

14 Work with Mail Merge

In this chapter, you will learn how to

- ✓ Understand mail merge.
 - ✓ Prepare data sources.
 - ✓ Prepare main documents.
 - ✓ Merge main documents and data sources.
 - ✓ Send personalized e-mail messages to multiple recipients.
 - ✓ Create and print labels.
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Many business and other organizations communicate with their customers or members by means of letters, newsletters, and promotional pieces that are sent to everyone on a mailing list. The easiest way to generate a set of documents that are identical except for certain information—such as the name, address, and greeting of a letter—is to use a process called *mail merge*. If you have a list of potential recipients stored in a consistent format, you can use the mail merge process to easily produce a set of personalized documents and mailing labels.

In this chapter, you'll use the Mail Merge wizard in Microsoft Word 2010 to guide you through the process of creating a form letter. You'll select a data source, add a record to it, sort it, and filter it. You'll then add merge fields for an address and greeting line to an existing form letter, preview the merged data, exclude recipients from the merge, merge the letters into a new document, and save the merged file. You'll also set up and send a merged e-mail message. Finally, you'll create and print mailing labels.

Practice Files Before you can complete the exercises in this chapter, you need to copy the book's practice files to your computer. The practice files you'll use to complete the exercises in this chapter are in the Chapter14 practice file folder. A complete list of practice files is provided in "Using the Practice Files" at the beginning of this book.

Understanding Mail Merge

The mail merge process combines the static information stored in one document with variable information stored in another document, as follows:

- **Main document** This document contains the static text that will appear in all the merged documents. It also contains placeholders—called *merge fields*—that tell Word where to insert the variable information.
- **Data source** This is a structured document, such as a Word table, Microsoft Excel worksheet, Microsoft Access database table, or Microsoft Outlook contacts list, that contains sets of information—called *records*—in a predictable format. You can use an existing data source, or you can create a new one as part of the mail merge process.

You can use the Mail Merge wizard to merge a main document with a data source in easy steps. The first step is to select the document type, which can be a letter, an e-mail message, envelopes, labels, or a directory. The type you select determines the subsequent steps. When you have some experience with mail merge, you can use the buttons on the Mailings tab to create and merge documents, instead of the Mail Merge wizard. Regardless of the method, the end result is one copy of the merged document for every record in the data source.

You can merge the main document and data source into a new document, with each merged document separated from the next by a page break. You can then personalize the merged documents before printing them, and you can save the document for later use. If you don't need to edit or save the merged documents, you can merge the main document and data source directly to the printer or to an e-mail message.

Preparing Data Sources

The first step in the mail merge process is to either specify an existing data source or create one. The data source consists of a matrix of rows and columns. Each row contains one record, such as the complete name and address of a customer, and each column contains a particular type of information—called a *field*—such as the first name of all the customers. In the first row of the data source, each field is identified by its column heading—called a *field name*.

	A	B	C	D	E	F	G
1	FirstName	LastName	Address1	City	State	PostalCode	
2	Isabel	Martins	7899 38th St.	Tucker	NJ	90025	
3	Garth	Fort	5678 Ford Ave.	Planter	WA	10002	
4	Dan	Wilson	1234 Editorial Way	Harvest	WA	10004	
5	Carol	Troup	456 South Rd.	Harvest	WA	10004	
6	John	Rodman	987 Hard Rock Way	Potential	DE	97540	
7							
8							

The data source stores information in a structured way so that individual items can easily be identified and retrieved.

Tip Because the field names are also used as the merge fields in the main document, they cannot contain spaces. To make the field names readable with no spaces, capitalize each word, as in *PostalCode*, or replace the spaces with underscores, as in *Last_Name*.

If the data source contains many records and it changes frequently, you might want to create it in a program designed for working with large amounts of data, such as Excel or Access. You can also use the contacts list from Outlook. If the data source contains only a few records and it won't be updated often, you can create it in Word, either as a table or as a list with each field separated by a tab. Or you can create it as part of the mail merge process.

What if you want to create merge documents for only a subset of the data in the data source? For example, you might have mail-order customers from all over the United States but want to send an announcement about a store sale only to customers with addresses in your state. After you specify the data source, you can do the following:

- Filter the data source to create merged documents for only some of its data.
- Create a query (a set of selection criteria) to extract only the information you're interested in—for example, all the postal codes for your state.
- Sort the data source—for example, in postal code order for a bulk mailing.

When you use a filter or a query, all the data remains in the data source, but only the data that meets your specifications is used for the mail merge.

In this exercise, you'll open a document that you want to send to multiple people (the main document) and use the Mail Merge wizard to select the list of recipients (the data source). After you add information for a new recipient (a record) to the data source, you'll sort and filter it.

Important The mail merge process is discussed in this topic and the two following topics, each with its own exercise. You need to complete the exercises in sequence. Be sure to read the SET UP paragraphs of each exercise closely to ensure that you can successfully complete the exercises.



SET UP You need the `AnniversaryLetter_start` document and `CustomerList_start` workbook located in your `Chapter14` practice file folder to complete this exercise. In Windows Explorer, navigate to your `Chapter14` folder, double-click the `CustomerList_start` workbook to open it in Excel, save it as `CustomerListLetter`, and then close it. (To save the file, click the `File` tab to display the Backstage view, and click `Save As` in the usual way.) Open the `AnniversaryLetter_start` document, save it as `AnniversaryLetter`, and leave it open. Then display formatting marks, and follow the steps.



1. On the **Mailings** tab, in the **Start Mail Merge** group, click the **Start Mail Merge** button, and then click **Step by Step Mail Merge Wizard**.

The Mail Merge task pane opens.



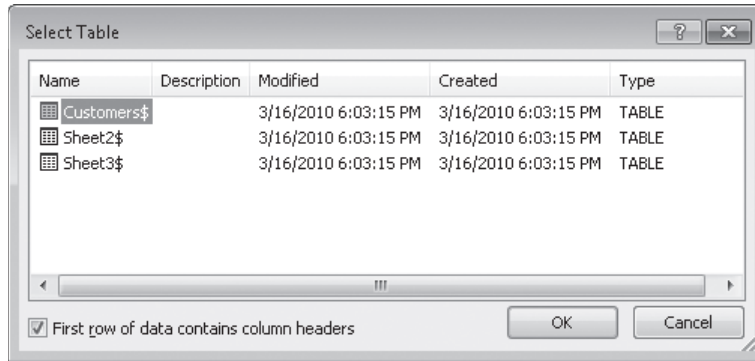
The first of the wizard's six mail merge steps.

