

## Mail Merge

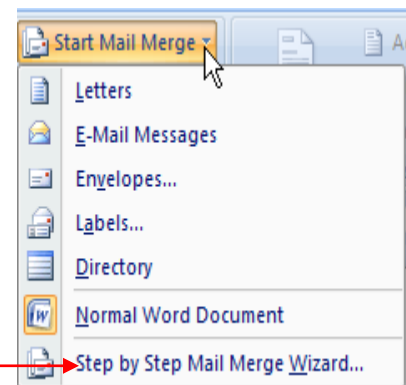
Mail merge is a feature of Word processing programs such as Word 07 that enables you to generate form letters. Form letters are sent out en masse to people where much of the letter is the same for each recipient. What changes in the letter are the recipient's name, address, and maybe certain other items specific to each recipient.

To use a mail-merge system, first create a data file with a set of information, like a list of names and addresses. In a Word document, create a letter, substituting special symbols in place of names and addresses (or whatever other information will come from the first file). Through a series of a few small steps using mail merge, you can create form letters that are personalized for each recipient.

The data file can be created with various programs such as Word, Excel, or Access. The beauty of the mail merge feature is that while you can create your own data source in Word, if you already have a spreadsheet of data created in Excel or some other program, it makes sense to use that.

### Follow these steps to create a mail merge document.

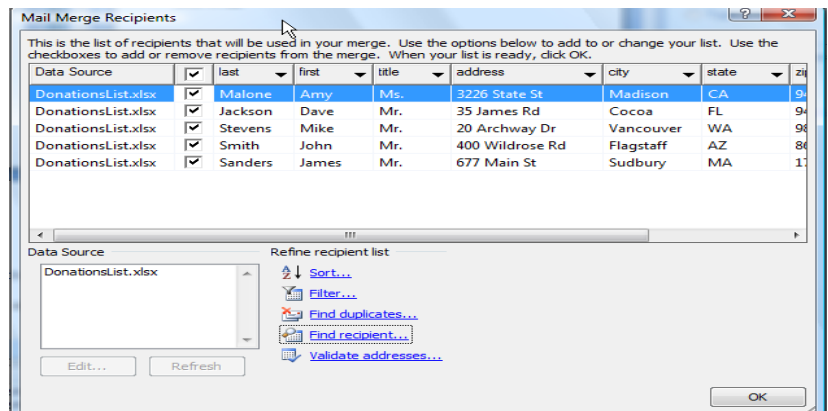
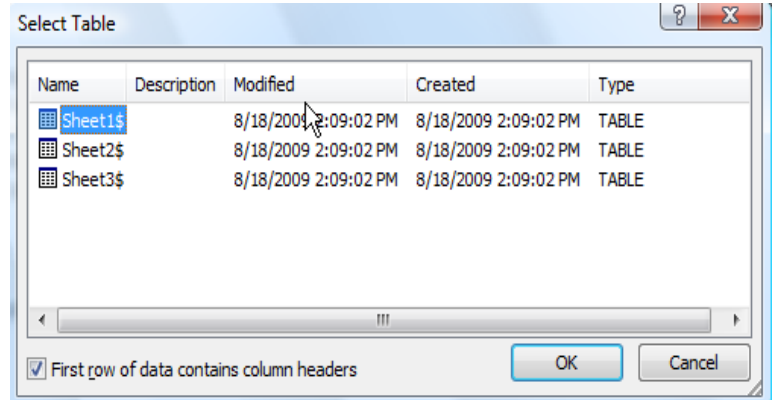
1. To save time, we have already created a data file in Excel and a sample letter in Word that you can access and save onto your flash drive.
  - a. Insert your flash drive and close the AutoPlay window.
  - b. Open the class resource page on the desktop, scroll down to the Word Course, and click on Donations List Save the file to your flash drive. When the download is complete, close the window.
  - c. Now click on Merge Letter and save that to your flash drive; again closing the download complete window.
  - d. Close the class resources page.
2. Before we start the mail merge process, let's look at the donations list that was created in excel.
  - a. Double click on the flash drive icon on the desktop.
  - b. Open DonationsList.xlsx
  - c. Notice that the list is on the worksheet named Sheet 1.
  - d. Notice that the first row of the worksheet contains headings.
  - e. Close DonationsList.xlsx
3. Open the MergeLetter.docx. Notice that the address of the establishment, the body of the letter and the closing are all in place. We will use mail merge to personalize each letter with an address block, a salutation, and a donation amount for each person in our list.
4. On the Ribbon, click on the Mailings Tab.
5. Find the Start Mail Merge group. Click on the Start Mail Merge button to open the menu and then click on Step by Step Mail Merge Wizard.
6. A Mail Merge pane will open on the right that will take you through the mail merge process in 6 steps.
7. Step 1 - select a document type. By default, the radio button for letters is checked, and that is the one that we want. Click on "Next: Starting Document" at the bottom of the Mail Merge pane.
8. Step 2 - select the starting document. Since we will be



