Mail Merge
Microsoft Word 2007
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Introduction

Objectives
The aim of this session is to introduce you to the Mail Merge functions in Microsoft Word 2007. After today's session you will be able to:

- Create form letters from a document and a data source using the Mail Merge Wizard.
- Create addressed envelopes and mailing labels using the Mail Merge Wizard.

Prerequisites
You should have basic computer skills (using the mouse and keyboard), and be familiar with the Windows XP and/or Vista desktop and with general concepts of manipulating windows such as menus, scrollbars and dialogue boxes. You should also be able to create and edit documents in Microsoft Word and Excel.
1. Getting Started

What is a Mail Merge?
A mail merge is primarily used to address pieces of mail such as form letters and envelopes. However, it can be used with any type of document, for example, achievement certificates or nametags. A mail merge is the process of combining generic information (such as a form letter) with specific information (such as a recipient's name and address). Mail merges can be used to personalize form letters and similar documents, as well as to simplify large or repetitive tasks, such as producing envelopes and mailing labels.

A mail merge document is made up of two parts:

1. **Main Document**
   The document that contains text that is the same for each version of the merged document, such as the body of a letter.

2. **Data Source**
   The file that contains the information to be merged into a document, such as a list of names and addresses.

The Mail Merge Wizard
This course will show you how to use Microsoft Word's Mail Merge Wizard to create letters, envelopes, and mailing labels. You can use the Mail Merge Wizard to create the main document and the data source, and then merge the information from the data source into the main document. The procedure for performing a mail merge consists of six steps, which the Wizard walks you through.

When launched, the Mail Merge Wizard is displayed in a task pane called the Mail Merge Task Pane, which will walk you through the process. Figure 1-1 at right displays the Mail Merge Task Pane for Step 1 of the mail merge process.

*Figure 1-1: Mail Merge Task Pane*
Activity 1-1
Create a New Blank Document & Launch the Mail Merge Wizard

1. Open a new blank document in Microsoft Word.

2. Launch the Mail Merge Wizard (Figure 1-2).
   
   **Mailings tab > Start Mail Merge > Step by Step Mail Merge Wizard**

*Figure 1-2: Launch the Mail Merge Wizard*
2. Create Form Letters in Microsoft Word

If you have information to send to one individual, you create a letter. However, if you need to send the same information to multiple recipients, you will want to use a form letter.

The six steps for creating form letters using Microsoft Word's Mail Merge Wizard are:

Step 1 Select the Document Type
Step 2 Starting Document
Step 3 Select Recipients
Step 4 Finish your Letter
Step 5 Preview your Letters
Step 6 Complete the Merge
2-A. Select Main Document Type & Choose Starting Document

This is where it all begins for a mail merge. The main document is the document that contains the content that does not change from recipient to recipient. For example, the main document would contain the body of a letter and the letter closing. Ultimately, the main document would also include the merge fields. For now, think of a merge field as a placeholder that instructs Microsoft Word where to put data source information within the main document, like names or mailing addresses, when the merge takes place. Merge fields generally are not inserted until after the data source has been created or identified.

Step 1: Select Document Type
You can create a variety of document types using Word’s mail merge capabilities including: letters, e-mail messages, envelopes, labels, and directories. Step 1 in the Mail Merge Wizard asks you to identify the type of mail merge you want to perform.

Scenario:
Your manager has asked you to send a thank you letter to your department’s student employees. You have already created and saved the letter body text, naming it Student Thank Letter.doc.

Activity 2-1
Select the “Letters” Document Type

1. In the Mail Merge Task Pane’s Select document type area, click the radio button to the left of the document type Letters to select it (Figure 2-1).

![Mail Merge Task Pane](Figure 2-1: Select Document Type)
2. At the bottom of the task pane, click the **Next: Starting Document** hyperlink (Figure 2-2) to advance to Step 2.

![Click Next to continue.](image)

**Step 1 of 6**

[Next: Starting document](image)

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**Figure 2-2:**

*Next: Starting Document*

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**Step 2: Starting Document**

In Step 2, the Mail Merge Wizard asks how you want to set up your letters. Here you will choose the main document for the mail merge. Three options are available to you:

- **Use the current document**
  
  Use the document currently open in the document window.

- **Start from a template**
  
  Use a Word template as the main document for your mail merge.

- **Start from existing document**
  
  Open a document already saved on your computer to use in the mail merge.

Since you have already written the text for the student thank you letter, you can start from that existing document.
Activity 2-2
Open, Edit and Save the Student Thank You Merge Letter

1. In the Mail Merge Task Pane’s Select starting document area, click the radio button to the left of the Start from existing document option to select it (Figure 2-3).

