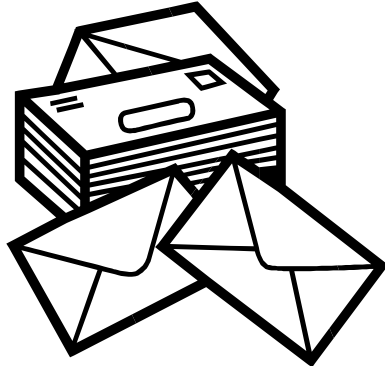


Welcome to *Teach Yourself*:

Intermediate Microsoft Word: Mail Merge, Envelopes & Labels

This *Teach Yourself* tutorial explains the mail merge, envelope and label features on Microsoft Word 2003, a word processing program. This is the same tutorial we use in our Intermediate Microsoft Word: Mail Merge, Envelopes & Labels class, but it has been adjusted so you can take the course on your own. If you would like to attend Intermediate Microsoft Word: Mail Merge, Envelopes & Labels or any other class offered by LFPL, just go to the LFPL website www.lfp.org and click on 'Events' on the left side of the screen to find when and where the next class meets.



Intermediate Microsoft Word: Mail Merge, Envelopes & Labels

Class learning objectives

1. [What is Mail Merge](#)
 - Main Documents
 - Data Sources
 - Fields
 - Records
 - Sorting and Filtering
2. **Creating a Form Letter & Data Source**
 - Creating & Customizing a new Data Source
 - Using an existing Data Source
3. [Creating Mailing Labels](#)
4. [Creating Envelopes](#)
5. **Additional Mail Merge Features**
 - Sorting data
 - Filtering records



What is Mail Merge?

Once you have learned the basics of Microsoft Word, you will find it has many useful features. Mail Merge is a feature of Microsoft Word that allows you to produce personalized letters and mailing labels from a mailing list. It is often used when you are sending the same document, such as a form letter, to a lot of people. As you can imagine, this feature is used frequently in business settings for advertisements and newsletters, but it can also be used at home for such things as sending out holiday cards.

Before we begin, we need to learn some vocabulary surrounding mail merge.

Main Document – The Main Documents is the document that you want to personalize and send to multiple people. It could be a form letter, an announcement, an advertisement, an envelope or a mailing label.

Data Source – The Data Source is like a database that contains information on the people or business on your mailing list. The Data Source is made up of **fields**, which are categories of information (such as “city,” “state,” “address,” or “phone number”), and **records**, which are the individual listings of each person on your mailing list. Once you have created a Data Source you can use it over and over again. Existing Access and Excel files with mailing list information can also be used as a data source.

Sorting – It is possible to arrange the records in your Data Source in a particular order alphabetically or numerically. This is called sorting.

Query – It is possible to be selective about which records you want to merge into your Main Document. This filter is called a query.

There are essentially 3 parts to the Mail Merge Process:

1. Creating a Main Document
2. Creating/Designating a Data Source
3. Merging the two together.

We have three mail merge projects for today:

1. Create a Form Letter
2. Create a sheet of Mailing Labels
3. Print on Envelopes

Creating Form Letters & New Data Sources

1. Open **Microsoft Word**.

2. Click on **Tools** → **Letters and Mailings** → **Mail Merge**.

The Mail Merge tool opens in the task pane. You will navigate through the steps of the Mail Merge tool by making selections and then advancing to the next step.

Step 1: Select the desired document.

- Select **Letters**.

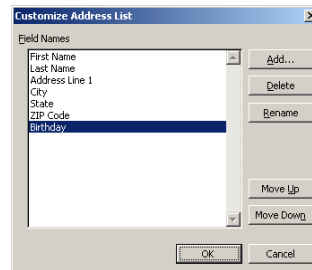
Step 2: Starting Document

- Select **Use the current document**.

Step 3: Select recipients

- Select **Type a new list**. We will create a mailing list that can be used for the form letter project and the other mail merge projects we will do in this class.
- Click on **Create**. A form for entering the names and addresses of recipients is created. You can customize the fields that appear on the form by clicking on **Customize**. You can add, delete or rename fields in the form. You can also adjust the order in which the fields appear. Customize the form to display the just the following fields, then click on **OK**.

