*
8. When Word prompts you to save the return address, click **Yes**, if appropriate.

Optional: Change the size, font, or layout

1. On the **Envelopes** tab in the **Envelopes and Labels** box, click **Options > Envelope Options**.

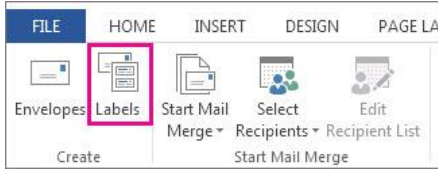


2. To change the envelope size, click the arrow next to the **Envelope** size list and click the choice that matches the size of your envelopes.
3. To change the font, click the **Font** button under **Delivery address** or **Return address**, and choose the font you want.
4. To change the position of the addresses, click the up or down arrow next to the **From left** or **From top** boxes. The **Preview** area shows you the new layout.

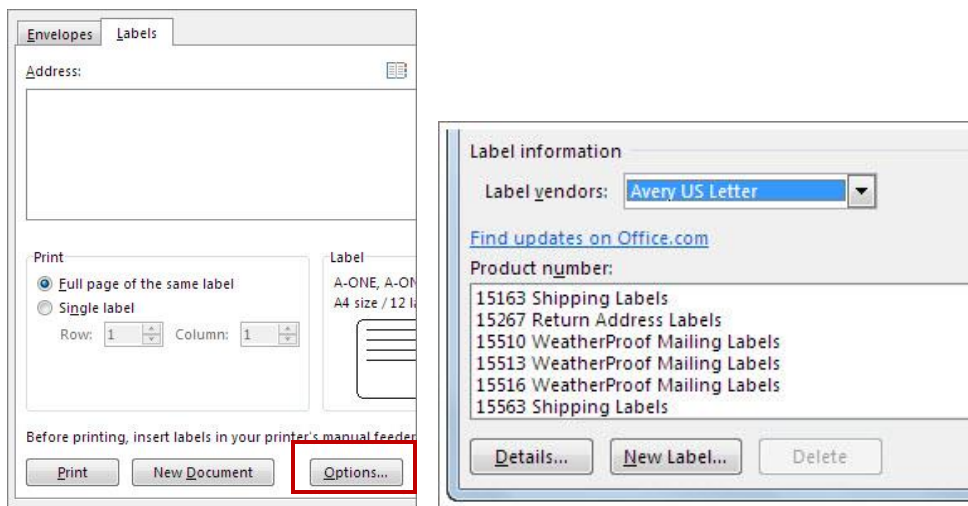
Print Labels (sans Mail Merge)

Set up and print one label or a page of the same label or different labels.

1. Click **Mailings > Labels > Click Options.**



2. In the **Label vendors** list, click the company that made your labels, or the company and page size. For example, click **Avery US Letter.**



3. Under **Product number**, click the number that matches the one on your labels package > **Click OK.**

4. Type information in the **Address** box.

- To type a page of different labels, click **OK > click New Document > Type the information you want in each label**
- To change formatting, **select text > right click > click Font or Paragraph > make changes > Click OK.**

5. Under **Print**, click **Full page** of the same label or click **Single label.**

6. Place your label sheets in the printer > **Click File > Print** and click the **Print** button.