2. With **Letters** selected as the document type, at the bottom of the **Mail Merge** task pane, click **Next: Starting document**.
3. With **Use the current document** selected in the step 2 task pane, click **Next: Select recipients**.
4. With **Use an existing list** selected in the step 3 task pane, click **Browse**.

The Select Data Source dialog box opens so that you can select the file in which your recipient information is stored.

- Navigate to your **Chapter14** practice file folder, and double-click the **CustomerListLetter** workbook.

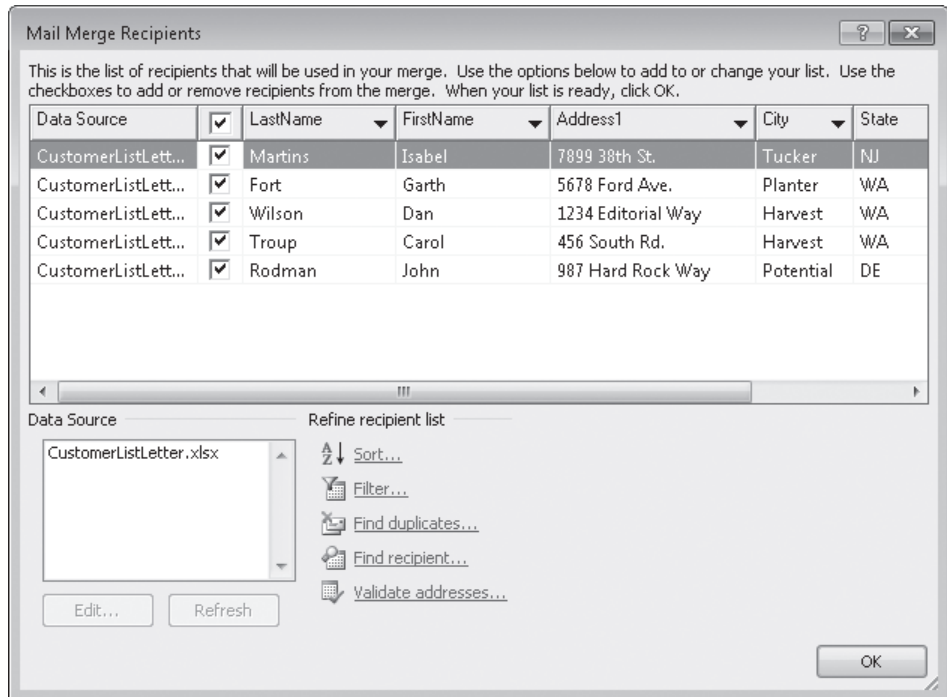
The Select Table dialog box opens.



This workbook contains three sheets, so you need to specify which sheet contains the data.

- With **Customers\$** selected in the **Select Table** dialog box, click **OK**.

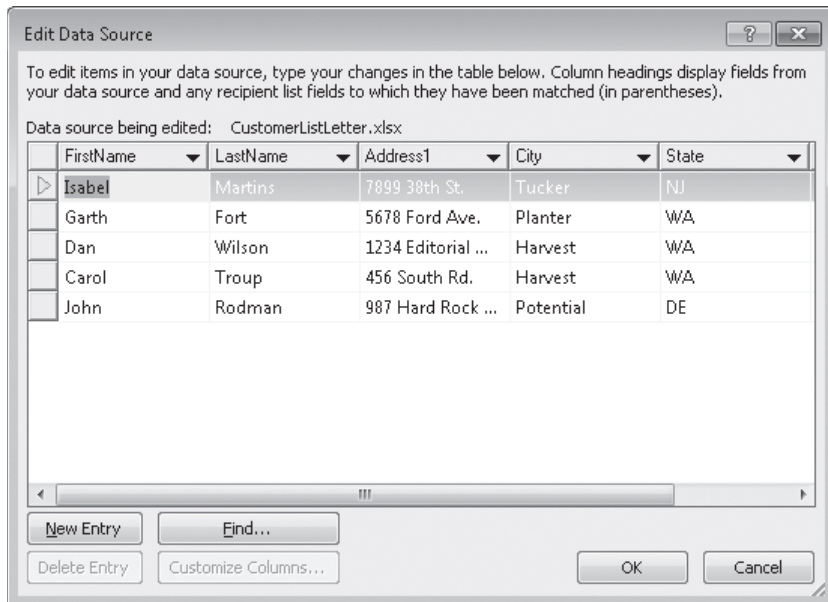
The Mail Merge Recipients dialog box opens.



The dialog box shows the records contained in the data source.

7. In the box in the **Data Source** area, click **CustomerListLetter.xlsx**, and then click **Edit**.

The Edit Data Source dialog box opens.



You can make changes to the data source in this dialog box.

8. Click **New Entry**, and then in the cell below **John**, type the following, pressing Tab to move from field to field:

FirstName **Heidi**
LastName **Steen**
Address1 **678 Pine St.**
City **Agriculture**
State **WA**
PostalCode **10003**

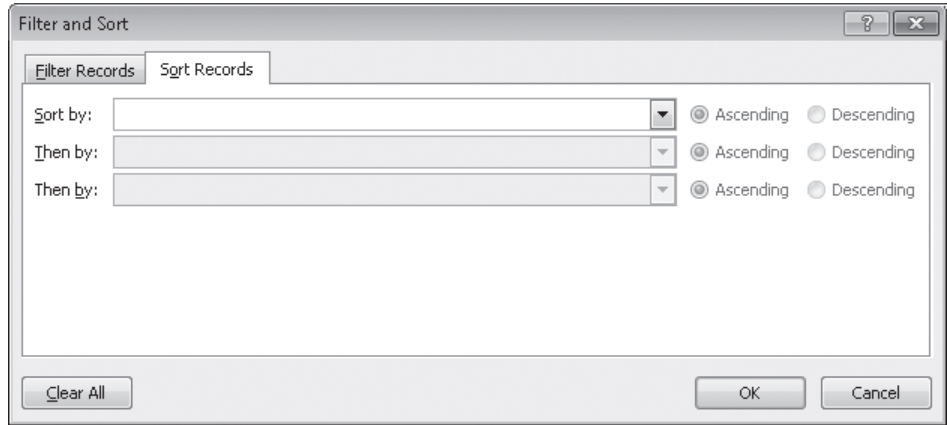
Tip You can add multiple records by clicking **New Entry** after you enter each record.