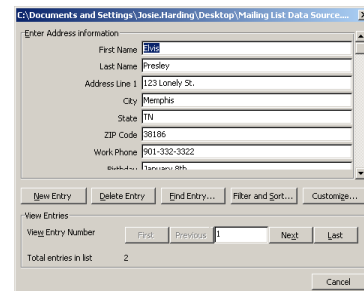
First Name
Last Name
Address Line 1
City
State
Zip Code
Birthday (added field)



- Once you have adjusted the fields listed and clicked on **OK**, a data entry form should appear. Enter the following records into the data form. Between records, click on **New Entry** to add the next entry.

Elvis Presley 123 Lonely St. Memphis TN 38186 January 8th	Peter Cottontail 45 Bunny Trail Los Angeles CA 90012 June 4th	Elwood Blues 1060 W. Addison St. Chicago IL 60613 December 27th	Roseanne Connor 714 Delaware St. Lanford IL 62515 December 12th
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- Notice that there are options to delete an entry, find an entry, and filter and sort the entries.
- To navigate between entries, click on **First**, **Previous**, **Next** or **Last** or type in the record number.
- When you close the form window, you will be prompted to save the data source. Save as "**Data Source**" on 3 ½ **Floppy A**.



Step 4: Write your letter.

- When writing a letter, you customarily include the following:
 - The date
 - An internal address block
 - A greeting line
 - The body of the message
 - A closing line
- Let us type the following letter. The highlighted areas are inserted dates or inserted fields from your data source.

July 21, 2009

«AddressBlock»

«GreetingLine»

According to our files we see that your birthday will be coming up on «Birthday». Since you celebrated your birthday last year at our restaurant, we hope to see you again this year. A complimentary birthday dessert is waiting for you.

Sincerely,
Eddie Haskell

To insert a date,

1. Click on **Insert** in the main menu area.
2. Click on **Date and Time**.
3. Select the desired format.
4. Click on **OK**.

To insert an address block,

1. Click on **Address block** in the task pane
2. Select the desired format (Joshua Randall Jr.)
3. Click on **OK**.

To insert a greeting line,

1. Click on **Greeting line** in the task pane.
2. Select the desired greeting format.
3. Click on **OK**.

To insert an individual field from your data source,

1. Click on **More items** in the task pane.
2. Select the desired field
3. Click on **Insert**.

Step 5: Preview your letters

- Use the double arrows (<< and >>) in the task pane to preview what the form letter will look like with the recipient information.

Step 6: Complete the merge

- The final merge will take place in this step. You can choose to print immediately or to edit individual letters. Select **Edit individual letters**.
- Select **All** and **OK** to merge. A new document will open with a letter for every recipient.

Creating Mailing Labels

1. Open **Microsoft Word**.

2. Click on **Tools** → **Letters and Mailings** → **Mail Merge**.

The Mail Merge tool opens in the task pane. You will navigate through the steps of the Mail Merge tool by making selections and then advancing to the next step.

Step 1: Select document type

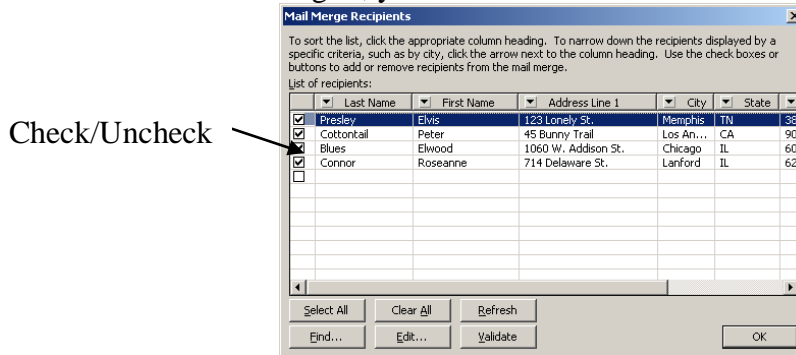
- Select **Labels** as the desired document type.

