Mail Merge, Envelopes & Labels
Microsoft Word 2007!

Extended Services
Mail Merge - Letters

- Click on the Mailings Tab

- You can also perform a mail merge by using the Mail Merge task pane, which leads you step by step through the process. To use the task pane, in the Start Mail Merge group under the Mailings tab, click Start Mail Merge, and then click Step by Step Mail Merge Wizard.
Creating a Mail Merge

Step 1 – Select Document type

Select the type of document

Click to move to next step

USI Extended Services
Creating a Mail Merge

Step 2 – Starting document

Can use the open document, start from a template or open an existing document. After the document has been created or selected, the next step is to select recipients or option of going back to selecting the document type.
Creating a Mail Merge

Step 3 - Selecting Recipients

After typing in the 1st name, click **New Entry** to add the next entry.

Click Ok when finished putting in the names.
Creating a Mail Merge

Step 4 – Write your letter

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

After setting up the letter, preview each letter individually before printing.
Creating a Mail Merge

Step 5 – Preview your letters

Mr. John Donnelly
962 Edwards Drive
Evansville, Indiana 47723

January 10, 2008

Dear Mr. Donnelly,

I wanted to thank you for your business during the past year. It’s loyal customers like you who have made Fourth Coffee a success.

We have some wonderful new coffee roasts that I think you’ll enjoy, and we’re now baking scones and muffins on site. [Instructions for the coupon below to get a free half pound of coffee.

Sincerely yours,

Scroll through all of the recipients to check them over.

Next, complete the merge.
Creating a Mail Merge

Step 6 - Complete the Merge

Final step in the process is to print the letters, at this time select the printer tray or add letter head if needed.
Dear <Title> <Last Name>:

Thank you for agreeing to sell 50 tickets to the Little League Fundraiser scheduled for the second Saturday night of the next month. Your packet of 50 is enclosed. The ticket price is $15 per ticket.

We really appreciate your willingness to help with this worthwhile project. As you know, the proceeds from the fundraiser will be used to provide new baseball equipment for the team.

Again, thank you!

Sincerely,

(Your name)

Enclosure
You can also create addresses on envelopes and the easiest method is to use the Step by Step Mail Merge Wizard and select Envelopes.

The mail merge process entails the following overall steps:

**Set up the envelopes.** You set up the layout of the envelopes one time, for all the envelopes in the mail merge. In a mail merge, the document that you use to do this is called the main document. In the envelope main document, you can also set up any content that you want repeated on each label, such as a return address, a company logo, or boilerplate text.

**Connect the envelopes to your address list.** Your address list is the data source that Microsoft Office Word uses in the mail merge. It is a file that contains the addresses to be printed on the envelopes.

**Refine the list of recipients.** Word generates an envelope for each address in your mailing list. If you want to generate envelopes for only certain addresses in your mailing list, you can choose which addresses, or records, to include.

**Add placeholders, called mail merge fields, to the envelopes.** When you perform the mail merge, the mail merge fields are filled with information from your address list.

**Preview and complete the mail merge.** You can preview each envelope before you print or send the whole set.
If you want to include a return address on the envelopes, you can set this up before you start working on the envelope main document. It is also a good idea to try printing a few test envelopes to verify that your printing options are configured correctly for your printer.

**Set up a return address**
1. Start Word.
2. Click the **Microsoft Office Button**, and then click **Word Options**.
3. Click **Advanced**.
4. Scroll down, and under **General**, type your return address in the **Mailing address** box. Word stores the address so that you can use it whenever you want to insert your return address in a document.
5. Click **OK**.

![General settings with return address](image-url)
Addressing Envelopes

Step 1 – Set up the envelop

Select the Envelope size and any other options such as font, etc.

Select to set up your envelope options

Step 2 of 6

• Next: Select recipients
• Previous: Select document type

USI Extended Services
Addressing Envelopes

Printing Options Tab

1. The feed method determines the position of the envelope (right, middle, left) and whether the long or short edge is being fed into the printer.

2. The envelope can be face up or face down. The face is the side that the address is printed on.

3. If the envelope is fed short edge first, the envelope may need to be rotated to prevent the text from appearing upside down on the face of the envelope.
Addressing Envelopes

Step 2 – Selecting Options

After selecting options, click ok and your screen appears like the example below.
Step 3 – Selecting recipients

Do one of the following:

1. If you have a Microsoft Office Excel worksheet, a Microsoft Office Access database, or another type of data file, click **Use Existing List**, and then locate the file in the **Select Data Source** dialog box.

2. If you want to use your Contacts list in Microsoft Office Outlook, click **Select from Outlook Contacts**.

3. If you don’t have a data file yet, click **Type a new list**, and then use the form that opens to create your list. The list is saved as a database (.mdb) file that you can reuse.
Addressing Envelopes

Step 3 – Selecting recipients/Creating a new list

Type in the information in each field and click on **New Entry** to input the next entry. When finished adding, click okay to save. Give the address list a name and click on **Save**.
Addressing Envelopes

When your list is created or selected, the option is given to edit, sort, filter, find duplicates, find recipients or validate the addresses.
Addressing Envelopes

Step 4 – Arrange your envelope

Arrange your envelope

If you have not already done so, lay out your envelope now.