![Figure 2-3: Select Starting Document](image)

2. Click the Open button to browse for the file Student Thank Letter.doc (Figure 2-4).

![Figure 2-4: Open Mail Merge Document](image)

In the Open window, navigate to Desktop > Mail Merge Activities and select the file, Student Thank Letter.doc.

The letter displays in the document window.

3. Type today’s date at the top of the student thank you letter.

4. Type your name at the bottom of the student thank you letter to sign it.

5. At the bottom of the task pane, click the Next: Select Recipients hyperlink (Figure 2-5) to advance to Step 3.

![Figure 2-5: Next: Select Recipients](image)
2-B. Select the Data Source

Now that you have selected the main document, the next step in the mail merge process is to specify who the form letters will be sent to. The data source, also called the recipient list, is a critical piece of the mail merge process. Without it, you could not perform the mail merge. The data source is the file that contains the information to be merged into the main document and can contain information like names, addresses, and dates. You can think of a data source as a table of information. Each column of data in the data source corresponds to a category of information, such as first name, last name, or street address. These are referred to as fields. When you complete the merge, individual recipient information is mapped to the merge fields you include in your main document.

Step 3: Select Recipients
In Step 3, the Mail Merge Wizard asks you to select the recipients for the letters. Here you will choose the recipient list for the mail merge. Three options are available to you:

- **Use an existing list**
  Use an existing file (database file or Excel workbook) that contains the data you want to merge.

- **Select from Outlook contacts**
  Use a Microsoft Outlook Contacts folder as the source of the mail merge.

- **Type a new list**
  Create a new list by typing the data in a Microsoft Word Address List.

If you create your own data sources, keep the following rules in mind to ensure data sources that give consistent and correct results:
- Use a unique name for each field.
- Begin field names with a letter.
- Use up to 40 characters in a field name.
- Do not use spaces in field names.

Scenario:
You are now ready to specify to whom the form letters will go – your student employees. Since you will mail these letters to their home addresses, you will need to type their information into a Microsoft Word Address List that will be used to perform the mail merge.
Activity 2-3
Type a New Recipient List

1. In the Mail Merge Task Pane's Select recipients area, click the radio button to the left of the Type a new list option to select it (Figure 2-6).

2. Click the Create hyperlink (Figure 2-6) to open the New Address List window (Figure 2-7).

![Mail Merge](image)

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

**Type a new list**
Type the names and addresses of recipients.

![Create...](image)

*Figure 2-6: Type a New List*

3. In the New Address List window, type the following information for the first student (Figure 2-7):

<table>
<thead>
<tr>
<th>First Name:</th>
<th>Amy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name:</td>
<td>Talbot</td>
</tr>
<tr>
<td>Address Line 1:</td>
<td>5 Main Street</td>
</tr>
<tr>
<td>City:</td>
<td>Holyoke</td>
</tr>
<tr>
<td>State:</td>
<td>MA</td>
</tr>
<tr>
<td>Zip Code:</td>
<td>01040</td>
</tr>
</tbody>
</table>
Click the Customize Columns button to delete or re-arrange fields to allow for easier data entry or to add new fields to your mail merge data list.

4. Click the New Entry button to add the name and address information for the remaining three students:

<table>
<thead>
<tr>
<th>First Name</th>
<th>Greg</th>
<th>Amanda</th>
<th>Jane</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td>Smith</td>
<td>Espindola</td>
<td>Richardson</td>
</tr>
<tr>
<td>Address Line 1</td>
<td>42 Linden Avenue</td>
<td>4 Parker Lane</td>
<td>19 Clark Street</td>
</tr>
<tr>
<td>City</td>
<td>Albany</td>
<td>Fairhaven</td>
<td>Chicago</td>
</tr>
<tr>
<td>State</td>
<td>NY</td>
<td>MA</td>
<td>IL</td>
</tr>
<tr>
<td>Zip Code</td>
<td>12204</td>
<td>02719</td>
<td>60601</td>
</tr>
</tbody>
</table>

5. Once the address information is entered for all four students, click the Close button to close the New Address List window.

The Save As window opens.

6. Name the file Student Thank Data.mdb and save it to the Mail Merge Activities folder on the Desktop.
The Mail Merge Recipients window (Figure 2-8) opens, listing all the recipients you added.

