

Word 2008: Mail Merge

How to create a Mail Merge for letters, labels, and envelopes

Overview

This quick guide provides the step by step directions for creating a mail merge in Microsoft Word 2008. The guide provides instructions for creating data merges in letters, labels, and envelopes with tips and tricks along the way.

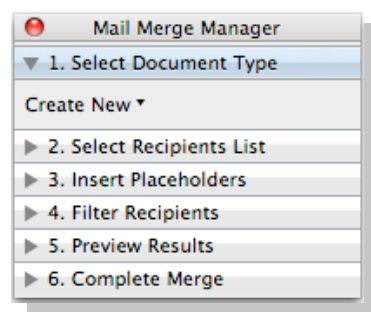
Purpose of Mail Merge

You use mail merge when you want to create a set of documents that are essentially the same but where each document contains unique elements. For example, in a letter about orientation, the logo and text about orientation will stay consistent in each letter and the address and greeting line will be different in each letter. Using mail merge, you can create:

- **A set of labels or envelopes** The return address is the same on all the labels or envelopes, but the destination address is unique on each one.
- **A set of form letters, e-mail messages, or faxes** The basic content is the same in all the letters, messages, or faxes, but each contains information that is specific to the individual recipient, such as name, address, or some other piece of personal data.

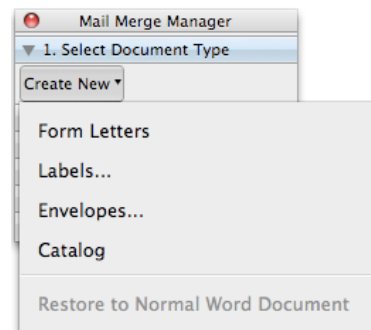
Steps to creating a Mail Merge

To begin a Mail Merge, open Microsoft Word. On the **Tools** menu, select **Mail Merge Manager** from the pull-down list. The **Mail Merge Manager** palette will appear which provides step by step instructions for creating a mail merge in a word document. To complete the **Mail Merge**, follow the steps below.



Step 1: Select Document Type

- Step 1 is to select the document type that you would like to create a merge in. Click the button **Create New** to expand the options. Your options for the main document type are:
- **Form Letters:** allows you to tailor one letter to many individuals
- **Labels:** allows you to print labels with different addresses.
- If you select this option, the **Label Options** dialogue box appears.
- From the **Label products** pull-down menu, select the brand name of your labels
- From the **Product number** scroll box, select the product number of your labels
- Click **OK**
- **Envelopes:** allows you to print envelopes with different addresses
- **Catalog:** allows you to gather varied but related information into a list. For example, list people's names, office locations, and phone numbers to create an organizational directory.

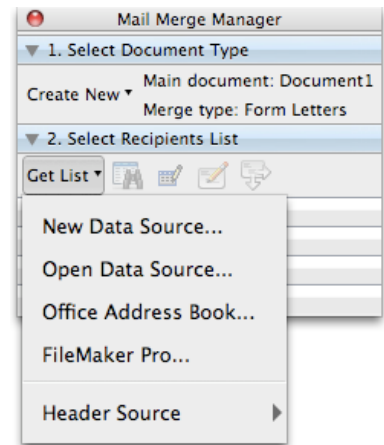


Quick Guide

Step 2: Select Recipients List / Data Source

The options for data source are:

- **New Data Source:** allows you to create your own list by typing each recipient in a pop up window in Microsoft Word.
- The **Create Data Source** dialogue box will appear.
- In the **Placeholder list** text box, type the name of the field you want to add if it is already not in the list to the right.
- Click **Add Placeholder**
- To remove a field from the data source, select the desired field and click **Remove Field Name**
- Click **OK** and save the data source.
- Then after saving the data source, to add an entry, click **Add New** and type in the information into the allotted slots.
- **Open Data Source:** uses a previously saved list. Once you make this selection, a link will appear. Clicking it takes you to the **Choose a File** dialog box where you can choose the file you want to use that was previously saved on your computer.
- When choosing an **Excel** file, locate the Excel workbook you will use for your list and click **Open**
- When the **Open Workbook** dialogue box appears, choose the sheet and cell range that your data is in
- **Office Address Book:** uses your email contacts as recipients. You must use the email client **Entourage** and have existing Contacts. Once you make this selection, Word retrieves your Contacts in the form of an editable recipient list.



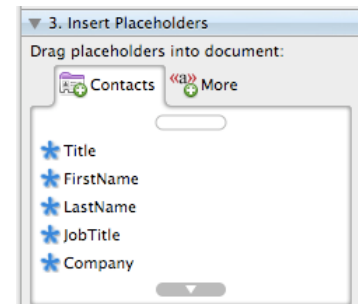
Step 3: Insert Placeholders

During this step you will be adding text and the variable information to your document through placeholders. Word has created pre-formatted entries along with the fields from your recipient list. Once you have the text that you want in your document, click with the cursor where you want to insert the first field. In the **Mail Merge Manager** palette, under **Insert Placeholders**, drag the field name that you want to use into the main document. The options that appear are consistent with the fields in your data source.

Repeat this step as many times as necessary to create the appropriate text and merge fields that you want in the main document.

