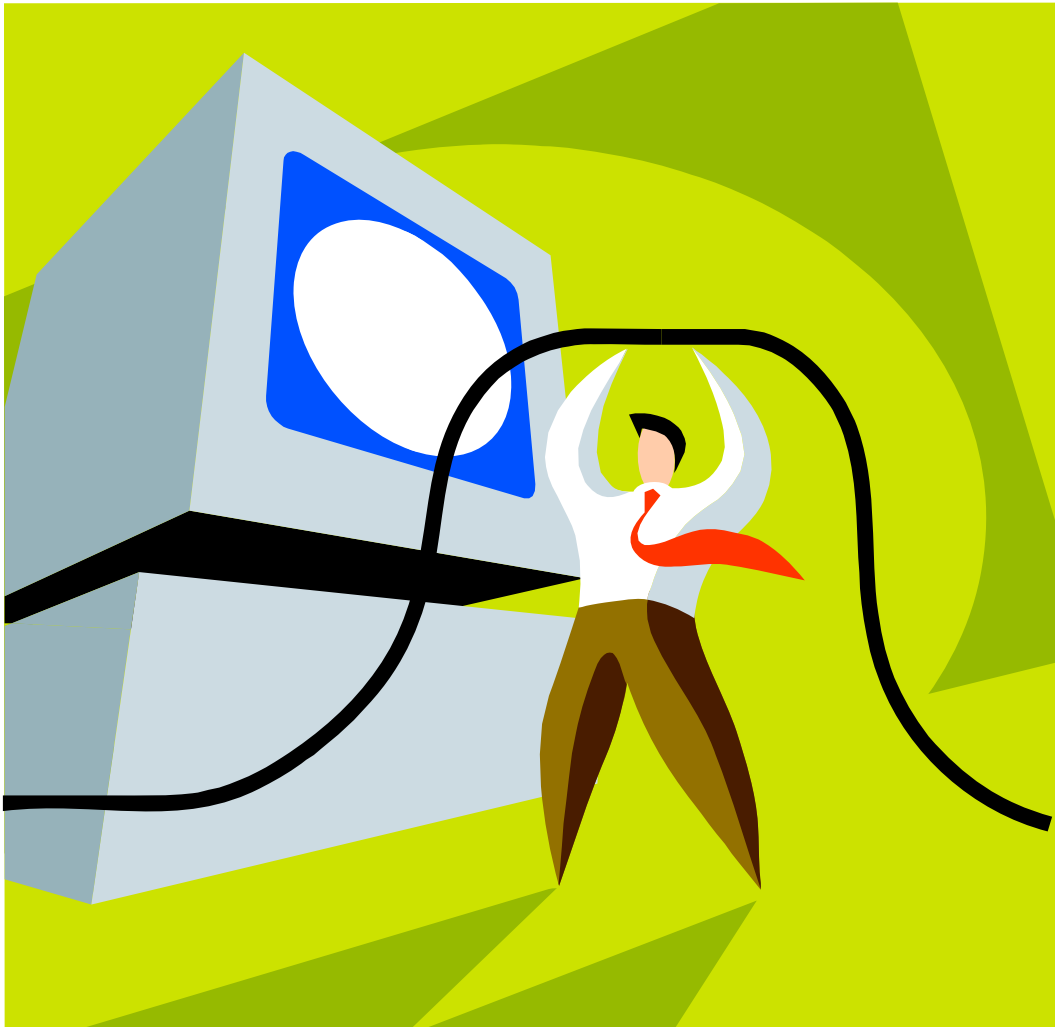


# Office Productivity Series



Mail Merge with Word and  
Excel

# Mail Merge Wizard: An Overview

The Mail Merge Wizard takes you step-by-step through the process of creating merged documents. It is always available and easily accessible in the task pane. At each step there are options to choose from that will help you to tailor the merge to your needs. This document describes each step in general and the options available. At any point while using the wizard, you can go back to a previous step to adjust your choices.

## To Access the Mail Merge Wizard:

1. From the *Tools* menu, select **Letters and Mailings » Mail Merge Wizard...**  
The *Mail Merge* task pane appears.

## STEP 1: Selecting the document type

Your options for document type are:

### Select document type

What type of document are you working on?