9. Click **OK**, and then click **Yes** to update the recipient list.

The new record appears at the bottom of the list of recipients in the Mail Merge Recipients dialog box.

10. In the **Refine recipient list** area, click **Sort**.

The Filter And Sort dialog box opens, with the Sort Records page displayed.



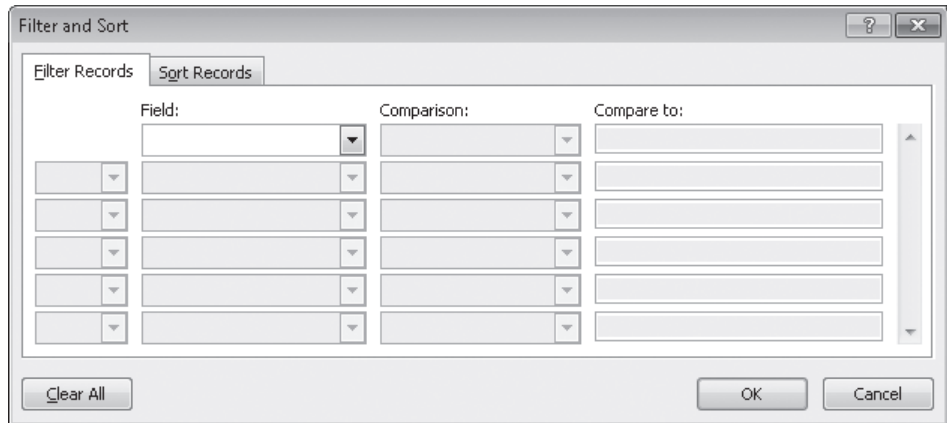
You can sort the records on up to three fields, each in ascending or descending order.

11. Display the **Sort by** list, and click **PostalCode**. Then with **Ascending** selected, click **OK**.

Tip You can also sort data in the Mail Merge Recipients dialog box by clicking the arrow to the right of the field you want to sort on and then clicking Sort Ascending or Sort Descending.

12. Drag the horizontal scroll box to the right, and verify that the records are sorted in ascending order by the **PostalCode** field. Then in the **Refine recipient list** area, click **Filter**.

The Filter And Sort dialog box opens, with the Filter Records page displayed.



You can specify that only the records that match certain criteria should be included in the merge.

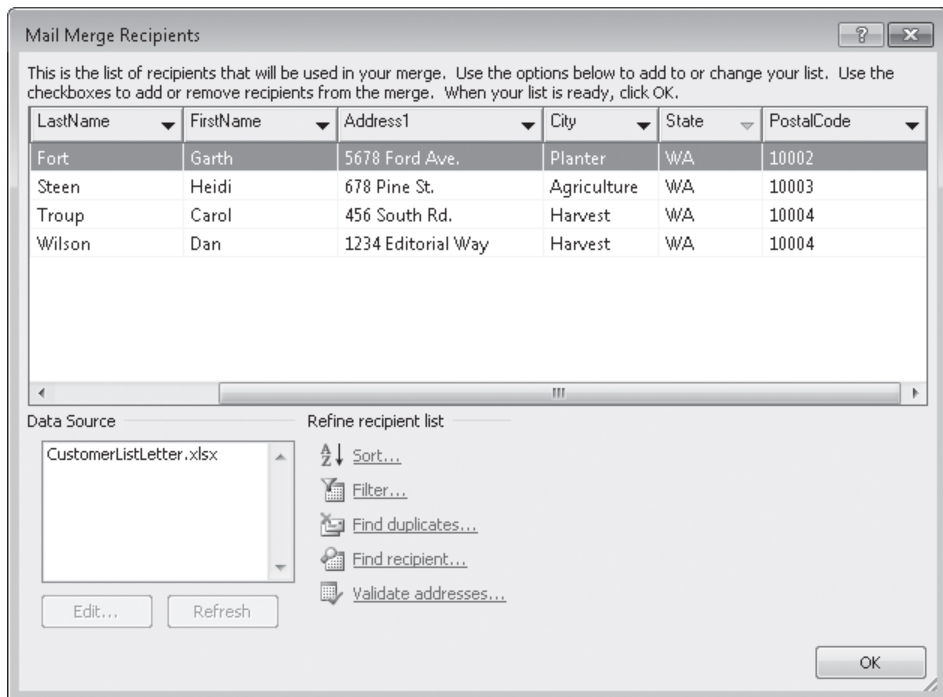
Tip You can also open the Filter And Sort dialog box by clicking the arrow to the right of any field name and then clicking Advanced.

13. Display the **Field** list, and click **State**.

The Comparison box displays the default Equal To criterion.

14. In the **Compare to** box, type **WA**, and then click **OK**.

The Mail Merge Recipients dialog box is updated to show only Washington State residents in ascending PostalCode order.



The records for customers who do not live in Washington State are hidden and will be excluded from the merge process.

15. Click **OK** to close the **Mail Merge Recipients** dialog box.

✘ CLEAN UP Save the **AnniversaryLetter** document, and leave it open for the next exercise.

Using an Outlook Contacts List as a Data Source

Using information from an Outlook contacts list as the data source for the merge process requires a few extra steps in the Mail Merge wizard.

To use Outlook information as the data source for a form letter:

1. In the Mail Merge task pane, display the step 3 task pane.
2. Under Select Recipients, click Select From Outlook Contacts, and then click Choose Contacts Folder.
3. If you are prompted to select your Outlook profile, select the one you want to use, and then click OK.

The Select Contacts dialog box opens.

4. In the Select A Contact Folder To Import list, click the folder you want to use, and then click OK.

The Mail Merge Recipients dialog box opens, displaying your Outlook contacts.

5. In the contacts table, clear the check boxes of any contacts you want to exclude from the merge process, or sort and filter the list to display the contacts you want to include in the desired order.
6. Click OK.

You can then continue with the next steps in the merge process, as explained in later topics in this chapter.

Preparing Main Documents

One common type of main document used in the mail merge process is a form letter. This type of document typically contains merge fields for the name and address of each recipient along with text that is the same in all the letters. In the form letter, each merge field is enclosed in « and » characters, which are called *chevrons*—for example, «AddressBlock».

