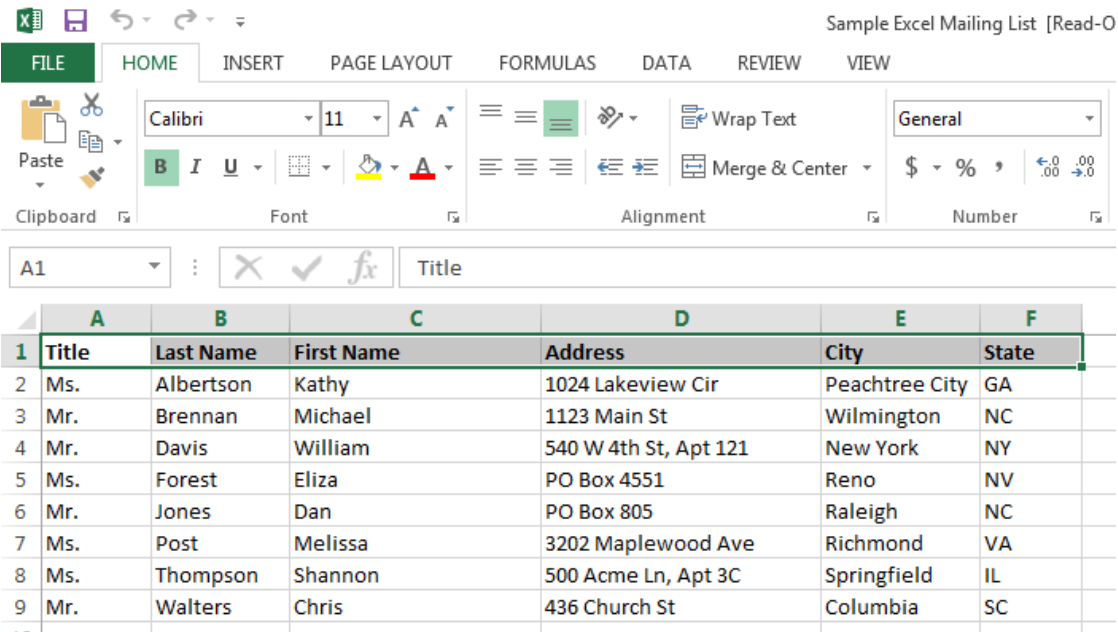


Mail Merge Instructions

Before Starting a Mail Merge: Setup the Excel Document

1. Open a **new or existing workbook** in **Excel** that has the address information you wish to mail merge.
2. Make sure that the **first row has labels for what is in each column** (ie. last name, first name, address, etc.). The order of the columns doesn't matter. You will use these labels to full in the mailing information later, so this step is extremely important.

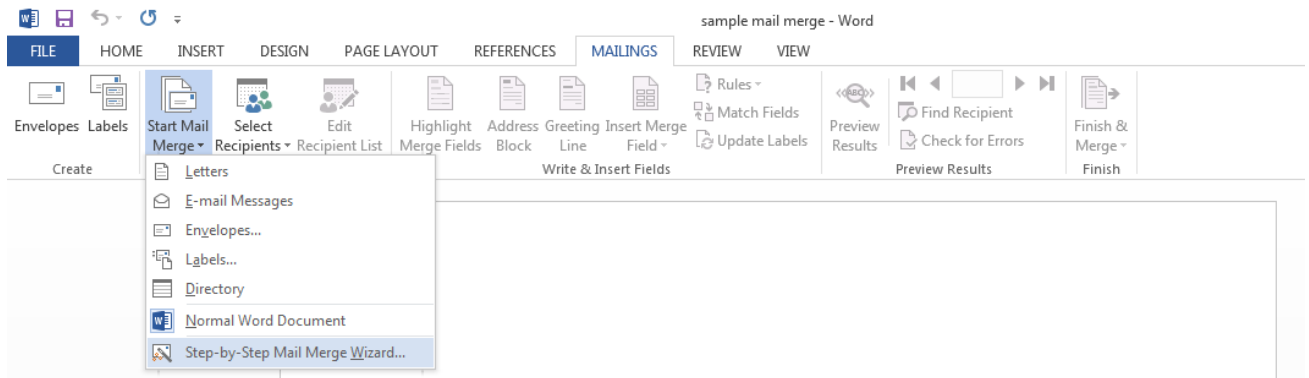


	A	B	C	D	E	F
1	Title	Last Name	First Name	Address	City	State
2	Ms.	Albertson	Kathy	1024 Lakeview Cir	Peachtree City	GA
3	Mr.	Brennan	Michael	1123 Main St	Wilmington	NC
4	Mr.	Davis	William	540 W 4th St, Apt 121	New York	NY
5	Ms.	Forest	Eliza	PO Box 4551	Reno	NV
6	Mr.	Jones	Dan	PO Box 805	Raleigh	NC
7	Ms.	Post	Melissa	3202 Maplewood Ave	Richmond	VA
8	Ms.	Thompson	Shannon	500 Acme Ln, Apt 3C	Springfield	IL
9	Mr.	Walters	Chris	436 Church St	Columbia	SC

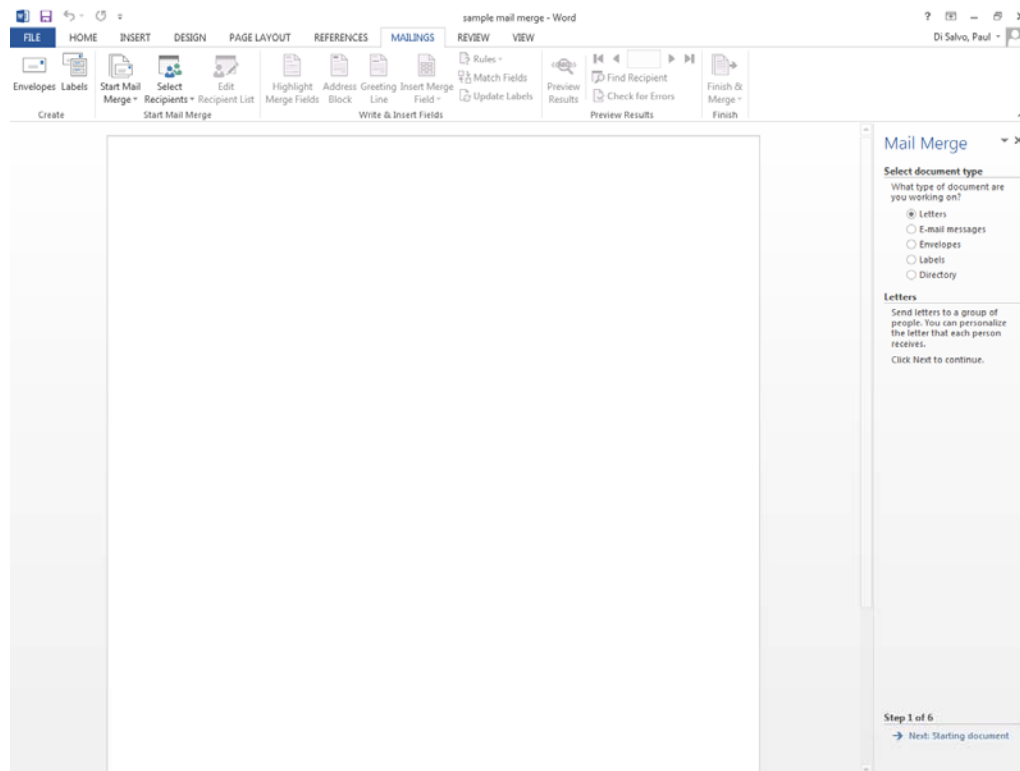
3. **Save** the excel document somewhere you can find it during the mail merge.

