

# \*Word Sig Class May 2011

Sun Lakes Phase 1

May 25, 2011

Mail Merge - Word 2010

# \* Mail Merge

Envelopes

Labels

Mail Merge

- Envelopes
- Labels
- Letters
- E-Mail
- Directory

# \* Creating Envelopes

For Single Envelope

On the mailing Tab

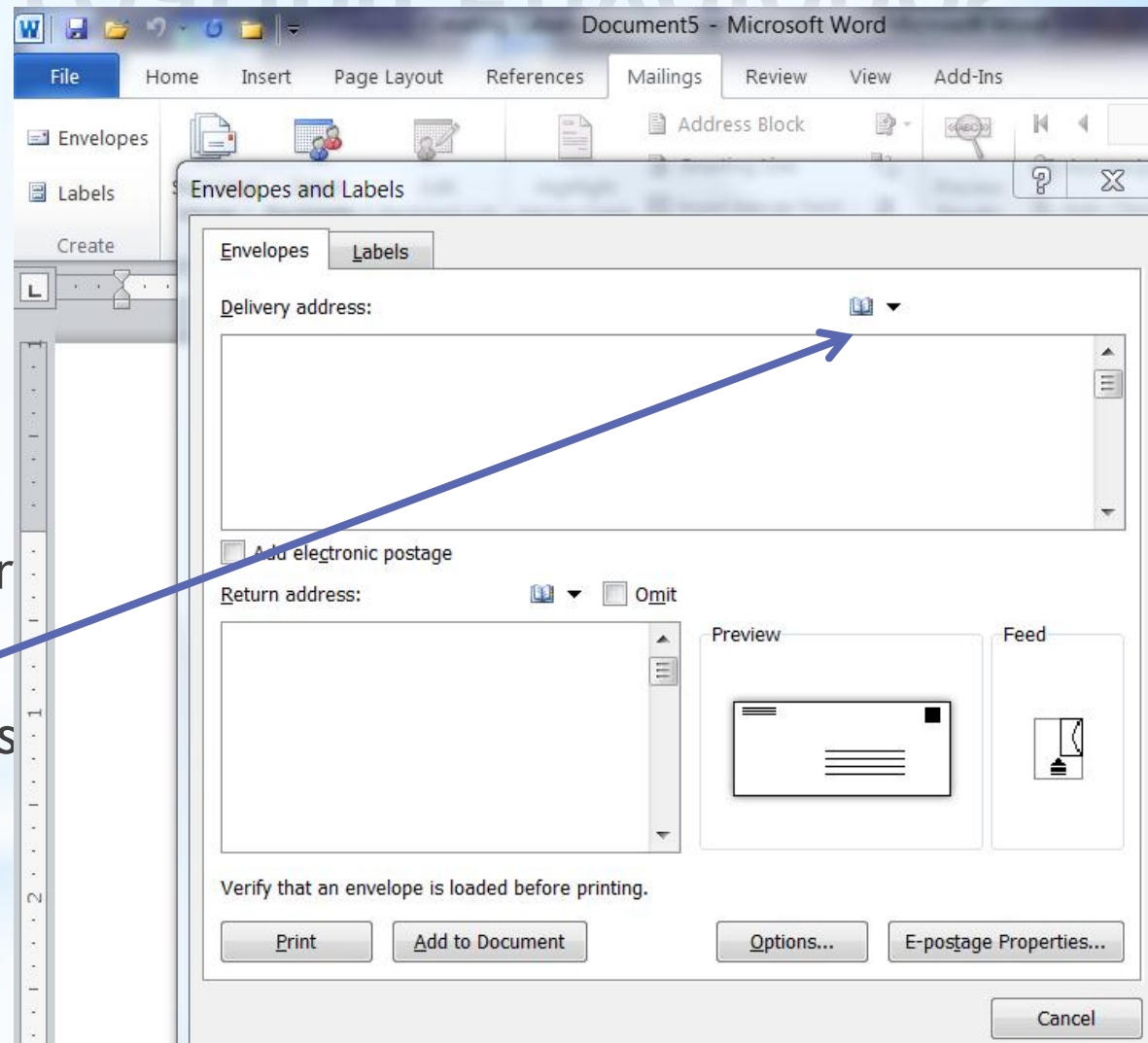
Select Envelopes, the  
Envelopes and Labels