Step 2: Starting document

- Select **Change document layout**.
- Select **Label Options**, choose the Avery Standard 5160 address labels and **OK**.

Step 3: Select recipients

- Select **Use an existing list**.
- Click on **Browse** and open the **Data Source** you saved to **3 ½ Floppy A**.
- A list of recipients in your data source will appear. If there is anyone you do not wish to send the mailing to, you can uncheck their name from the list. Click on **OK**.



Step 4: Arrange your labels

- Select **Address block**
 - Choose the desired address block format (Joshua Randall Jr.) and **OK**.
- Click on **Update All Labels**.

Step 5: Preview your labels

- If you wish to further edit your recipient list, click on **Edit recipient list**.

Step 6: Complete the merge

- Select **Edit individual labels**. A new document will open with a label for every recipient.

Creating Envelopes

1. Open **Microsoft Word**.

2. Click on **Tools** → **Letters and Mailings** → **Mail Merge**.

The Mail Merge tool opens in the task pane. You will navigate through the steps of the Mail Merge tool by making selections and then advancing to the next step.

Step 1: Select document type

- Select **Envelopes** as the desired document type.

Step 2: Starting document

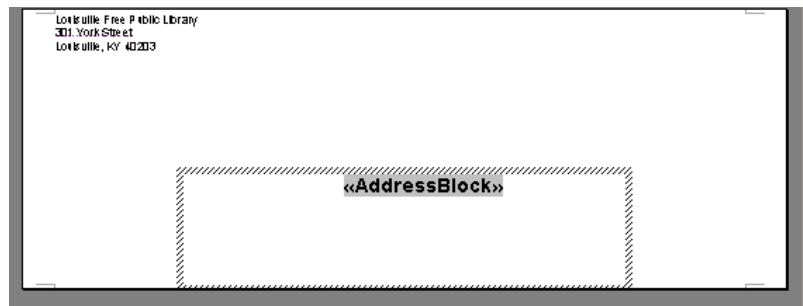
- Select **Change document layout**.
- Click on **Envelope options**. Select the desired envelope size and make any desired adjustments to the placement or font of the delivery address and return address. Click on **OK**.

Step 3: Select recipients

- Type your return address in the box in the upper left corner of the envelope.
- Select **Use an existing list** on the task pane.
- Click on **Browse** and open the **Data Source** saved to **3 1/2 Floppy A**.

Step 4: Arrange your envelope

- Click on the lower middle portion of the envelope and a box for the delivery address should appear. Click inside the box.
- Click on **Address block** on the task pane. Choose the desired address block format (Joshua Randall Jr.) and **OK**.
- At this time you can also select different text areas on the envelope and use the formatting toolbar to make font adjustments.

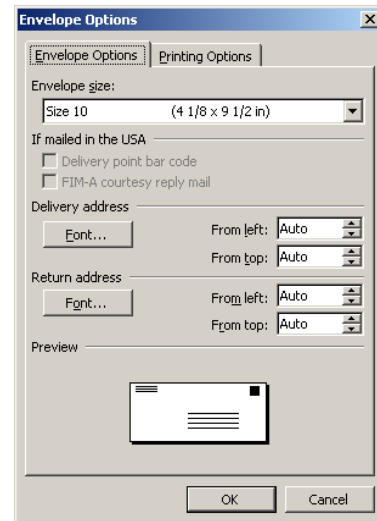


Step 5: Preview your envelopes

- Make any last minute adjustments to the recipient list.

Step 6: Complete the merge

- Select **Edit individual labels**.
- Select **All** and **OK** to merge. A new document will open with an envelope for every recipient.