using this letter, do not change the default selection of "use the current document." Click on "Next: Select Recipients" at the bottom of the Mail Merge pane.

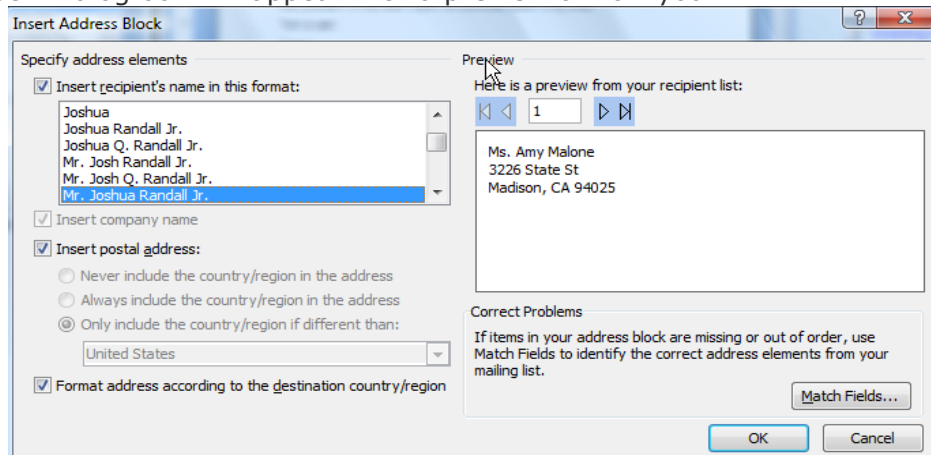
9. Step 3 – select recipients.

- a. The default selection, "Use an existing list" is the one we need. To find the list, click on the Browse button.
- b. The restrictions message box will appear. Click OK each time it appears.
- c. A Select Data Source Dialog box will open. Navigate to your Flash drive and open DonationsList.xlsx
- d. A Select Table dialog box will open. We need to provide some information about our document. Notice that by default, Sheet 1 is selected. Remember that when we examined our Excel file our data was on the Worksheet entitled Sheet 1. Also be sure that the check box before "First row of data contains column headers" is selected. Click OK.
- e. A Mail Merge Recipients dialog box will open which will allow you to review, delete or change your list. Since we are not making any changes, click OK.
- f. Click "Next: Write your letter" at the bottom of the Mail Merge pane.

