

Software Application Tutorial



Microsoft 2010 WORD: MAILMERGE



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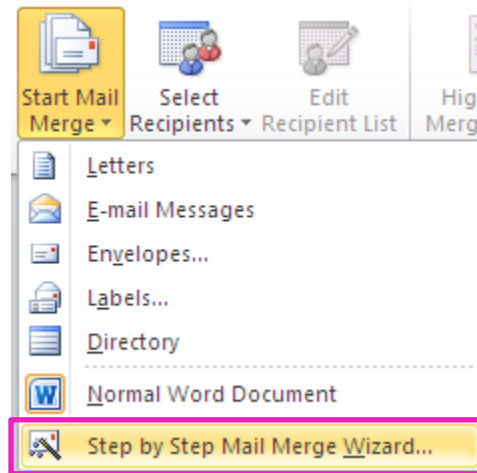
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Introduction

The Mail Merge Wizard for Word 2010 allows, just like Word 2007 allowed, you to create a list of mailing addresses in a data source and then merge them into a standard document file that is referred to as the main document. Microsoft Word can combine—or merge—lists of variable information in one file with a Word document to individualize form letters and envelopes.

Getting Started

To start the Mail Merge Wizard, you **MUST** choose the **Mailings** tab on the Ribbon Bar. Once there, you will see an icon that reads **Start Mail Merge**. Click that and from the drop down menu that appears, you will be given seven options as shown below:



For the purpose of this manual and the demonstration, choose the **last option**. **Step by Step Mail Merge Wizard** is what most are used to from Word 2003. Once you click on this option, the wizard will open up a task pane on the right side of the screen.

Note: Notice that as you move forward along in your mail merge, the ribbon bar also changes. You can actually perform your merge from the task pane on the right-hand side of the screen OR right on the Ribbon itself.

Select Document Type

The first step, regardless if you choose the step by step option or not, is to choose what kind of documents you want to produce in mail merge. Word offers the following types, which can be seen above, but below I will type a description of the options.

- ❖ The letters option allows you to create personalized letters for mass mailings.
- ❖ The e-mail messaging options allow you to create personalized e-mails for mass e-mailings.

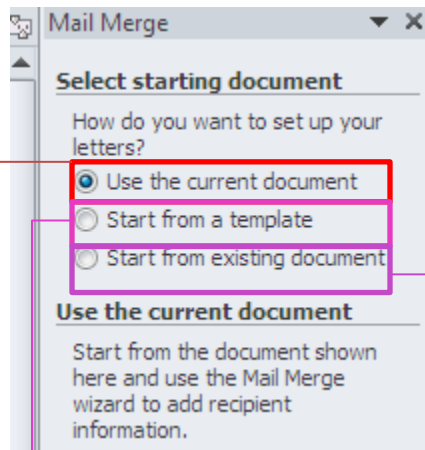
- ❖ The envelope option allows you to print addressed envelopes for a group mailing.
- ❖ The label option allows you to print address labels for a group mailing.
- ❖ The directory option allows you to create a single document containing a catalogue or printed list of addresses.

Letters

When you are in step by step mode for letters, you will see a hyperlink at the bottom of the task pane directing you to click **Next: Starting document** to continue onto the next step. Once you click on the hyperlink, you will be brought to the **select starting document** task pane.

Select Starting Document

The second step in the mail merge process is to select where you want to create your starting document. Word offers the following two options:



This allows you to start from the document that is already open. Be aware that this option is not available for envelopes or labels.

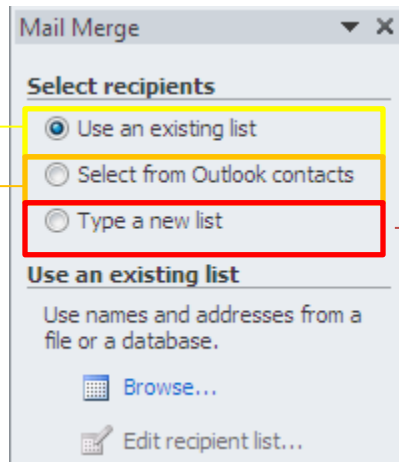
This allows you to start from a ready-to-use template that can be customized to suit your needs.

This allows you to start from a document that has already been created and saved on your computer.

Please select, for this manual, **Use the current document** and click on **Next: Select recipients** to continue onto the next step of our sample mail merge.

Select Recipients

The third step in the mail merge process is to select a list of recipients. Word offers these three options:



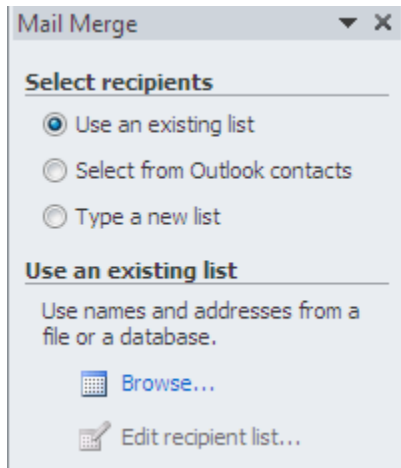
Here you will use the names and addresses that are already saved on your computer from other databases like **Access** and **Excel**.

This will allow you to select names and addresses from an **Outlook** contacts folder.

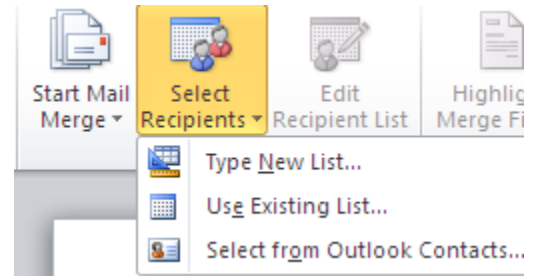
This will allow you to type the names and addresses of the recipients.

Note: You can also select your recipients from the Ribbon Bar. **Under the Start Mail Merge** Group, select **Select Recipients**. The same options that appear on the task pane now appear available on your Ribbon Bar as well. The following image is a comparison of both ways you can select your recipients.