- Letters
- E-mail messages
- Envelopes
- Labels
- Directory

**Letters:** Allows you to tailor one letter to many individuals.

**E-mail messages:** Allows you to personalize a message as you would form letters and send them via email. For instructions on how to perform this type of merge, see [Creating an Email Merge](#).

**Envelopes:** Allows you to print envelopes with different addresses. For instructions on how to perform this type of merge, see [Creating Merged Envelopes](#).

**Labels:** Allows you to print labels with different addresses. For instructions on how to perform this type of merge, see [Creating Mailing Labels](#).

**Directory:** Allows you to gather varied but related information into a list. For example, list the names, office locations, and phone numbers to create a departmental or organizational directory.

## STEP 2: Establishing the starting document

Your options for the starting document are:

**Use the current document:** uses the document currently open

**Start from a template:** uses a preset Word design. Once you make this selection a link appears. Clicking it takes you to the *Select Template* dialog box where you can choose the template you want to use.

**Start from existing document:** uses a previously saved document. Once you make this selection, you can choose from a list of recently used files or select another of your files.

### Select starting document

---

How do you want to set up your letters?

- Use the current document
- Start from a template
- Start from existing document

### Use the current document

---

Start from the document shown here and use the Mail Merge wizard to add recipient information.

## STEP 3: Selecting the recipients

Your options for selecting recipients are:

**Use an existing list:** uses a previously saved list. Once you make this selection, a link appears. Clicking it takes you to the *Select Data Source* dialog box where you can choose the file you want to use.

**Select from Outlook contacts:** uses your Outlook contacts as recipients. You must use Outlook and have existing Contacts. Once you make this selection, Word retrieves your Outlook Contacts in the form of an editable recipient list.

**Type a new list:** allows you to create your own list by typing each recipient.

### Select recipients

---



- Use an existing list
- Select from Outlook contacts
- Type a new list

### Use an existing list

---

Currently, your recipients are selected from:

[Office Address List] in "oneaddress.m

-  Select a different list...
-  Edit recipient list...

## STEP 4: Writing your letter

During this step you will be adding text and variable information to your letter. To assist you in this, Word has a number of pre-formatted entries along with the fields from your recipient list. Frequently used options include:

**Address block:** lets you specify the format of recipients' names, whether to insert the company name and postal address, and format the postal address.

**Greeting Line:** allows you to format how the greeting line will appear (e.g. *Dear Mr. Randall,*) and choose which format to use for invalid names (e.g. *Dear Sir or Madam,*).

**More items:** enables you to insert additional address and database fields.

### Write your letter

---

If you have not already done so, write your letter now.

To add recipient information to your letter, click a location in the document, and then click one of the items below.

-  Address block...
-  Greeting line...
-  Electronic postage...
-  Postal bar code...
-  More items...

## STEP 5: Previewing your letters

At this point, you are almost ready to merge. Before you do so, it is a good idea to preview your letters. You can browse through the letters by clicking either the PREVIOUS or NEXT button. You can also locate specific recipients.


Based on what you see during this preview, you may decide to edit your letter, edit the recipient list, or exclude one or more recipients from the merge.

### Preview your letters

---

One of the merged letters is previewed here. To preview another letter, click one of the following:

Recipient: 1

 Find a recipient...

### Make changes

---

You can also change your recipient list:

 Edit recipient list...

## STEP 6: Completing the merge

Once the merge is complete, you can print the merged letters or, prior to printing, you can edit individual letters.

### **Complete the merge**

---

Mail Merge is ready to produce your letters.

To personalize your letters, click "Edit Individual Letters." This will open a new document with your merged letters. To make changes to all the letters, switch back to the original document.

### **Merge**

---

 Print...

 Edit individual letters...

# About the Mail Merge Toolbar


Within *Mail Merge*, there is a special toolbar to help make the mail merge quick and easy. Toolbars allow you to simply click a button, instead of using the main menus. This document shows the *Mail Merge* toolbar and describes the functions of each button.


