Mail Merge: Create Labels and Envelopes, Oh My!

Overview: Do you want to create multiple letters or envelopes for mailing items? Then this intermediate-level class is for you! Learn how to use TWO Microsoft programs: Excel for an address list and Word for the letters and envelopes.

Student Skill Level: Intermediate

Requirements: Good mouse skills (ability to move the mouse on the computer screen and click or double click as required with minimal assistance).
Flash Drive (USB drive) for saving personal data
Familiarity with Excel and Word (Basics classes or previous experience with the programs)

Length: 3 hours (including a 10 minute break)

Objectives
- Define Mail Merge
- The student will be able to use Excel and Word to create letters and envelopes:
    - Create a properly labeled Excel spreadsheet with name and address information
    - Create standard labels with Mail Merge
    - Create a letter in Word with names and addresses from the Excel file
   - Create standard letter size envelopes (4 1/8 x 9 ½ inches) with return and mailing addresses
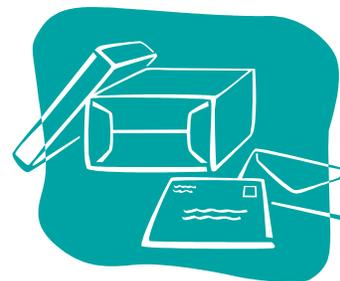
What is Mail Merge?

Mail merge is a software function describing the production of multiple (and potentially large numbers of) documents from a single template form and a structured data source. Documents could be letters, envelopes, or labels, depending on the needs of the organization.

Examples:
 Christmas Cards
 Employer's Addresses (for resumes)
 Boy/Girl Scout mailings
 Church mailings
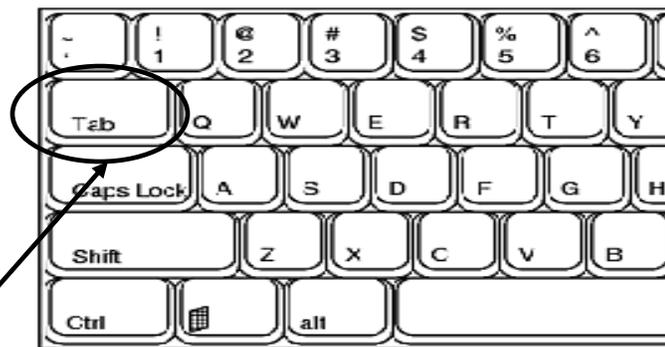 **Anyone can use Mail Merge!**
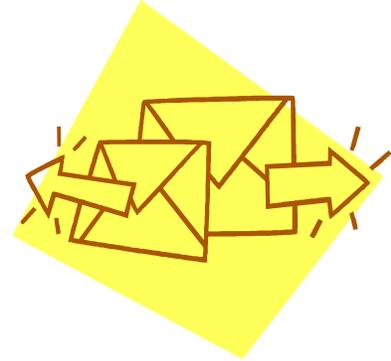
Open Excel

Double click the Excel icon on your desktop

We will create a **small database** of names and addresses (this is what we will **merge** into **Word** later in this class)

Line 1 is the "**header**" line to be labeled as follows:
 First Name – can be all the first names you wish to include, or simply "The"
 Last Name
 Street address
 City
 State
 Zip

Remember you can use your **Tab** key to move from cell to cell, left to right

We only need 3 or 4 fictional (or nonfictional) names and addresses for our database

If you already have an Excel list, please wait until the end of class to work with it. Let's stay together for now and work individually during practice time!

………..Practice………

Open Excel

Type in the headers across Row 1 as you see
listed on the previous page

When you're done, they will look like this:

	A	B	C	D	E	F
1	first name	last	street address	city	state	zip

Type in Names and Addresses

Now you may type in
any names and
addresses you like
All of my addresses are
fake

	A	B	C	D	E	F
1	first name	last	street address	city	state	zip
2	The	Allisters	1 Main St	Buffalo	NY	14203
3	The	Altmans	2 Main St	Buffalo	NY	14201
4	The	Claypools	3 Main St	Buffalo	NY	14201

Remember, you may use your **Tab** key to move left to right, cell to cell
Use your **Enter** key to move down and back to the beginning of the next row:

	A	B	C	D	E	F
1	first name	last	street address	city	state	zip
2	The	Allisters	1 Main St	Buffalo	NY	14203

Pressing Enter moves you from here to <u>here</u> (F1 to A2).

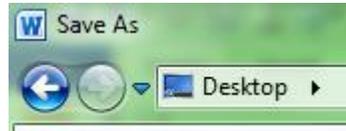|	A	B	C	D	E	F
1	first name	last	street address	city	state	zip
2	The	Allisters	1 Main St	Buffalo	NY	14203

………Practice………..