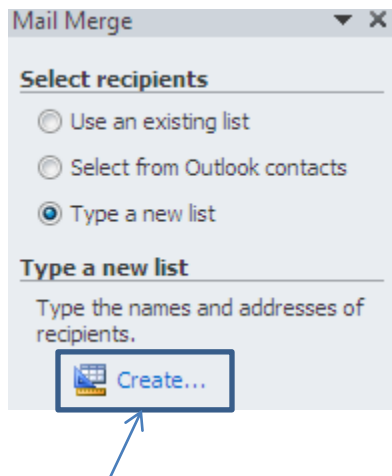
Mail Merge Wizard Task Pane



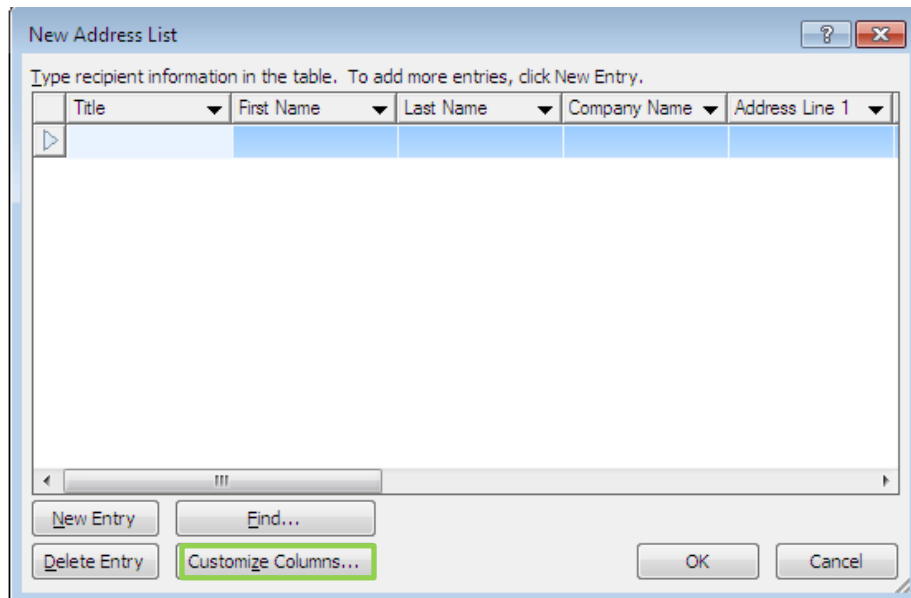
Ribbon Bar



Select **Type a New List** in either of the above examples in your document to insert your recipients into your mail merge.



Now, click the hyperlink titled **Create...** and the following window will appear:



Here you will create your list of recipients. To create your list, follow these steps:

Step 1: First you will need to click on **Customize Columns** (labeled in green above) to customize the address list. Please delete the following entries:

- ❖ Company Name
- ❖ Address Line 2
- ❖ Home Phone
- ❖ Work Phone

Click **OK**.

Step 2: Enter the following names on the list one by one. After the first one is entered, click on New Entry to add another entry into the address list.

Lady Stephanie Germanotta
1339 Poker Face Road
Brooklyn, NY 23890
United States
justdance@streamline.com

Sir Clay Matthews
452 Packers Court
Green Bay, WI 38049
United States
Claymatthews52@packers.com

Brig Gen Willie Nelson
66 Larkspur Lane
On the Road, TX 38006
United States
braidedcowboy@willienelson.com

Dr. Ben Roethlisberger
10 Steel Mill Mews
Pittsburgh, PA 59608
United States
Steelcurtain07@steelers.com

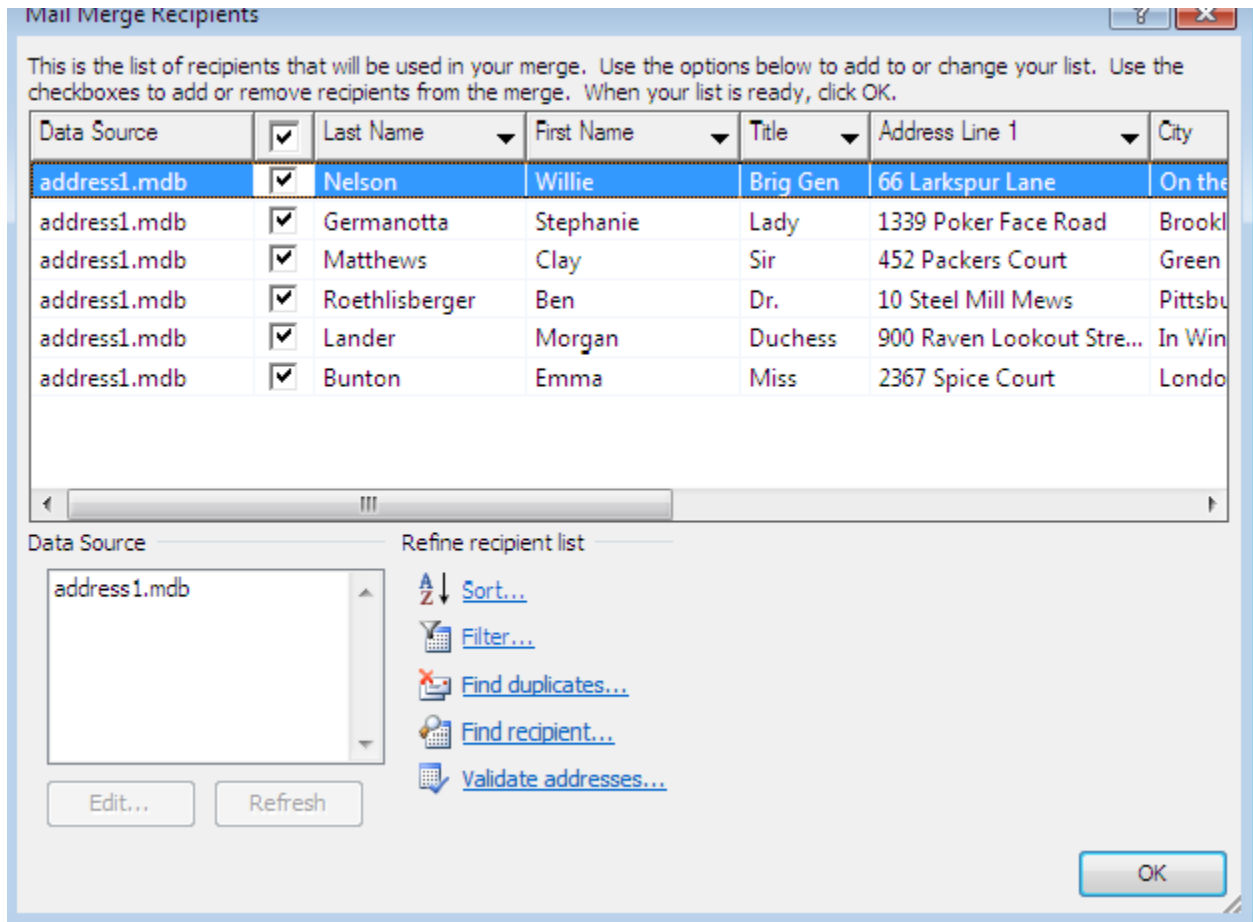
Duchess Morgan Lander
900 Raven Lookout Street
In Winter, Nova Scotia
Canada
kittie_drummer@aol.com