If the *Mail Merge* toolbar is not displayed when you are working in your main document:


1. From the *View* menu, select **Toolbars » Mail Merge**  
The *Mail Merge* toolbar appears.




## Button Function


 Allows you to select a document type for your main document.

 Allows you to select a data source for your merge.


 Opens the data source, making it available for editing.

 Inserts an address block in your letter.


 Inserts a greeting line in your letter.


 Inserts the code referencing a merge field from the data source.

**Insert Word Field ▾** Inserts a special merge code to control how the merge will continue (e.g., next record; If, Then, Else).

 Views the main document with information from the data source. This is helpful for editing the contents, punctuation, and grammar of the main document.

 Highlights the merged fields in your document

 Matches fields in your data source to merge fields in Word so as to avoid renaming them.

 Merges fields and text to labels.



Moves through merged records:

- The end buttons will move to the first or last record in the data document.
- The middle buttons will move to the previous or next record in the data document.
- The number in the center identifies the current record.



Locates a record in the data document.



Reviews the current document for errors in the merge commands. For example, you may discover a reference to a field in the data document that does not exist or discover that a merge code is missing the end code ( » ).



Merges the documents to a new file.



Merges the documents directly to the printer. To save paper, use this button when you are confident that the merge is working properly (especially if you have a lot of records).



Merges the documents and sends them as email messages.



Merges the documents and sends them as a fax to each recipient. This option is available only if you have the properly compatible components as part of your computer system.

# Creating Merged Letters

One popular use of the *Mail Merge* feature is to create form letters. *Mail Merge* allows you to set up one letter (your main document). Using data from a table or external database, you can print one letter with different information for each record in the database or table.

1. Open a blank Word document
2. From the *Tools* menu, select **Letters and Mailings » Mail Merge Wizard...**  
The *Mail Merge* task pane appears.
3. From the *Select document type* section, select **Letters**
4. At the bottom of the task pane, click **NEXT: STARTING DOCUMENT**
5. From the *Select starting document* section, select **Use the current document**
6. At the bottom of the task pane, click **NEXT: SELECT RECIPIENTS**
7. From the *Select recipients* section, select **Use an existing list**
8. From the *Use an existing list* section, click **BROWSE...**  
The *Select Data Source* dialog box appears.
9. Locate and select the file you will use for your list
10. Click **OPEN**  
The *Mail Merge Recipients* dialog box appears.
11. Select which recipients you want to include in your mail merge  
**NOTE:** To edit the recipients' information, refer to [Working with the Recipient List](#).
12. Click **OK**
13. At the bottom of the task pane, click **NEXT: WRITE YOUR LETTER**
14. If you have not already done so, write your letter and insert the variable fields
15. When finished, click **NEXT: PREVIEW YOUR LETTERS**  
A preview of your first recipient appears.  
**NOTE:** For more information on editing the recipients' information, refer to [Working with the Recipient List](#).  
**HINT:** To remove a recipient from the mail merge, from the *Make changes* section, click **EXCLUDE THIS RECIPIENT**
16. Click **NEXT: COMPLETE THE MERGE**
17. To print the letters:
  - a. From the *Merge* section, click **PRINT...**  
The *Merge to Printer* dialog box appears.
  - b. Make the appropriate selection
  - c. Click **OK**

To make changes to the letters:

