



# Mail Merge

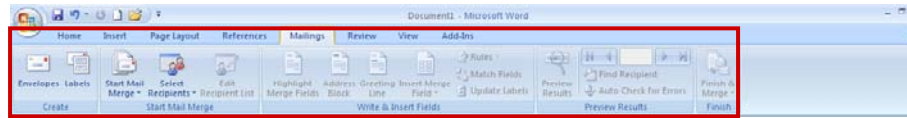
Presented By: Terence Peak



## What you will Need

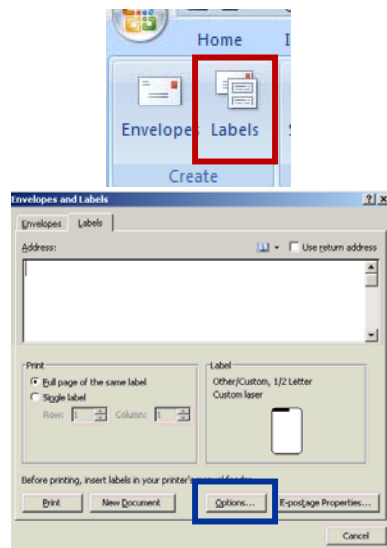
- ❶ Before you begin this tutorial, click here:  
<http://support.uiwtx.edu/MediaTraining/Tutorials.html>
- ❷ Download the Zip file For Word.zip
- ❸ The .zip file contains all of the documents necessary to complete the exercises outlined in the instructions.

## THE MAILINGS TAB



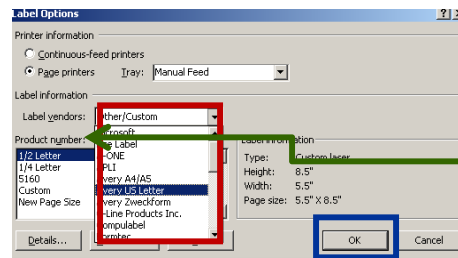
- 1 **The Mailings tab:** The Mailings tab replaces the Mail Merge Task Pane in Word 2003.
- 2 The pane is arranged chronologically, so begin with the **Create group** (Letters or Envelopes), and continue until the merge is completed (the **Finish group**)

## STEP 1: ENVELOPES OR LABELS?



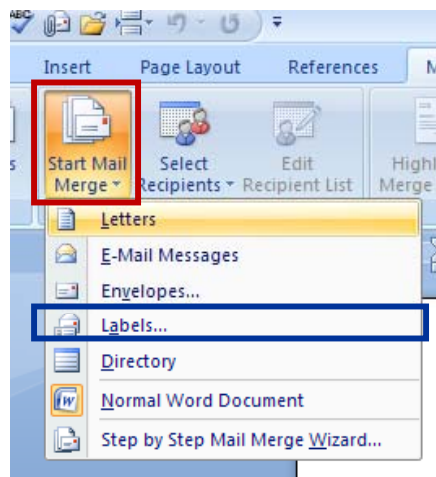
- 1 This function is used if only a single envelope or label is being created. Otherwise, proceed to Step 2
- 2 Click **Labels**
- 3 On the next menu, click **Options**

## STEP 1: ENVELOPES OR LABELS?



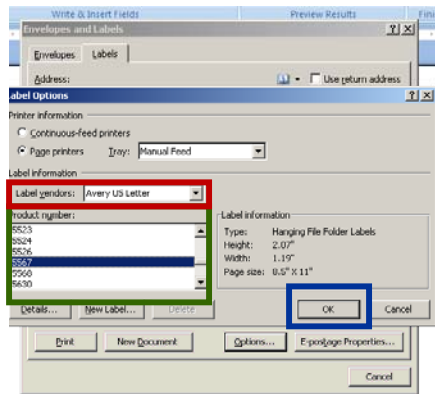
- 1. Locate the Brand of label from the **Label Vendor** list
- 2. Locate **Product number**
- 3. Click **OK**
- 4. Fill out the address information on the next menu.

## STEP 2: START MAIL MERGE



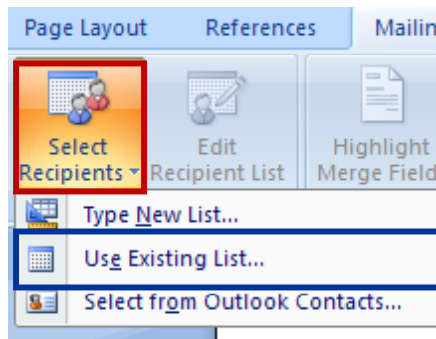
- 1. Begin with this step for multiple addressees or addressing letters
- 2. Click **Start Mail Merge**
- 3. Choose **Labels**

## STEP 2: START MAIL MERGE



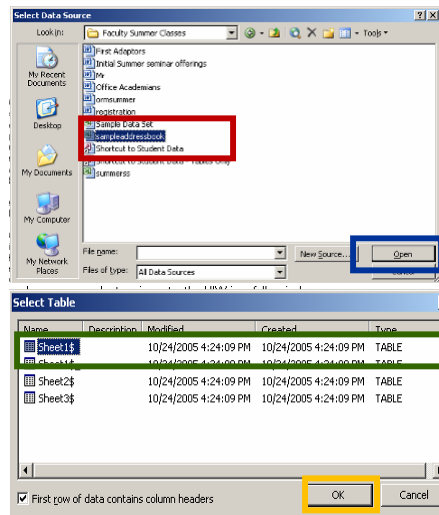
- 1. Locate the brand of envelope from the **Label Vendor** list
- 2. Locate **Product number**
- 3. Click **OK**
- 4. Fill out the address information on the next menu.