![Mail Merge Recipients Window](image)

**Figure 2-8:**
Mail Merge Recipients Window

7. Click the **Last Name** column header to sort the records in alphabetical order by last name.

| Sorting items in a data source can be helpful if you want your merged documents to be organized in alphabetical or numeric order. To sort data from the Mail Merge Recipients window, click the column heading of the item by which you want to sort. After sorting the list, you may select the checkboxes to the left of the recipients' names to eliminate their records from the list. |

<table>
<thead>
<tr>
<th>Data Source</th>
<th>Last Name</th>
<th>First Name</th>
<th>Title</th>
<th>Company Name</th>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>mergelist.mdb</td>
<td>Talbot</td>
<td>Amy</td>
<td></td>
<td></td>
<td>5 Main</td>
</tr>
<tr>
<td>mergelist.mdb</td>
<td>Smith</td>
<td>Greg</td>
<td></td>
<td></td>
<td>42 Lin</td>
</tr>
<tr>
<td>mergelist.mdb</td>
<td>Espindola</td>
<td>Amanda</td>
<td></td>
<td></td>
<td>4 Par</td>
</tr>
<tr>
<td>mergelist.mdb</td>
<td>Richardson</td>
<td>Jane</td>
<td></td>
<td></td>
<td>19 Clar</td>
</tr>
</tbody>
</table>
8. Click OK to close the window and return to the document window.

9. At the bottom of the task pane, click the Next: Write your letter hyperlink (Figure 2-9) to advance to Step 4.
2-C. Insert Merge Fields

You have specified the main document and the data source for your mail merge. You now need to connect the two. To connect the main document with the data source, you must include merge fields in the main document.

A mail merge to create form letters is that you don’t have to type individual name and address information in each letter. Rather, you pull the information in from the data source. In order for the main document to have access to the information contained in the data source you need to include the necessary data source fields within the main document. This is referred to as inserting merge fields.

In a Microsoft Word mail merge, a merge field is a placeholder that instructs Microsoft Word to insert text into the document automatically. If you have a data field in the data source called Last Name, Microsoft Word replaces every occurrence of the field &lt;&lt;Last_Name&gt;&gt; in the form letter with the Last Name data in the current record of the data source.

Step 4: Write Your Letter
In Step 4, the Mail Merge Wizard asks you add the merge fields you want into your letter such as name, greeting, and address.

Scenario:
You now have the main document and the data source specified. Currently there is no link between the two. To link them, you need to insert the name and address merge fields into the thank you letter.
Activity 2-4
Insert the Name Merge Fields

1. Press the [Enter] key three times after the date to place the cursor in a position to insert the name merge fields.

2. In the Mailings tab’s Write and Insert Fields group, click the down arrow in the Insert Merge Field function to display the available fields (Figure 2-10).

![Insert Merge Field]

Figure 2-10: Insert Merge Field

3. From the list of database merge fields, select First Name to insert the First Name merge field into the document

4. From the list of database merge fields, select Last Name to insert the Last Name merge field into the document.

5. Close the Insert Merge Field window to return to the main document window.

Your letter should now look like Figure 2-11.
January 21, 2010

«First_Name» «Last_Name»

I am writing this quick note to thank you for your commitment and dedication while working as a student employee in the Happy Camper department at Boston College. Your enthusiasm and dedication to excellence has been crucial to the success of our department. We look forward to having you as a member of our team next year!

Please accept my personal gratitude.

Sincerely,

Elihu Smails

Figure 2-11: Letter with Name Merge Fields

6. Click between the «First_Name>> and «Last_Name>> merge fields and enter a [Space].
Activity 2-5
Insert the Address Merge Fields

1. Click to place the cursor after the <<Last_Name>> merge field and press [Enter] once to place the cursor in a position to insert the address merge fields.

2. In the Mailing tab’s Write and Insert Fields group, click the down arrow in the Insert Merge Field function to display the available fields (Figure 2-10).

3. From the list of database merge fields, select Address line 1 to insert the Address line 1 merge field into the document.

4. From the list of database merge fields, select City to insert the City merge field into the document.

5. From the list of database merge fields, select State to insert the State merge field into the document.

6. From the list of database merge fields, select ZIP Code to insert the ZIP Code merge field into the document.

You may insert merge fields a few at a time or all at once, rather than one by one. To add multiple fields in quick succession, add each field after the other without moving the insertion point. Then, format the spaces and line breaks between the fields after you are finished adding them. For the address heading, you can add the street address, city, state, and zip code fields all at the same insertion point. Once they are all entered into the document, add the spaces, punctuation and line breaks between each address field.