Make up some names and addresses and practice typing them into Excel
Use your **Tab** and **Enter** keys to easily move from cell to cell

Save Your Database

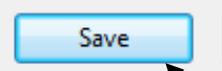You can click on the **Save** icon located on the **Home Tab**

This will bring up the **Save As** dialog box

Save in: Desktop

Type **Mail Merge List** (so I can find and delete them after class)

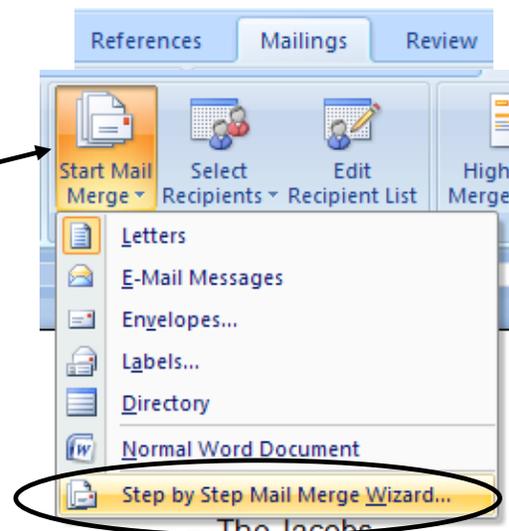Click **Save** and then **Close Excel**

Microsoft Word Mail Merge – Create Labels

Open **Word**

Go to **Mailings** > **Start Mail Merge** > **Step by Step Mail Merge Wizard**

This opens a dialog box on the right side of the screen.

In the **Mail Merge Task Pane**, click on the **Labels** radio button

Go to the bottom of the box and click **Next: Starting document**
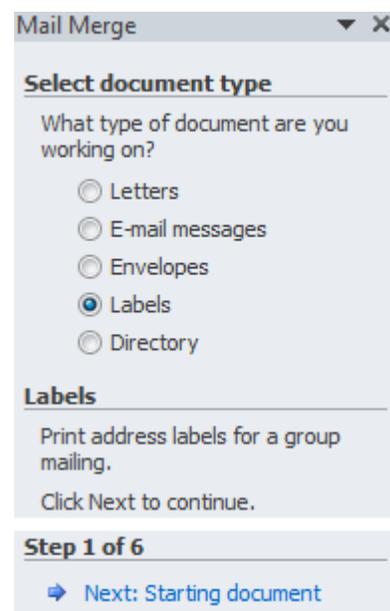
Keep **Change document layout** selected (do nothing)

Click **Label Options…**
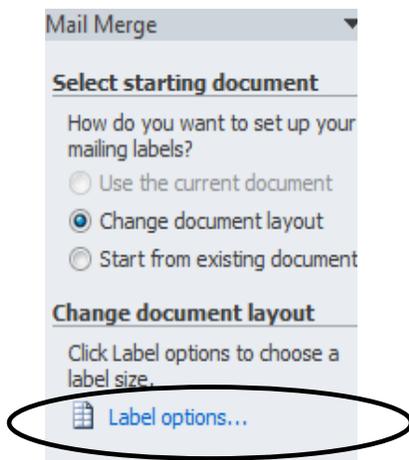
Mail Merge – Label Options

Choose the correct label options within the **Label Options** dialog box. This is vital in getting your labels right. Once you have that, click **OK**.

