

## How To Create A Mail Merge

A mail merge, whether it be mailing labels or a form letter, is composed of three parts. These three parts are:

1. A data file. This file is an organized set of information such as names and addresses. This file can be created in Word, it can be an Excel spreadsheet, an Access database or a table in a Word document.
2. A master Word document that indicates where the information in the data file will be merged into the document.
3. The merged document. This document is created by merging the data file with the master document. This file will have a page or a label for each record of information that exists in the data file. This is the document that is printed but not necessarily saved because it can be recreated at any time by remerging the master document and the data file.

How to create mailing labels using a mail merge: (A data file must exist or a new can be created within Word). There is a data file on your class CD, in the Word Documents folder what we will use for the merge.

- Open Microsoft Word.
- Click on the Tools menu.
- Click on Letters and Mailings.
- Click on Mail Merge. The Mail Merge Task Pane opens at the right side of the screen and will lead you through the six step process of creating a Mail Merge.

### Step 1: Selecting the Document Type

- Choose Labels.
- Click Next at the bottom of the Task Pane.

### Step 2: The Starting Document

- Under Select Starting Document, we don't need to make a change since this is the first time we are doing a merge. We are making the master document. If we had made a master document previously we could change the choice to Start from existing document.
- Under Change Document Layout, click on Label Options. Here we will choose the type of address label that we will be using. Avery 5160 is a popular address label. Let's choose that one. When you choose Avery 5160 and click OK, you'll see the layout of the document change to a page that looks like labels.
- Click Next at the bottom of the Task Pane.

### Step 3: Select Recipients

- Under Select Recipients, we will use an existing list, make no changes. If a list didn't exist, we could make a new list at this point.
- Under Use an Existing List, click on Browse.
- The data file we will be using is on your CD. Browse to D:\Word Documents. The data file is called Address List.
- When Address List is chosen, you'll see the master document change and <Next Record> will appear on all of the labels.
- Click Next at the bottom of the Task Pane.

#### Step 4: Arrange Your Labels

- Under Arrange Your Labels, choose Address Block. The Address Block dialog box appears. Usually the default setting in this dialog box are OK to use so click OK.
- Under Replicate Labels, click Update All Labels. If you miss this step you will have only one label. By replicating the labels you will have a full set of labels and a label for each record in the data file. After replication all labels, you will see <Address Block> added to each label.
- Click Next at the bottom of the Task Pane.

#### Step 5: Preview Your Labels

- Step 5 lets you preview your labels to see how they will look when they are printed.
- Click Next at the bottom of the Task Pane.

#### Step 6: Complete the Merge

- At this point you can print the labels or you can choose Edit Individual Labels. I usually choose Edit Individual Labels because this will cause a new document that is the product of the data file and the master document to be created. I can then look at the new document and see if it is OK to print before sending the job to the printer and then finding out that something wrong and wasting a bunch of labels or paper.

#### Last Step: Saving the master document.

- When you save the master document Word will remember the data file that was used with this merge. When you open the master document again, it will be ready to merge and print even if you changed the information in the data file.