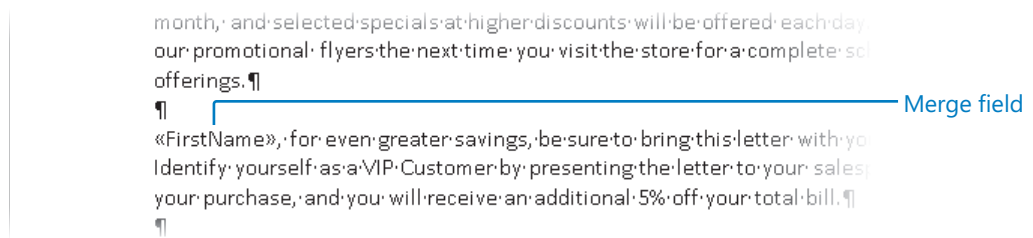
If you have already written the letter, you can insert the merge fields during the merge process; if you haven't written the letter, you can write it as part of the process. Either way, you first enter the text that will be common to all the letters and then insert the merge fields that will be replaced by the variable information from the data source.

Tip If you need to stop before you finish the merge process, you can save the form letter to retain the work you have done so far. You can then open the form letter and resume from where you left off. Because you have specified a data source for the form letter, you will be asked to confirm that you want to run a command to reattach the same data source.

You can insert merge fields in two ways:

- From the Mail Merge task pane in step 4 of the Mail Merge wizard
- By clicking buttons in the Write & Insert Fields group on the Mailings tab

Either way, clicking Address Block or Greeting Line opens a dialog box in which you can refine the fields' settings, whereas clicking individual fields inserts them with their default settings.



You can insert a merge field anywhere in the main document.

Tip To save the form letter without any mail merge information, click **Start Mail Merge** in the **Start Mail Merge** group on the **Mailings** tab, and then click **Normal Word Document**.

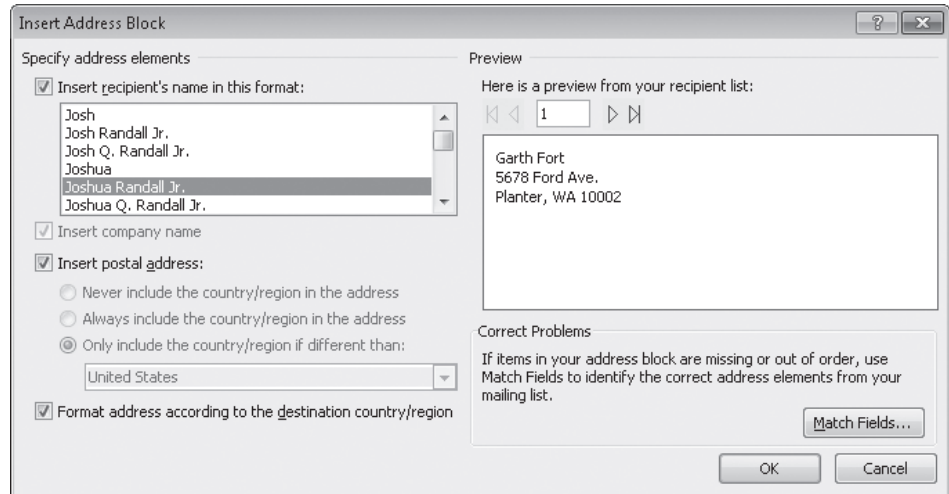
In this exercise, you'll modify an existing form letter by adding merge fields for a standard address, an informal greeting line, and the recipient's first name.



SET UP This exercise uses the **AnniversaryLetter** document to which you attached the **CustomerListLetter** workbook as the data source in the previous exercise. If you didn't complete that exercise, you should do so now. If you closed the **AnniversaryLetter** document at the end of the previous exercise, open it, and when a message asks whether you want to run the command that will attach the data source to the document, click **Yes**. Then open the Mail Merge task pane by clicking the **Start Mail Merge** button in the **Start Mail Merge** group on the **Mailings** tab and clicking **Step by Step Mail Merge Wizard**. The Mail Merge task pane opens to the step 3 task pane. Then display formatting marks, and follow the steps.

1. At the bottom of the **Mail Merge** task pane, click **Next: Write your letter**.
2. In the document, position the cursor in the first empty left-aligned paragraph, and then in the **Mail Merge** task pane, click **Address block**.

The Insert Address Block dialog box opens.



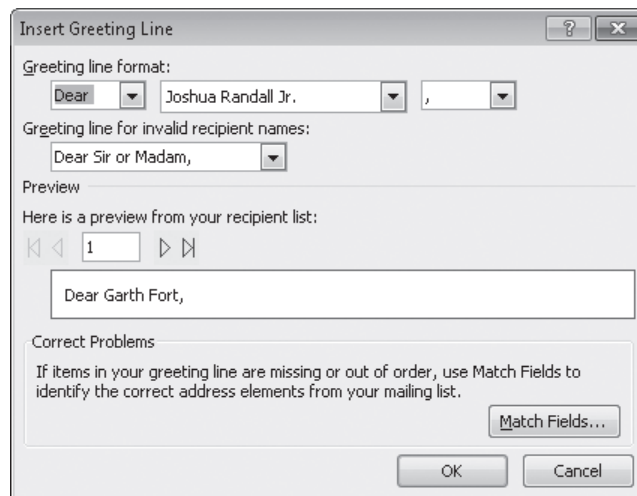
In this dialog box, you can refine the format of the fields that make up the Address Block merge field.

3. Click **OK** to accept the default settings.

Word inserts the «AddressBlock» merge field into the document. When you merge the form letter with the data source, Word will substitute the component name and address information for this merge field.

4. Press the Enter key twice, and then in the **Mail Merge** task pane, click **Greeting line**.

The Insert Greeting Line dialog box opens.



In this dialog box, you can specify how the greeting line should appear in the merged letters.

5. Under **Greeting line format**, display the list for the second box, and then click **Joshua**.
6. In the **Preview** area, click the **Next** button three times to view the greeting line for each of the recipients in the linked data source. Then click **OK** to close the **Insert Greeting Line** dialog box.

