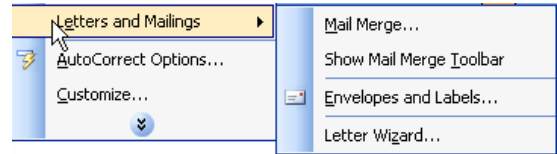


MAIL MERGE - DIRECTORY

When working with the Mail Merge feature, it is possible to create several types of documents, such as labels. In this document, information on how to set up a labels merge is explained.

STARTING THE MERGE

- ❖ Select **Tools** from the **Menu Bar**.
- ❖ Select **Letters and Mailings** from the list of options.
- ❖ Select **Mail Merge Wizard** from the next list that appears.
- ❖ The **Mail Merge Task Pane** will appear, displaying the first step in the Mail Merge process (see illustration at right).



- ❖ **Select Document Type** - The following choices will appear:

➤ Letters

- This option is used to create letters, memos, and so forth by inserting Boilerplate information and variable information from the Recipient List/Data Source.
- Each letter or memo is placed on a new page.

➤ E-mail Messages

- Use this option to create a Mail Merge to send to e-mail recipients.
- It uses the e-mail addresses contained in the Outlook contact list.
- When using this feature, it is not possible to add an attachment to the letter.

➤ Envelopes

- This option is used to create Envelopes by inserting the variable information from the Recipient List/Data Source.
- Each envelope appears on a new page.

➤ Labels

- Use this option to create Mailing Labels by inserting variable information from the Recipient List/Data Source.
- Labels are placed one after another on a page.
- The size and type of label are defined when they are created.

➤ Directory

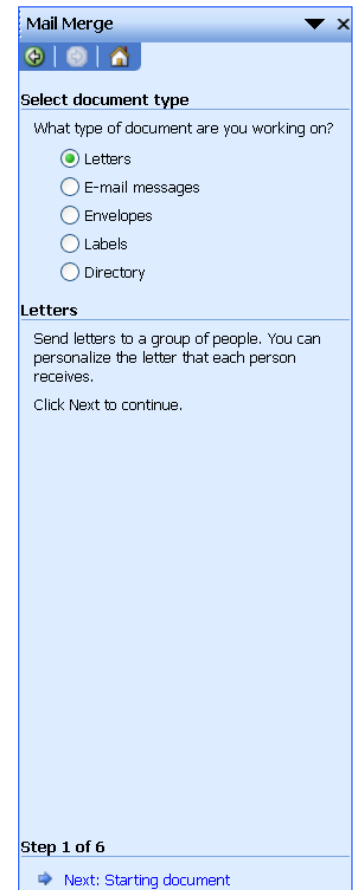
- This option is used to create a document with variable information from the Recipient List/Data Source.
- Instead of each item appearing on a new page, the data is placed continuously on a page.

- Select **Directory** for the type of document.

- ❖ **Click Next: Starting document.** This appears at the bottom of the Mail Merge Task Pane.

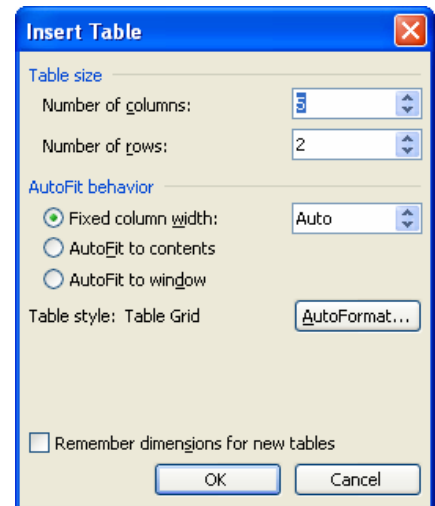
- In this step choose one of the three options:

- **Use the current document** - This option uses the document where the insertion point is located.