Click **Next: Select Recipients**

We will use our existing list in Excel. Click on **Browse…**

Mail Merge

Select recipients

◉ Use an existing list

◯ Select from Outlook contacts

◯ Type a new list
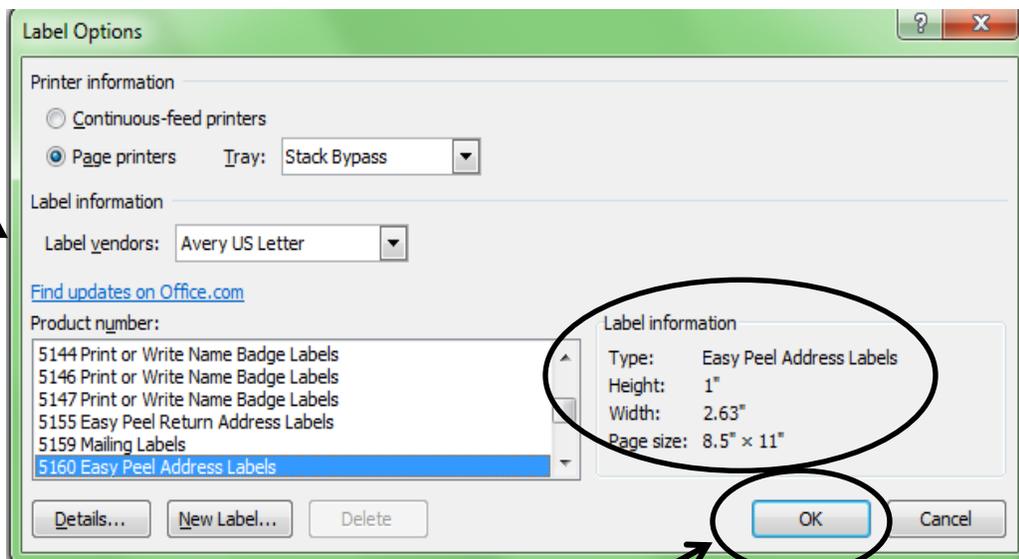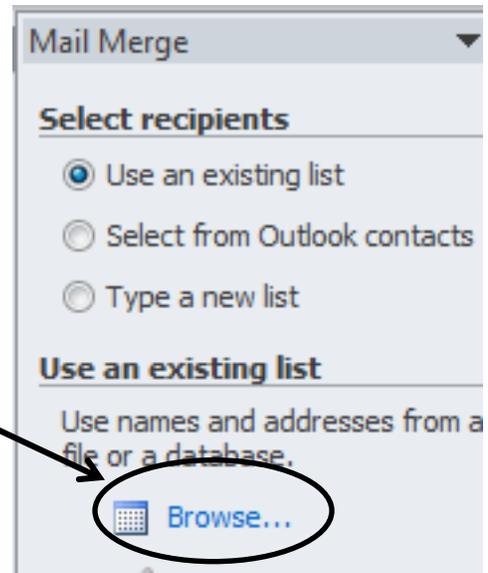
Use an existing list

Use names and addresses from a file or a database.

▦ Browse…

Remember, we saved our list on the **Desktop**. Go there and **double click** on our data source.

W Select Data Source

Desktop ▶

Organize ▼   New folder

▷ W Microsoft Word

▲ ★ Favorites
   💻 Desktop
   ⬇ Downloads
   🔳 Recent Places

▲ 📚 Libraries
   ▷ 📄 Documents
   ▷ 🎵 Music
   ▷ 🖼 Pictures

Libraries
System Folder

Computer
System Folder

2011
File folder

Mail Merge List
Microsoft Excel Worksheet
10.6 KB
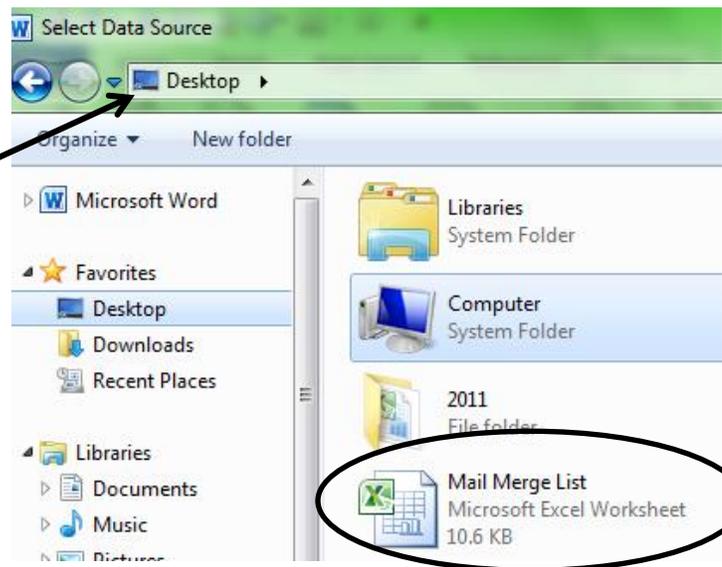
We only have one table, and our information is on sheet one of the file. Please note **that our first row of data contains column headers.** This is important – we should be able to match fields and correct any errors much easier now.

Click the **OK** button.

Select Table

Name	Description	Modified	Created	Type
▦ Sheet1$		2/8/2011 9:35:11 AM	2/8/2011 9:35:11 AM	TABLE
▦ Sheet2$		2/8/2011 9:35:11 AM	2/8/2011 9:35:11 AM	TABLE
▦ Sheet3$		2/8/2011 9:35:11 AM	2/8/2011 9:35:11 AM	TABLE