Word inserts the «GreetingLine» merge field into the document. When you merge the form letter with the data source, Word will replace this merge field with the word *Dear* and a space, followed by the information in the `FirstName` field, followed by a comma.

7. Click to the left of the **For even greater savings** paragraph, and in the **Mail Merge** task pane, click **More items**.

The Insert Merge Field dialog box opens.



You can insert individual fields from the data source.

8. With **Database Fields** selected and **FirstName** highlighted in the **Fields** box, click **Insert**, and then click **Close**.
9. Without moving the cursor, type a comma and press the Spacebar. Then change **For** to **for**.

The form letter is now ready for merging.

Wide World Importers

· 3 4 5 6 · E L M · S T R E E T , · S A N · F R A N C I S C O , · C A · 1 0 0 1 2 ¶

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«AddressBlock»¶
¶

«GreetingLine»¶
¶

I want to take a moment to thank you for your continued support of Wide World Importers. Because loyal customers like you come back year after year, we are still growing steadily and the future looks brighter than ever.¶

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As you know, we will celebrate our 10th anniversary in March. In honor of that occasion, we are holding a special *Mad March* sale! Everything in the store will be 20% off throughout the month, and selected specials at higher discounts will be offered each day. Please pick up one of our promotional flyers the next time you visit the store for a complete schedule of these special offerings.¶

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«FirstName», for even greater savings, be sure to bring this letter with you when you shop. Identify yourself as a VIP Customer by presenting the letter to your salesperson at the time of your purchase, and you will receive an additional 5% off your total bill.¶

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This form letter contains three merge fields that will be replaced with information from the data source.



CLEAN UP Save the AnniversaryLetter document, and leave it open for the next exercise.

Merging Main Documents and Data Sources

After you specify the data source you want to use and enter merge fields in the main document, you can preview the merged documents before performing the actual merge. You can exclude recipients during this preview. When you are ready, you can either send the merged documents directly to the printer or you can merge them one after the other into a new document, separated by page breaks. If you merge to a new document, you have another chance to review and, if necessary, edit the merged documents before sending them to the printer.

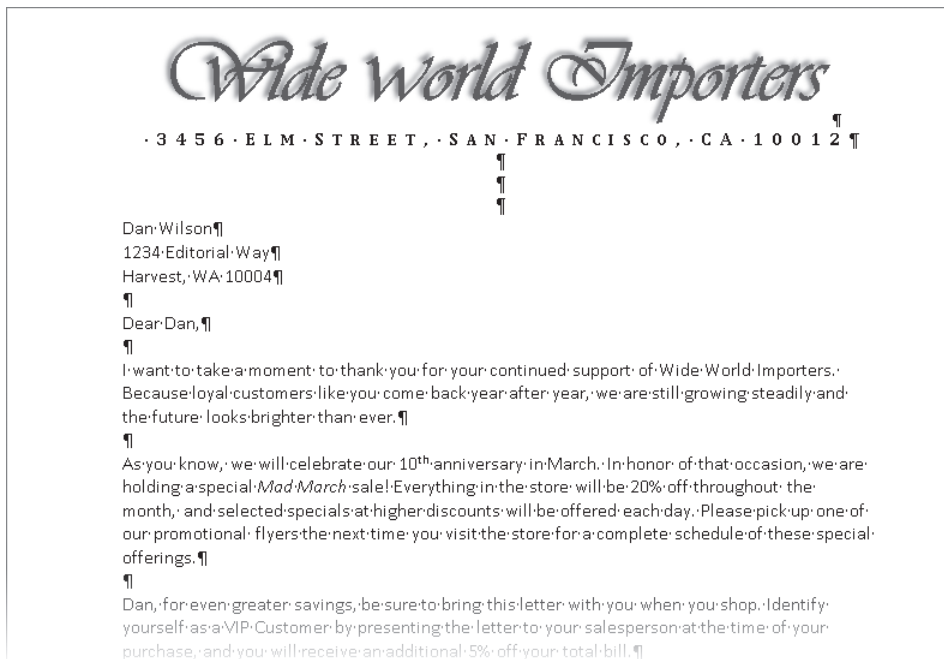
In this exercise, you'll preview merged letters, exclude recipients from the merge, merge the letters into a new document, and then save the merged file.



SET UP This exercise uses the *AnniversaryLetter* document to which you attached the *CustomerListLetter* workbook as the data source and in which you inserted merge fields in the previous two exercises. If you didn't complete those exercises, you should do so now. If you closed the *AnniversaryLetter* document at the end of the last exercise, open it, and when a message asks whether you want to run the command that will attach the data source to the document, click **Yes**. Then open the **Mail Merge** task pane by clicking the **Start Mail Merge** button in the **Start Mail Merge** group on the **Mailings** tab and clicking **Step by Step Mail Merge Wizard**. The **Mail Merge** task pane opens to the step 3 task pane. Then display formatting marks, and follow the steps.

1. At the bottom of the **Mail Merge** task pane, click **Next** until the step 5 task pane is displayed.
2. If necessary, scroll down the letter until you can see the address block, the greeting line, and the third paragraph at the same time.

Word displays a preview of how the personalized letter will look when merged with the data source.



You can preview how the personalized letters will look before you proceed with the merge.

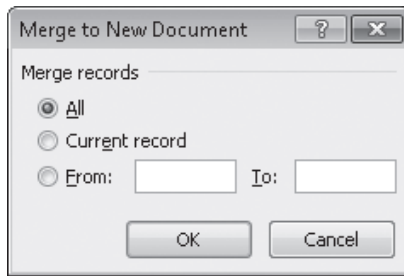


3. Under **Preview your letters** in the **Mail Merge** task pane, click the **Previous Record** button three times to preview all the letters.

Tip You can also preview the next or previous documents by clicking the **Next Record** or **Previous Record** button in the **Preview Results** group on the **Mailings** tab. You can jump to the first merged document by clicking the **First Record** button or the last merged document by clicking the **Last Record** button.

4. To exclude the displayed recipient (*Garth Fort*) from the merge, under **Make changes** in the **Mail Merge** task pane, click **Exclude this recipient**.
5. Preview the letters again. Then at the bottom of the **Mail Merge** task pane, click **Next: Complete the merge**.
6. In the **Mail Merge** task pane, click **Edit individual letters**.

The Merge To New Document dialog box opens.



If you want to merge only some of the records, you can specify which ones in this dialog box.