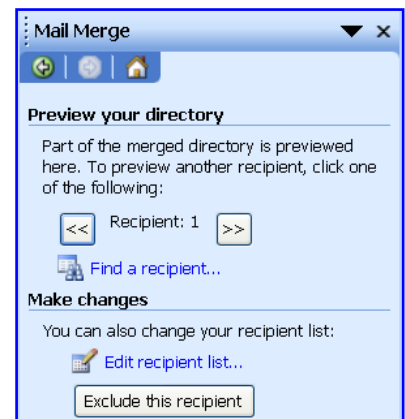
- **Start from a template** – Click **Select Template** to choose which template to use.
 - **Start from existing document** – When this option is selected, a list of documents will appear. Choose the document that is to be used for the merge.
 - Choose **Use Current Document**.
- ❖ **Click Next: Select recipients.** The options here are:
- The options in this step are:
 - **Use an existing list** – Click **Browse** to select the list that is to be used for the merge.
 - **Select from Outlook contacts** – Click the **Choose Contacts Folder** link. A dialog box will appear asking which Contact Folder is to be used.
 - **Type a new list** – Click **Create** to input custom fields or to start a new list of recipients.
 - For information on creating a new Recipient List, go to the link for **Creating a Recipient List** on the Word Web page.
 - Choose the option that is to be used for this merge.
- ❖ **Click Next: Arrange your directory.**
- Before inserting any of the options below, it is a good idea to change the Page Setup, Insert a Table, or complete any other formatting that needs to be done to complete this document. After all of this is done, then insert the fields that need to be inserted. Choose one of the options below to complete the document.
- **Address Block** – This option is used to insert the entire address, such as Last Name, First Name, and so forth into the document. Options are available to choose the format for the names. These options include:
 - **Insert recipient's name in this format** – Click a format to use from the list.
 - **Insert company name** – Click this option to deselect it if the company name is not to be included in the address block.
 - **Insert postal address** – Choose from one of the three options listed below this option. These include:
 - Never include the country/region in the address.
 - Always include the country/region in the address.
 - Only include the country/region if different than. When this option is chosen, specify the country or region in the box below the option.
 - **Match Fields** – If the fields in the recipient list are different from the default ones, this option allows you to match the fields with the default ones so that they will appear in the Address Block.
 - **Greeting Line** – This option is used to choose the format for the salutation in the document.
 - **Electronic Postage** – This option must be installed before it can be used.
 - **Postal Bar Code** – Inserts the bar code used by the Post Office for delivery.
 - **More Items** – This option provides a list of fields that are included in the data source. Use this to insert additional fields into a directory or to match personally created fields with the default fields in Word.
 - **When choosing any of these options, make sure the insertion point is in the correct location within the directory so that the fields will be inserted properly.**

- To practice using a table for a directory, complete these steps:
 - Choose **File** from the **Menu Bar**.
 - Choose **Page Setup** from the list that appears.
 - Change the **Orientation** to **Landscape**.
 - Change the **Margins** to **0.7-inches**, and then click **OK**.
 - Choose **Table** from the **Menu Bar**.
 - Choose **Insert** from the list that appears.
 - Choose **Table** from the next list.
 - The **Insert Table** dialog box will appear.
 - For the **Number of Columns**, input 4 (four).
 - For the **Number of Rows**, input 1 (one).
 - Click in the first cell of the table.
 - Click **More Items** on the **Task Pane**.
 - Select a field name from the list of fields.
 - Click **Insert** and then click **Close**.
 - Follow the same procedure to insert the Last Name, Phone Number, and Course fields in the cells in the table from left to right.



❖ **Click Next: Preview your directory**

- ❖ The following options are available in this step.
 - **Left/Right Arrows** – These arrows allow you to move through the merge one record at a time.
 - **Find a Recipient** – This option allows you to look for a particular person in the recipient list.
 - **Edit Recipient List** – To display the recipient list so it can be edited, click this option.
 - **Exclude this recipient** – To remove a recipient from the Mail Merge results, but not from the recipient list, click this button.



❖ **Click Next: Complete the merge**

- Click the **To New Document** link.
- The **Merge to New Document** dialog box will appear (see illustration bottom right).
- Choose one of the options in this dialog box. They are:
 - All – Merges all the records in the Recipient List.
 - Current Record – Merges just one record in the Recipient List.
 - From – This option allows you to choose which range of records to merge.
- Click **OK** to complete the merge.
- The directory will appear in a new document window.
- Each record in the Recipient List will appear on a new line.