☑ First row of data contains column headers   OK   Cancel
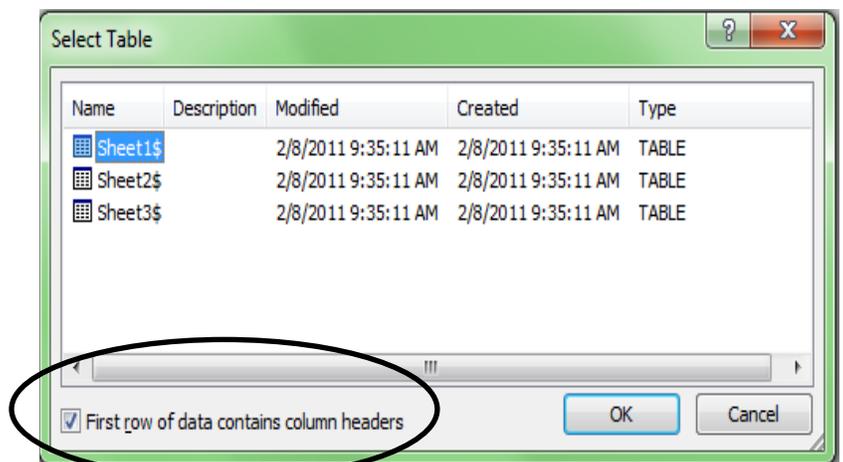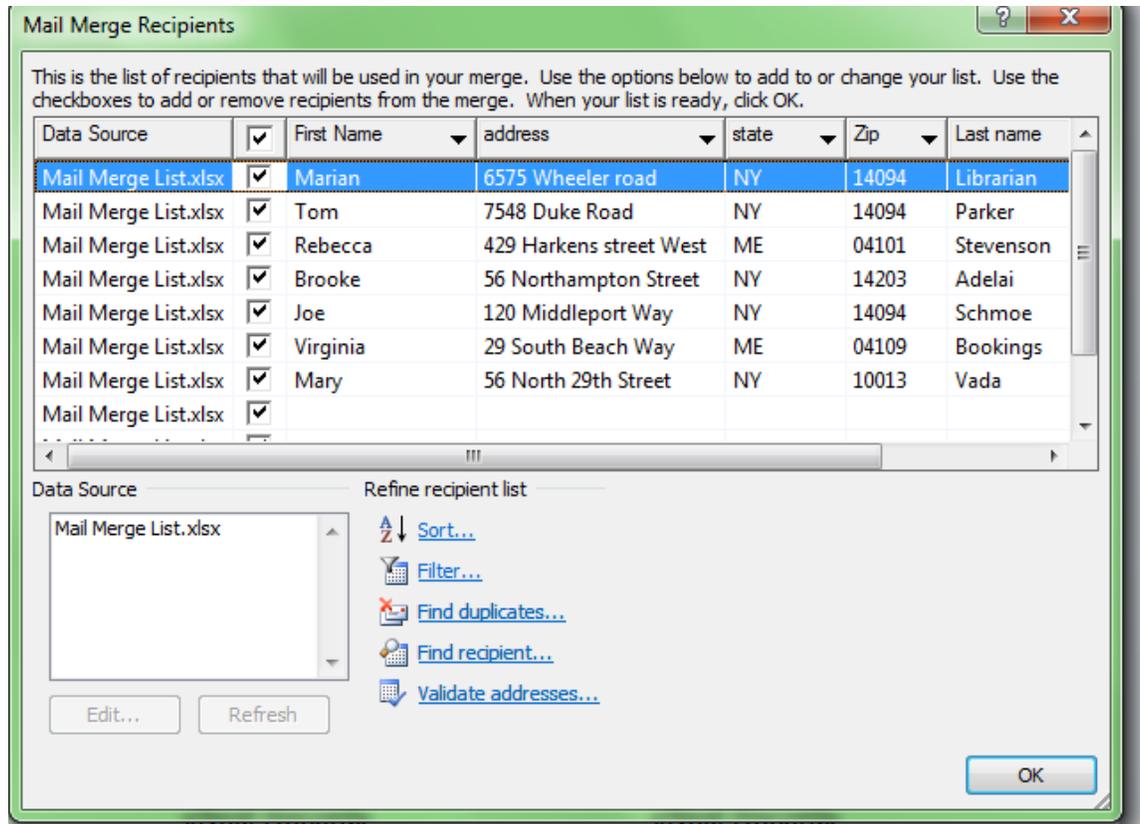
This is a very important dialog box. First, it allows you to choose ALL people listed as recipients of the label, or choose SPECIFIC people. You may also refine the list by:

Sorting – reorganize the entire list from A to Z or Z to A, by field

Filter – find particular records by filtering out all the others (for example by city)

Find recipient – another way of finding one particular person

Validate addresses – requires special add-on software to use (we don't use this)