## STEP 3: SELECT RECIPIENTS



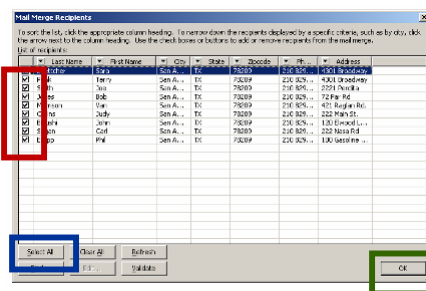
- 1. Click **Select Recipients**
- 2. Choose **Use Existing List**
- 3. This feature is used if you have a spreadsheet or database from which to select recipients. A list may also be generated by manually creating a list or using an Outlook contact list

## STEP 3: SELECT RECIPIENTS



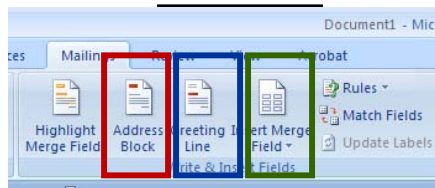
- 1. Navigate to **sampleaddressbook**
- 2. Click **Open**
- 3. On the next menu, select the **name of the worksheet** containing addressee information
- 4. Click **OK**

## STEP 4: EDIT RECIPIENTS (OPTIONAL)



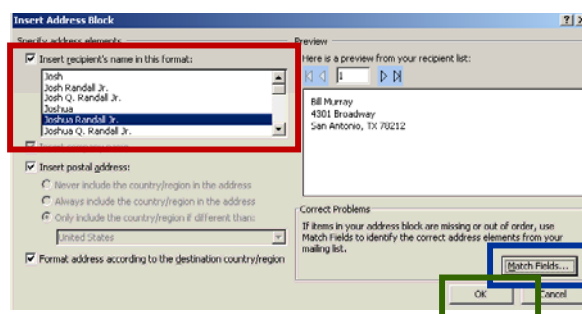
- 1. This step selects specific recipients
- 2. Select recipients by selecting **checkboxes**
- 3. To select the entire list, click **Select All**
- 4. Click **OK**

## STEP 5: INSERT FIELDS



- ❶ The **Address Block** adds an address to a label or letter.
- ❷ In addition, a greeting line (i.e. Dear ---) may be added by clicking **Greeting Line**
- ❸ Specific field information may be inserted manually using **Insert Merge Field**
- ❹ Add these fields by inserting the cursor where the field will be placed

## STEP 5: INSERT FIELDS (ADDRESS BLOCK)



- ❶ Select the **name format**
- ❷ To add or remove fields from the address line (i.e. a field may not be used on the label), click **Match Fields**
- ❸ Click **OK**

## STEP 5: INSERT FIELDS (ADDRESS BLOCK)

In order to use special features, Mail Merge needs to know which fields in your recipient list match to the required fields. Use the drop-down list to select the appropriate recipient list field for each address field component

**Required for Address Block**

First Name: First Name  
 Last Name: Last Name  
 Suffix: (not matched)  
 Company: (not matched)  
 Address 1: Address  
 Address 2: (not matched)  
 City: City  
 State: State  
 Postal Code: Zipcode  
 Country or Region: (not matched)  
**Optional information**  
 Unique Identifier: (not matched)

Use the drop-down lists to choose the field from your database that corresponds to the address information Mail Merge expects (listed on the left.)

Remember this matching for this set of data sources on this computer

OK Cancel

- 1 Click on the drop-down menu to add a field by matching the **field name**
- 2 To remove a field, change the field name to **not matched**
- 3 If this is the format for all labels, click the **Remember** checkbox
- 4 Click **OK**

## STEP 5: INSERT FIELD (MERGE FIELDS)

**Insert Merge Field**

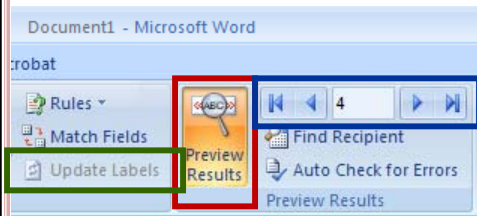
Insert:  
 Address Fields  Database Fields

Fields:  
 Last Name  
 Address  
 City  
 State  
 Zipcode  
 Phone

Match Fields... Insert Cancel

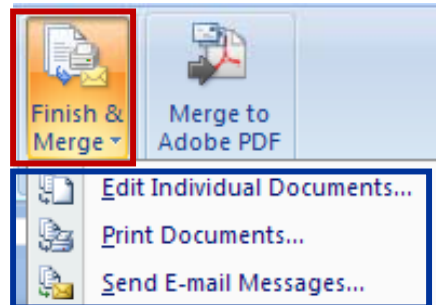
- 1 Click **Insert Merged Field**
- 2 Choose the **field type** to insert
- 3 Choose the **items** to add to the letter from the list
- 4 Click **Insert** after each item

## STEP 5: PREVIEW LETTERS



- 1 Click **Preview Results**
- 2 To review each recipient, click on the **recipient arrows**
- 3 If there is *one label per page*, click **Update Labels**

## STEP 6 ; COMPLETING THE MERGE



- 1 Click **Finish & Merge** to complete the merge
- 2 Click **Edit, Print,** or **Send** to complete the process



## QUESTIONS?

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