Starting Mail Merge

1. Open a new word document.
2. Go to the **mailings** tab and click **start mail merge**.
3. Choose the **step-by-step mail merge wizard** from the drop down menu. This will open the **Mail Merge Wizard** as a panel on the right-hand side of the screen.

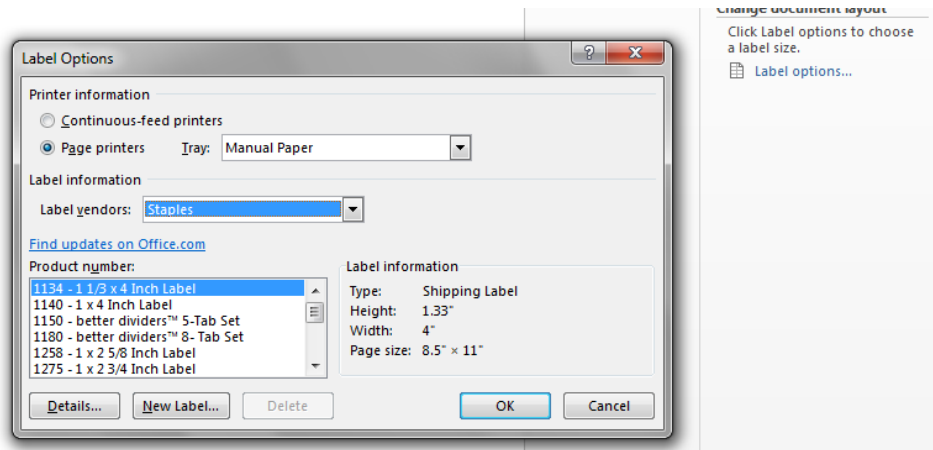


4. Select the document type that you desire in the **Mail Merge Wizard** and click **Next: Starting Document**.

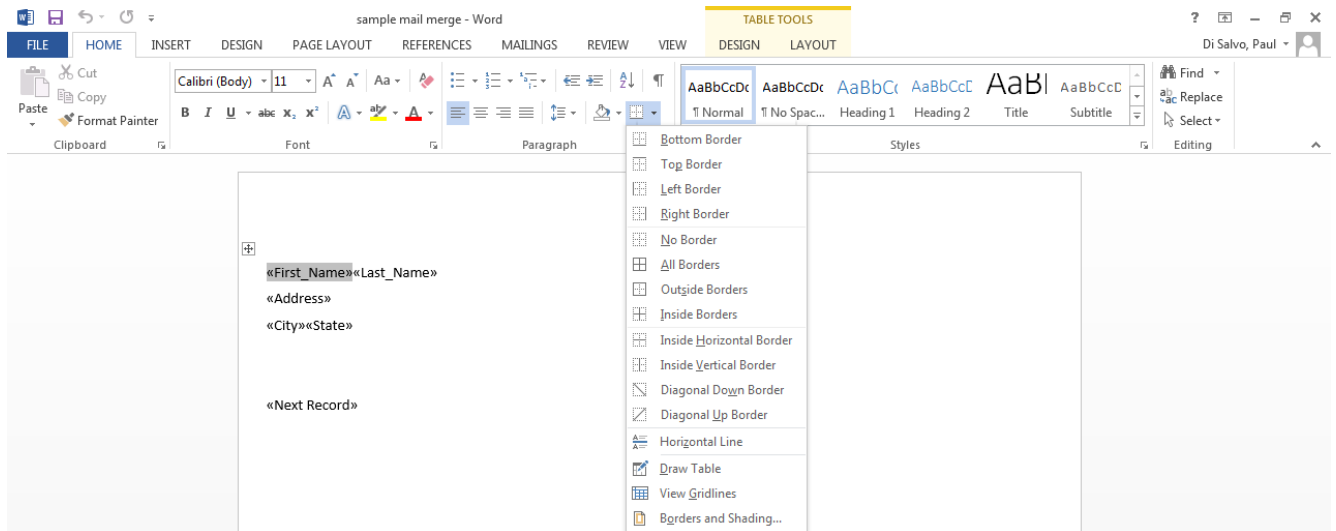


Instructions for Labels

1. To set the label brand and size, click **Label options...**
2. Leave the settings to **Page printers; Tray: Manual Paper**. Select a **label vendor** (ie. Avery, Staples, etc.) and the **product number** or size. Then click **ok** to close the window.

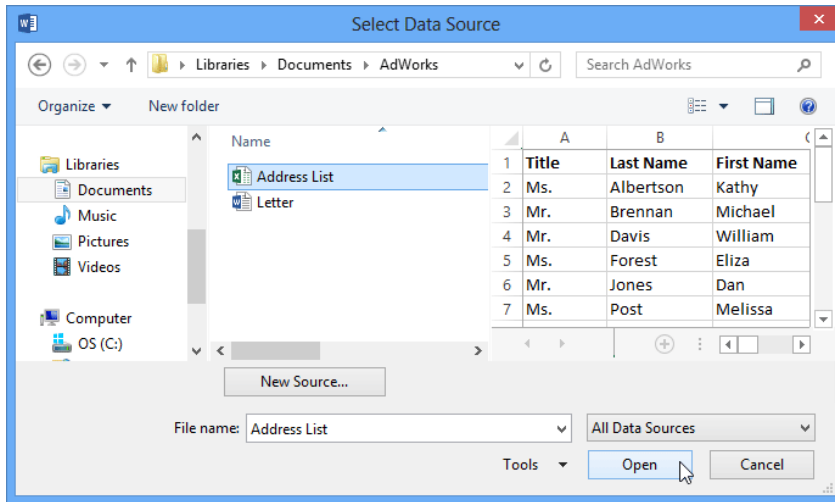


3. To have the document show you where the margins of the labels are, hold down the two keys **CTRL + a**. This will select the entire document.

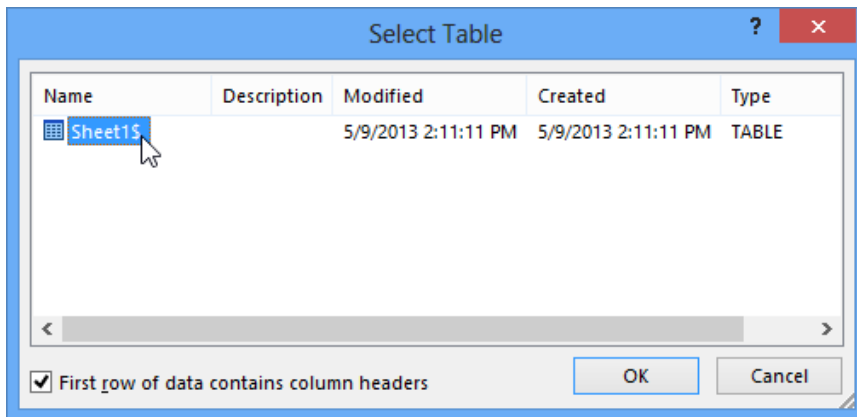


4. Next, click the drop down arrow next to the **Borders** icon, select **All Borders**. You will have to undo this before printing the labels, but that will be explained later in the instructions.
5. On the **Mail Merge Wizard**, click **Next: Select recipients**.