Window opens

Type delivery address or

Click address book

Your address book opens

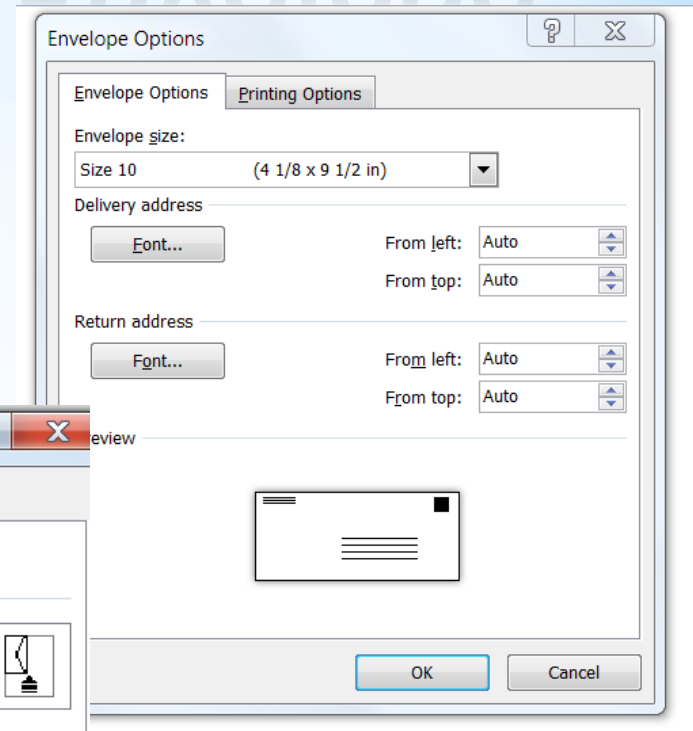
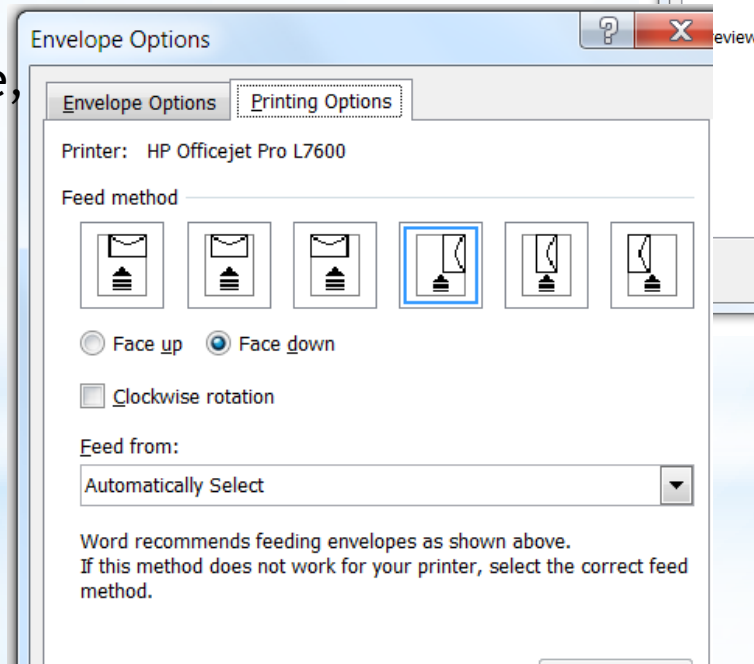


# \*Single Envelope

In the Envelopes and Labels Window,  
Select Options to set envelop type and  
Print feed

The Envelopes Options opens  
Select the Type and Position. Select the  
Printing options for feeding

When complete,  
Click Print



# \*Creating Labels

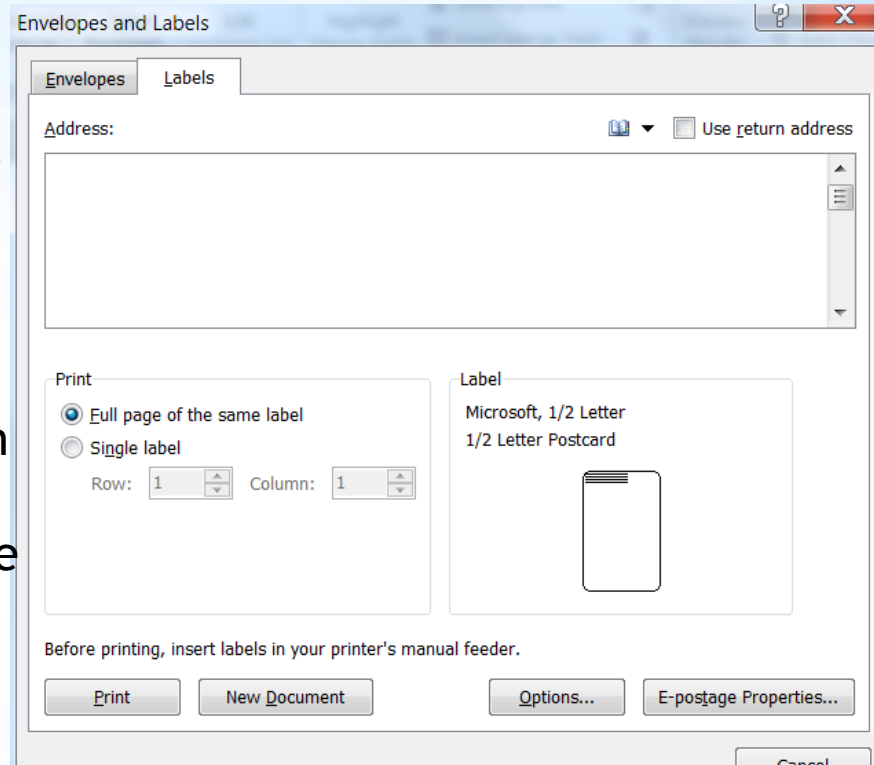
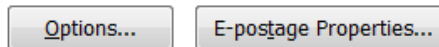
On Mailings Tab, Create Group, Select Labels. Envelopes and Labels Window opens. Type or select an Address