Sort
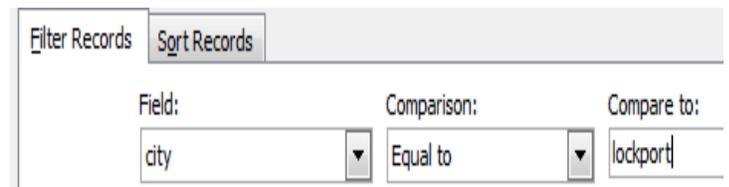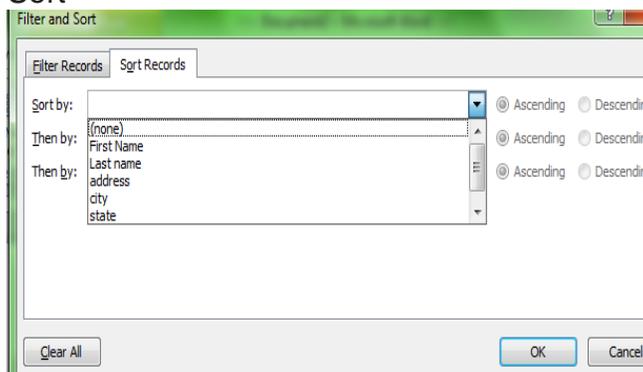
This filter will lead to all recipients with "lockport" as a city.

Please do not filter or sort people for this class. We'll use all the potential recipients for now.

At the bottom of the task pane, click on
Next: Arrange your labels

Add the **Address block….**

Arrange your labels

If you have not already done so, lay out your label using the first label on the sheet.

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

📄 Address block…

I have purposely made "mistakes" in the address block – you may notice that there is no "last name" or "city" in my preview pane.

Insert Address Block

Specify address elements

☑ Insert recipient's name in this format:

Josh
Josh Randall Jr.
Josh Q. Randall Jr.
Joshua
Joshua Randall Jr.
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:

◁ 1 ▷ ▷|

Marian
6575 Wheeler road
, NY 14094

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

I need to correct this with the **Match Fields…** button.

Here we see that the "last name" is "not matched" as well as the "city."

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

Required for Address Block

First Name	First Name
Last Name	(not matched)
Suffix	(not matched)
Company	(not matched)
Address 1	address
Address 2	(not matched)
City	(not matched)
State	state
Postal Code	Zip
Country or Region	(not matched)

Optional information

Unique Identifier	(not matched)

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

Correct this by clicking on the **drop down menu** next to both and matching the fields. When you are done, your preview pane should be right.

Required for Address Block

First Name	First Name
Last Name	(not matched)
Suffix	First Name
Company	Last name
Address 1	address

Click **OK**

Insert Address Block

Specify address elements

☑ Insert recipient's name in this format:

Josh
Josh Randall Jr.
Josh Q. Randall Jr.
Joshua
Joshua Randall Jr.
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:

◁◁ 1 ▷▷|

Marian Librarian
6575 Wheeler road
lockport, NY 14094

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

Replicate labels

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

Update all labels

Now click the **Update all labels** button in the task pane on the right. Here is what your labels will look like:

«AddressBlock»   «Next Record»«AddressBlock»   «Next Record»«AddressBlock»

Click on **Next: Preview your labels**

Step 4 of 6

➡ Next: Preview your labels

Marian Librarian   Tom Parker   Rebecca Stevenson
6575 Wheeler road   7548 Duke Road   429 Harkens street West
lockport, NY 14094| Lockport, NY 14094   Augusta, ME 04101

All of your addresses should come up on the screen. If you notice a mistake in one label (here we see that the "L" of Lockport isn't capitalized) you may click on the label, move the cursor to the correct spot, and make changes. HOWEVER, this will only change it ONCE. **To make permanent changes, you'll need to correct the Excel spreadsheet and save your edits there.**
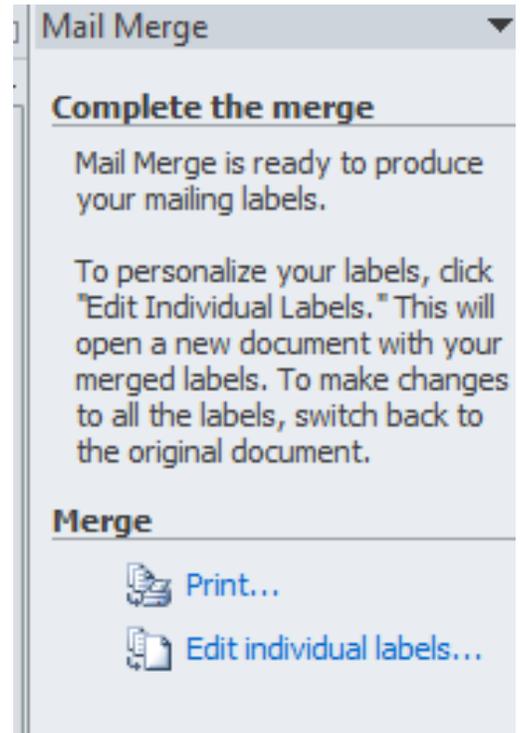
Marian Librarian
6575 Wheeler road
lockport, NY 14094

Once you have edited everything to your satisfaction, click **Next: Complete the merge.**

Step 5 of 6

➡ Next: Complete the merge
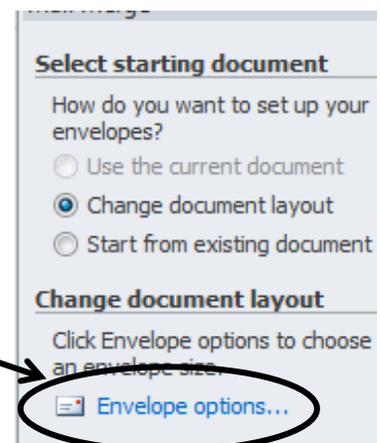
You may do further editing or print your labels.