To add recipient information to your envelope, 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 arranging your envelope, click Next. Then you can preview each recipient’s envelope and make any individual changes.

Step 4 of 6

Next: Preview your envelopes
Previous: Select recipients

USI Extended Services
8000 University Blvd.
Evansville IN 47712

<AddressBlock>
Addressing Envelopes

Step 5 – Preview your envelopes

Scroll through your recipients to proofread them.

Next step, complete the merge
Addressing Envelopes

Print the envelopes
1. On the Mailings tab, in the Finish group, click Finish & Merge, and then click Print Documents.
2. Choose whether to print the whole set of envelopes, only the envelope that is currently visible, or a subset of the set, which you specify by record number.

Change individual envelopes
1. On the Mailings tab, in the Finish group, click Finish & Merge, and then click Edit Individual Documents.
2. Choose whether you want to edit the whole set of envelopes, only the envelope that is currently visible, or a subset of the set, which you specify by record number. Word saves the copies that you want to edit to a single file, with a page break between each envelope.

Save the envelop main document
Remember that the envelopes that you save are separate from the initial envelope that you set up (the envelope main document). It is a good idea to save the envelope main document itself if you plan to use it for another mail merge. When you save the envelope main document, you also save its connection to the data file. The next time that you open the envelope main document, you are prompted to choose whether you want the information from the data file to be merged again into the envelope main document.
*If you click Yes, the document opens with the information from the first record merged in.
*If you click No, the connection between the envelope main document and the data file is broken. The envelope main document becomes a standard Word document. Fields are replaced with the unique information from the first record.
Creating Labels

Step 1 – Selecting the document type

The mail merge process entails the following overall steps:

**Set up the labels.** You set up the layout of the labels one time, for all the labels in the mail merge. In a mail merge, the document that you use to do this is called the main document. In the label main document, you can also set up any content that you want repeated on each label, such as a company logo or your return address on shipping labels.

**Connect the labels to your address list.** Your address list is the data source that Microsoft Office Word uses in the mail merge. It is a file that contains the addresses to be printed on the labels.

**Refine the list of recipients.** Word generates a label for each address in your mailing list. If you want to generate labels for only certain addresses in your mailing list, you can choose which addresses, or records, to include.

**Add placeholders, called mail merge fields, to the labels.** When you perform the mail merge, the mail merge fields are filled with information from your address list.

**Preview and complete the merge.** You can preview each label before you print the whole set.

You can use commands on the Mailings tab to perform a merge.
Chances are that you already have a package of label sheets from one of the label sheet suppliers, such as Avery, AOne, or Formtec. Each sheet is a certain size and contains a certain number of labels with specific dimensions. To set up the label main document, you need to match the dimensions of that document with the dimensions of the labels on the sheets that you have on hand.

Click on Label options to set up the sizes for your labels.

1. The type of printer that you are using to print labels
2. The supplier that produced your label sheets
3. The number that corresponds to the product number listed on your package of labels.

* If the label type isn’t in the drop down menu, click on New label and put in the dimensions.

After you select the label options, click OK. Word creates a document that contains the sheet of labels.
Creating Labels

If you don’t see lines separating the labels, click **Layout** tab under the **Table Tools**, and then in the **Table** group, click **View Gridlines**.
Creating Labels

Step 4 – Arranging your Labels

Have the cursor on the 1st label box and then click the recipient information for the label.

After you set up the first label, click on Update all labels to complete the layout on the entire sheet.
Creating Labels

Illustrates the preview of how the label will be laid out.
## Creating Labels

**Step 5 – Preview your labels**

**Step 6 – Complete the merge**

<table>
<thead>
<tr>
<th>Preview your labels</th>
<th>Complete the merge</th>
</tr>
</thead>
<tbody>
<tr>
<td>Some of the merged labels are previewed here. To preview another label, click one of the following:</td>
<td>Mail Merge is ready to produce your mailing labels.</td>
</tr>
<tr>
<td></td>
<td>To personalize your labels, click &quot;Edit Individual Labels.&quot; This will open a new document with your merged labels. To make changes to all the labels, switch back to the original document.</td>
</tr>
<tr>
<td>Find a recipient…</td>
<td></td>
</tr>
<tr>
<td>Make changes</td>
<td></td>
</tr>
<tr>
<td>You can also change your recipient list:</td>
<td></td>
</tr>
<tr>
<td>Edit recipient list…</td>
<td></td>
</tr>
<tr>
<td>When you have finished previewing your labels, click Next. Then you can print the merged labels or edit individual labels to add personal comments.</td>
<td></td>
</tr>
</tbody>
</table>

### Mail Merge

**Step 5 of 6**

- Next: Complete the merge
- Previous: Arrange your labels

**Step 6 of 6**

- Previous: Preview your labels
http://office.microsoft.com

- Click on the **Help and How-To tab** at the top of page.
- Click on the **2007 Office System tab** in the middle of the page.
- Click on **Word 2007**
- You now have several demos to choose from. To view the Interactive 2003/2007 Word site, select **Getting Help** from the menu list and then select **Interactive: Word 2003 to Word 2007 command reference guide**. Scroll to the middle of the page and click the **Start the Guide Button**.
Reference

Site for training and helpful tips in Word or any other Microsoft Office application.

http://office.microsoft.com/training/