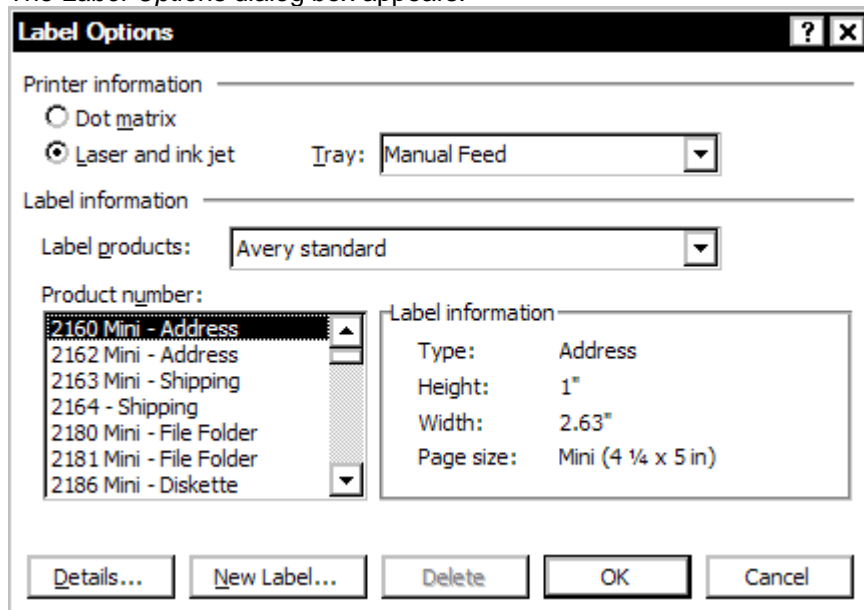
- d. From the *Merge* section, click **EDIT INDIVIDUAL LETTERS...**  
The *Merge to New Document* dialog box appears.
- e. Make the appropriate selection
- f. Click **OK**  
Make the appropriate changes in the new document that appears.

# Creating Mailing Labels

A popular use of the *Mail Merge* feature is to create mailing labels. The following instructions describe how to merge a pre-existing database's values into address labels with the *Mail Merge Wizard*.

Begin the process of creating mail merge labels by setting up your starting document. When creating labels, you have many options. You can choose the label size, text font, positioning of the information, etc. to suit the needs of your particular project.

1. Open a blank Word document
2. From the *Tools* menu, select **Letters and Mailings » Mail Merge Wizard...**  
The *Mail Merge* task pane appears.
3. From the *Select document type* section, select **Labels**
4. At the bottom of the task pane, click **NEXT: STARTING DOCUMENT**
5. From the *Select starting document* section, select **Change document layout**
6. From the *Change document layout* section, click **LABEL OPTIONS...**  
The *Label Options* dialog box appears.



7. From the *Label products* pull-down list, select the type of label  
**NOTE:** The most common is *Avery standard*.
8. From the *Product number* scroll box, select the model number  
**NOTE:** The most common is *5160-Address*.
9. Click **OK**
10. Click **NEXT: SELECT RECIPIENTS**

11. From the *Select recipients* section, select **Use an existing list**
12. From the *Use an existing list* section, click **BROWSE...**  
The *Select Data Source* dialog box appears.
13. Locate and select the file you will use for your list
14. Click **OPEN**  
The *Mail Merge Recipients* dialog box appears.
15. Select which recipients you want to include in your mail merge  
**NOTE:** To edit the recipients' information, refer to [Working with the Recipients List](#).
16. Click **OK**
17. At the bottom of the task pane, click **NEXT: ARRANGE YOUR LABELS**
18. In the first blank label, insert the variable fields on the label
19. To have the same information repeat for each record on the same sheet of labels, under *Replicate labels*, click **UPDATE ALL LABELS**
20. When finished, click **NEXT: PREVIEW YOUR LABELS**  
A preview of your label(s) appears.
21. Click **NEXT: COMPLETE THE MERGE**
22. To print the labels:
  - a. From the *Merge* section, click **PRINT...**  
The *Merge to Printer* dialog box appears.
  - b. Make the appropriate selection
  - c. Click **OK**

To make changes to the labels:

- d. From the *Merge* section, click **EDIT INDIVIDUAL LABELS...**  
The *Merge to New Document* dialog box appears.
- e. Make the appropriate selection
- f. Click **OK**  
Make the appropriate changes in the new document that appears.

## Working with Labels

This document has been prepared as a guide to working with labels and to building awareness of some special issues related to printing labels.

Labels can be used in a variety of ways to make work easier. Applying labels to envelopes, diskettes, and videocassettes can save you a lot of time and make organizing your work easier.

## Options for Creating Labels

Microsoft Word offers three ways of creating labels:

- [Creating an Entire Page of the Same Label](#)  
This is useful when you need many labels with the same information (e.g., return address).
- [Creating a Page of Custom/Unique Labels](#)  
This may be helpful when you want to use mailing labels for names which are not already typed into Microsoft Word.
- [Creating Custom/Unique Labels Using Mail Merge](#)  
This allows you to print unique labels based on a mailing list. This is especially helpful if you already have the names in a Word data file.