Miss Emma Bunton
2367 Spice Court
London, England
United Kingdom
wannabe@spice.com|

Step 3: Once you have finished the list, click **OK**.

Step 4: Now you will be prompted to save the address list. Name the file *address1* and click **Save**.

Step 5: You will be brought into a recipient table:



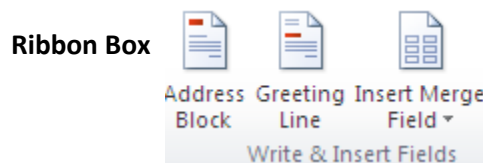
Press **OK** after you review your list. If you need to edit, you will be brought into **Access**.

Now select **Next: Write your letter** to continue onto the next step.

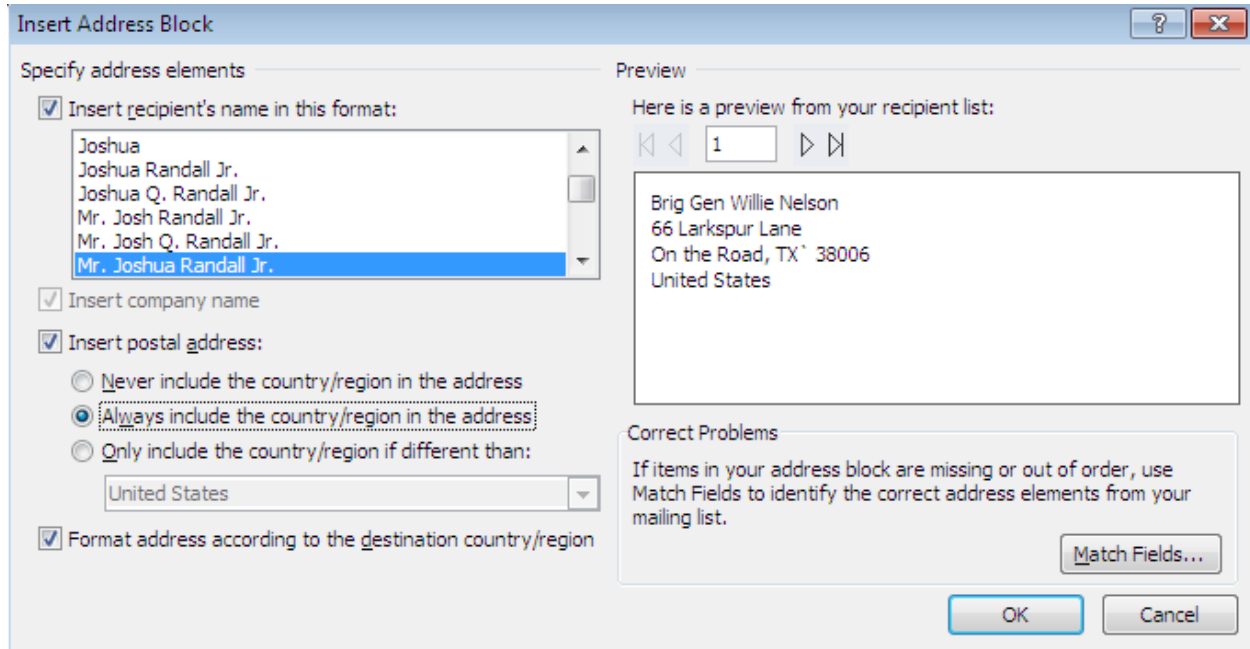
Writing Your Letter

Now is the time to write the letter. Please type the following sample letter in your main document window:

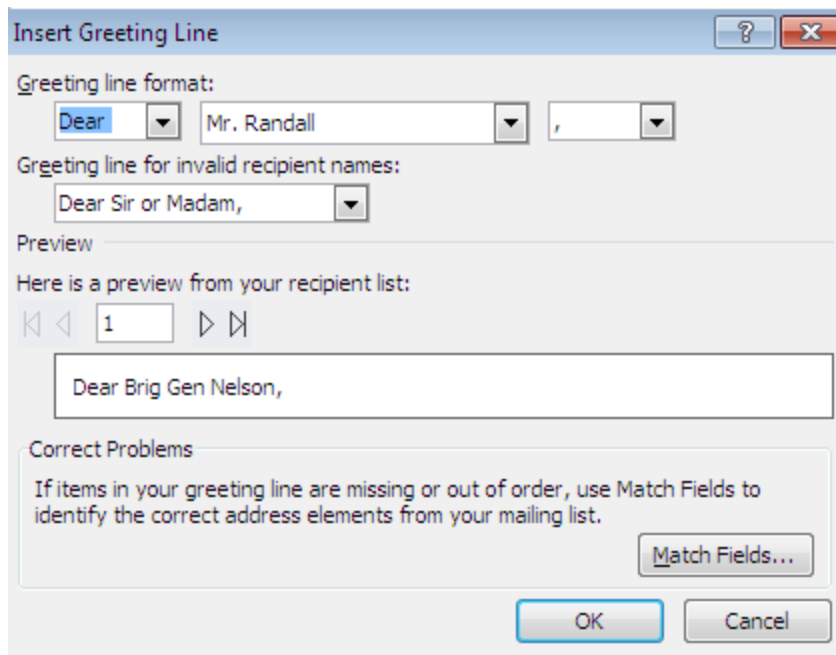
☆ **Please note:** to enter in the address block and greeting line, select **Address block...** and **Greeting line...** from the mail merge task pane and the choose the desired style. Unlike in Word 2007, you don't need to uncheck **Insert company name** because since it was deleted already, it'll automatically be deleted. However, you have to make sure to select **Always include the country/region in the address**. And to insert the **First Name** merge field, click on more items... from the mail merge task pane, select first name and click on Insert button. Notice that underneath these groups, you will see the **Ribbon Bar** with the same options.