You have the option of printing  
A full page of the same address, or  
A single label and define its position

Click Options to setup the label type

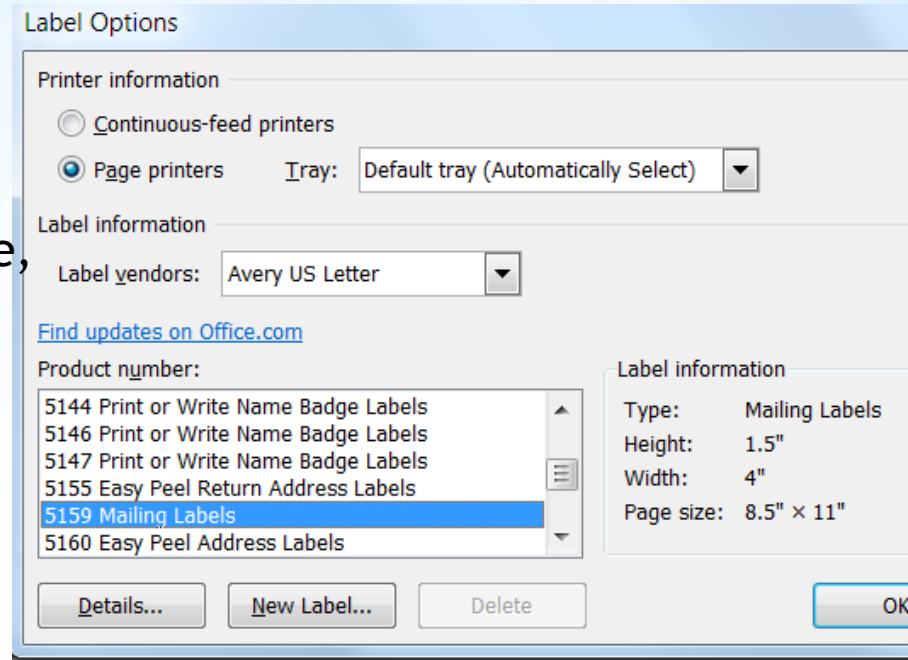


ial feeder.



# \*Single Labels

In the options Window, select A Vendor, and a label Type  
In this case, Avery and #5159.  
If you don't find your label type, check the display size that Matches yours  
Click OK.  
The label picture displays in the window



# \* Using Mail Merge

- \* Mail Merge Option
  - \* Envelopes
    - \* May have to feed one at a time (Printer)
  - \* Labels
    - \* Holidays Labels
    - \* Return Labels (easier with Single Label Step)
  - \* Letters
    - \* Personalized letters
    - \* Holidays letters
  - \* E-Mails
  - \* Directory

# \* Mail Merge Steps

Select Document Type

Envelopes, Labels, Letters, E-Mails, Directory

Choose Recipients

New List, Existing List

Select, Filter List

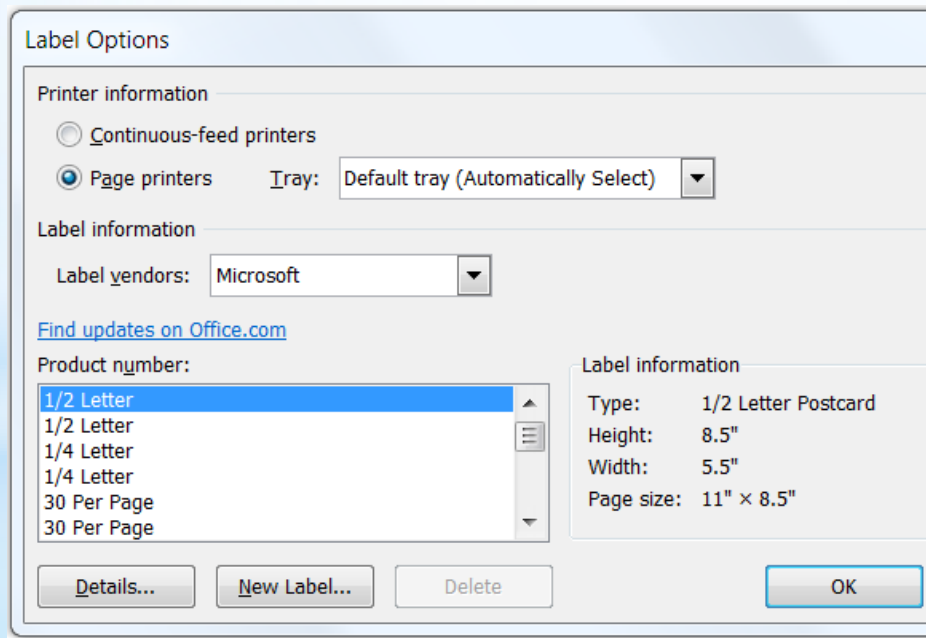
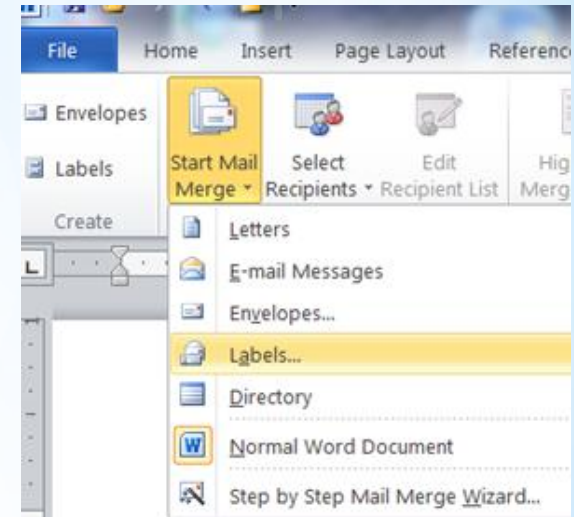
Merge Fields