Your letter should now look like Figure 2-12.

```
January 21, 2010

<<First_Name>> <<Last_Name>>
<<Address_Line_1>> <<City>> <<State>> <<ZIP_Code>>

I am writing this quick note to thank you for your commitment and dedication while working as a student employee in the Happy Camper department at Boston College. Your enthusiasm and dedication to excellence has been crucial to the success of our department. We look forward to having you as a member of our team next year!

Please accept my personal gratitude.

Sincerely,

Elihu Smalls
```

Figure 2-12:
Letter with Address Merge Fields

Now that the address merge fields have been inserted, format them in the correct address format.
7. Use the [Enter] key, comma and [space bar] to format your address merge fields to look like Figure 2-13.

```
«First_Name» «Last_Name»
«Address_Line_1»
«City» «State» «ZIP_Code»
```

*Figure 2-13: Formatted Address Merge Fields*
1. Press the [Enter] key three times after the address merge fields to place the cursor in a position to insert the greeting.

You can also the Address block... and Greeting line... hyperlinks in the Mail Merge Task Pane on the right to save time by specifying a group of text and merge fields you want to include in your mail merge.
2. In the Mail Merge Task Pane's **Write your letter** area, click the **Greeting line...** hyperlink to open the **Greeting Line** window (Figure 2-14).

![Insert Greeting Line](image)

**Figure 2-14:**
*Greeting Line Window*

3. Verify that the greeting selected is **Dear**.

4. Click the drop-down arrow to select the name format **Joshua Randall Jr.**

5. Verify that the **comma** is selected. A preview of your greeting displays in the lower half of the window.

6. Click **OK** to return to the main document window.

Your letter should now look like Figure 2-15
January 21, 2010

«First_Name» «Last_Name»
«Address_Line_1» «City» «State» «ZIP_Code»

«GreetingLine»

I am writing this quick note to thank you for your commitment and dedication while working as a student employee in the Happy Camper department at Boston College. Your enthusiasm and dedication to excellence has been crucial to the success of our department. We look forward to having you as a member of our team next year!

Please accept my personal gratitude.

Sincerely,
Elihu Smalls

Figure 2-15:
Letter with Greeting Line Merge Field

7. At the bottom of the task pane, click the Next: Preview your letters hyperlink (Figure 2-16) to advance to Step 5.

Step 4 of 6

Next: Preview your letters
Previous: Select recipients

Figure 2-16:
Next: Preview Your Letter
2-D. Merge and Preview Form Letters

You have completed the setup involved in a mail merge and are now ready to perform the actual merging of the main document and data source information. In the last steps of the mail merge process you will merge and then preview your form letters in order to verify accuracy prior to printing.

Step 5: Preview Your Letters
In Step 5 of the mail merge process, each of the merge fields in the main document is replaced with the actual text from the data source. From the Preview your letters area of the task pane, you can see what your output documents will look like. If you find any errors, you can fix them before wasting time and paper.

Scenario:
Now that the name and address merge fields have been inserted as placeholders in the letter, you are ready to perform the mail merge. You will need to preview the letters to check for accuracy and save the merged letters to the Mail Merge Activities folder.

Activity 2-7
Preview Your Merged Letters

1. In the Preview your letters area in the Mail Merge Task Pane, click the arrow buttons to navigate through the merged letters to preview them.
   - Recipient letters are displayed in the order in which they were entered into the data source.
   - You may move forward and backward through the letters by clicking the arrow buttons shown in Figure 2-17.
   - You may also search for a particular recipient's letter by clicking the Find a recipient... hyperlink shown in Figure 2-17.

![Figure 2-17: Preview Recipient Letters]
In the Preview your letters area, you may also edit the list of recipients that will be used in the final merge. Click the Edit recipient list... hyperlink to open the Mail Merge Recipients window. From this window you can sort, filter and select recipients for your final merge. You can also exclude recipients as you preview the merged data. To exclude a recipient, navigate to the recipient letter you would like to exclude and then click on the Exclude this recipient button in the Preview your letters area.

2. At the bottom of the task pane, click the Next: Complete the merge hyperlink (Figure 2-18) to advance to the final step, Step 6.

Step 5 of 6

- Next: Complete the merge
- Previous: Write your letter

Figure 2-18:
Next: Complete the Merge

Step 6: Merge your Letters

After previewing your letters and making any corrections, it is time to merge the data source into the main document. This will take the names and addresses from the data source and fill them into the merge fields to create your letters.

In the Complete the merge area in the Mail Merge Task Pane you are given two options:

1. **Print**
   Merges the documents directly to the printer.

2. **Edit individual letters**
   Creates and opens a new merged document, which allows you to edit the merged documents individually and save them for later use.
To print your documents:

1. Click the Print... hyperlink in the Complete the merge area to open the Merge to Printer window (Figure 2-19).

![Merge to Printer](image)

*Figure 2-19: Merge to Printer*

2. Click the radio button to select which records to print.

You can print all the records, the current record, or a range of records.

3. Click OK.

The Print window opens and your documents are ready to print to your selected printer.