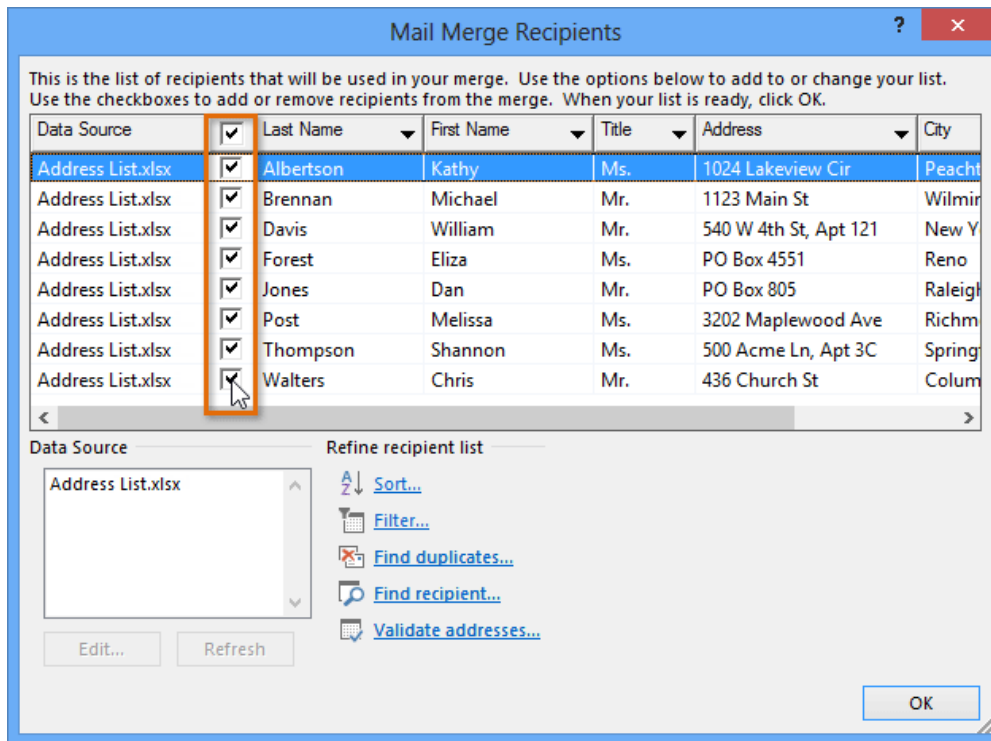
- Under **Select Recipients**, select **use an existing list**. Then click **Browse...**
- Locate your file and click **Open**.



- If the address list is in an Excel workbook, select the **worksheet** that contains the list and click **OK**.



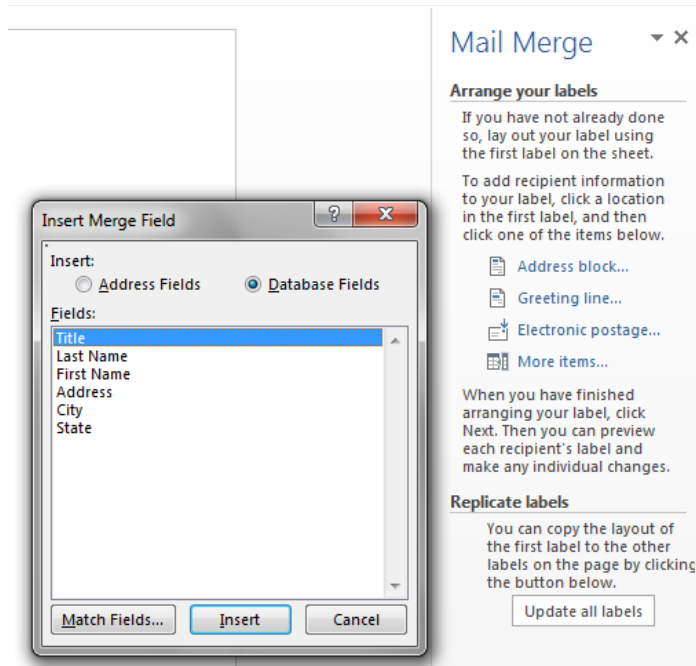
- In the **Mail Merge Wizard** dialog box, you can **check** or **uncheck** each box to control which recipients are included in the merge. By default, all recipients should be selected. When you're done, click **OK**.



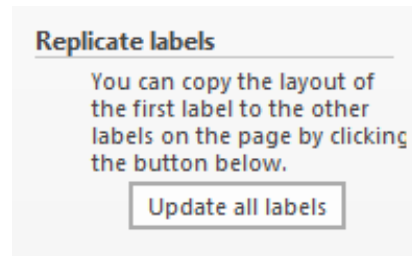
- From the **Mail Merge Wizard**, click **Next: Arrange your labels**.

- Click **More items...**

12. This will open up the **Insert Merge Field** window. Under **Insert...** select **Database Fields**. These are the column labels from your excel file. **Do NOT USE** Address Fields, as this will take the wrong information.

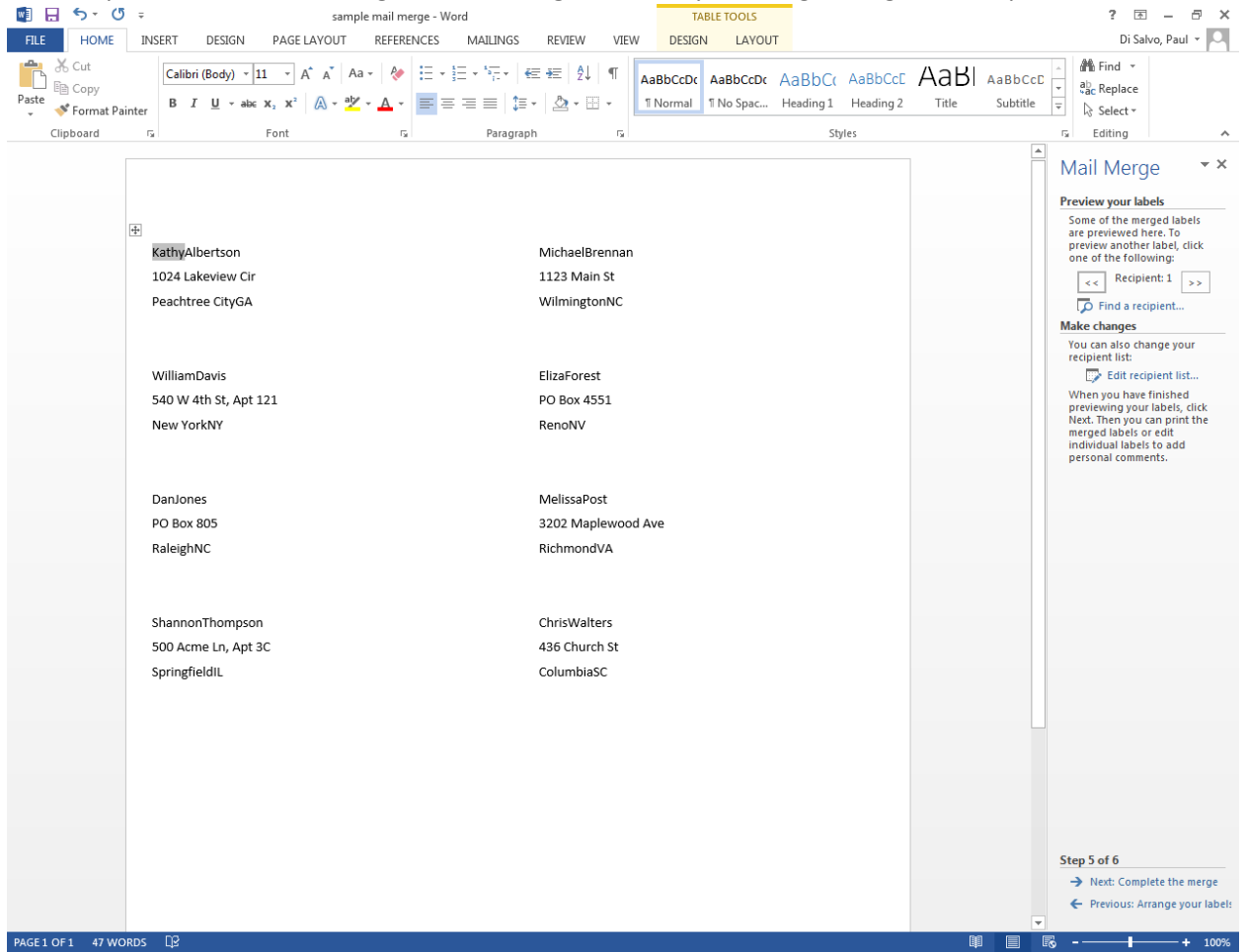


13. Select the **first field** you wish to add (ie. company name) and click **Insert**. Then select the **next field** you wish to show up (ie. address line 1) and click **Insert**. You DO NOT need to close the Insert Merge Field window after each Insert. Only close the window when you have added all the fields you want and are done.
14. The fields you selected will most likely not be formatted properly on your label. Use the space and enter keys to alter the first label to fit within the label guidelines.
15. Once the label is set up the way you want it, click the **Update all labels** button on the **Mail Merge Wizard**.