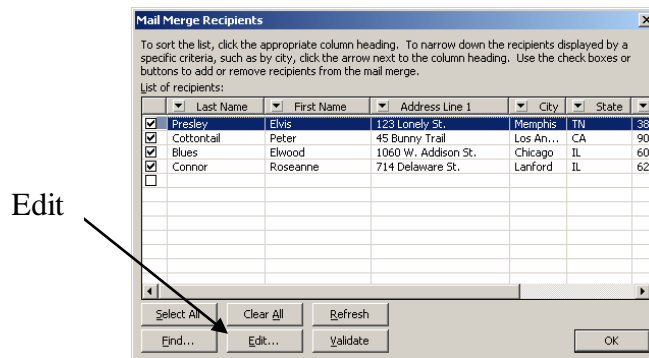


Sorting & Filtering Recipient Lists

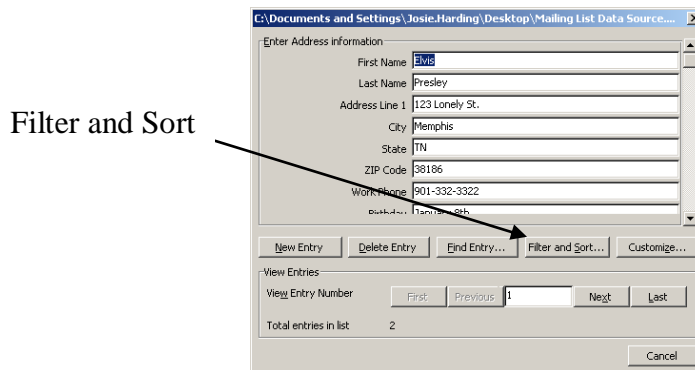
You can edit your recipients from an existing list in step 3, and from a new or existing list in step 5 of the mail merge process. You may wish to

- apply a sorting order to the recipient list to make it easier to mail batches of form letters or envelopes.
- apply a filter to the recipient list to be more selective about who in your data source receives the document (form letter, mailing label, envelope).

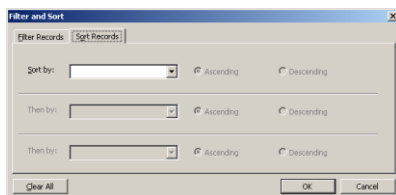
Click on **Edit recipient list** then click on the **Edit** button.



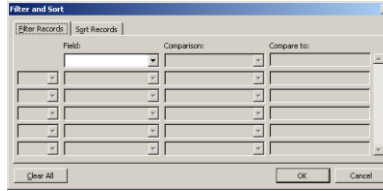
When the form appears, click on the **Filter and Sort** button.



Under the **Sort Records** tab, select the field you wish to sort by first, second, and third.



Under the **Filter Records** tab, select the fields you want to filter by and the comparison terms you wish to use. Enter the filter criteria. If you have multiple criteria, you can join them with OR or And. “And” means that all of the criteria must be met. “Or” means that either one can be met.

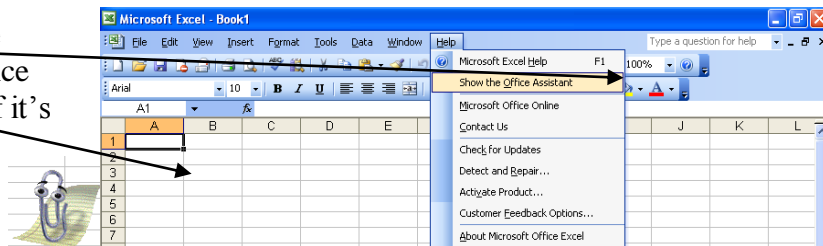


Click on **OK**, **Close**, and **OK** to apply the changes you made.

The Help Menu

If you have a question about Excel that you need answered right away, you might want to consult the Help menu. The help menu has two interfaces: the Office Assistant and the standard Help menu. Let's examine the Office Assistant first. You've probably seen it before—it's a little dog, cat, paperclip, etc that you can click on to get help. If you don't see it, click **Help** on the main menu bar. Then click **Show the Office Assistant**, and the Office Assistant will appear. Once it appears, or if it was already visible, click on it to begin interacting with it.