*It is a good idea to save the merged documents even though you have printed them. The Edit individual letters hyperlink will allow you to save all of the individual letters in one document.*

To edit and save individual letters:

1. Click the Edit individual letters hyperlink in the Complete the merge area to open the Merge to New Document window (Figure 2-20).

![Merge to New Document](image)

*Figure 2-20: Merge to New Document*

2. Click the radio button to select which records to merge.
You can merge all the records, the current record, or a range of records.

3. Click OK.

A new document will open containing all the letters. You can edit each letter individually, print, and save the merged letters as one Microsoft Word document.

Activity 2-8
Edit and Save Your Merged Letters

1. Click the Edit individual letters hyperlink (Figure 2-21) in the Complete the merge area to open the Merge to New Document window.

   ![Complete the merge](image)

   **Figure 2-21:**
   *Edit Individual Letters*

2. Verify that the All records radio button is selected so that all of the student records will be merged.

3. Click OK.

4. Use the scroll bar to navigate to the letter for Amanda Espindola.

5. Add the following line of personal text to the bottom of Amanda’s letter: **Have fun in Spain this summer!**

6. Save the merged document as **Student Thank Merge.doc** in the Mail Merge Activities folder on the Desktop.
3. Create Envelopes in Microsoft Word

You have printed all your letters and now need to mail them. Rather than print individual envelopes or labels, you can save time by using the Mail Merge Wizard to create them all at once using the same data source as you did for your form letter. You already know much of this process since it is very similar to the process for creating form letters.

The six steps for creating envelopes using Microsoft Word's Mail Merge Wizard are:

Step 1  Select Document Type
Step 2  Starting Document
Step 3  Select Recipients
Step 4  Arrange your Envelopes
Step 5  Preview your Envelopes
Step 6  Complete the Merge

Scenario:
Now that you have printed out all the letters, you need to mail them. You launch the Mail Merge Wizard and walk through the necessary steps involved in creating addressed envelopes. Since all of your address information resides in Student Thank Data.mdb, you will identify that file as your data source. You will then add merge fields to create the envelopes.

Activity 3-1
Create a New Document & launch the Mail Merge Wizard

1. Open a new blank document in Microsoft Word.
   \textit{Start > All Programs > Microsoft Word}

2. Launch the Mail Merge Wizard.
   \textit{Mailings tab > Start Mail Merge > Step by Step Mail Merge Wizard}
3-A. Select the Main Document Type

Step 1: Select Document Type
In Step 1 of the Mail Merge process you will need to specify the document type as “Envelopes”.

Activity 3-2
Select the “Envelopes” Document Type

1. In the Mail Merge Task Pane’s Select document type area, click the radio button to the left of the document type Envelopes to select it (Figure 3-1).

![Figure 3-1: Select Document Type](image)

2. At the bottom of the task pane, click the Next: Starting Document hyperlink to advance to Step 2.
Step 2: Starting Document
In Step 2, the Mail Merge Wizard asks how you want to set up your envelopes. Here you will change the document layout and choose an envelope size according to the kind of envelopes you will use. You can also select a specific font and printing format.

Activity 3-3
Change the Document Layout and Select Envelope Size

1. In the Mail Merge Task Pane’s Select starting document area, click the radio button to the left of the Change document layout option to select it (Figure 3-2).

![Mail Merge Task Pane]

*Figure 3-2: Select Starting Document*
2. Click the **Envelope options**... hyperlink (Figure 3-2) to open the Envelope Options window (Figure 3-3).

![Figure 3-3: Envelope Options](image)

Click **OK** to accept the default options and close the Envelope Options window (Figure 3-3).

3. At the bottom of the task pane, click the **Next: Select Recipients** hyperlink to advance to Step 3.
3-B. Select the Data Source

Step 3: Select Recipients
In Step 3, the Mail Merge Wizard asks you to select the data source to be used to create the addressed envelopes. Since you already typed all the mailing address information in Student Thank Data.mdb when you created the form letters, you can use that same data source to create the envelopes.

Activity 3-4
Select the Data Source and Recipient List for the Envelopes

1. In the Mail Merge Task Pane’s Select recipient area, click the radio button to the left of the Use an existing list option to select it (Figure 3-4).

2. Click the Browse... hyperlink (Figure 3-4) to open the Select Data Source window.

   ![Mail Merge Select Recipients](image)

   **Figure 3-4:**
   Select Recipients

3. In the Select Data Source window, look on the Desktop in the Mail Merge Activities folder and select the file Student Thank Data.mdb.

   The Mail Merge Recipients window (Figure 3-5) opens, listing all the recipients in your student list.