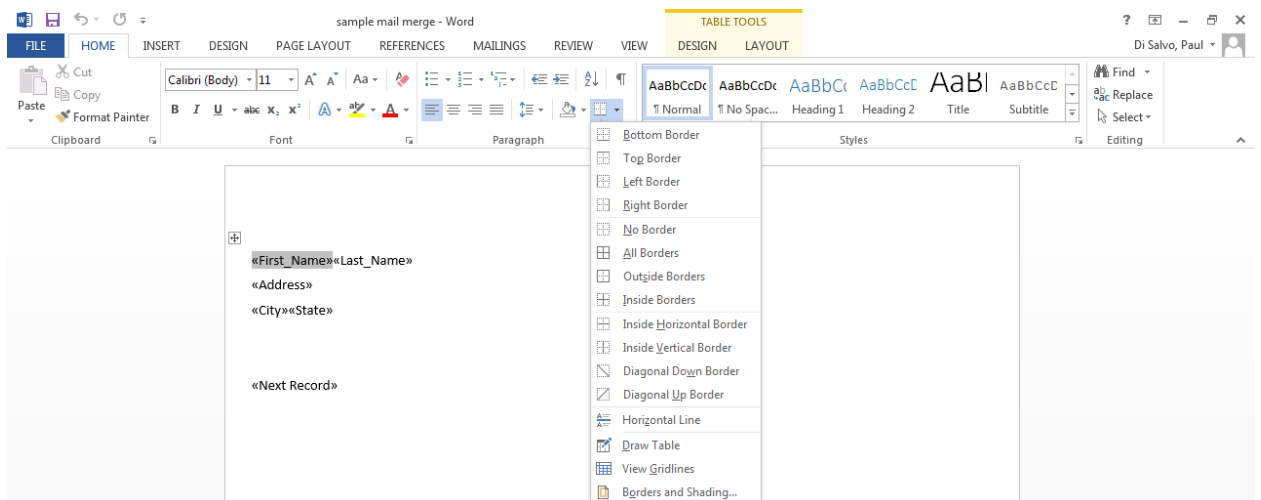


16. On the bottom of the **Mail Merge Wizard**, click **Next: Preview your labels**.

17. You can preview the labels using the **Mail Merge Wizard** by scrolling through the recipients.



18. To remove the lines around the labels before printing, hold down the two keys **CTRL + a** . This will select the entire document.

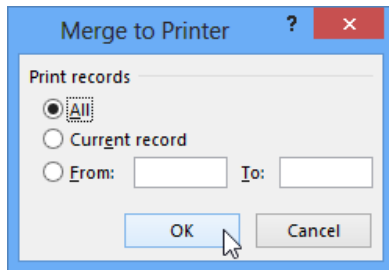


19. Next, click the drop down arrow next to the **Borders** icon, deselect **All Borders**.

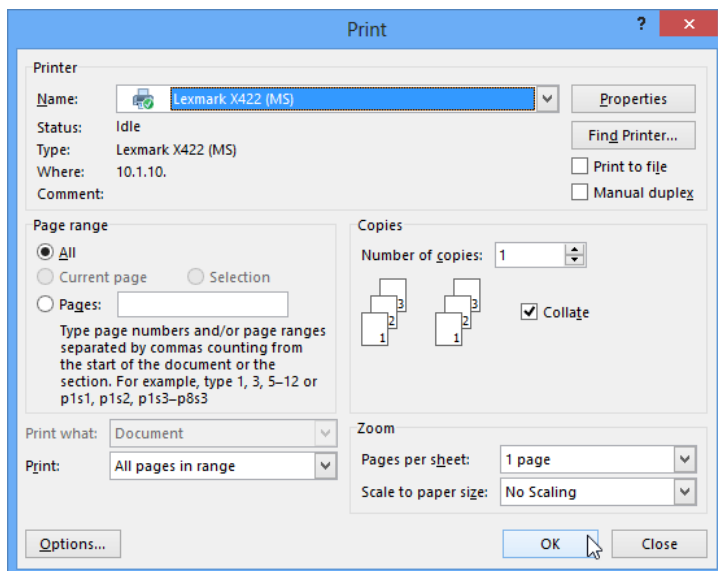
20. Click **Next: Complete the merge.**

21. Click **Print...** to print the letters.

22. A dialog box will appear. Click **All**, then click **OK**.

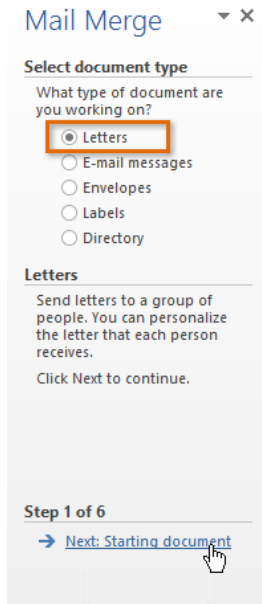


23. The **Print** dialog box will appear. Adjust the print settings if needed, then click **OK**. The letters will be printed.

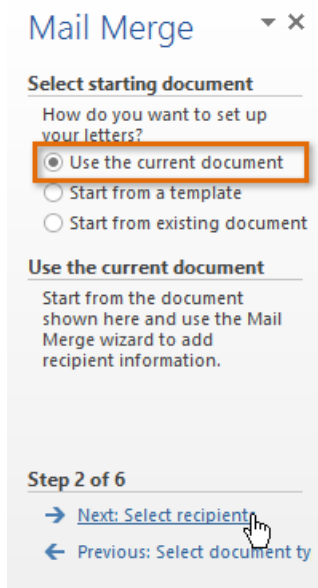


Instructions for Letters

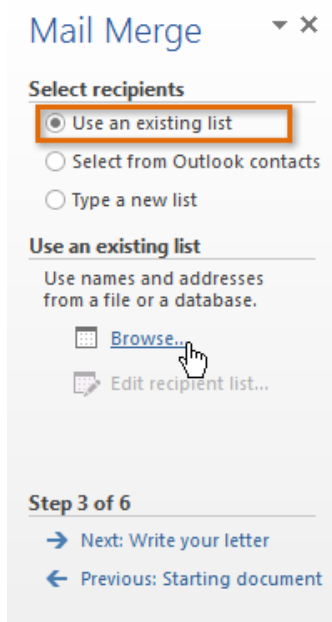
1. Choose the **type** of document you wish to create. In our example, we'll select **Letters**. Then click **Next: Starting document** to move to Step 2.



