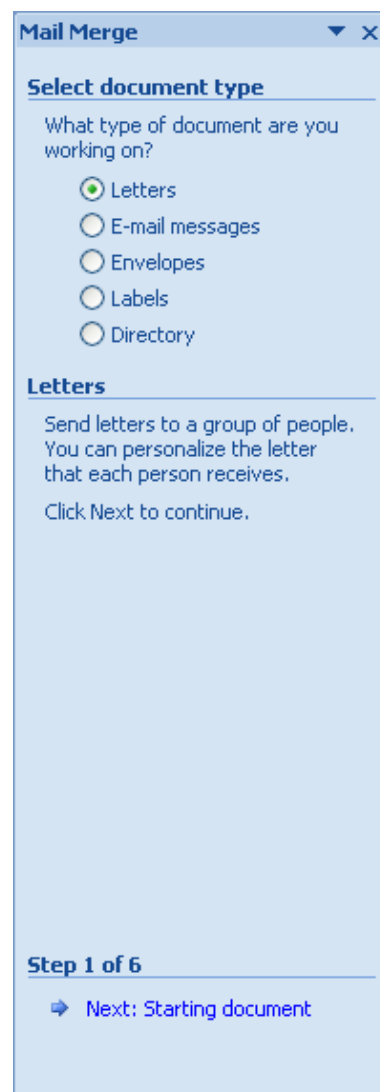


## CREATING A RECIPIENT LIST/DATA SOURCE USING THE MAIL MERGE WIZARD

When working with the Mail Merge feature, it is possible to create several types of documents, such as letters and envelopes. In this document, information on how to set up a letter merge and create a new recipient list will be provided. A letter merge can be completed using a previously created letter or a new letter can be input.

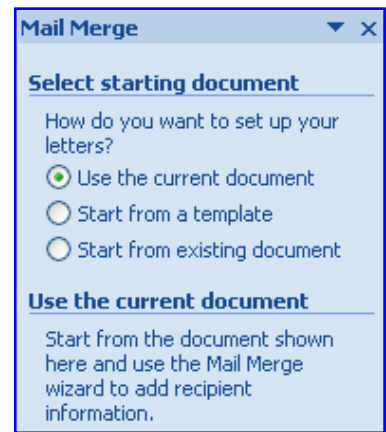
### STARTING THE MERGE

- ❖ Click the **Mailings** tab.
- ❖ Click the **Start Mail Merge** list arrow.
- ❖ Click the **Step by Step Mail Merge Wizard** link at the bottom of the list.
- ❖ 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 **Letters** for the type of document.
  - The letter can be one that was created earlier.
  - The new letter can be created while using the Mail Merge Wizard.



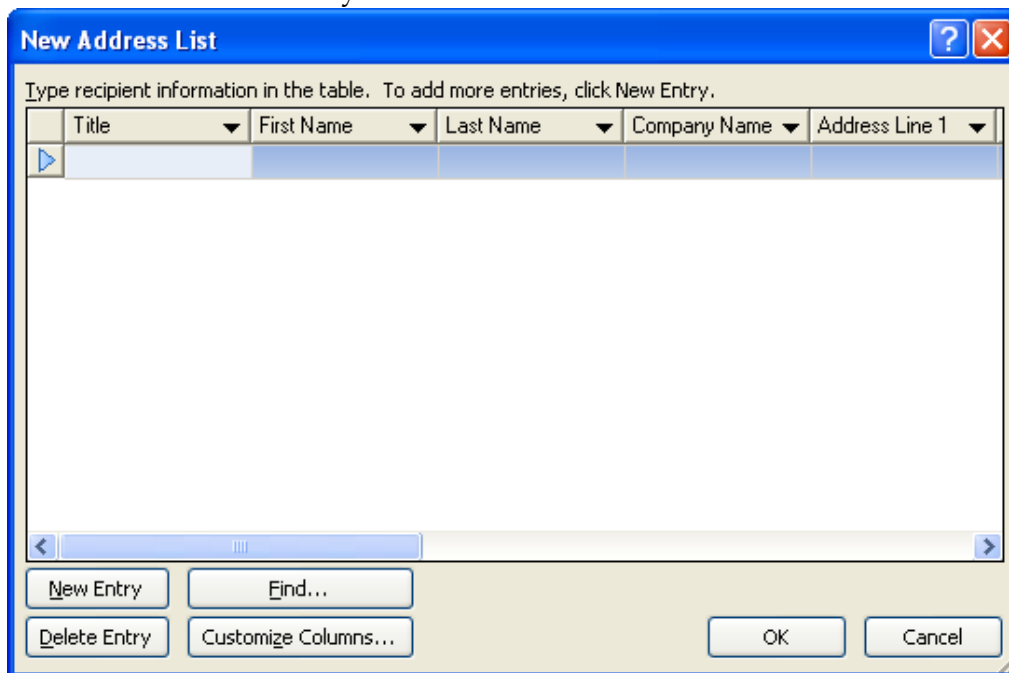
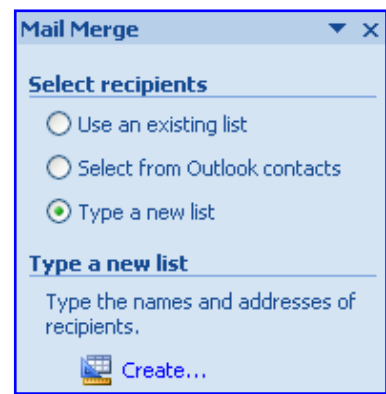
❖ **Click Next: Starting document.** This appears at the bottom of the **Mail Merge Task Pane**.