4. Click the Last Name column header to sort the records in alphabetical order by last name.
Your mail merge recipient list should look like Figure 3-5.

Sorting items in a data source can be helpful if you want your merged documents to be organized in alphabetical or numeric order. To sort data from the Mail Merge Recipients window, click the column heading of the item by which you want to sort. After sorting the list, you may opt to click on the checkboxes to the left of the recipients’ names to continue eliminating records from the list.

5. Click **OK** to close the window and return to the document window.

6. At the bottom of the task pane, click the **Next: Arrange your envelope** hyperlink to advance to Step 4.
3-C. Insert Merge Fields

Step 4: Arrange Your Envelopes
In Step 4, you will add merge fields as placeholders to indicate where on the envelope layout you would like recipient mailing address information to print.

Activity 3-5
Insert the Address Block Merge Field

1. In the main document window, click towards the bottom center of the envelope layout to highlight the address area.

2. In the Arrange your envelope... area of the Mail Merge Task Pane, click the Address block... hyperlink to insert the address block inside the address area.

The Insert Address Block box displays. Choose the format for your envelope (a preview displays on the right).

![Insert Address Block](image)

*Figure 3-6: Insert Address Block*

3. Click OK in the Insert Address Block window to select the default formatting.
Your envelope layout will look like Figure 3-7.

Figure 3-7: Envelope Address Block

You can apply font formatting, such as font style and size, on this layout. Formatting will be applied to all envelopes.

4. At the bottom of the task pane, click the **Next: Preview your envelopes** hyperlink to advance to Step 5.
3-D. Merge and Preview Envelopes

Merging and previewing your envelopes is done in the same manner in which you merged and previewed your form letters.

Step 5: Preview your Envelopes
In Step 5 of the mail merge process, each of the merge fields in the address block on the envelope layout is replaced with the actual text from the data source. From the Preview your envelopes area in the Mail Merge Task Pane you can see what your envelopes will look like. You can click through and preview each of the merged envelopes to check for accuracy before printing.

To preview your envelopes:

- In the Preview your envelopes area of the Mail Merge Task Pane, click the arrow buttons to navigate through the merged addressed envelopes.
- Envelopes are displayed in the order in which they were entered into the data source.
- Move forward and backward through the letters by clicking the arrow buttons shown in Figure 3-8.
- To search for a particular recipient’s envelope, click the Find a recipient... hyperlink (Figure 3-8).

![Preview your envelopes](image)

Figure 3-8:
Preview Recipient Envelopes

To make changes to your envelopes:

- In the Preview your envelopes area, click the Edit recipient list... hyperlink (Figure 3-9) to open the Mail Merge Recipients window.
- In the Mail Merge Recipients window you can sort, filter and select recipients for your final merge.
- To exclude recipients from the merged data, navigate to the recipient envelope you would like to exclude and then click the Exclude this recipient button (Figure 3-9).

![Make changes](image)

Figure 3-9:
Make Changes to Recipient Envelopes
Step 6: Merge your Envelopes

In Step 6 of the mail merge process, Microsoft Word is ready to produce your envelopes. You have the option of merging the envelopes directly to the printer or merging the envelopes to a new document where you can make changes and save the envelope document for later use.

On the Complete the merge area of the Mail Merge Task Pane you are given two options:

1. **Print**
   Merges the documents directly to the printer.

2. **Edit individual envelopes**
   Creates and opens a new merged document, which allows you to edit the merged documents individually and save them for later use.

**To print your envelopes:**

1. Click the **Print...** hyperlink in the Complete the merge area to open the Merge to Printer window.

2. Click the radio button to select which records to print.
   You can print all the records, the current record, or a range of records.

3. Click **OK**.
   The Print window will open and your envelopes will be ready to print to your selected printer.

**To edit and save individual envelopes:**

1. Click the **Edit individual envelopes** hyperlink in the Complete the merge area to open the Merge to New Document window.

2. Click the radio button to select which records to merge.
   You can merge all the records, the current record, or a range of records.

3. Click **OK**.
   A new document will open containing all the envelopes.

   You can edit each envelope individually, print and save the merged envelopes as one Microsoft Word document.
4. Create Mailing Labels Using an Excel Data Source

As you learned in the previous sections, the data source is a critical piece of the mail merge process. Without it, you could not perform the mail merge. Fortunately, Microsoft Word’s Mail Merge feature allows you to make use of existing data files, such as Microsoft Excel files, instead of requiring you to re-type data into a new list in Microsoft Word. Although we will create mailing labels in this example, remember that you can use Microsoft Excel as a data source for any of the mail merge documents you create (such as form letters, envelopes, and labels).