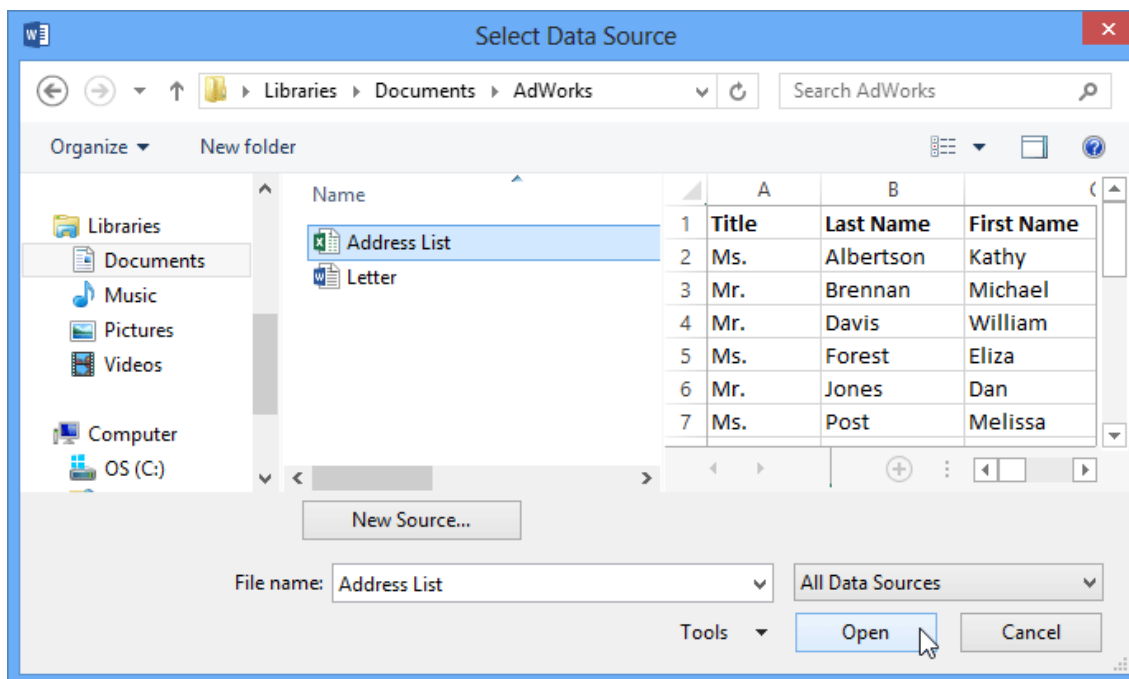
2. Select **Use the current document**, then click **Next: Select recipients** to move to Step 3.



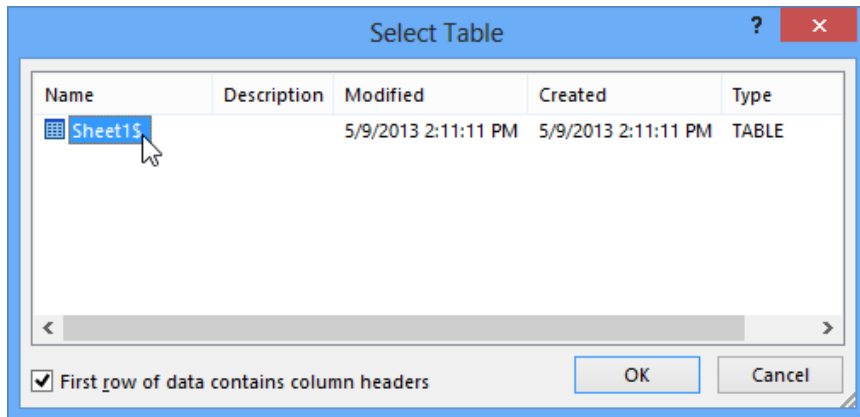
3. Now you'll need an address list so Word can automatically place each address into the document. The list can be in an existing file, such as an **Excel workbook**. From the **Mail Merge** task pane, select **Use an existing list**, then click **Browse...** to select the file.



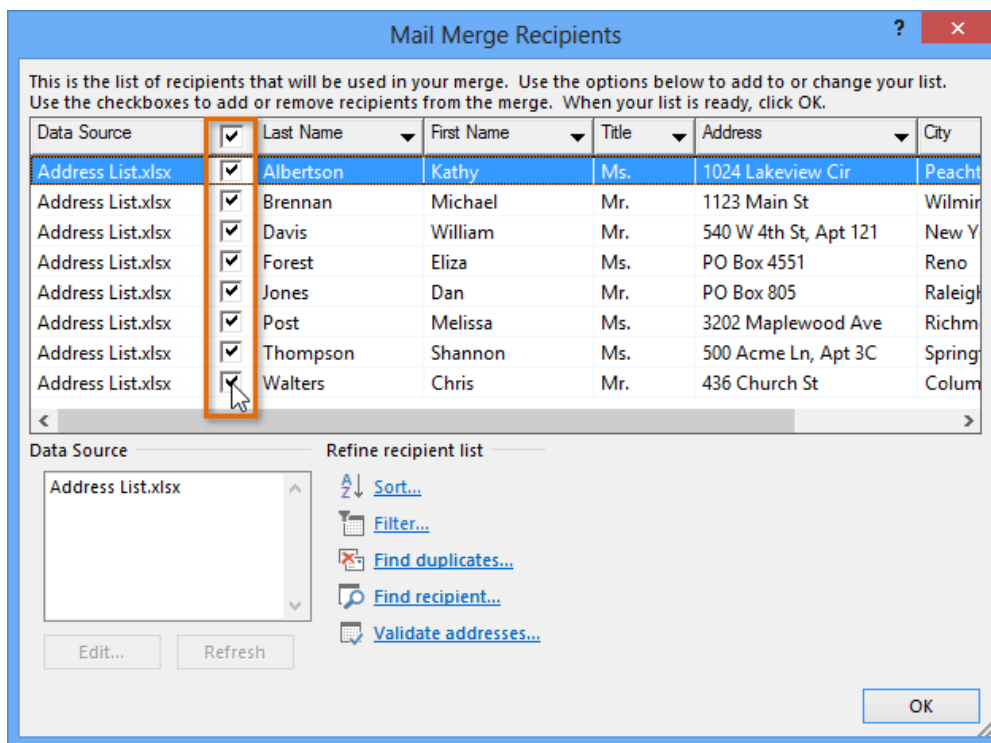
24. Locate your file and click **Open**.



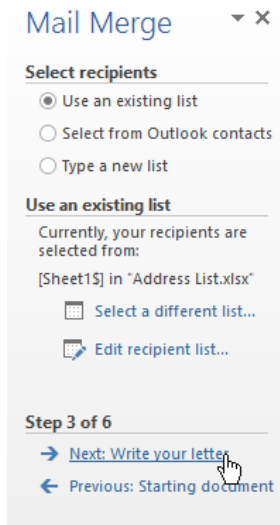
25. If the address list is in an Excel workbook, select the **worksheet** that contains the list and click **OK**.



26. In the **Mail Merge Recipients** dialog box, you can **check** or **uncheck** each box to control which recipients are included in the merge. By default, all recipients should be selected. When you're done, click **OK**.