Formatting the Address Block



☆**Please note:** Unlike Word 2007, when you click on the hyperlink **Greeting line...** you will be given options of salutations to choose.



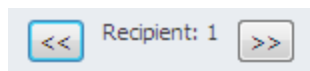
««AddressBlock»»
««Greeting Line»»

«First_Name», you are cordially invited to join me on a voyage to Bergen and Oslo, Norway and Copenhagen, Denmark. Along with a select group of others, you will be whisked away on a journey beyond your wildest dreams where you will explore the fjords looking for buried treasure. This scavenger hunt is very fun and there will be many surprises in store for you. All you need to do is RSVP to this [letter](#) as soon as possible and your adventure will begin. I hope to hear from you soon.

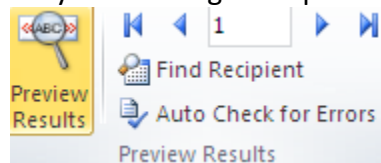
Sincerely,
The Game Master

Preview Your Letters

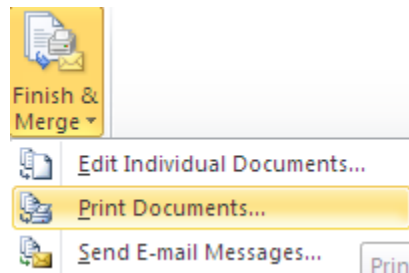
Now that you have finished typing your letter, click on Next: Preview your letters in the mail merge task pane to get a preview of your letters with the recipients names in the merge fields. You will also have the option, if you change your mind about something, to exclude a recipient. You can view the letters one by one. To see a preview of the rest of the recipients, use the arrows seen below to scroll through the remaining recipients.



You can also preview your letters from the Ribbon Bar as well. Under the Preview Results group on the Ribbon Bar, you can easily sort through and preview your letters.



Once the letters have been previewed, click on **Next: Complete the merge** in the task pane to complete the merge. You can also complete the mail merge under the **Finish Group** on your Ribbon Bar.



Once you have completed the merge, simply click on **Print...** in the mail merge task pane to print out your letters. You can also edit individual letters by clicking on the hyperlink **Edit individual letters...** in the mail merge task pane. Editing individual letters will open a new window and you will be able to go through your letters one by one.

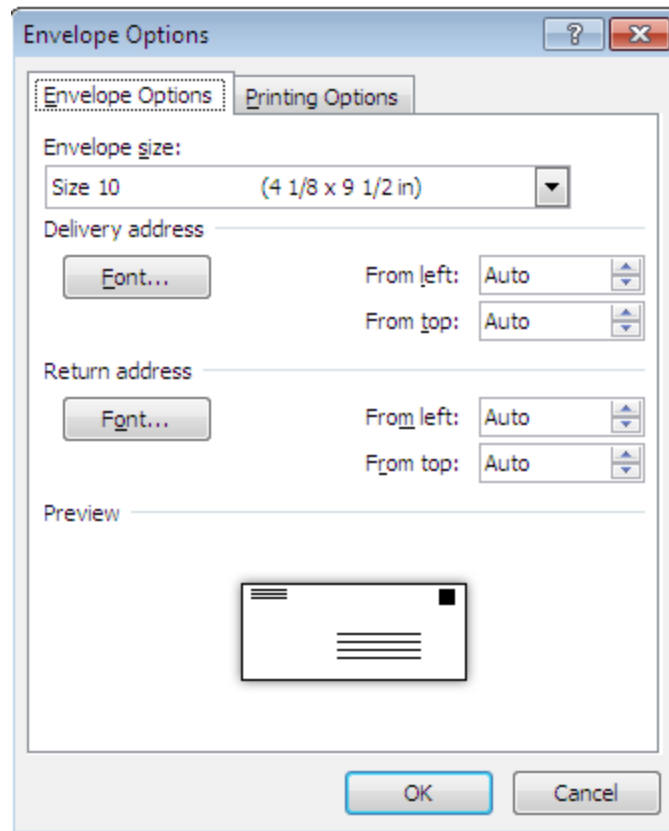
Envelopes

Select Document Type

Like before, the first step in the mail merge pane will be selecting a document type. Instead of choosing **Letters**, you will choose Envelopes and click **Next: Starting document**.