- In this step, choose one of the three options:
  - **Use the current document** – When this option is chosen, the merge will use the document where the insertion point is located.
  - **Start from a template** – To create a Mail Merge using a template, click **Select Template** to choose which template to use.
  - **Start from existing document** – A list of documents that were created earlier will appear. Choose the document that is to be used for the merge.



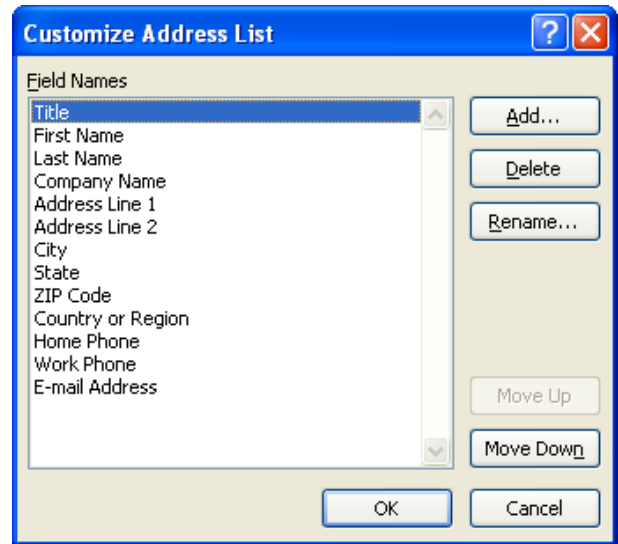
❖ **Click Next: Select recipients**

- Select **Type a new list** from this step in the Wizard.
- Click **Create** under **Type the names and addresses of recipients**.
- The **New Address List** dialog box will appear.
- The options in this dialog box are:
  - **New Entry** – Use this to insert a new entry into the recipient list.
  - **Delete Entry** – Use this to delete an entry from the recipient list.
  - **Find** – Use this to locate an entry in the recipient list.
  - **Customize Columns** – Use this to insert fields into the recipient list that are not the default ones established by Microsoft Word.



- Click the **Customize Columns** button in the **New Address List** dialog box.
- The **Customize Address List** dialog box will appear.

- The options in this dialog box are:
  - **Add** – Use this option to insert a new field into the record.
  - **Delete** – This option is used to delete a field from a record.
  - **Rename** – Click this button to change the name of a field in a record.
  - **Move Up** – To move a field in a record to another location above the highlighted field, use this button.
  - **Move Down** – To move a field in a record to another location below the highlighted field, use this button.



- When a new Recipient List is created the Mail Merge Wizard uses the **Microsoft Access** format. The Recipient List becomes an Access database table.

#### ❖ Removing Field Names

- Click the **Field Name** that is to be removed in the box on the right side of the dialog box.
- Click the **Delete** button to remove the field.
- A message will appear asking if you really want to remove this field. Click **Yes**.
- Complete the process of highlighting and deleting fields until all the unwanted field names are removed.