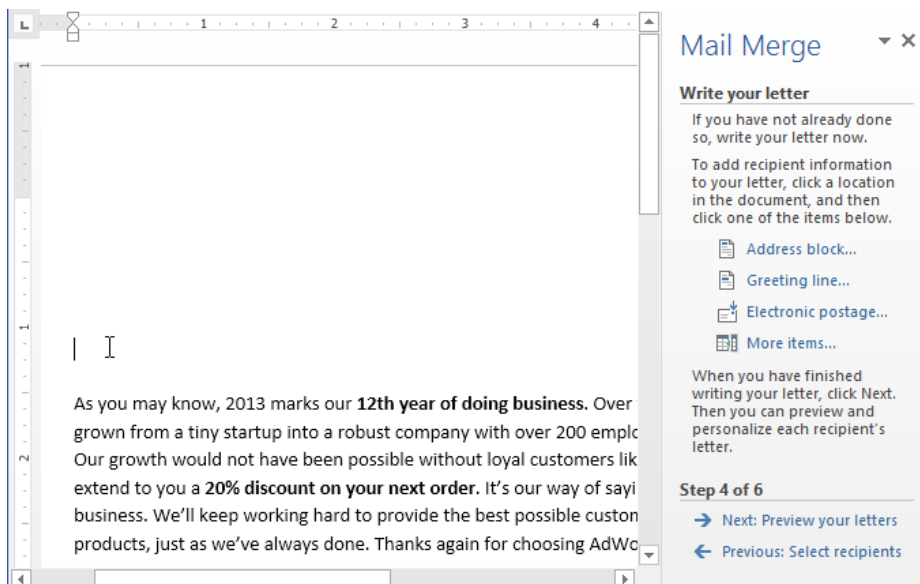


27. From the **Mail Merge** task pane, click **Next: Write your letter** to move to Step 4.



28. Now you're ready to write your letter. When it's printed, each copy of the letter will basically be the same; only the **recipient data** (such as the **name** and **address**) will be different. You'll need to add **placeholders** for the recipient data so Mail Merge knows exactly where to add the data.

29. Place the insertion point in the document where you wish the information to appear.



30. Choose one of the four **placeholder** options: **Address block**, **Greeting line**, **Electronic postage**, or **More items**.

Mail Merge ▾ ×

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 writing your letter, click Next. Then you can preview and personalize each recipient's letter.

Step 4 of 6

→ Next: Preview your letters

← Previous: Select recipients

31. Depending on your selection, a dialog box may appear with various options. Select the desired options and click **OK**.

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:

1

Ms. Kathy Albertson
1024 Lakeview Cir
Peachtree City, GA

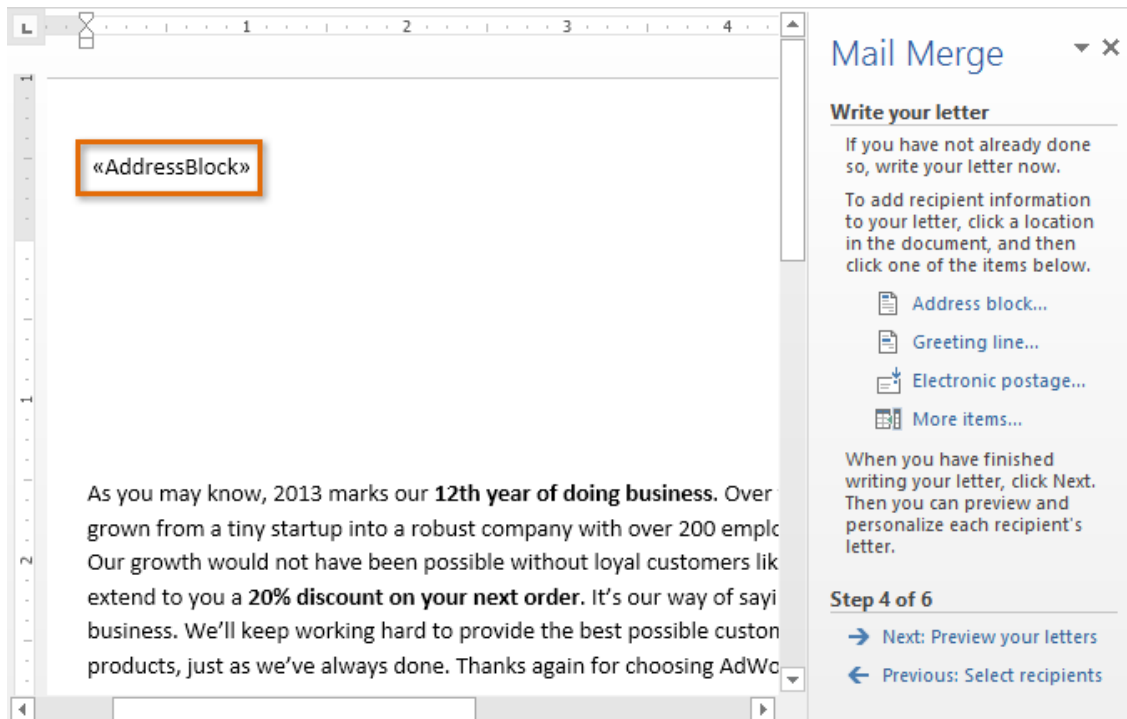
Correct Problems

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

Match Fields...

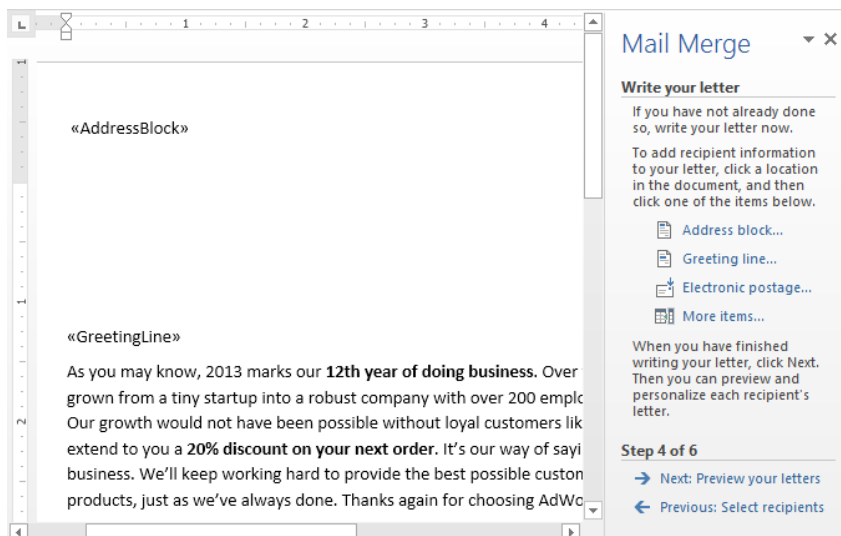
OK Cancel

32. A placeholder will appear in your document. For example: «AddressBlock».



The screenshot shows the Microsoft Word interface with the Mail Merge task pane open on the right. In the document window, a placeholder box labeled «AddressBlock» is highlighted with an orange border. Below it, a paragraph of text reads: "As you may know, 2013 marks our 12th year of doing business. Overgrown from a tiny startup into a robust company with over 200 employees. Our growth would not have been possible without loyal customers like you. We'll extend to you a 20% discount on your next order. It's our way of saying thank you for your business. We'll keep working hard to provide the best possible customer service, just as we've always done. Thanks again for choosing AdWords." The Mail Merge task pane on the right is titled "Mail Merge" and contains the following text: "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.", a list of options: "Address block...", "Greeting line...", "Electronic postage...", and "More items...", "When you have finished writing your letter, click Next. Then you can preview and personalize each recipient's letter.", and "Step 4 of 6" with navigation buttons: "Next: Preview your letters" and "Previous: Select recipients".

33. Repeat these steps each time you need to enter information from your data record. In our example, we'll add a **Greeting line**.



The screenshot shows the Microsoft Word interface with the Mail Merge task pane open on the right. In the document window, a placeholder box labeled «AddressBlock» is at the top, and a new placeholder box labeled «GreetingLine» is added below it. The paragraph of text from the previous screenshot is still present below the placeholders. The Mail Merge task pane on the right is the same as in the previous screenshot, but the "Greeting line..." option in the list is now highlighted with a blue background, indicating it is the selected option.

34. When you're done, click **Next: Preview your letters** to move to Step 5.

Mail Merge

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 writing your letter, click Next. Then you can preview and personalize each recipient's letter.