You might want to print mailing labels for a mailing to be used on standard sized envelopes instead of printing on the individual envelopes themselves. You also might want to print mailing labels to be used on unique sized envelopes that may not feed correctly into your printer.

Rather than create individual mailing labels by re-entering all of the addresses, you can use the Mail Merge Wizard to create them all quickly. You already know much of this process since it is very similar to the process for creating form letters and envelopes.

The six steps for creating mailing labels using Microsoft Word’s Mail Merge Wizard are:

   Step 1  Select Document Type
   Step 2  Starting Document
   Step 3  Select Recipients
   Step 4  Arrange your Labels
   Step 5  Preview your Labels
   Step 6  Complete the Merge

Scenario:
You have printed out this year’s annual merit letters for the staff in your department. You now need to mail them via campus mail. You launch the Mail Merge Wizard and walk through the necessary steps involved in creating mailing labels. Since all of your address information resides in an Excel file, you will identify the file Merit 2004.xls as your data source. You will then add merge fields to create the labels.
Activity 4-1
Create a new blank document and launch the Mail Merge Wizard

1. Open a new blank document in Microsoft Word.
   
   Start > All Programs > Microsoft Word

2. Launch the Mail Merge Wizard.
   
   Mailings tab > Start Mail Merge > Step by Step Mail Merge Wizard

4-A. Select the Main Document Type

Step 1: Select Document Type
In Step 1 of the Mail Merge process you will need to specify the document type as “Labels”.

Activity 4-2
Select the “Labels” Document Type

1. In the Mail Merge Task Pane’s Select document type area, click the radio button to the left of the document type Labels to select it (Figure 4-1).

   ![Select Document Type](image)

   Figure 4-1: Select Document Type

2. At the bottom of the task pane, click the Next: Starting Document hyperlink to advance to Step 2.


Step 2: Starting Document
In Step 2, the Mail Merge Wizard asks how you want to set up your mailing labels. Here you will change the document layout and choose a label size according to the kind of labels you will be using.

Activity 4-3
Change the Document Layout and Select Label Size

1. In the Mail Merge Task Pane’s Select starting document area, click the radio button to the left of the Change document layout option to select it (Figure 4-2).

2. Click the Label options... hyperlink (Figure 4-2) to open the Label Options window.

3. In the Label Options window select the following label information (Figure 4-3):
   - Label products: Avery US Letter
   - Product number: 5160
4. Click OK to close the window and return to the document window.

5. In the task pane, click the Next: Select Recipients hyperlink to advance to Step 3.

4-B. Select the Data Source

Step 3: Select the Data Source
In Step 3, the Mail Merge Wizard asks you to select the data source to be used to create the mailing labels. This is where you will locate and select the Microsoft Excel file Merit 2004.xls that already contains the information you will need to create the mailing labels.

Activity 4-4
Select the Data Source and Recipient List for the Labels

1. In the Mail Merge Task Pane’s Select recipient area, click the radio button to the left of the Use an existing list option to select it (Figure 4-4).

2. Click the Browse... hyperlink (Figure 4-4) to open the Select Data Source window.


   The Select Table window will open (Figure 4-5), listing all the Microsoft Excel worksheets in this Excel file.

4. Click OK to select Sheet 1.
If your Excel file contains more than one worksheet, highlight to select the particular worksheet that contains the data you want to use in the mail merge.

The Mail Merge Recipients window (Figure 4-6) opens, listing all the recipients in your list.

5. Click the **Dept Name** column header to sort the records in alphabetical order by department name.

Your mail merge recipient list should look like Figure 4-6.
6. Click **OK** to close the window and return to the document window.

7. At the bottom of the task pane, click the **Next: Arrange your labels** hyperlink to advance to Step 4.
4-C. Insert Merge Fields

Step 4: Arrange your Labels
In Step 4, you will add recipient information to the first label on the sheet and then update all the labels on the sheet to apply the same formatting to all of the mailing labels.

Activity 4-5
Insert the Name and Campus Address Merge Fields

1. In the Mail Merge Task Pane’s Arrange your labels area, click the More items... hyperlink to open the Insert Merge Field window (Figure 4-7).