Select Starting Document

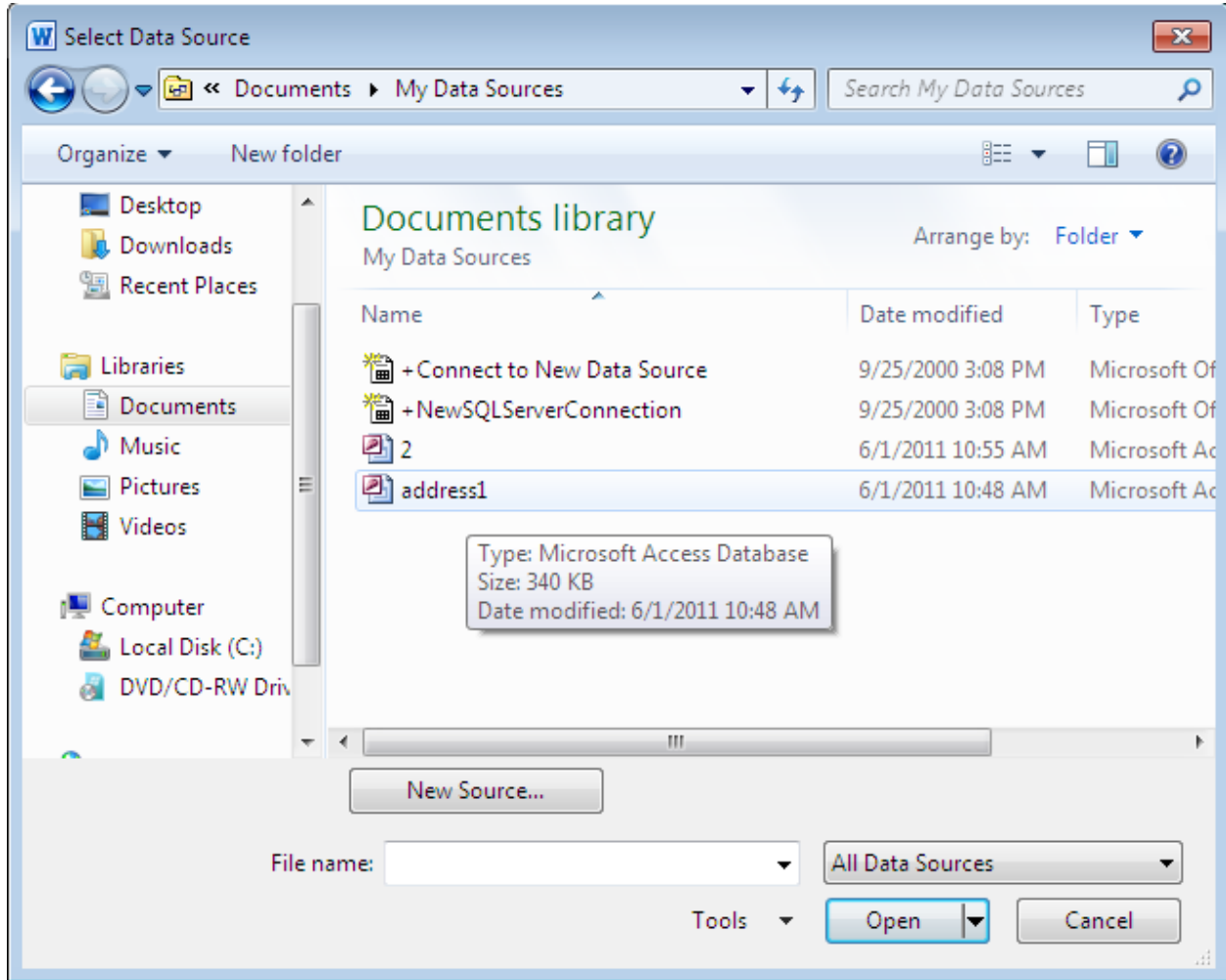
Unlike with the Letters, you will not have the option to stay in the document as is. Instead, when you are selecting your starting document for an envelope, you will select **Change document layout** (if you already have something saved, you can start from that existing document) and click the hyperlink that says **Envelope options...** and the following window will open:



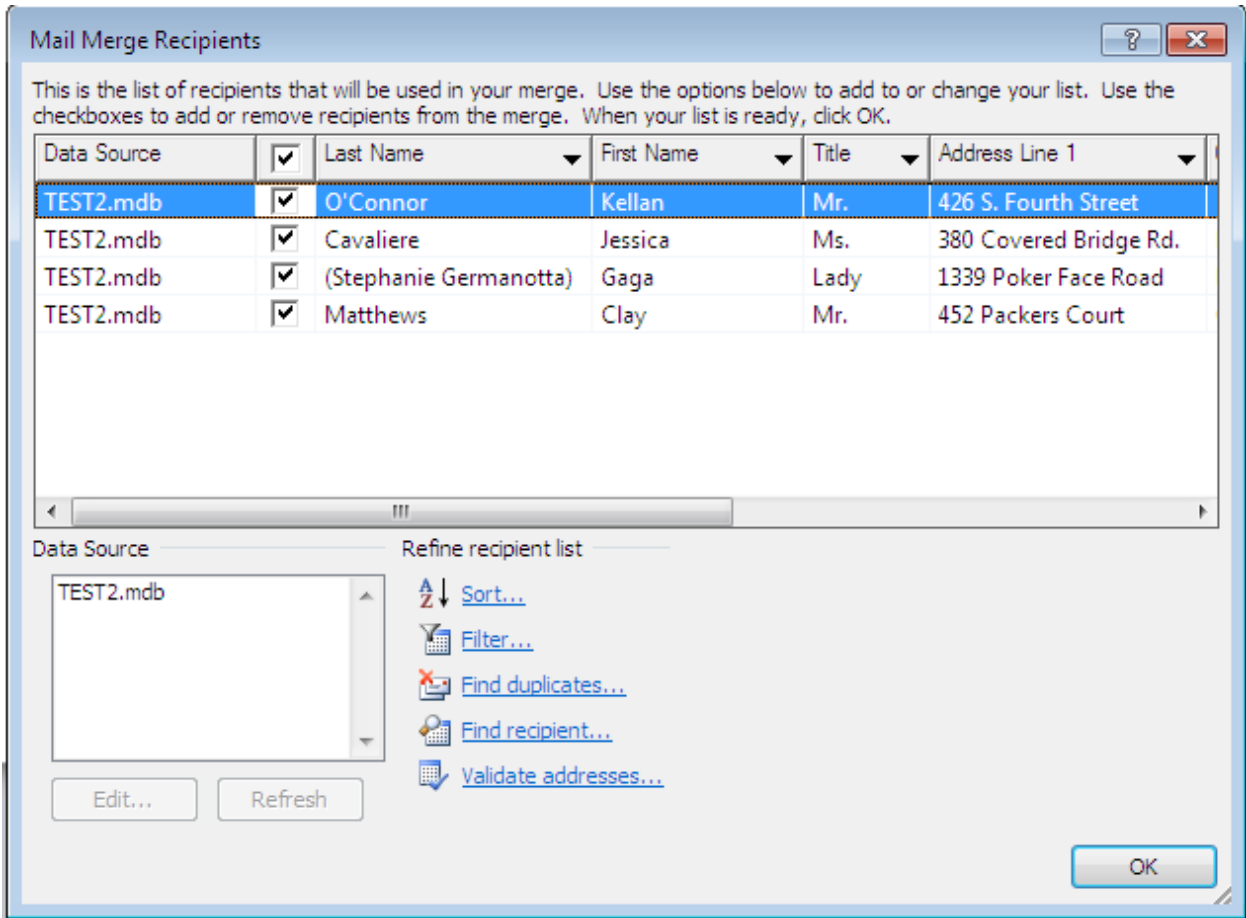
Within the **Envelope Options** window, select the envelope size desired. For this manual, I will be going with the default: **Size 10 (4 1/8 x 9 1/2 in)**.