Step 4 of 6

→ Next: Preview your letters

← Previous: Select recipient

For some letters, you'll only need to add an **Address block** and **Greeting line**. Sometimes, however, you may wish to place **recipient data** within the body of the letter to **personalize it** even further.

35. Preview the letters to make sure the information from the recipient list appears correctly in the letter. You can use the left and right scroll arrows to view each document.

Mail Merge

Preview your letters

One of the merged letters is previewed here. To preview another letter, click one of the following:

<< Recipient: 1 >>

Find a recipient...

Make changes

You can also change your recipient list:

Edit recipient list...

Exclude this recipient

When you have finished previewing your letters, click Next. Then you can print the merged letters or edit individual letters to add personal comments.

Step 5 of 6

→ Next: Complete the merge

Use the arrows to preview each letter

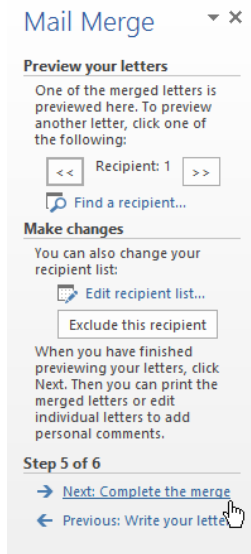
The preview allows you to see how recipient data will appear in each letter

Ms. Kathy Albertson
1024 Lakeview Cir
Peachtree City, GA

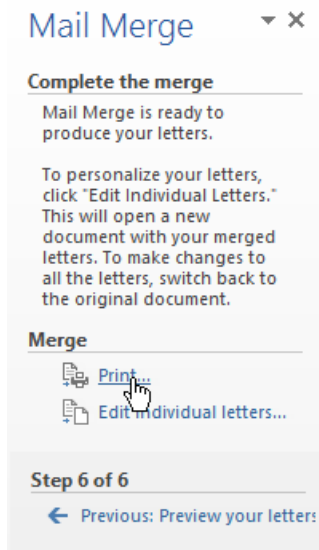
Dear Ms. Albertson,

As you may know, 2013 marks our **12th year of doing business**. Over grown from a tiny startup into a robust company with over 200 emplc Our growth would not have been possible without loyal customers lik extend to you a **20% discount on your next order**. It's our way of sayi

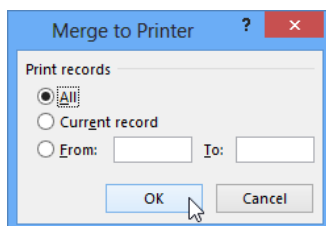
36. Click **Next: Complete the merge** to move to Step 6.



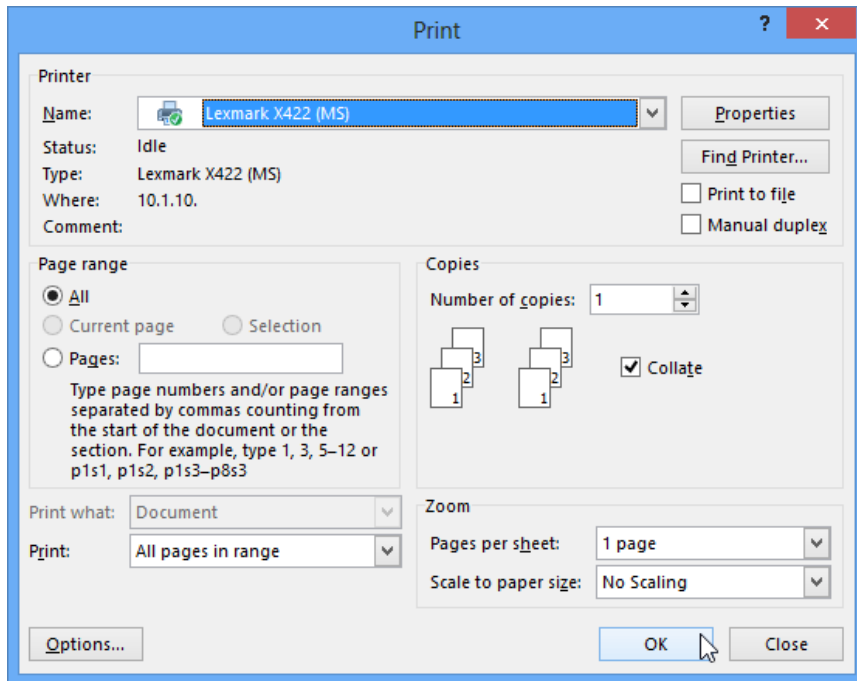
37. Click **Print...** to print the letters.



38. A dialog box will appear. Click **All**, then click **OK**.

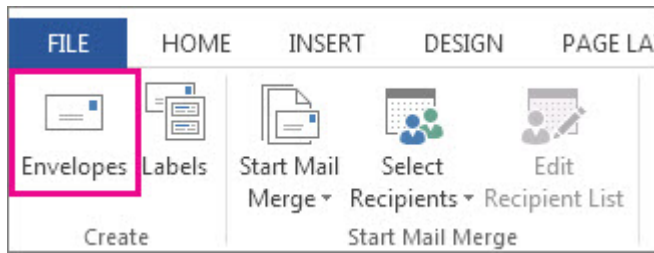


39. The **Print** dialog box will appear. Adjust the print settings if needed, then click **OK**. The letters will be printed.



Instructions for Envelopes

1. Click **Mailings > Envelopes**.

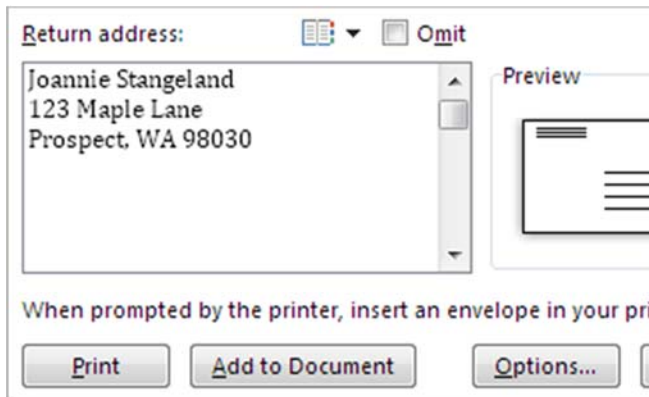


2. In the **Delivery address** box, type some text.



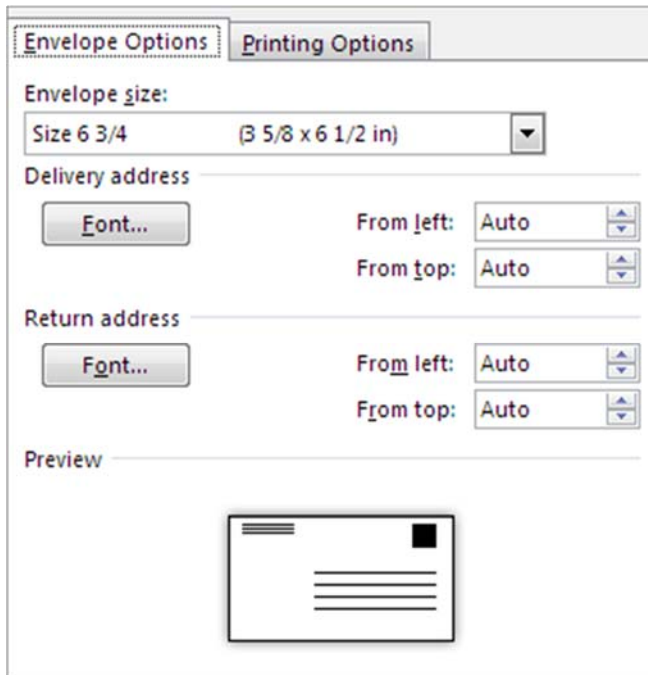
This is for testing the how the envelopes will look when you print them. It won't show up in your mail merge.