## Access to Envelopes and Labels Feature

The *Envelopes and Labels* feature is central to the label program and will be accessed often. If you wish, a button can be added to your toolbar, allowing access to the *Envelopes and Labels* dialog box. For instructions on how to add the button to your toolbar, see [Additional Options for Creating Envelopes](#).

## Purchasing Your Labels

Labels are available for almost every need. Avery, one of the manufacturers of labels, provides labels for envelopes, diskettes, shipping, return addresses, binder dividers, and name badges. Many of the labels come in white, clear, and colors. You will want to select the label that best meets your need. When purchasing labels that you will be printing with your printer, make sure that they are designed for the type of printer (laser, ink-jet, or dot matrix) you have.

## Tips for Printing Your Labels

While your printer may be capable of printing labels, it may not be good for your printer. Labels can peel off during the printing process and stick to various parts of the printer. The following tips can help minimize the risk of these problems:

- Store your labels according to the manufacturer's instructions.
- Manually feed the labels into the printer to prevent paper jams.
- When printing several pages of labels, print them in small batches.
- Print a master page of regular white paper on your printer and then use your copy machine to transfer the information to the label.

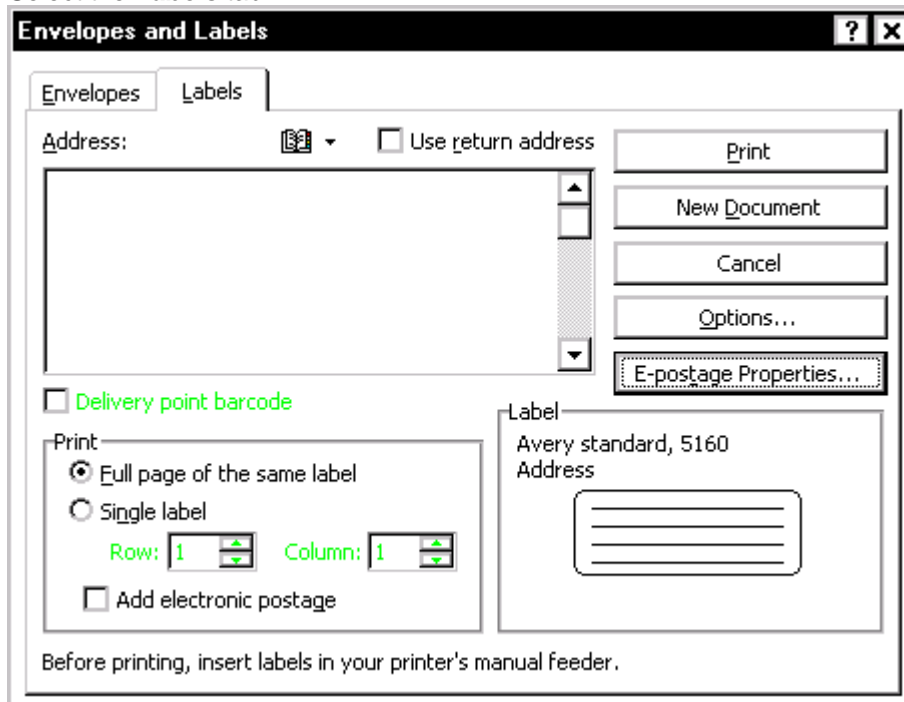


## Using Pre-defined Label Sizes

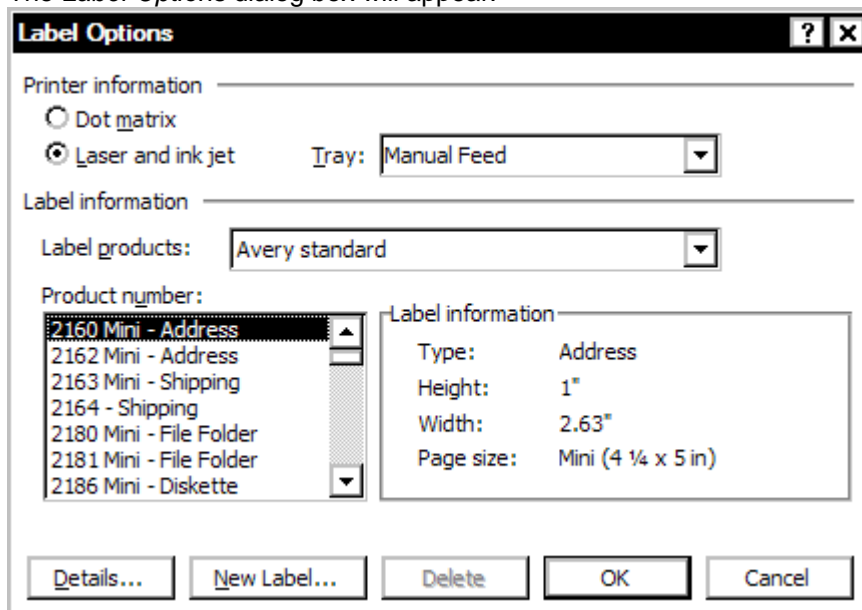
Microsoft Word offers many pre-defined label sizes and styles for you to choose from. A frequent choice is the Avery Standard 5160 Address Label. When creating labels, always verify, from the *Envelopes and Labels* dialog box, that the label size or style is the one you want.

1. Open your document

- From the *Tools* menu, select **Letters and Mailings » Envelopes and Labels...**  
The *Envelopes and Labels* dialog box will appear.
- Select the **Labels** tab



- If the label size you want is not displayed in the *Label* section, click **OPTIONS...**  
The *Label Options* dialog box will appear.



- From the *Product number* scroll box, select the product number for the label you will be using  
**HINT:** For address labels, Avery Product Code 5160 (1" by 2 5/8" ) is a common choice.
- Click **OK**