2. From the list of database merge fields, click to highlight and insert the following fields in succession (Figure 4-7):
   - First Name
   - Last Name
   - Dept Name
   - Location

   ![Insert Merge Field Window]

   *Figure 4-7: Insert Merge Field Window*

3. After the four merge fields have been inserted, Close the Insert Merge Field window to return to the main document window.
Your sheet of labels should now look like Figure 4-8.

| «FirstName»  «LastName»  «Dept_Name»  «Location» | «Next Records» | «Next Records» |
| «Next Records» | «Next Records» | «Next Records» |
| «Next Records» | «Next Records» | «Next Records» |

**Figure 4-8:**
Label Layout

4. Format the merge fields in the correct address format, by doing the following:
   a. Enter a [Space] between FirstName and LastName
   b. Press [Enter] after LastName
   c. Press [Enter] after Dept_Name

The formatted label should look like Figure 4-9.

```
«FirstName»  «LastName»
«Dept_Name»
«Location»
```

**Figure 4-9:**
Formatted Label Layout

5. In the Mail Merge Task Pane's Replicate labels area, click the Update all labels button (Figure 4-10) to copy the merge field layout of the first label to the other labels on the sheet.

**Figure 4-10:**
Replicate Labels

You can apply font formatting, such as font style and size, on this layout. Using the Update all labels option will apply font formatting to all labels on the sheet.

6. At the bottom of the task pane, click the Next: Preview your labels hyperlink to advance to Step 5.
4-D. Merge and Preview Mailing Labels

Step 5: Preview your Labels
In Step 5 of the mail merge process, each of the merge fields on the sheet of mailing labels are replaced with the actual text from the Merit 2004.xls Microsoft Excel file that was used as the data source. From the Preview your labels area in the Mail Merge Task Pane, you can see what your envelopes will look like before you actually print them.

Step 6: Merge your Labels
In Step 6 of the mail merge process, you complete the merge by printing and/or editing your mailing labels.

Merging and previewing your labels is done in the same manner in which you merged and previewed your form letters and envelopes.
5. Dynamic Data Exchange

Your mail merge appears to be working just fine, but suddenly you notice that dates, zip codes, and other numbers don’t look right in your merged documents (Figure 5-1). Little frustrating things like numbers not merging correctly can ruin an entire mail merge project.

Dynamic Data Exchange (DDE) is one method available in the Microsoft Windows operating system to transfer data from Excel to a mail merge document while maintaining Excel formatting. Dynamic Data Exchange uses shared memory to exchange data between applications (such as Excel and Word). If you use other data transfer methods, you run into a problem: Data from the worksheet is transferred in the native format in which Excel stores it rather than with the formatting that you applied in the worksheet cells.

For example:

In Excel the zip codes look correct...

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>First Name</td>
<td>Last Name</td>
<td>Address</td>
<td>City</td>
<td>State</td>
</tr>
<tr>
<td>2</td>
<td>Kevin</td>
<td>James</td>
<td>258 Hammond Street</td>
<td>Chestnut Hill</td>
<td>MA</td>
</tr>
<tr>
<td>3</td>
<td>Cristin</td>
<td>Richard</td>
<td>257 Hammond Street</td>
<td>Chestnut Hill</td>
<td>MA</td>
</tr>
<tr>
<td>4</td>
<td>Serene</td>
<td>Silva</td>
<td>256 Hammond Street</td>
<td>Chestnut Hill</td>
<td>MA</td>
</tr>
</tbody>
</table>

*Figure 5-1:* Zip Code in Excel

However, once merged into your document, the formatting is lost...

Kevin James
258 Hammond Street
Chestnut Hill, MA 02467

Cristin Richard
257 Hammond Street
Chestnut Hill, MA 02467

Serene Silva
256 Hammond Street
Chestnut Hill, MA 02467

*Figure 5-2:* Zip Code Merged into Document
Before you begin the mail merge process, you only have to select one check box in Microsoft Word to set up the Dynamic Data Exchange:

1. Open a new blank document in Microsoft Word.
2. Click the Office button, then click Word Options.
3. In the Word Options window, click Advanced.
4. Under the General group, Select Confirm file format conversion at Open (Figure 5-3).

![Figure 5-3: Options Window](image)

5. Click OK to close the Word Options window.
During Step 3 of the mail merge process when you connect to your data file, after you locate the Excel worksheet you want to connect to, the **Confirm Data Source** window will open (Figure 5-4).

1. Select **MS Excel Worksheets via DDE (*.xls)** (Figure 5-4).

   ![Figure 5-4: Confirm Data Source](image)

2. Click **OK** to close the Confirm Data Source window.

3. In the **Microsoft Excel** window that will open next (Figure 5-5), for **Named or cell range**, select the cell range or worksheet that contains the information you want to merge.

   ![Figure 5-5: Select Named or Cell Range](image)

4. Click **OK** to close the Microsoft Excel window.

   The numbers from the Excel spreadsheet will now look exactly the same in your merged documents as they look in the worksheet cells.

   It's a good idea to turn off the **Confirm conversion at Open** option after you finish your mail merge. Otherwise, you might be prompted to confirm your data source at times when it is not necessary to connect through DDE.