Preview

Merge

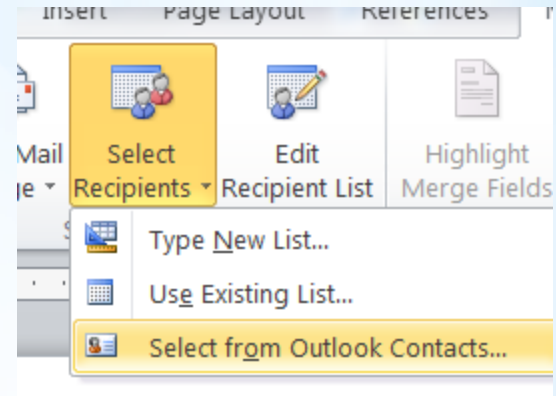
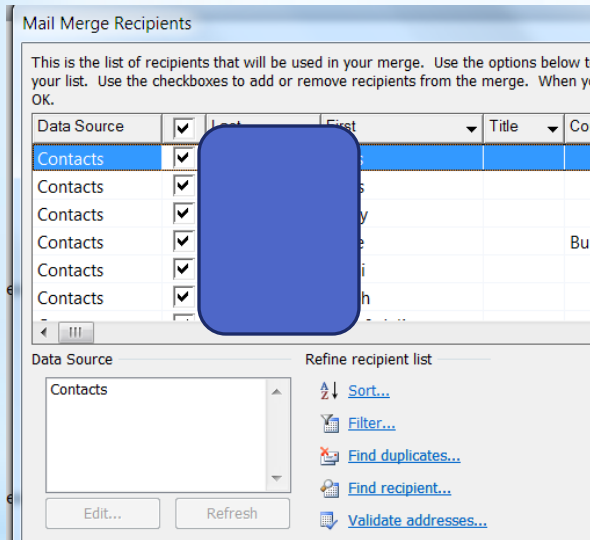
# \* Mail Merge - Labels

On the Mailings Tab, Start Mail Merge group  
Expand the selection arrow  
For Labels - Select from the Label Option Window



# \*Select Recipients

Next Select Recipients - Here from Outlook



The list opens (all selected). Check desired entries

# \* Merge Field

## Insert Merge Fields or Address Block

Insert Address Block

Specify address elements

Insert recipient's name in this format:

Joshua Randall Jr.  
Joshua Q. Randall Jr.  
Mr. Josh Randall Jr.  
Mr. Josh Q. Randall Jr.  
**Mr. Joshua Randall Jr.**  
Mr. Joshua Q. Randall Jr.

Insert company name

Insert postal address:

Never include the country/region in the address

Always include the country/region in the address

Only include the country/region if different than:

United States

Format address according to the destination country/region

Preview

Here is a preview from your recipient list:

8

Gerard & Josette Tixier

Correct Problems

If items in your address block are missing or out of Fields to identify the correct address elements from

OK

«First»  
«Last»  
«Address»  
«City» «State»  
«Next Record»

Insert Merge Field

Insert:

Address Fields

Fields:

First  
Last  
Title  
Company  
Department  
Office  
Post Office Box  
Address  
**City**  
State  
Zip/Postal Code

Selection is shown on the page

In Step 4  
Don't forget to "Update all labels"  
To see all selected recipients  
Load Label sheets in printer - Print

Replicate labels

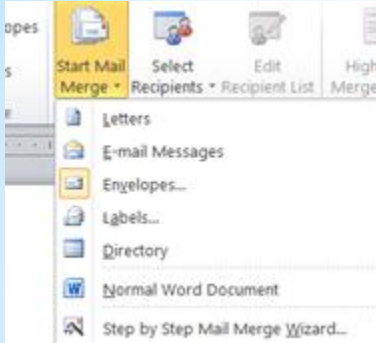
You can copy the layout of the first label to the other labels on the page by clicking the button below.