7. With the **All** option selected, click **OK**.

Word creates a document called *Letters1* that contains a personalized copy of the form letter for each of the selected records.



8. On the Quick Access Toolbar, click the **Save** button.

Keyboard Shortcut Press **Ctrl+S** to save files.

See Also For more information about keyboard shortcuts, see “Keyboard Shortcuts” at the end of this book.

The Save As dialog box opens so that you can save the new document with a more specific name.

9. Navigate to your **Chapter14** practice file folder, type **My Merged Letters** in the **File name** box, and then click **Save**.

Word saves the new document in the specified folder with the name *My Merged Letters*.



CLEAN UP Close the **My Merged Letters** document. Then save and close the **AnniversaryLetter** document.

Printing Envelopes

You can print an envelope based on an address in a document. To do this:

1. In the document, select the lines of the address. (Do not select any blank lines above or below the address.)
2. On the Mailings tab, in the Create group, click the Envelopes button.

The Envelopes And Labels dialog box opens. You can edit the address in the Delivery Address box and enter a return address in the Return Address box.

Tip You can have Word supply the return address. Display the Advanced page of the Word Options dialog box. Toward the bottom of the page, under General, enter the return address in the Mailing Address box, and click OK. The address then appears by default as the Return Address in the Envelopes And Labels dialog box. If you want to use envelopes with a preprinted return address, you must select the Omit check box to avoid duplication.

3. Size 10 is the default envelope size. If you want to select a different envelope size, click Options, make your selection, and then click OK.

In the Envelope Options dialog box, you can also specify the feed method (horizontally or vertically and face up or face down), and the font and font size of both the address and the return address.

If you have electronic postage software installed on your computer, you can include electronic postage.

4. Insert an envelope in the printer, and then click Print.

Alternatively, you can click Add To Document to have Word insert the address in the format required for an envelope on a separate page at the beginning of the current document.

Sending Personalized E-Mail Messages to Multiple Recipients

When you want to send the same information to all the people on a list—for example, all your customers, or all the members of a club or your family—you don't have to print letters and physically mail them. Instead, you can use mail merge to create a personalized e-mail message for each person in a data source. As with a form letter that will be printed, you can either use the Mail Merge wizard or use the buttons on the Mailings tab to insert merge fields into the form message. These merge fields will be replaced with information from the specified data source.

If you are using the wizard, be sure to click E-Mail Messages in step 1. If you are not using the wizard, you can specify the list of e-mail addresses you want to send the message to by clicking the Select Recipients button in the Start Mail Merge group on the Mailings tab. In either case, you have three options:

- Type an entirely new list of recipients.
- Use an existing list of recipients.
- Select recipients from an Outlook contacts list.

You can quickly add merge fields to a form message by using the buttons in the Write & Insert Fields group. Many e-mail messages need only a greeting line. Because e-mail messages tend to be less formal than printed letters, you might want to start the messages with something other than the predefined greeting options (*Dear* and *To:*) by typing a custom greeting.

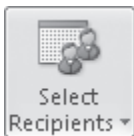
In this exercise, you'll open an existing form message, use the buttons on the Mailings tab to create a short mailing list, add a custom greeting line merge field, and then complete the merge.



SET UP You need the [ThankYouEmail_start](#) document located in your [Chapter14 practice file folder](#) to complete this exercise. Open the [ThankYouEmail_start](#) document, and save it as [ThankYouEmail](#). Display formatting marks, and then follow the steps.

1. On the **Mailings** tab, in the **Start Mail Merge** group, click the **Select Recipients** button, and then in the list, click **Type New List**.

The New Address List dialog box opens.



Title	First Name	Last Name	Company Name	Address Line 1

If you don't have an existing data source, you can create one as part of the mail merge process.

2. Skipping over the Title field, type **Andrea** in the **First Name** field, type **Dunker** in the **Last Name** field, press the Tab key until you reach the **E-mail Address** field (the last field in the table), and then type **andrea@consolidatedmessenger.com**.
3. Click **New Entry**, and then add **Judy Lew**, whose e-mail address is **judy@lucernepublishing.com**.

Tip If you have several e-mail addresses to add to the list, you can press Tab in the last field of the last entry, instead of clicking New Entry each time.

4. Repeat step 3 to add **Ben Miller**, whose e-mail address is **ben@wingtiptoys.com**, and then click **OK**.

The Save Address List dialog box opens, with the contents of your My Data Sources folder displayed. This dialog box is very similar to the Save As dialog box.

Troubleshooting If the dialog box doesn't appear, it might be hidden behind the program window, which will start flashing to indicate that you need to attend to the dialog box before you can proceed. Click the program window title bar to make the dialog box appear, or click the Word button on the Windows Taskbar and then click the dialog box thumbnail.

5. Navigate to your **Chapter14** practice file folder, type **My E-Mail Data Source** in the **File name** box, and then click **Save**.

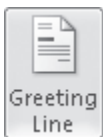
Word saves the data source in the specified location as a database.

6. With the cursor at the beginning of the form message, press Enter twice, and then press the Up Arrow key twice.
7. On the **Mailings** tab, in the **Write & Insert Fields** group, click the **Greeting Line** button.

The Insert Greeting Line dialog box opens.

8. In the first box under **Greeting line format**, replace **Dear** with **Hello** followed by a comma and a space. Display the list of options for the second box, and click **Joshua**. Then display the list of options for the third box, and click **:** (the colon).
9. In the **Preview** area, click the **Next** button twice to preview the greetings as they will appear in the e-mail messages.
10. Click the **First** button to return to the first record, and then click **OK**.

Word inserts the «GreetingLine» merge field at the top of the form message.



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«GreetingLine»¶
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Thank you for your recent visit to our store. It was a pleasure to be able to answer your decorating
questions and offer suggestions. As you requested, we have added your name to our online mailing list.
You will be receiving our monthly newsletter, as well as advance notice of upcoming shipments and in-
store events. ¶
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You can also visit our Web site at www.wideworldimporters.com for a schedule of events, links to online
decorating resources, articles on furniture care, and more. ¶
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If you want to edit the custom greeting, you can right-click its merge field and then click *Edit Greeting Line*.



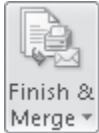
11. On the **Mailings** tab, in the **Preview Results** group, click the **Preview Results** button.