Mail Merge ▼

Complete the merge

Mail Merge is ready to produce your mailing labels.

To personalize your labels, click "Edit Individual Labels." This will open a new document with your merged labels. To make changes to all the labels, switch back to the original document.

Merge

📇 Print...

📇 Edit individual labels...

Envelopes

Creating envelopes is a similar process to both labels and letters. Envelopes in Mail Merge require typing in a return address and then using our now-familiar Address Block to fill in the mailing address.

Open a new Word document and start the Mail Merge Wizard. Choose Envelopes and change the document layout.

Choose the correct **Envelope options….**

Select starting document

How do you want to set up your envelopes?

○ Use the current document
◉ Change document layout
○ Start from existing document

Change document layout

Click Envelope options to choose an envelope size.

✉ Envelope options...

Size 10 is a standard letter envelope in the US. Other options are available under the drop down menu.
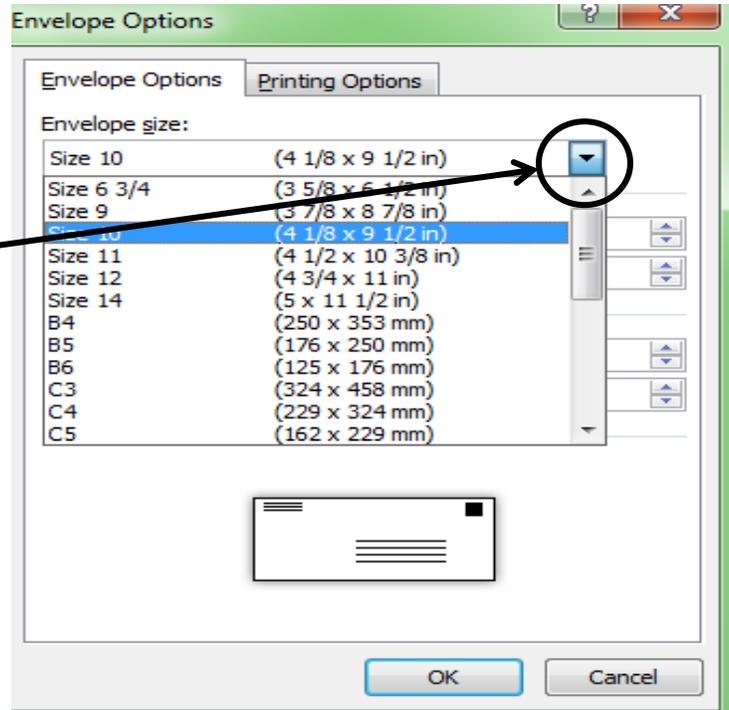
Once you have chosen the correct envelope, your page layout on the computer screen should change. Type in your return address in the upper left corner.


NIOGA
6575 Wheeler Road
Lockport, NY 14094
Attn: Sara

Bring your mouse down and into the lower half of the envelope and click once. There is a **hidden** text box located there. **IF YOU DON'T POSITION THE CURSOR IN THIS BOX, THE ADDRESS BLOCK WILL APPEAR IN THE WRONG PLACE**. You should see your cursor blinking in a box surrounded by a dotted line. If you don't, click near the lower half until your cursor is placed correctly.

Add in the Address Block the same way you did before then preview your envelopes.

«AddressBlock»