Update all labels

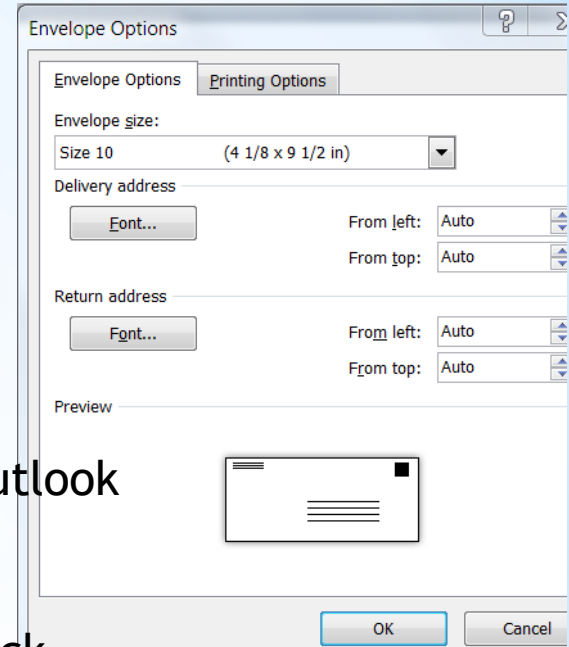
Step 4 of 6

«AddressBlock»

# \* Mail Merge - Envelopes



Manual setting (non-wizard)  
On Mailings Tab, Start Mail Merge Group, click Envelopes...  
The Envelope Options opens  
Select type, etc.



Next select recipients: either  
Type new list, use existing, or Outlook  
Edit the list as required



Insert Merge Field or Address Block  
Position address

Preview results to check list

# \* Mail Merge - Labels

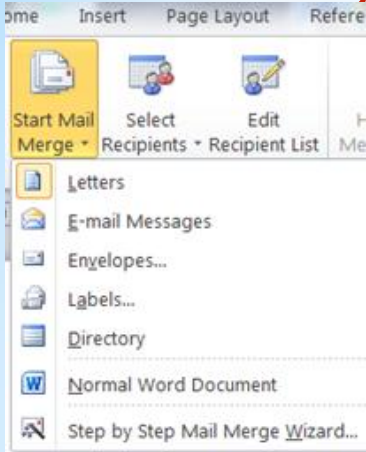
Manual mode (non-Wizard)

Follow the steps as shown In previous slide for Mail Merge Envelope, but This time select Labels instead of Envelopes

This is the hard way. Use the wizard to simplify the process



# Mail Merge - Envelopes Using Wizard



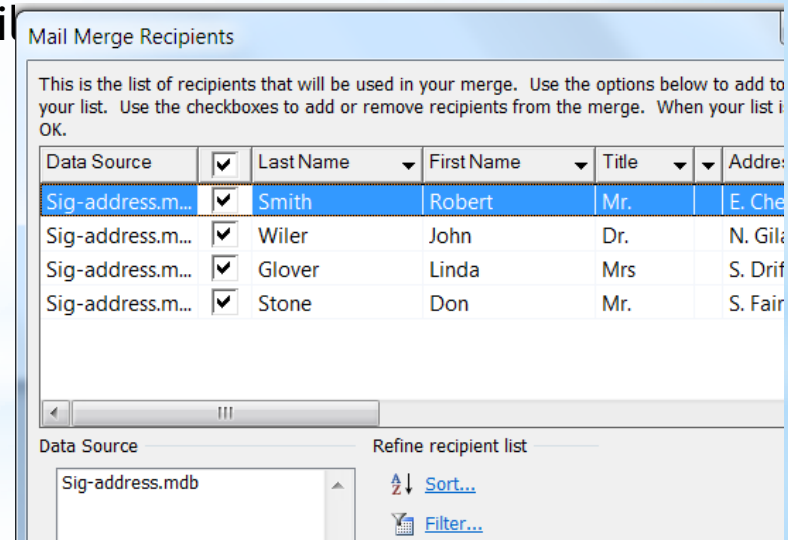
The process is similar to manual but with guide for each step from the Wizard

From Mailings Tab, Select “Step by Step Mail Merge Wizard”  
The Mail Merge Task Pane opens on the right side of screen

**Step 1** - Select Document Type: Letters, E-mail messages, *Envelopes*, Labels, or Directory. Click “Next”

**Step 2** - Click Envelope Options to set up. Next: Select Recipients

**Step 3** - Chose your recipients list. Use existing, Outlook, or Type a new list  
Sample list



# \* Mail Merge - Envelopes

Select All or some recipients - OK. Next: Arrange your Envelope  
**Step 4 - Built-in Address Block, More Items for Fields selection**

Insert Address Block

Specify address elements

Insert recipient's name in this format:

Joshua  
Joshua Randall Jr.  
Joshua Q. Randall Jr.  
Mr. Josh Randall Jr.  
Mr. Josh Q. Randall Jr.  
**Mr. Joshua Randall Jr.**

Insert company name

Insert postal address:

Never include the country/region in the address

Always include the country/region in the address

Only include the country/region if different than:

United States

Format address according to the destination country/region

Preview

Here is a preview from your recipient list:

Mr. Robert Smith  
E. Chestnut Ct  
Phoenix, AZ 85051

Correct Problems

If items in your address block are missing c  
Fields to identify the correct address eleme

Insert Merge Field

Insert:

Address Fields  D

Fields:

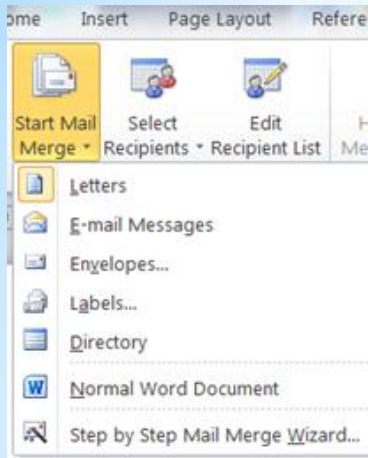
**Title**  
First Name  
Last Name  
Company Name  
Address Line 1  
Address Line 2  
City  
State  
ZIP Code  
Country or Region  
Home Phone  
Work Phone  
E-mail Address

Match Fields... Insert

Select an Address Block type. Next: Preview your Envelopes

**Step 5 - Preview your Envelopes**

**Step 6 - Complete the merge**



# \* Mail Merge - Labels

The process is similar to manual but with guide for each step from the Wizard

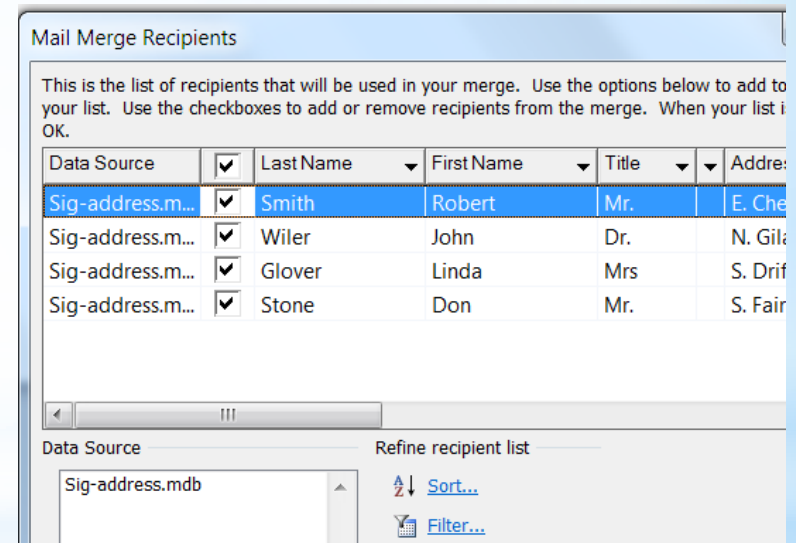
From Mailings Tab, Select “Step by Step Mail Merge Wizard”

The Mail Merge Task Pane opens on the right side of screen

**Step 1** - Select Document Type: Letters, E-mail messages, Envelopes, *Labels*, or Directory. Click “Next”

**Step 2** - Click Label Options to set up. Next: Select Recipients

**Step 3** - Chose your recipients list. Use existing, Outlook, or Type a new list  
Sample list



# \* Mail Merge - Labels

Select All or some recipients - OK. Next: Arrange your Label  
**Step 4 - Built-in Address Block, More Items for Fields selection**

Insert Address Block

Specify address elements

Insert recipient's name in this format:

Joshua  
Joshua Randall Jr.  
Joshua Q. Randall Jr.  
Mr. Josh Randall Jr.  
Mr. Josh Q. Randall Jr.  
Mr. Joshua Randall Jr.

Insert company name

Insert postal address:

Never include the country/region in the address

Always include the country/region in the address

Only include the country/region if different than:

United States

Format address according to the destination country/region

Preview

Here is a preview from your recipient list:

Mr. Robert Smith  
E. Chestnut Ct  
Phoenix, AZ 85051

Correct Problems

If items in your address block are missing c  
Fields to identify the correct address eleme

Insert Merge Field

Insert:

Address Fields  D

Fields:

Title  
First Name  
Last Name  
Company Name  
Address Line 1  
Address Line 2  
City  
State  
ZIP Code  
Country or Region  
Home Phone  
Work Phone  
E-mail Address

Match Fields... Insert

Select an Address Block type. Next: Preview your Labels

In Step 4

Don't forget to "Update all labels"

To see all selected recipients

**Step 5 - Preview your Labels**

**Step 6 - Complete the merge**

Replicate labels

You can copy the layout of the first label to the other labels on the page by clicking the button below.