#### ❖ Renaming a Field

- Click on the field that is to be renamed.
- Click the **Rename** button to change the name of the field.
- Input a new name for the field into the **Rename Field** dialog box that appears.
- Click **OK** to exit the dialog box.
- The new field name will appear in the list of fields.

#### ❖ Adding a Field

- Move to the **Field Name** above where the new field is to be added.
- Click the **Add** button.
- The **Add Field** dialog box will appear.
- In the text box under, **Type a name for your field**, input the new field name.
- Click **OK** to exit the dialog box.
- The new field should appear after the selected field.

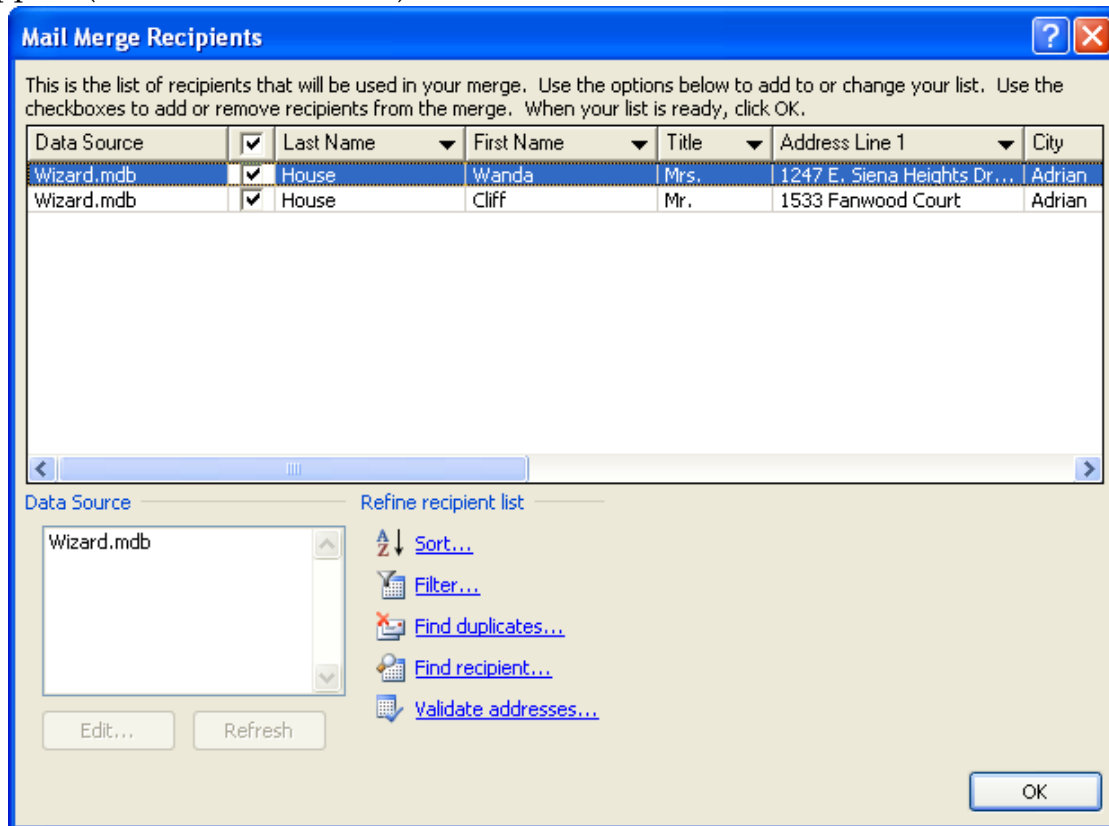
- ❖ Once all the field names have been added, renamed, or removed, click **OK** to exit the **Customize Address List** dialog box.

#### ❖ Adding Records

- Click in the first field name box.
- Input the information for the first field.
- Tab to the next field and input the information for this field.
- Continue this process until all the information has been entered.
- Click the **New Entry** button to insert a new record into the Recipient List/Data Source.
- Once all the records have been added, click the **OK** button to exit the dialog box.

## ❖ Saving the Recipient List

- The **Save** dialog box will appear.
- Input a name for the file in the **File Name** box.
- Click the **Save in** list arrow and select the storage area for the list.
- To create a new folder for the Mail Merge, click the **New Folder** button in the **Save As** dialog box.
- Insert a name for the folder and then click **OK**.
- Click the **Save** button to save the **Recipient List** into the new folder.
- Once the Recipient List has been saved, the **Mail Merge Recipients** dialog box will appear (see illustration below).



