

Mail Merge with Excel or Word

You can use the Mail Merge Helper to create form letters, mailing labels, envelopes, or catalogs. For example, you can send a Christmas letter addressed to each family member individually, send an update to each member of your club or social group, specifying exact amount owed, or number of points awarded, or time to meet or phone. Whatever information you keep in an MS Word table, an Excel spreadsheet, or an Access database can be merged with a form letter, a form envelope, or a form page of labels and sent to your individual recipients.

The Mail Merge Helper guides you through organizing the address data, merging it into a generic document, and printing the resulting personalized documents.

Using Mail Merge to Create Labels, Envelopes, and Automated Mailings



Step 1: Create the main document. In MS Word, click *New Blank Document* on the Standard toolbar. On the *Tools* menu, click *Mail Merge*. Under *Main Document*, click *Create*, and then click “Form Letter,” “Envelopes,” “Mail Labels,” or “Catalog” Click *Active Window*. The document on your screen becomes the *Main Document*. (You will be creating a form letter to mail to selected names on your address list, or a page of mailing labels for the names on your address list, or a series of envelopes for names on your address list, or a catalog listing, showing each row in your address list as an entry in your catalog.)

Step 2: Open or create the *Data Source*. In the Mail Merge Helper dialog box, do one of the following:

- ❖ Create a new *data source*. Use this method if you haven’t already stored names, addresses, and other data in a data source, and you want to store the data in a Word table.
- ❖ Use data in an existing data source. Under **Data Source**, click **Get Data**, and then click **Open Data Source**. Select a Word table, or an Excel spreadsheet, or an Access database, and then click **Open**. If you can’t find your Excel spreadsheet, click on “Files of Type” and scroll down to “MS Excel Worksheets *.xls) to find your Excel spreadsheet. Scroll to “All Word documents *.doc” to find your Word table, or scroll down to “MS Access database *.mdb” to find your Access database.
- ❖ You can use only use your e-mail address book if you use **MS Outlook** as your default e-mail client. . Under **Data source**, click **Get Data**, and then click **Use Address Book**. Select your address book, and then click **OK**.

Important: When using a spreadsheet or table as your data source, be sure to identify the titles in your data source. In Excel, click in the row below your title row. Then in the **Window** menu, click on “**Freeze Titles**.” This should keep your column titles on every page for printing, as well as provide “fields” for you to merge with an MS Word form letter, mailing labels, envelopes, or catalog list.

Step 3: Select the letter, envelope, mailing label, or catalog options, and then insert merge fields.

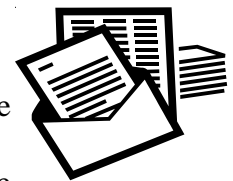
❖ If you don't see the Options dialog box, click anywhere in the main document, and then click **Tools menu, Mail Merge** again.

❖ **For a Form Letter:** You will be prompted to "Edit Main Document." On your blank form letter, begin with **Insert Menu, Date and Time**, to insert today's date. Check box to automatically update to current date each time you send the same letter. Then begin to put in merge fields by clicking **each time** on the "Insert Merge Fields" tab on the tool bar above your letter. Select "First Name" field. Then space once and select "Last Name" field. Then (Enter) to go to the next line. Select the "Address" field, (Enter), and select the "City, State and Zip" field. (Enter) (Enter) and type "Dear" followed by a space. "First Name" field to put in the first name. Then (Enter) (Enter) and begin typing your form letter. End with your usual closing lines and your typed name, leaving room for your signature. Finally, click on **Tools menu, "Mail Merge" and "Merge"** button again to make your letter merge with your address list.

❖ **For Mailing Labels:** You will be prompted to "Set Up Main Document." On the **Label Options** tab, select the brand name and size of labels you will be printing, for example, Avery 5161, and click whether you have an impact printer or an inkjet/laser printer. Then select **Tools menu, "Mail Merge"** again. You will see a label form. Begin to put in merge fields by clicking on the "Insert Merge Fields" tab **each time** on the toolbar above your label form. Select the "First Name" field. Then space once and select "Last Name" field. Then (Enter) to go to the next line. Select the "Address" field, (Enter again), and select the "City, State and Zip" field.

❖ **For Envelopes:** You will be prompted to "Set Up Main Document." On the **Envelope Options** tab, select the envelope size you want, and adjust the address format and position on the envelope. Size 10 is the standard large business envelope, and Size 6 3/4 is the standard smaller business envelope. Begin to put in merge fields by clicking on the "**Insert Merge Fields**" tab **each time** on the tool bar above your letter. Select the "First Name" field. Then space once and select "Last Name" field. Then (Enter) to go to the next line. Select the "Address" field, (Enter again), and select the "City, State and Zip" field. Finally, click on the upper left-hand corner of the envelope form and type your name and return address to appear on each envelope.

❖ **For a Catalog:** You will be prompted to "Edit Main Document." On your blank catalog form, begin to put in merge fields by clicking **each time** on the "**Insert Merge Fields**" tab on the tool bar above your letter. Select the First Name field. Then space once and select "Last Name" field. Then (Enter) to go to the next line. Select the "Address" field, (Enter again), and select the "City, State and Zip" field. Finally, click on **Tools menu, "Mail Merge" and "Merge"** button again to create your catalog listing of names and addresses. city,



Step 4: Merge the data into the main document. Each row (or record) in the data source produces an individual form letter, mailing label, envelope, or catalog item.

1. If you want to specify the order in which data is merged, or merge only part of the data, you can sort and select data records to merge.
2. If you want to see how the merged data will appear, you can preview the merged documents.
3. In the **Mail Merge Helper** dialog box, click **Merge** under **Merge the data with the document**.
4. If you want to check the data source for errors before you merge, click **Check Errors**. Choose an option, and then click **OK**.
5. Then Send the merged document to the printer.