- Continue with [Creating an Entire Page of the Same Label](#) or [Creating a Page of Custom/Unique Labels](#).

## Generating Labels

The *Envelopes and Labels* feature is used to generate your labels. With the *Envelopes and Labels* feature you can specify the size of the label, text to appear on each label (if appropriate), and modify the appearance of the label.

### Creating an Entire Page of the Same Label

1. From the *Tools* menu, select **Envelopes and Labels...**  
The *Envelopes and Labels* dialog box will appear.
2. Select the **Labels** tab
3. In the *Label* section, verify that the type of label you wish to use is selected  
**NOTE:** If the label that you are using is not selected, see [Using Pre-defined Label Sizes](#).
4. In the *Address* text box, type the text for the labels
5. **OPTIONAL:** To adjust the font:
  - a. Select the text that you want to change
  - b. Pointing to the selected text, click the right mouse button » select **Font...**
  - c. Make the appropriate changes in the *Font* dialog box
  - d. Click **OK**
6. To print your labels, continue with [Printing Using the Print Button](#) or [Printing Using the New Document Button](#)

### Creating a Page of Custom/Unique Labels

1. From the *Tools* menu, select **Letters and Mailings » Envelopes and Labels...**  
The *Envelopes and Labels* dialog box will appear.
2. Select the **Labels** tab
3. In the *Label* section, verify that the type of label you wish to use is selected  
**NOTE:** If the label that you are using is not selected, see [Using Pre-defined Label Sizes](#).
4. Click **NEW DOCUMENT**  
A blank document will appear with a table. Each cell of the table represents one label. To move between labels use the **[Tab]** key.  
**NOTE:** For additional information on working with tables see Organizing Information with Word Tables in the [Word XP documentation](#).
5. Type each label's contents
6. **OPTIONAL:** Make formatting changes as you would with any Word document
7. To print your labels, see [Printing Labels](#)

### Creating Custom/Unique Labels Using Mail Merge

Another way to create labels using Microsoft Word is by using *Mail Merge*. *Mail Merge* allows you to set up mailing labels (your main document). Using data from a table or external database, you can print one label with different information for each record in the database or table. For more information on setting up and performing mail merges, see [Mail Merge: Creating Mailing Labels](#).