Click **Show the Office Assistant**, and the Office Assistant will appear if it's not already visible.

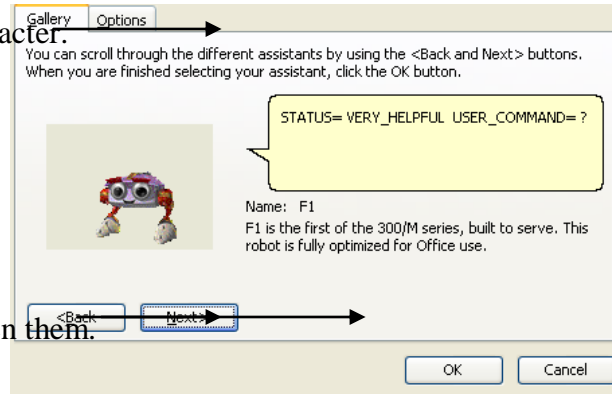


Clicking on the Office Assistant opens up a search bar into which you can type your help topic. Type "create a chart" (without the quotes) into the search bar, and click **Search**. You will see a task pane appear on the right side of the screen listing (usually) 30 results. You should see your help topic at or near the top of the list. Click on it to open another task pane with the solution to your problem. Close the two task panes when done.

Customizing the Office Assistant

Click on the Office Assistant again and click **Options**. Here you can change the look and behavior of the Office Assistant. You will see two tabs: **Gallery** and **Options**. Click on the **Gallery** tab. Here you can change the look of the Assistant. Click the **Back** and **Next** buttons to move back and forth between the selections. If one of these two buttons becomes grayed out, you must go in the opposite direction by pressing the other button.

Click **Gallery** to choose another character.

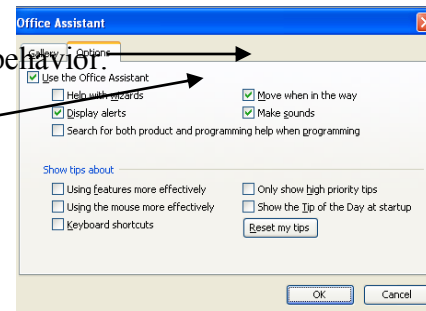


Click **Back** and **Next** to cycle between them.

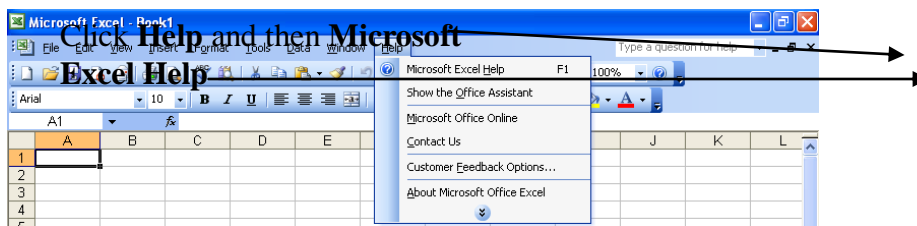
Once you've examined the different characters, click the **Options** tab. **Options** presents several checkboxes with which you can customize the Assistant. Scan these over, and then uncheck the one at the top left that says **Use the Office Assistant**, and then click **OK**. The Office Assistant will disappear.

Click the **Options** tab to customize the Assistant's behavior.

Uncheck **Use the Office Assistant** to turn it off.



Now let's take a look at the standard Help menu. Click **Help** on the **Main Menu Bar**. Next, click **Microsoft Office Excel Help**. This will open a task pane on the right side of the screen. Type "create a chart" into the search bar provided, and then click the white arrow. You will see another task pane with the same 30 results you saw earlier. In other words, you get the same level of help whether or not you use the Office Assistant.



For Further Reading and Learning

Thank you for attending Intermediate Microsoft Word: Mail Merge. For further reading, search the library catalog for the subject "Microsoft Word."

Please consider building your research and/or technological skill sets by taking another class with us. Learn more about upcoming classes on the library's website, www.lfpl.org, or in the Computer Learning Center brochure.