Update all labels

Step 4 of 6

# \* Mail Merge - Letters

## Mail Merge Terms:

### Main Document

Word Document containing Text, Picture, Logo constant for all Addressees

### Source File

File containing Recipient information (Name, Address, E-Mail, etc.)

### Merge Fields

Placeholder in main document replaced by Variable

### Address Block

Pre-formatted address field

### Greeting Line

Pre-formatted greeting field

# \* Main Document

On Mailings Tab, expand Start Mail Merge and select “Step by Step Mail Merge Wizard...”

The Mail Merge Task Pane opens

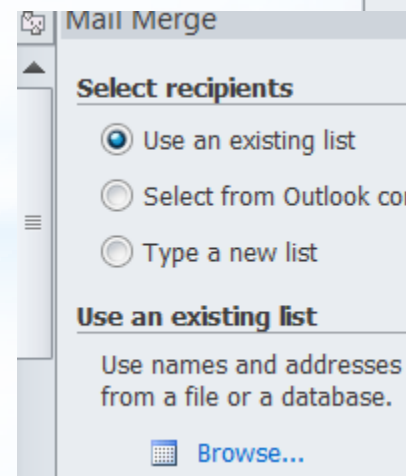
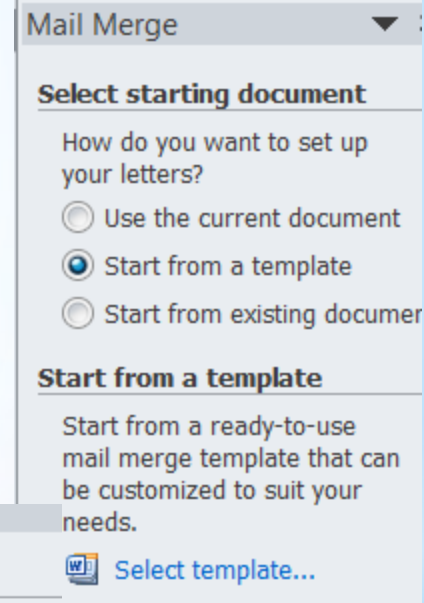
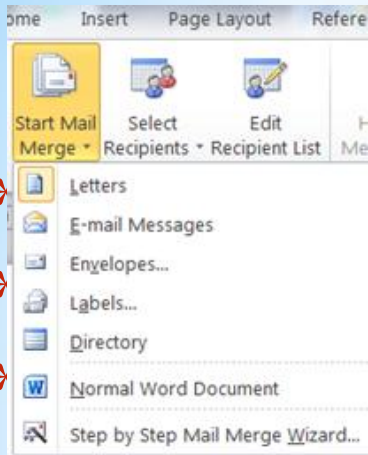
\* Step 1 - Select Letters - Next: Starting Document

\* Step 2 - Choose letter setup

\* Write the letter, use existing one, or use template

\* Step 3 - Select Recipients

\* Use existing list, Outlook, or new list



# \* Recipient List

Specify address elements

Insert recipient's name in this format:

Joshua  
Joshua Randall Jr.  
Joshua Q. Randall Jr.  
Mr. Josh Randall Jr.  
Mr. Josh Q. Randall Jr.  
Mr. Joshua Randall Jr.

Insert company name

Insert postal address:

Never include the country/region in the address  
 Always include the country/region in the address  
 Only include the country/region if different than:

United States

Format address according to the destination country/region

Preview

Here is a preview from your recipient list:

Michael Buelow  
3018 W. Villa Thomas Drive  
P [redacted]

Correct Problems

If items in your address block are missing or out of order, use Match Fields to identify the correct address elements from your mailin

Match

## Write your letter

If you have not already done so, write your letter now.

To add recipient information to your letter, click a location in the document, and then click one of the items below.

- Address block...
- Greeting line...
- Electronic postage...
- More items...

When you have finished

- \* Step 4 - Write your Letter
- \* Select Address Block, Greeting line, E-Postage (If enrolled to service), or Specific Fields

«AddressBlock»

«GreetingLine»

Use this space to tell your famil

Insert Greeting Line

Greeting line format:

Dear [dropdown] Joshua

Greeting line for invalid recipient name

Dear Sir or Madam, [dropdown]

Preview

Here is a preview from your recipient list:

Michael Buelow  
3018 W. Villa Thomas Drive  
P [redacted]

Dear Michael,

# \* Preview/Print

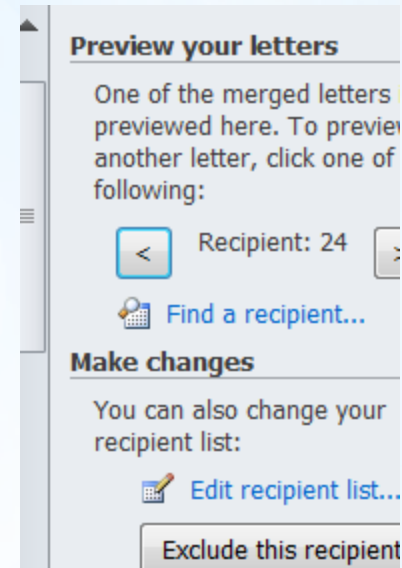
## \* Step 5 - Preview your Letter

Michael [redacted]  
3018 [redacted] sa Drive  
Phone [redacted] 053-1117  
Dear Michael,

## \* Step 6 - Complete the Merge

## \* Print

\* It will print a Personalized letter for each of the recipient on your list



# \*E-Mailing

From Mail Merge Tab, select Wizard.