## Printing Labels

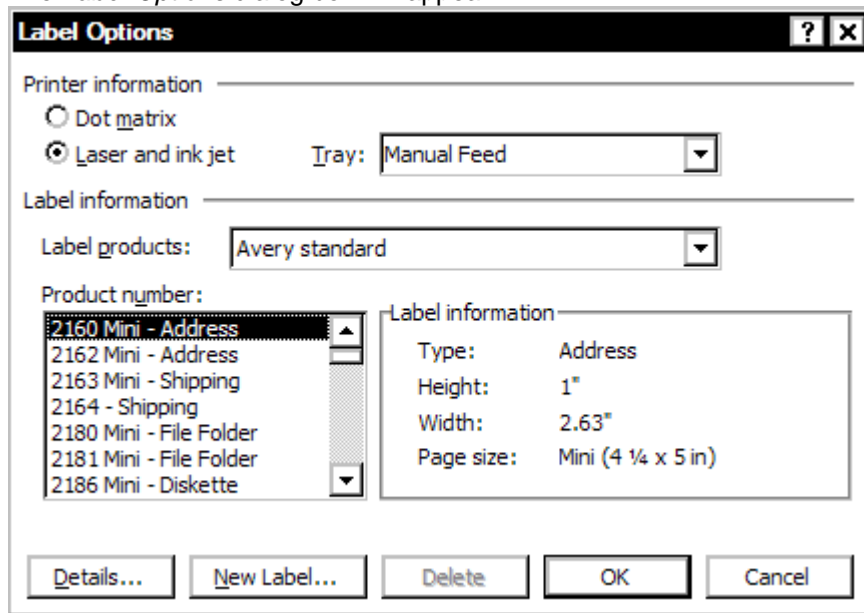
The direction in which labels are loaded is different from printer to printer. For example many inkjet printers require that labels are loaded face down, where as on campus, the laser printers

require you to load the labels face up. In addition, you can prevent printer jams by loading a stack of paper under the labels. Also, manually feeding the labels into the printer often prevents paper jams.

## Printing Using the Print Button

**NOTE:** This method does not use the *Print* dialog box; labels are sent directly to the printer when PRINT is clicked. To obtain more options when printing, see [Printing Using the New Document Button](#).

1. Open the document that contains the labels
2. To specify the feed source into the printer for the labels, from the *Tools* menu, select **Letters and Mailings » Envelopes and Labels...**
3. Select the **Labels** tab
4. Click **OPTIONS...**  
The *Label Options* dialog box will appear.



5. From the *Tray* pull-down list, select the default location for the labels
6. To return to the *Envelopes and Labels* dialog box, click **OK**
7. In the *Print* section of the dialog box, select **Full page of the same label**
8. Click **PRINT**

## Printing Using the New Document Button

The *New Document* option allows you to work with a page of labels as you would any other Word document. If there is an address you mail to frequently, you may want to save the page of labels so that you can open and print the file whenever you need more labels. Printing them is very similar to printing a Word document.

**NOTE:** When printing your labels, you will be taken through the *Print* dialog box. This gives you more printing options (e.g., copies).

Before printing your labels, make sure you have completed the following instructions: [Creating an Entire Page of the Same Label](#), or [Creating a Page of Custom/Unique Labels](#)

1. With your label document open, from the *Tools* menu, select **Letters and Mailings » Envelopes and Labels...**  
The *Envelopes and Labels* dialog box will appear.
2. Select the **Labels** tab
3. Click **OPTIONS...**  
The *Label Options* dialog box will appear.
4. From the *Tray* pull-down list select the default location for the labels
5. To return to the *Envelopes and Labels* dialog box, click **OK**
6. From the *Envelopes and Labels* dialog box, click **NEW DOCUMENT**  
A document with a table will appear. Each cell bears a copy of the label you just created. You can make formatting changes within this document, as you would with any Word document.
7. Load the labels into the printer
8. From the *File* menu, select **Print...**  
The *Print* dialog box will appear.
9. Make any necessary adjustments
10. Click **OK**