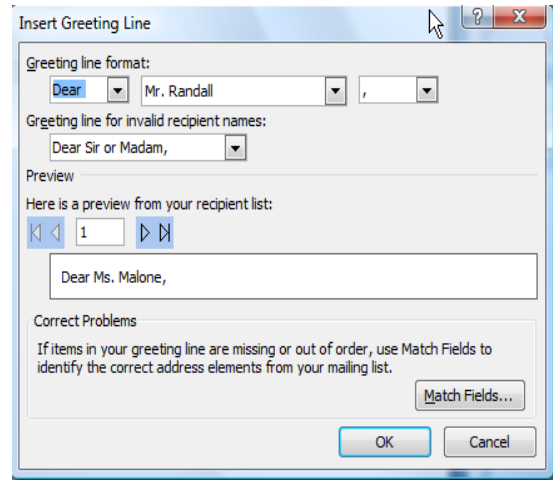


10. Step 4 Write your letter. Since we are using an existing letter, we merely have to click into a location within the letter to insert different items.

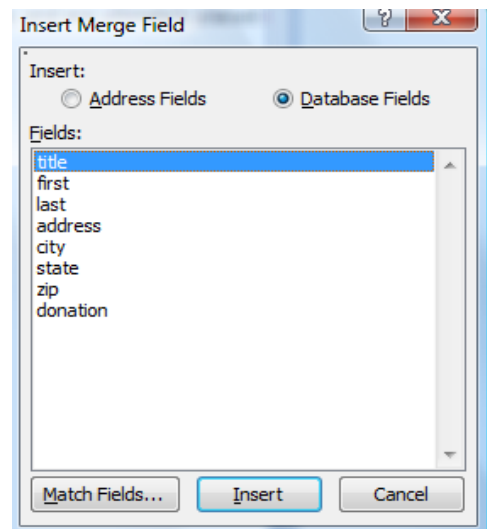
- a. Place your insertion point below the return address for the Animal Shelter, then click Address block in the Mail Merge Pane.
- b. An Insert Address Block Dialog box will appear with a preview of how your address block will look in the letter. If you select a different format, your preview will change. Make no changes. Click OK.
- c. Place your insertion point below the address block and click Greeting Line in the Mail Merge Pane.



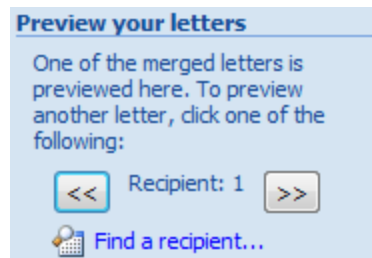
- d. An Insert Greeting line dialog box will appear to allow you to control the way you want your greeting to appear.
  - i. Click on the arrow next to the box that reads "Mr. Randall" and select "Joshua".
  - ii. Click OK.



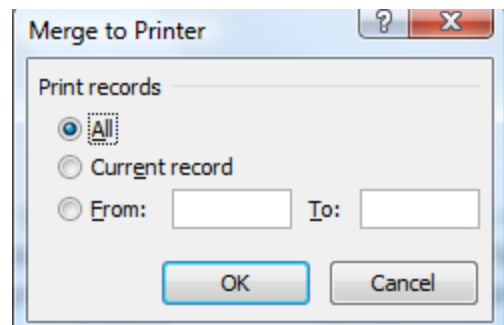
- e. Within the body of the letter, place your insertion point immediately after the words "contribution of" in the first sentence. Click on More items in the mail merge pane.
- f. An Insert Merge Field dialog box will appear.
  - i. Select donation
  - ii. Click the Insert button.
  - iii. Click the Close Button.
  - iv. Be sure that there is a space before and after «donation».
  - v. Click "Next: Preview your letters" at the bottom of the Mail Merge pane.



- g. Step 5 – Preview your letters.
  - i. The letter to the first person on your list will appear.
  - ii. Use the arrows to scroll through each succeeding letter.
  - iii. Notice that there is no \$ before the donation amount in your letter. Click on the donation amount in any letter, place your insertion point directly before it, and insert a \$. This change will affect each letter.



- iv. Click "Next: Complete the merge" at the bottom of the Mail Merge pane.
- v. Step 6 – Complete the merge.
  - 1. Click Print in the Mail Merge Pane to open this dialog box to allow you to print all or a portion of your letters.
  - 2. We will not be printing. Click Cancel.



- h. Close Word. Do not save changes.