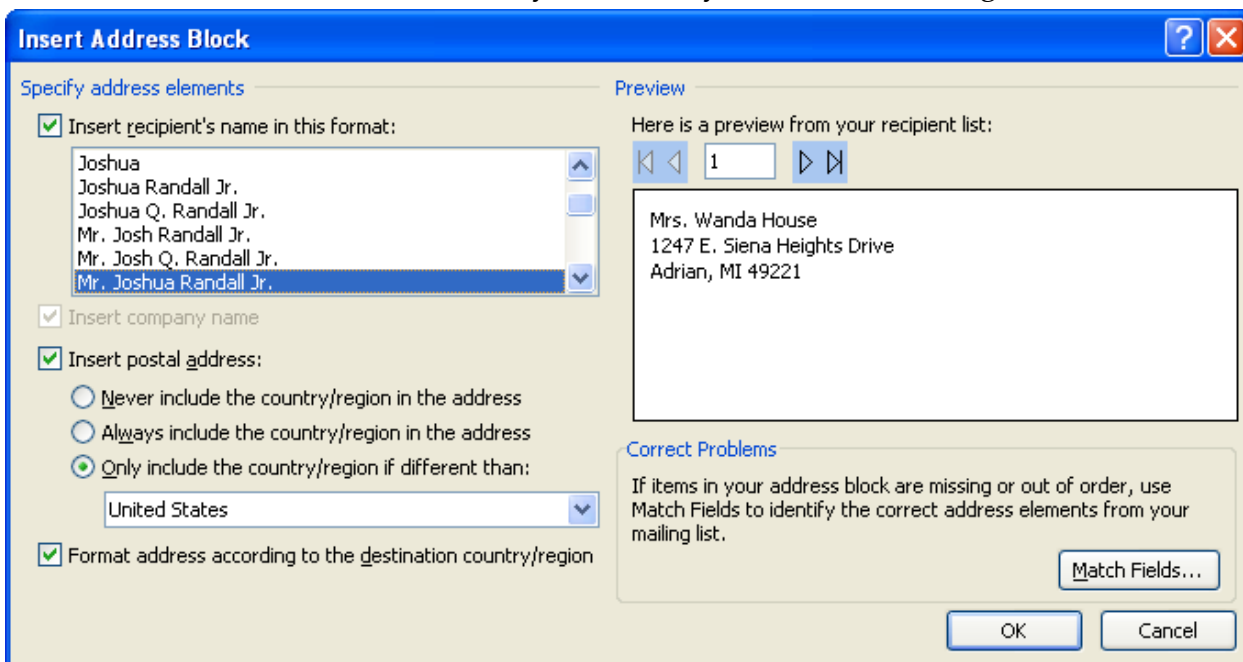
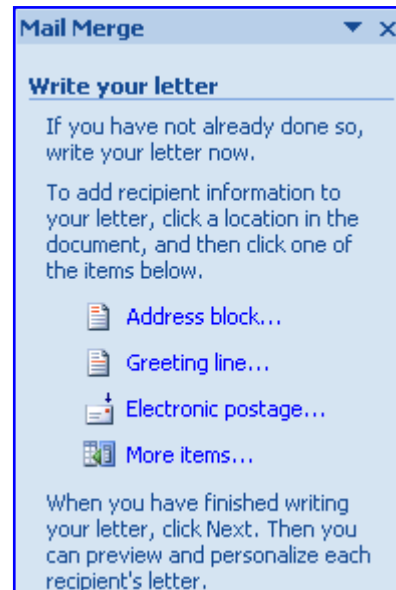
- The name of the **Data Source** will appear in the **Data Source** window.
- Options for refining the Recipient List will display under **Refine Recipient List**.
  - **Sort** – When this link is selected, a dialog box will display with options for sorting the fields in the Recipient List. For more information on working with this item, see the Sorting and Filtering link in the Word 2007 Web page.
  - **Filter** – To filter the items in the list, click this link. A dialog box will appear with options for filtering the Recipient List. For more information on working with this item, see the Sorting and Filtering link in the Word 2007 Web page.
  - **Find Duplicates** – This option is used to locate any duplicate records within the Recipient List.
  - **Find Recipient** – To locate one of the entries in the Recipient List, click this link. A dialog box will appear asking for the name of the recipient.
  - **Validate Addresses** – This is a special add-on that needs to be installed on the machine.