3. In the **Return address** box, type your return address.



4. Click **Options > Envelope Options** tab.

5. In the **Envelope size** box, click the choice that matches the size of your envelopes.



If none of the choices matches your envelope size, scroll to the bottom of the list, click **Custom size**, and type your envelope's dimensions in the **Width** and **Height** boxes.

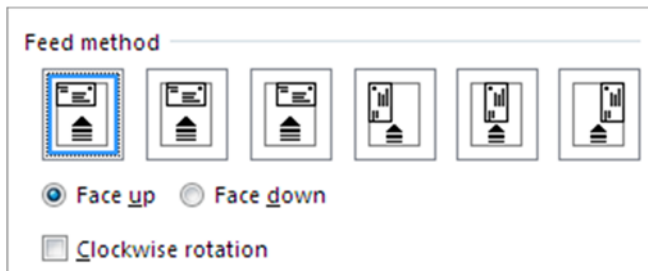
6. Click **Font** in the **Delivery address** and **Return address** sections to choose a font.
7. Make any position changes you want in the **From left** and **From top** boxes.

The **Preview** area shows you the envelope layout.

8. Click the **Printing Options** tab.

Your printer sends Word information about which way the envelope should be loaded into the printer. This information appears under **Feed method**.

9. Load the envelope the way it's shown under **Feed method**.



10. Click **OK**.
11. Click **Print** to print the envelope.
12. When Word prompts you to save the return address, click **Yes**.

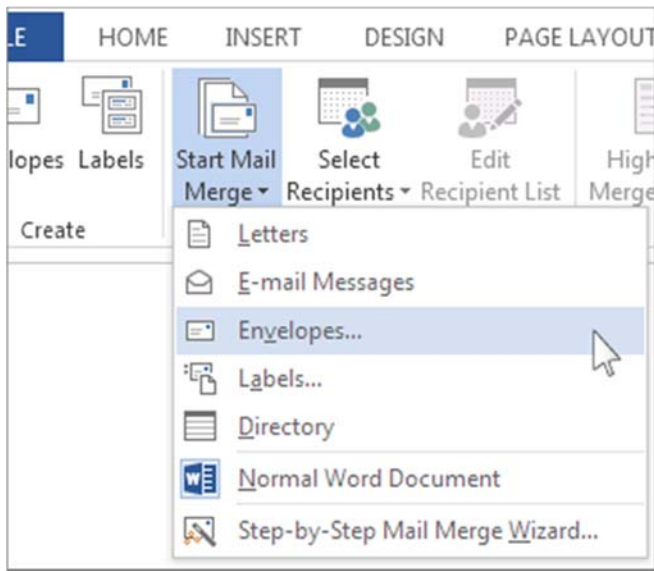
13. Check that the envelope printed correctly.

14. If the envelope didn't print correctly, try adjusting the **Feed method** options.

When your test envelope prints the way you want, you're ready to begin the merge.

Start the mail merge

15. Click **Mailings > Start Mail Merge > Envelopes**.



16. In the **Envelope Options** box, click **OK**.

You already set this up when you were printing your test envelope.

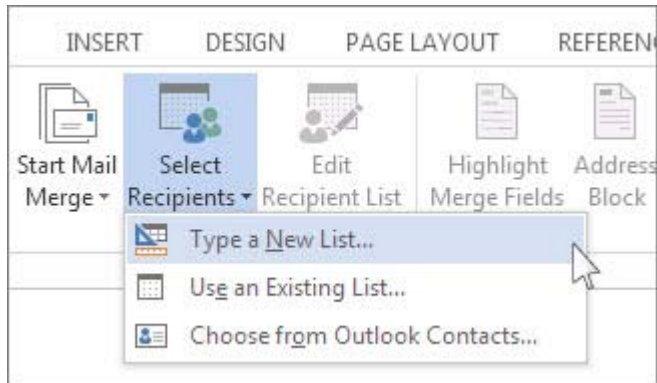
Word creates a document that's sized to the envelope dimensions.

The return address appears in a frame on the page. To see the frame for the delivery address, click where you expect the address to appear.

17. Connect the envelopes to your address list

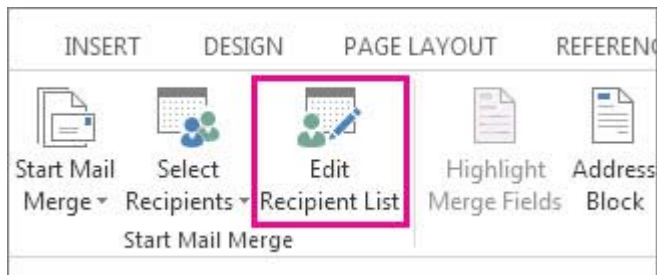
On the **Mailings** tab, click **Select Recipients** and click the option that matches your list.

If your mailing list is in an Excel spreadsheet, click **Use Existing List**. Then browse to your list and click **Open**.



If you're printing envelopes for everyone on your list, skip ahead to step 4. If you're contacting only some of the people on your list—for example, people who live within 20 miles of your event—choose which people you want to include.

18. Click **Edit Recipient List**.

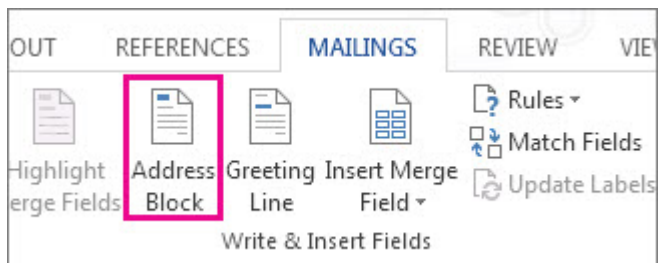


19. Check the names of the people you want to send your letter to.

Mail Merge Recipients			
This is the list of recipients that will be used in your merge. Use the checkboxes to add or remove recipients from the list.			
Data Source	<input type="checkbox"/>	Last Name	First Name
EventMailingList.x...	<input checked="" type="checkbox"/>	Anderson	Nancy
EventMailingList.x...	<input type="checkbox"/>	Basalik	Evan
EventMailingList.x...	<input checked="" type="checkbox"/>	Carbonati	Cyril
EventMailingList.x...	<input checked="" type="checkbox"/>	Dempsey	Molly
EventMailingList.x...	<input type="checkbox"/>	Dixon	Andrew
EventMailingList.x...	<input type="checkbox"/>	Dow	Jane

You can also [sort or filter the list](#) to make finding names and addresses easier.

19. Add the Address Block to the envelope. Click where you want the addresses to appear, and then click **Address Block**.



20. Choose how you want the name to appear.

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

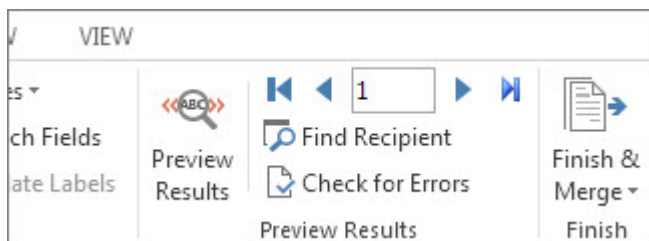
Only include the country/region if different than:

United States

Format address according to the destination country/re

TIP To be sure Word finds the names and addresses in your list, click **Match Fields**. Check that the fields you want appear in the list. If a field you want says **Not Matched**, click the drop-down list for that field and then click the column name that matches that column in your list.

21. Print the envelopes. Click **Preview Results**, and then click the arrows to make sure the names and addresses on the envelopes look right.



22. Click **Finish & Merge > Print Documents**.