Word shows a preview of the first message. You can click the Next Record button in the Preview Results group to preview the messages for other recipients. Clicking the Preview Results button again turns off the preview.



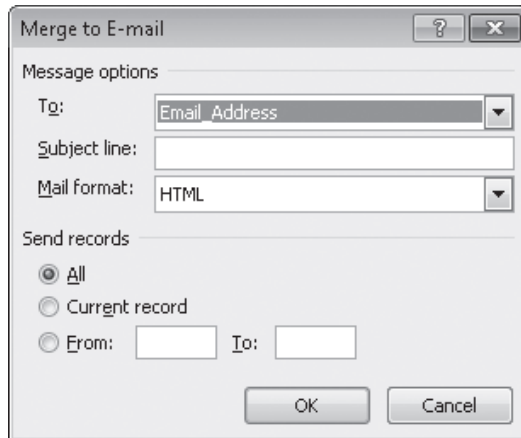
12. In the **Write & Insert Fields** group, click the **Highlight Merge Fields** button.

Word indicates the merge field with a gray highlight.



13. In the **Finish** group, click the **Finish & Merge** button, and then in the list, click **Send E-mail Messages**.

The Merge To E-Mail dialog box opens.



You set up the e-mail message header information and format in this dialog box.

14. In the **Message options** area, verify that **Email_Address** is selected in the **To** box, type **Welcome to Wide World Importers!** in the **Subject line** box, and verify that **HTML** is selected in the **Mail format** box.

15. In this case, click **Cancel**.

If you click OK, Word converts the form message to an e-mail message and transmits it to your default e-mail program, which then sends the message to each of the selected addresses in the data source.

Tip Your e-mail program might require that you log in or manually send the messages (they will be held in the outbox until sent). If you are using Outlook, a copy of each sent message appears in your Outlook Sent Items folder. If you plan to send a large number of messages, you might want to turn off the saving of sent messages.


 **CLEAN UP** Save the ThankYouEmail document, and then close it.

Creating and Printing Labels

Most organizations keep information about their customers or clients in a worksheet or database that can be used for several purposes. For example, the address information might be used to send billing statements, form letters, and brochures. It might also be used to print sheets of mailing labels that can be attached to items such as packages and catalogs.

To create sheets of mailing labels, you first prepare the data source and then prepare the main document by selecting the brand and style of labels you plan to use. Word creates a table with cells the size of the labels on a page the size of the label sheet, so that each record will print on one label on the sheet. You insert merge fields into the first cell as a template for all the other cells. When you merge the main document and the data source, you can print the labels or create a new label document that you can use whenever you want to send something to the same set of recipients.

In this exercise, you'll use the Mail Merge wizard to create mailing labels. You'll then print the labels on standard paper to proofread them.

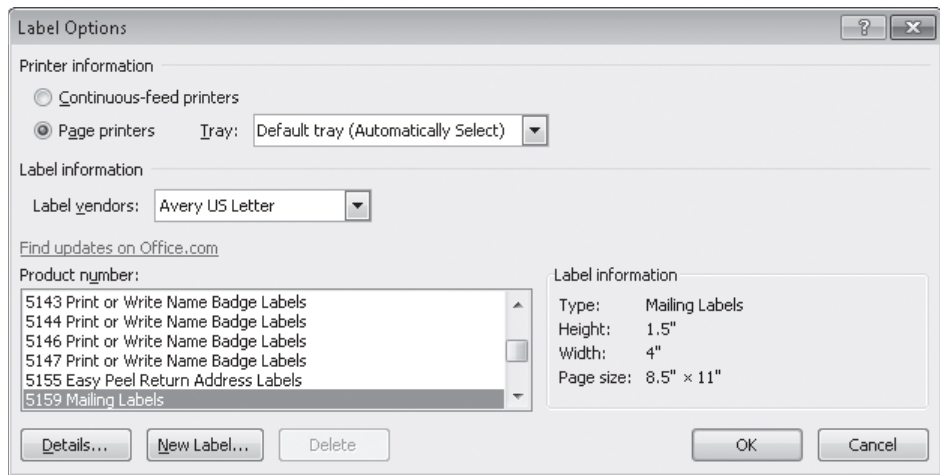
 **SET UP** You need the CustomerList_start workbook located in your Chapter14 practice file folder to complete this exercise. Open the CustomerList_start workbook, save it as *CustomerListLabels*, and then close it. Display formatting marks, and be sure to turn on your printer. (If you don't want to print the labels, you can proof them on-screen.) Then with the Word program window active, follow the steps.

1. Display the Backstage view, click **New**, and then double-click **Blank document**.
A new blank document opens.



2. On the **Mailings** tab, in the **Start Mail Merge** group, click the **Start Mail Merge** button, and then click **Step by Step Mail Merge Wizard**.
3. In the **Mail Merge** task pane, click **Labels**, and then click **Next: Starting document**.
4. With **Change document layout** selected in the step 2 task pane, click **Label options**.

The Label Options dialog box opens.



Every label is different. You need to specify the print method, the manufacturer and/or type, and the product number so that Word can set up the labels correctly.

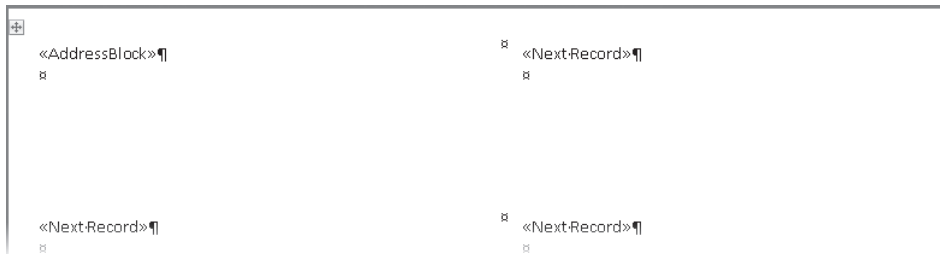
5. In the **Label information** area, ensure that the **Label vendors** setting is **Avery US Letter**.
6. In the **Product number** box, ensure that the setting is **5159 Mailing Labels**, and then click **OK**.

Word inserts a table that fills the first page of the main document.