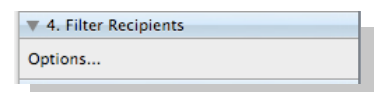
Placeholders, also referred to as **Fields**, are a subsection of a record, such as a name or zip code. Fields can be big and contain the whole address or small and break the address down into separate fields such as street address, state, and zip code. Separating the fields allows you to use them as a group (the entire address at the top of a letter) or use them individually (address the recipient by first and last name or first name alone).

Note: When you merge data, you can use as few or as many of the data fields as you want, and you can use them in any order. Also, you can use each field multiple times.



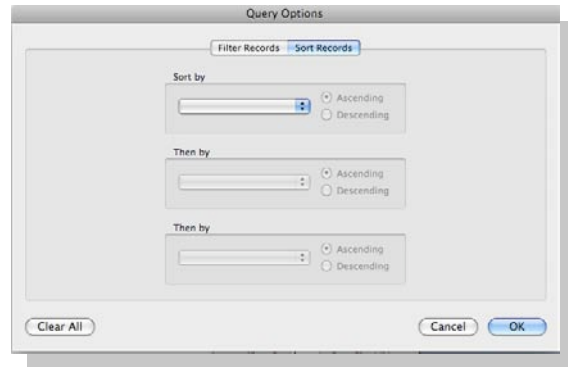
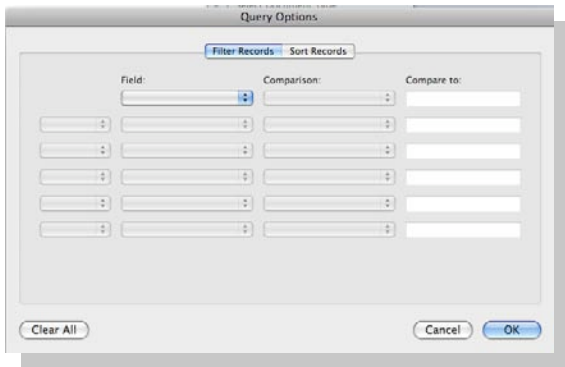
Step 4: Filter Recipients

This step allows the user to **Filter Recipients** or select sub-set of recipients. By clicking **Options**, the **Query Options** dialogue box will appear. You can either **Filter Records** or **Sort Records** (images on next page)



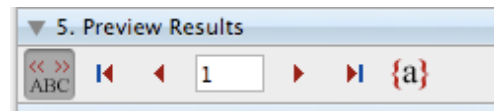
- **Filter Records** allows you to select a field from the pull down of available fields from your data source and select a comparison. For example, you can select title as a **Field**, equal to from the **Comparison** pull down, and then type "Mr." into the **Compare to** box and the data will be filtered to only those with the title of "Mr."

- **Sort Records** allows you to sort the data recipients into alphabetical order by ascending or descending. You are allowed to sort the records up to three times. For example, first you may choose to sort ascending by city, then you may choose to sort the lastname descending within each city.



Step 5: Preview Results

Before you complete your merge, it is a good idea to preview your document with the merged information to make sure it looks the way you intended. To preview the merged document for each record, click **<< >>ABC** button in the **Preview Results** section. This will initialize the Preview. You can then browse through your document by clicking either **Previous** or **Next** arrows. Also, manually typing in a number will move the preview to that specific record. For example, a wanting to see the 40th record would be quicker to type in the number 40 than scrolling through with the arrows.



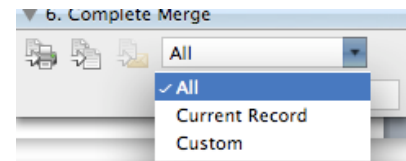
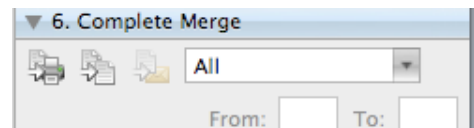
Based on what you see during the preview, you may decide to edit the document, edit the recipient list, or exclude one or more recipients from the merge.

Step 6: Complete Merge

Once the document is complete to your satisfaction, you can merge the documents to the printer or to a new file.

Merge to New Document, the document image icon, creates a new document that contains the results of the merge. You can print, save, or delete this new document without affecting either the main document or the data source document.

Merge to Printer, the image with the printer, allows you to print the merged documents. To print all merged documents click **All** in the **Complete Merge** section, and click the left button, **Merge to Printer**. Also, choosing **Custom Record**, will print what record is showing in the document on the screen at that moment. **Custom** allows you to pick a certain combination of merges



For More Information

A variety of support services are available from ITS if you would like additional help:

Computer training on a variety of topics is available to faculty, staff, and students at no charge through the Technology Learning Center (TLC). Check out the current TLC training schedule online at <https://www.ithaca.edu/its/workshops>

Online documentation and tutorials on IC-supported computing software and systems are available at <https://www.ithaca.edu/its/traindoc>

Frontline computing support is available through the ITS Helpdesk in 104 Job Hall; send e-mail to helpdesk@ithaca.edu or call 607-274-1000.

Backline consulting support is available in the Technology Learning Center, room 101 Friends Hall.

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