

# Mail Merge with Microsoft Word

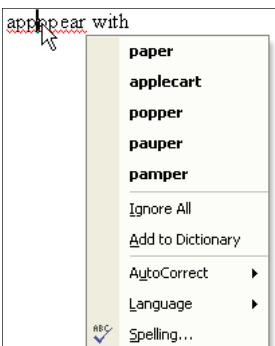


## Keyboard Shortcuts...

New document	Ctrl + N
Open document	Ctrl + O
Print	Ctrl + P
Save	Ctrl + S
Cut	Ctrl + X
Copy	Ctrl + C
Paste	Ctrl + V
Undo	Ctrl + Z
Redo	Ctrl + Y
Single space	Ctrl + 1
Double space	Ctrl + 2
Space and 1/2	Ctrl + 5

## Shortcut menus...

Clicking once with the right mouse button will produce a shortcut menu. The contents of this menu will change depending on what was selected when you right-clicked. Right clicking misspelled words will produce a menu of spelling suggestions, Right clicking green underlined words will offer grammar suggestions. Right mouse clicking selected text will offer formatting suggestions as well as cut and copy.



## MAIL MERGE

Mail merge is the process of taking a single form letter, combining it with a list of names and other information and then merging both to create several customized documents.

The file that contains the names and other information is the data source. The file that contains the form letter is the main document.

### 1 DOCUMENTS IN A MAIL MERGE

- 1 Data source with recipient information, such as names and addresses
- 2 Main document with merge fields that are placeholders for recipient information
- 3 Resulting merged document

## TASK PANE

This feature of Word is executed by following the directions in the Task Pane. The Task Pane appears on the right side of your screen when the Mail Merge task is selected.

## GETTING STARTED

Create an address file.

- created using a table in Word
- OR
- export names from address book into Excel

## STEPS IN THE MAIL MERGE TASK PANE

### In Word 2003

Open the Tools menu → Letters and Mailings → Mail Merge Wizard

### In Word 2007

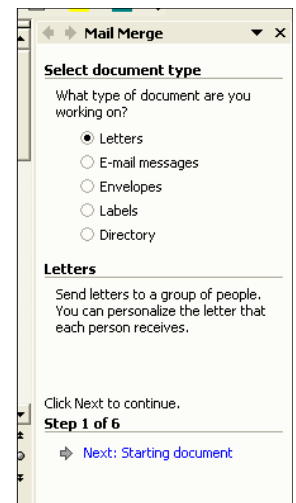
Click the Mailings Tab → Click the “Start Mail Merge” option → Select Step by Step Mail Merge Wizard.

- The task pane will appear on the right side of the screen

**Step 1** – Select documents type: letters, email messages, envelopes, labels or directory

- Letters – personalized letters
- Email messages – Outlook messages
- Envelopes – mailing envelopes
- Labels – any type of Avery type labels
- Directory – a catalog of information such as a telephone directory

**Step 2** – Click “Next: starting document” – set up the document choosing label type or document type



## The Data Document

The data document...the place where the names and addresses are stored...can be created in Word, Excel or Outlook. Here are some tips for setting it up in Word or Excel

### Word Tips

- ◇ Create a table and enter the data in the columns.
- ◇ There should be no returns in the document before you insert the table

### Excel Tips

- ◇ Use the first row as a header row and label the columns (e.g., First Name, Last Name, etc.)
- ◇ Format the zip code column as text (Format menu → Cells → Text)

**Step 3** – Select recipients — this step is asking you to identify the file where the names are coming from.

- Click Browse and find your file
- Click the Edit Recipient List button to identify which records you would like to merge. All records will have a check mark

**Step 4** – Arrange document – Insert the fields into the main document

- In Word 2003 click the More Items hyperlink on the right side of the screen
- In Word 2007 click the Mailings Tab — Insert Merge Fields option
  - ◇ A list of fields will be presented based on your data file
  - ◇ Click a field and click the Insert button
  - ◇ Click the Cancel button
  - ◇ Repeat until all the fields are added
- If creating labels, Click the Update All Labels button to add the same fields to all labels. This is also an opportunity for you to add graphics, change fonts, etc.

**Step 5** – Preview your labels

- If any adjustments are needed, click the Previous hyperlink to return to step 4 and make adjustments

**Step 6** – Complete the merge

- Print – will print the list (labels or document)
- Edit individual labels (letter) – creates a file you can save and edit and use again.
  - ◇ Merge to new document – Choose All records, a Current record, or identify a range of records, click OK

NOTE: Click a column heading to sort