Step 1 - On the Task Pane, select E-Mail

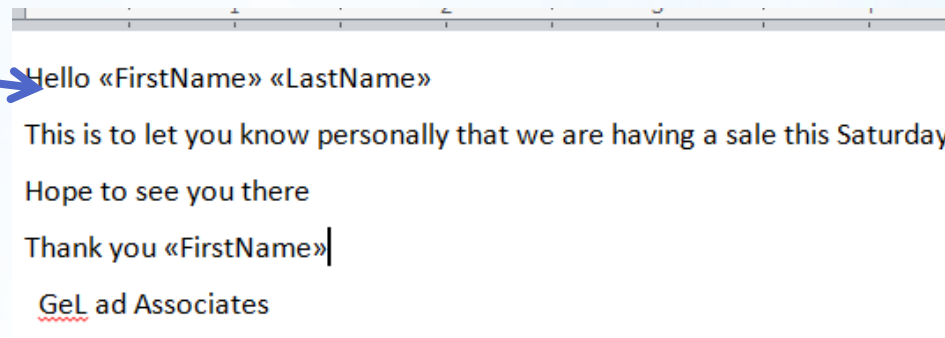
Step 2 - Select Document (if new, type your message

Step 3 - Select Recipient file - New list/Existing/Outlook

Edit the list as necessary

Step 4 - Use More Items to select fields in the message

For example



Step 5 - Preview

Step 6 - Complete the Merge

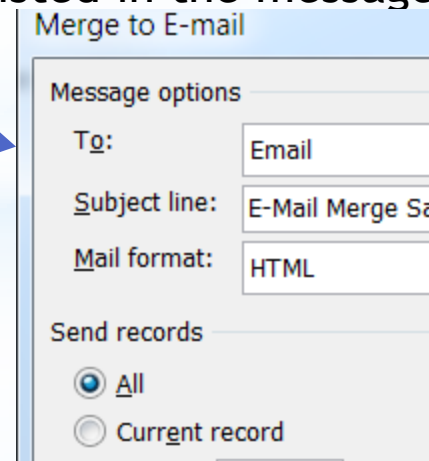
The selected entries of your directory are now listed in the message that can be

Edited - font type/size/color

Click Electronic Mail - Window opens

Type a subject

OK to send the messages through E-Mail



# \* Mail Merge - Directory

From Mail Merge Tab, select Wizard.

Step 1 - On the Task Pane, select Directory

Step 2 - Select Document

Step 3 - Select Recipient file - New list/Existing/Outlook

Edit the list as necessary

Step 4 - Use More Items to select fields printed

For example

Step 5 - Preview

Step 6 - Merge to new document

The selected entries of your directory

Are now listed in a Word document

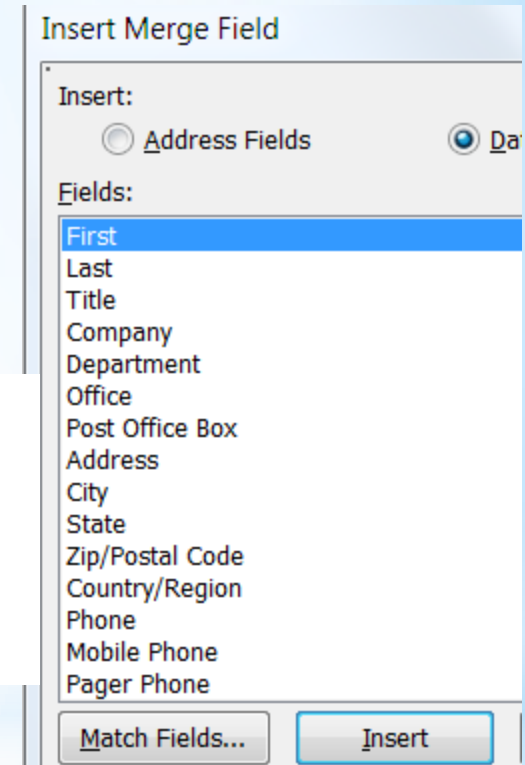
That can be edited, saved, Printed.

One popular option is to modify the page  
Layout.

Page Layout Tab, click Column and select 2 or 3

Depending on the length of name/address

«First» «Last»  
«Address»  
«City», «State» «ZipPostal\_Code»  
«CountryRegion»  
«Phone»



# \*Sample Directory

Formatting can be applied in Step 4 to the inserted Fields -  
Font type/size/color etc.

Print the file for Record