Select Recipients

Since we created a recipient list for the letters, you can use that same recipient list again for the envelopes. Select **Use an existing list**, then to find your list click on **Browse...** and the following window will open:



Find your recipient list and click on Open. Remember, you can also perform this task action by looking to your Ribbon Bar for the step by step mail merge process. Once you click on Open, the following window will open so you can confirm and edit your list of recipients.



Click **OK** once you are satisfied with your recipient list. Then click on **Next: Arrange your envelope** in the mail merge task pane.

Arrange Your Envelope

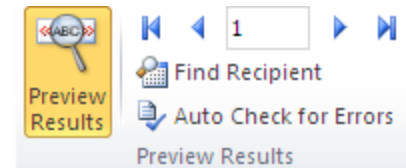
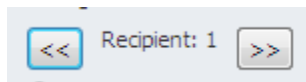
This is when you lay out your envelope. To add recipient information to your envelope, click the desired location. For this manual, I am going to put the address block in the center, as seen here:

«AddressBlock»

☆**Please note:** For our sample merge, be sure to follow the same steps as before in entering the **Address Block**.

Preview Your Envelopes

Once you have finished setting up your envelope, click on **Next: Preview your envelopes** in the mail merge task pane to get a preview of your envelopes with the recipient's names in the merge fields. You can view your envelopes one by one. To see a preview of the rest of the recipients, use the arrows seen below to scroll through the remaining recipients. Remember, you can also preview your envelopes from the Ribbon Bar as well.



Once you have previewed your envelopes, click on **Next: Complete the merge** to complete the merge. Once you have completed the merge, simply click on **Print...** in the mail merge task pane to print out your envelopes. To print your envelopes, you will have to manually feed them into your printer. You can also edit individual envelopes by clicking on **Edit individual envelopes...** in the mail merge task pane. Editing individual envelopes will open a new window and you can go through your envelopes one by one.

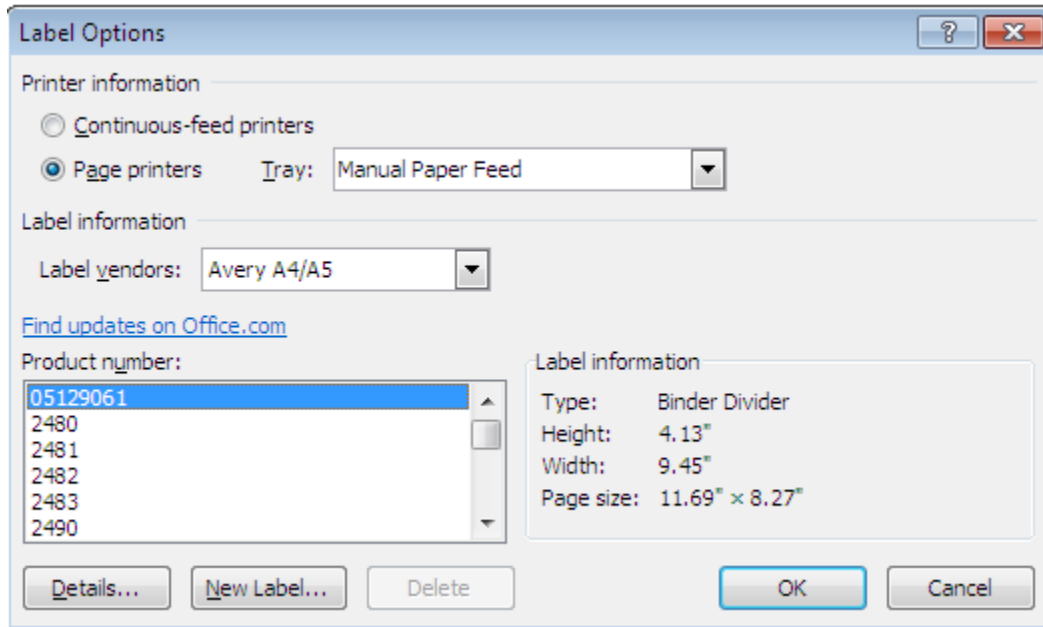
Labels

Select Document Type

Like before, the first step in the mail merge process is selecting a document type. Instead of choosing **Envelopes**, choose **Labels** and click **Next: Starting document**.