NIOGA
6575 Wheeler Road
Lockport, NY 14094
Attn: Sara

Marian Librarian
6575 Wheeler road
Lockport, NY 14094
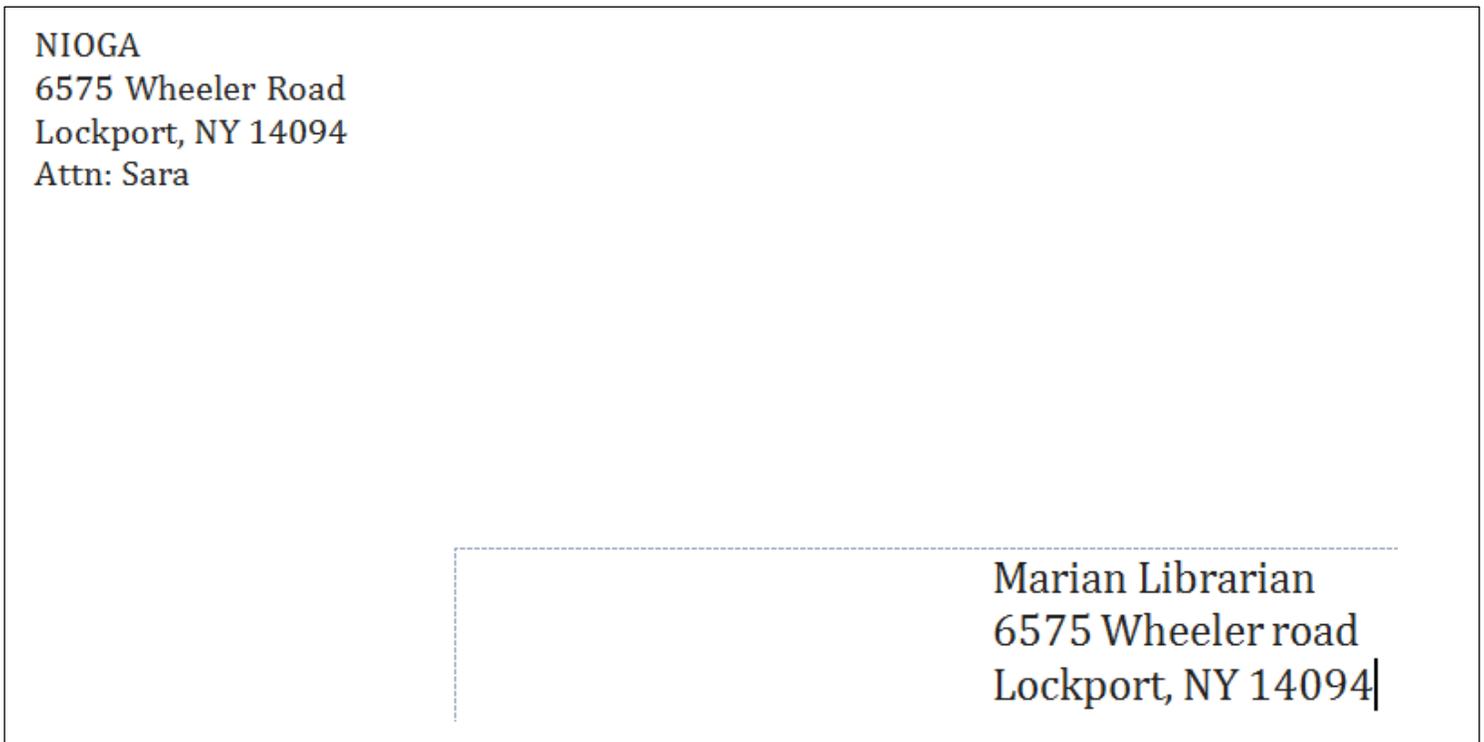
This is a "cutaway" of my envelope.

Create Letters

Creating labels is the hard part. If you can do that, letters and envelopes are easy! We'll use the same Excel spreadsheet for our letters.

Most of the time, it will be easier to type out the body of the letter first, and then add our address and greeting blocks after. So here's what we'll do now:

Open a new document in Word

Type a "letter"

Save the document on the **Desktop**

Here's what yours might look like:

Notice that I left some spaces (about 4) for an address block and greeting line

6575 Wheeler Road
Lockport, NY 14094

January 25, 2011

Type your letter here.

Sincerely,

NIOGA Library System

Use the following steps – in the Mail Merge Wizard – to create your "merged" letter:

Go to **Mailings** > **Start Mail Merge** > **Step by Step Mail Merge Wizard**

Select document type: **Letters**

Click on **Next: Starting document**
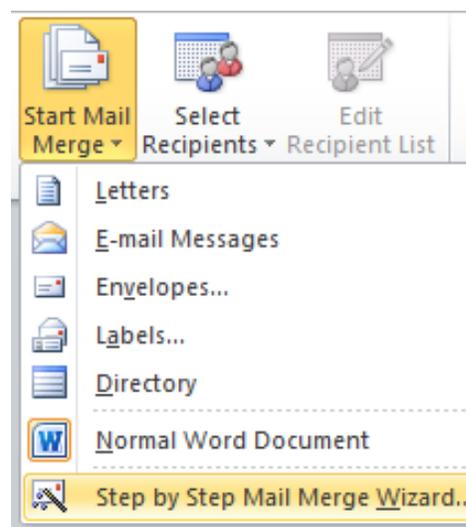
Use the current document.