7. At the bottom of the **Mail Merge** task pane, click **Next: Select recipients**.
8. With **Use an existing list** selected, click **Browse**, navigate to your **Chapter14** practice file folder, double-click the **CustomerListLabels** workbook, and then in the **Select Table** dialog box, click **OK**.
9. In the **Mail Merge Recipients** dialog box, clear the check boxes of the two recipients whose addresses are not in Washington State (WA), and then click **OK**.

Word inserts a «Next Record» merge field in all the cells in the main document except the first.

10. At the bottom of the **Mail Merge** task pane, click **Next: Arrange your labels**, and then ensure that you can see the left edge of the main document.
11. With the cursor positioned in the first cell, in the **Mail Merge** task pane, click **Address block**.
12. In the **Insert Address Block** dialog box, click **OK** to accept the default settings. Word inserts an «AddressBlock» merge field into the first cell.

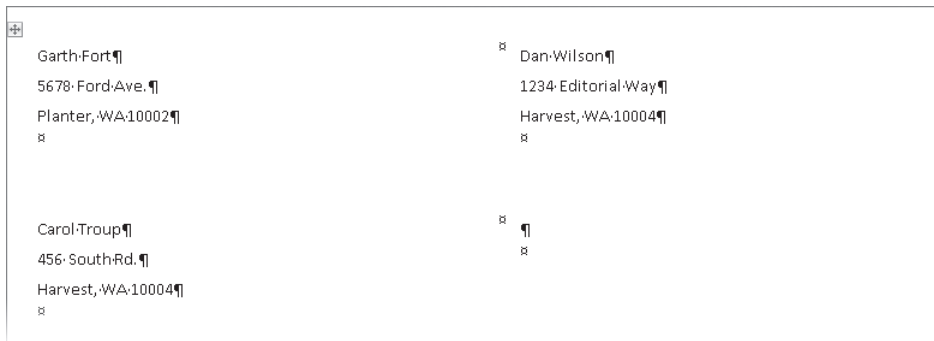


The merge fields in the first cell in the table will be used as a template for all the other cells.

13. In the **Mail Merge** task pane, click **Update all labels**.
The «AddressBlock» merge field is copied to the other cells, after the «Next Record» merge field.
14. At the bottom of the **Mail Merge** task pane, click **Next: Preview your labels**. Then in the **Preview Results** group, click the **First Record** button.



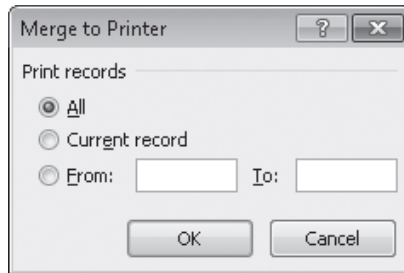
The merge fields are replaced by the specified information from the data source.



Labels for the three recipients who live in Washington State, as they will appear after the merge.

15. At the bottom of the **Mail Merge** task pane, click **Next: Complete the merge**. Then in the **Mail Merge** task pane, click **Print**.

The Merge To Printer dialog box opens.



You have the opportunity to exclude records from the merge before printing the labels.

16. With the **All** option selected, click **OK**.
17. In the **Print** dialog box, verify that the name of the printer you want to use to print the labels appears in the **Name** box, and then click **OK** to print the labels.

The labels are printed on regular paper on the printer you selected. If you want to print on label sheets, insert the sheets in the printer's paper tray before clicking OK in the Print dialog box.

✘ CLEAN UP Save the label document as *My Merged Labels*, and then close it.

Key Points

- The mail merge process works by combining static information in a main document with variable information in a data source.
- The main document can be any type of document, such as a letter, e-mail message, envelope or label template, or a directory or catalog.
- The data source is organized into sets of information, called *records*, with each record containing the same items, called *fields*.
- You insert placeholders called *merge fields* into the main document to tell Word where to merge items from the data source.
- You don't have to use all the records in a data source for a mail merge. You can filter the data and exclude specific records.
- You can send the mail merged results directly to your printer or to a new document that you can edit and save.

Chapter at a Glance

I saw some of the prices at Fabrikam, but I was reassured that our strategy involves weekly loss-leader promotions that are not unusual overall. We need to find a way to make this point in our

Prices	Service	Quality
Some lower, some much higher	Adequate	Some poor, some good
Lower	Non-existent	Substandard to adequate

Comment [M1]: But slow
 Comment [SH2R1]:
 Comment [SH3]: They carry the new Ultra line. 3/24. This is a special order.

Add and review comments, [page 385](#)

I saw some of the prices at Fabrikam, but I was reassured that our strategy involves weekly loss-leader promotions that are not unusual overall. We need to find a way to make this point in our

Prices	Service	Quality
Some lower, some much higher	Adequate but slow	Some poor, some good
Lower	Non-existent	Substandard to adequate
Much higher	Good	Good

Deleted: much
 Deleted: Poor

Track and manage document changes, [page 388](#)

Compare and merge documents, [page 393](#)

ServiceSH - Microsoft Word

File Home Insert Page Layout References Mailings Review View

Spelling & Grammar Research Thesaurus Word Count Proofing Translate Language Language New Comment Previous Next Track Changes Show Markup Show Markup Reviewing Pane Tracking Accept Reject Previous Next Compare Block Authors Restrict Editing Protect

Summary: 17 revisions
 Insertions: 7 Deletions: 9 Moves: 0
 Formatting: 1 Comments: 0

Main document changes and comments

- Inserted Chris Preston March 22
- Deleted Chris Preston January 25
- Deleted Chris Preston natural
- Inserted Chris Preston Build
- Deleted Chris Preston Forge
- Inserted Chris Preston 30
- Deleted Chris Preston 15
- Inserted Chris Preston 30
- Deleted Chris Preston 15
- Inserted Chris Preston 30
- Deleted Chris Preston 15

Combined Document (ServiceSH)

Original Document (ServiceSH - Sidney Higs)

Revised Document (ServiceCP - Chris Preston)

Community Service Committee
 EMPLOYEE ORIENTATION

Proposal
 Updated: March 22, 2010

Service Project Goals

- Familiarize you with the concept of service.
- Make service a natural part of your life.
- Engage and motivate you.
- Build Forge a sense of teamwork among all employees across departments.
- Provide appropriate skills development through brainstorming, planning, and leadership opportunities.
- Meet genuine community needs.

Password-protect documents, [page 396](#)

Password

'LoansProtected' is reserved by Marlene Lambert

Enter password to modify, or open read only.

Password:

Read Only OK Cancel