❖ **Click Next: Write your letter.** Choose one of the options:

➤ **Address Block** – Includes the entire address, such as Last Name, First Name, etc.

Options are available to choose the format for the names. See the illustration below for the options that are available in this dialog box. These 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 area. 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 than the default ones, this option allows you to match the fields with the default ones so that they will appear in the Address Block.
- **Preview** - On the right side of the **Insert Address Block** window, a preview of the entries in the Recipient List will display. Click the arrows to move from one entry to another.
- **Format address according to the destination country/region** - Click this check box if the address is to be format used by the country to which it is being sent.



➤ Once all the options have been selected, click the **OK** button.

➤ The **Address Block** field will be inserted into the document at the location of the insertion point.

➤ **Greeting Line** – This option is used to choose the format for the salutation in the document.

- The **Greeting Line** dialog box will appear (see illustration at right).

- Under **Greeting Line Format** in the first box, select from options such as Dear.

- In the second box on the same line, select the format for how the name will display in the letter.

- In the third box on the same line, choose the proper punctuation for the letter.

The options are:

- **Colon** – A colon is used at the end of a greeting line for a business letter.

- **Comma** – Commas are used at the end of the greeting line in a personal letter.

- **Preview** – This area provides a preview of how the Greeting Line will appear in the letter. Use the arrows to move from one Recipient to another.

- **Match Fields** – If the fields in the recipient list are different than the default ones, this option allows you to match the fields with the default ones so that they will appear in the Address Block.

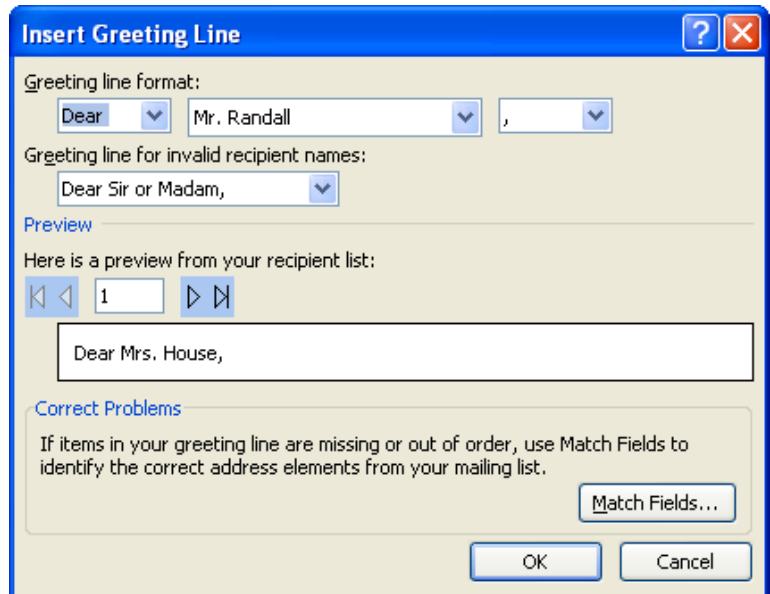
➤ **Electronic Postage** – This option must be installed before it can be used.

➤ **More Items** – When this option is chosen, a list of fields that are included in the data source will be displayed. Use this to insert additional fields into a letter 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 letter so that the fields will be inserted properly.**

➤ Once all the options have been chosen, click the **OK** button.

➤ The Greeting Line will be inserted into the document at the location of the insertion point.



❖ **Click Next: Preview your letters**

❖ The following options are available in this step.

➤ **Left/Right Arrows** – These arrows allow you to move through the merge one letter 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**
  - **Print** - To send letters directly to the printer, choose this option.
  - **Edit Individual Letters** - To make changes to individual letters, click this option.
    - When this option is selected, the **Merge to New Document** dialog box will appear (see illustration bottom right).
    - In this box, it is possible to choose whether to merge all the records or just part of the records.
- ❖ In the **Merge to New Document** dialog box:
  - Click the **All** option button to merge the letter to all the entries in the **Mail Merge Recipients List**.
  - Click the **Current Record** button to merge just one record.
  - Click the **From \_\_\_ To \_\_\_** option to merge specified records in the **Recipient List**.
- ❖ When the merge is completed, the letters will appear in a new Word window.