Select Starting Document

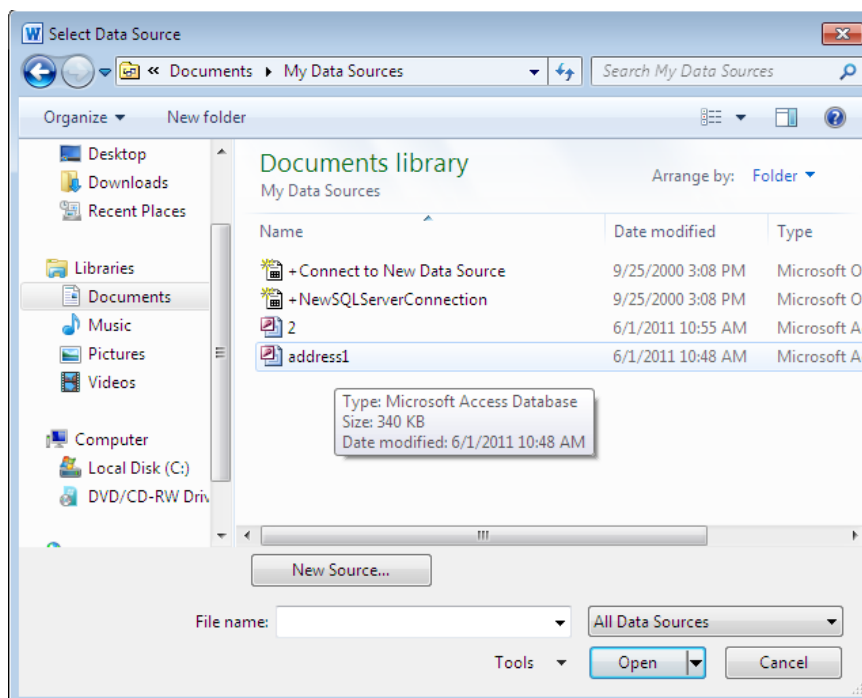
When selecting your starting document, select **Change document layout**, click on **Label options...** and the following window will appear:



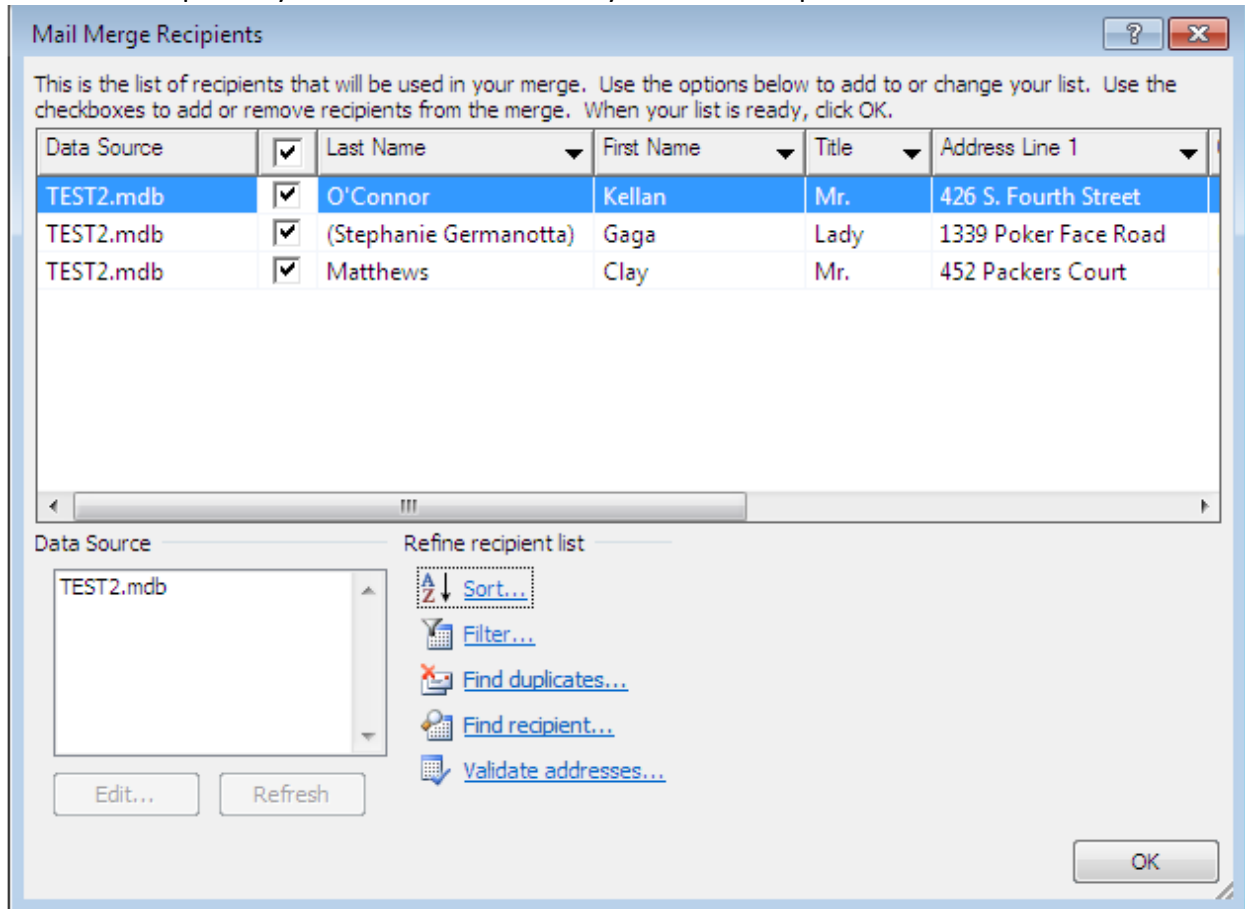
Within the **Label Options** window, please select the desired size of your labels. For our purposes, we’re going to select the default size shown above, however please add the following **[Type by double clicking on the label information: Sticker; Height: 2.5”; Width: 2.5”; Page size: Letter (8 ½ x 11 in)]**.