Next: Select recipients

Use an existing list > **Browse…**
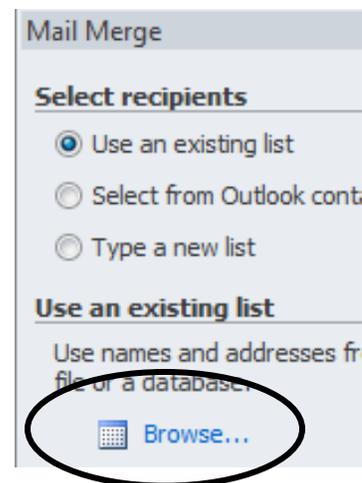
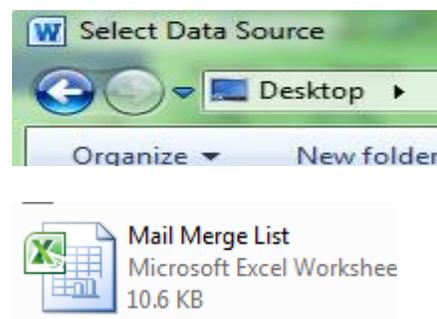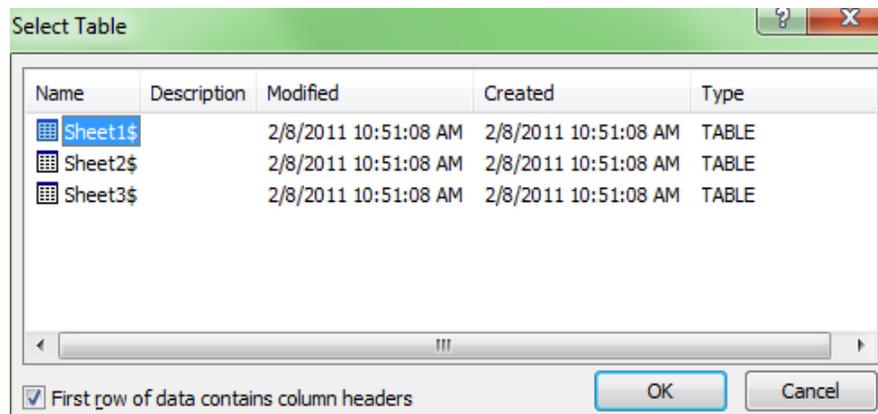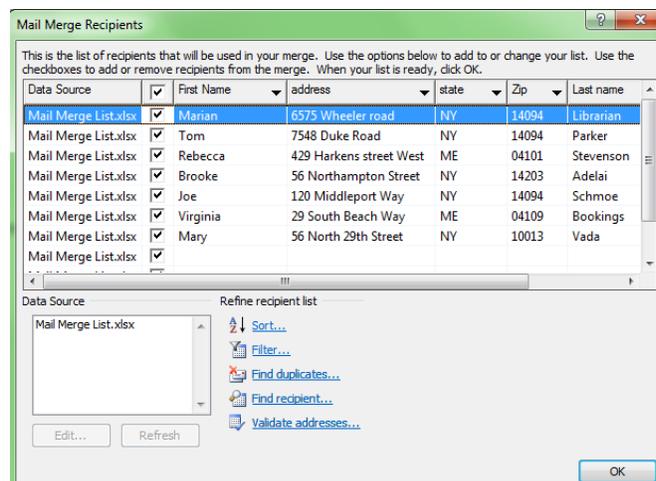**Select data source:** Remember, this is our Mail Merge List located on the Desktop

Our table is ready….

Keep all the recipients checked

Click **Next: Write your letter**

➡ Next: Write your letter

6575 Wheeler Road
Lockport, NY 14094

January 25, 2011

Place your cursor in the correct position for the **Address block** (one line down from the date)

Insert **Address block**, making corrections where necessary.

📄 Address block...

Insert Greeting Line

Greeting line format:

Dear ▾ | Joshua Randall Jr. ▾ | , ▾

Greeting line for invalid recipient names:

Dear Sir or Madam, ▾

Preview

Here is a preview from your recipient list:

|◁ ◁ | 1 | ▷ ▷|

Dear Marian Librarian,

Correct Problems

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

Match Fields...

OK | Cancel

Insert the **Greeting** line

Preview your letters

Step 4 of 6

➡ Next: Preview your letters

Here's my first "letter."

6575 Wheeler Road
Lockport, NY 14094

January 25, 2011

Marian Librarian
6575 Wheeler road
lockport, NY 14094

Dear Marian Librarian,

Type your letter here.

Sincerely,

NIOGA Library System

Now, just like with labels, you may complete the merge and print out your letters!

Resources
These items are available in the NIOGA Library System!
Contact your local library for assistance!

Call Number	Author	Title	Date
005.52HUDD	Huddleston, T	Using Microsoft Word 2010	2010
005.446 RATH	Rathbone, A	Windows 7 & Office 2010 for Dummies	2011
005.369 SHOU	Shoup, K	Office 2010 Simplified	2010
005.369 WEVE	Weverka, P	Office 2010 All-in-One for Dummies	2010

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