Select Recipients

Since we created and saved a recipient list before, select Use an existing list. To find your list, click on Browse... and the following window will appear:



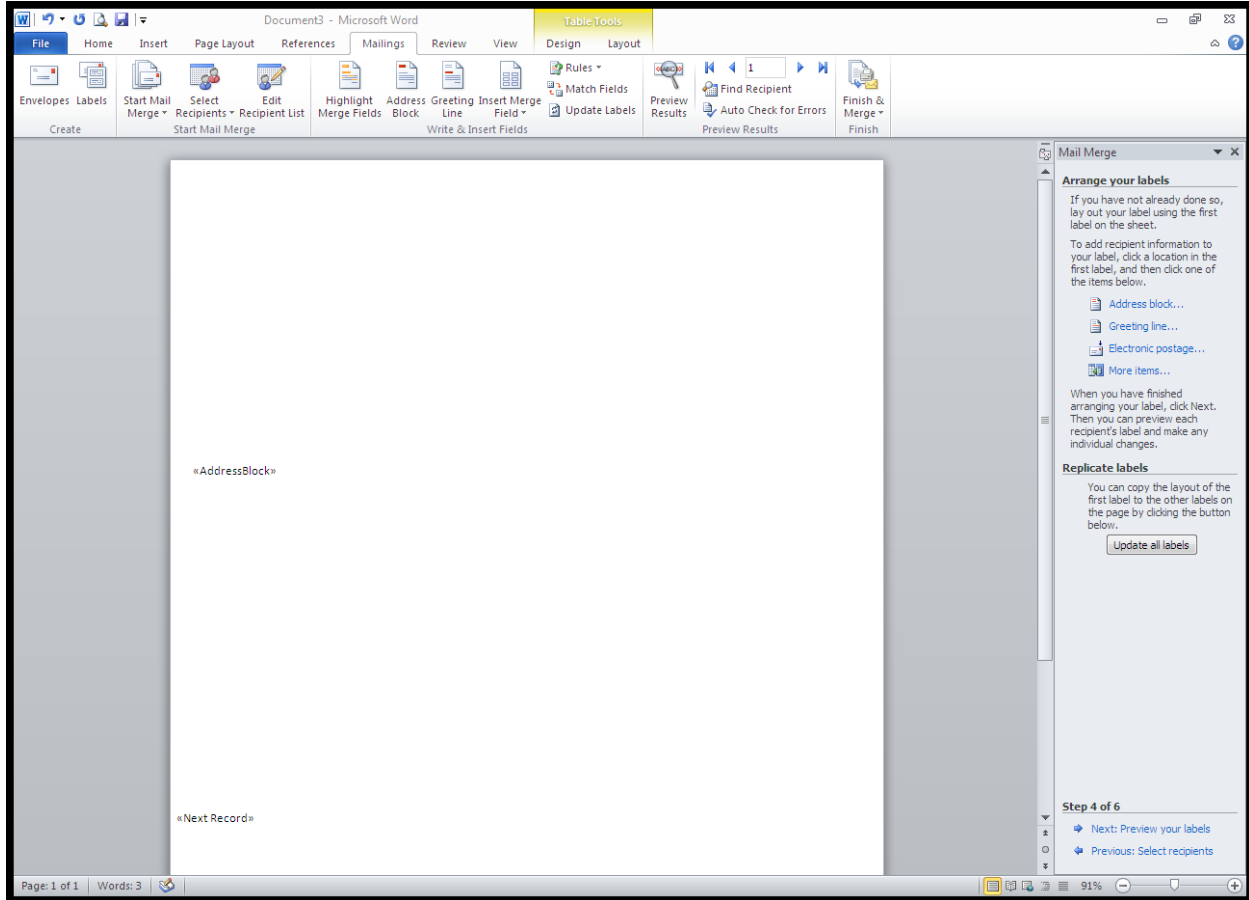
Find your recipient list and click on the **Open** button. Once you click on **Open**, the following window will open so you can confirm and edit your list of recipients.



Click **OK** once you are satisfied with your recipient list. Then click on **Next: Arrange your labels** in the mail merge task pane.

Arrange Your Labels

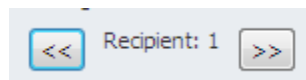
This is when you lay out your labels. To add recipient information to your label, click the desired location in the document, but be aware "Next Record" will appear as well, unlike in Word 2007. For our sample merge, insert the address block as seen continued on the next page:



Once you have set-up your first label, click on **Update all labels** (underneath Replicate labels on your mail merge task pane) to give all of your labels the same layout.

Preview Your Labels

Once you have finished setting up your label, click on **Next: Preview your labels** in the mail merge task pane to get a preview of your labels with the recipient's names in the merge fields. Here the "Next Record" label will disappear. You can also view the labels one by one. To see a preview of the rest of the recipients, use the arrows seen below to scroll through the remaining recipients.



Once you have previewed your labels, click on **Next: Complete the merge** to complete the merge. Once you have completed the merge, simply click on **Print...** in the mail merge task pane to print out your labels. You can also edit the individual labels by clicking on **Edit Individual labels...** in the mail merge task pane. Editing individual labels will open a new window and you can go through your labels one by one.

Tips from the Training Staff

Tip #1: To make your merge easier for you to manage and work with, we recommend creating your list of recipients in an Excel spreadsheet or an Access database. By doing this, you will always have access to certain spreadsheets or databases containing specific recipients. You can also save these spreadsheets or databases according to the population of recipients that you are working with. Also, it makes it easier for you to actually go into the spreadsheet or database while working on a Mail Merge, make changes to your recipients and save your spreadsheet or database with the updated information.

Tip #2: After you have selected the recipient list you plan on using in your Mail Merge, it is essential that you use the Match Fields button on the Ribbon Bar to make sure that all your fields in your recipient data source (Excel Spreadsheet or Access Database) are appropriately matched with the fields in your mail merge document. Matching your fields involves you looking through all the fields you decided to include in your recipient data source and compare/match them to the fields in your Mail Merge document. Match Fields look like this:

Match Fields

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

| | |
|-------------------|----------------|
| Unique Identifier | (not matched) |
| Courtesy Title | Title |
| First Name | First Name |
| Middle Name | (not matched) |
| Last Name | Last Name |
| Suffix | (not matched) |
| Nickname | (not matched) |
| Job Title | (not matched) |
| Company | (not matched) |
| Address 1 | Address Line 1 |
| Address 2 | (not matched) |
| City | City |
| State | State |

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

If a field is not matched, simply match it by selecting the same field in the drop down menu as the one listed in the left-hand column.

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