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**ST. JOHN FISHER COLLEGE**

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The Mailings Tab

1. From within the **Start Mail Merge** group, click on the **Start Mail Merge** button and select the **Mail Merge Wizard**. There are six key steps to creating a merged document in Word:

   - **Step 1**: Select Document type; letters, e-mail messages, envelopes, or labels and click on **Next**.
   - **Step 2**: Select different options to create letters; use current, template, or existing document
   - **Step 3**: Select Recipients; existing list, Outlook contacts, or type new list and click on **Next**.
   - **Step 4**: Write your letter; address block, greeting line, or more items and click on **Next**.
   - **Step 5**: Preview your letters; review merged letters or exclude recipients and click on **Next**.
   - **Step 6**: Complete the merge; print or edit individual letters.
Main Document

On the **Mailings** tab, within the **Start Mail Merge** group, click on **Start Mail Merge** button and select letters.

From the Mail Merge drop-down menu, you can use Mail Merge to create:

- **E-Mail Messages**- same content in all messages, but each e-mail message goes to an individual recipient.
- **Envelopes**- Unique destination address on each envelope while return address is the same for all envelopes.
- **Labels**- name and address is on each label, but name and address is unique for each individual label created.
- **Directory**- same kind of information; i.e., name and description but each name and description in each item is unique.

1. Create the main document (letter). Enter text, including formatting, and other elements needed.
2. Enter placeholders. Text you enter in ALL CAPS will be replaced during the mail merge process. The fill-in-the-blanks parts are known as fields. This will help you determine which and how many fields you will need in the document.

   **Example:**

   July 18, 2009

   Dear FIRST LAST,

   Welcome FIRST, we are glad that you have selected St. John Fisher College as place to begin your college education ….. We have scheduled you to move in on DATE. We look forward to seeing you in the fall.

3. After finishing the letter, save it.
E-Mail Messages

1. On the Mailings tab, within the Start Mail Merge group, click on Step-by-Step Mail Merge Wizard button and select E-Mail Messages.

2. Select a starting document; use the current document, start from a template, and start from existing document. Click on Next to select recipients.

   a. Use current document- start writing your message
   b. Start from a template- click on Select template... a ready to use template can be tailored to your needs.
   c. Start from existing document- click on Open to locate an existing document, make changes to content.

3. Select from Outlook contacts and click on Choose Contacts Folder.

4. From the Select Contacts dialog box, click on the appropriate choice and click on OK.

5. From the Mail Merge Recipients dialog box, from the list of recipients use options to add or change the list and click on OK.
6. Write your letter if you haven’t already done so and add information to your letter. Click within your document to add one of the items to your message and click on **Next**.
   a. Address block
   b. Greeting line
   c. Electronic postage—this option is an add-on available from Microsoft.
      Not installed by default.
   d. More items

7. Preview your letters using the arrows to view each message and click on **Next**.
8. Complete the merge:
   a. Click on print or edit individual letters if changes need to be made to messages.
   b. Using the Mail Merge Wizard, click on Electronic Mail or from the Mailings tab, within the Finish group, click on the Finish & Merge button and select Send E-mail Messages.
   c. From the Merge to E-mail dialog box, add a subject line and click on OK to send messages.

Create and print envelopes
1. On the Mailings tab, within the Start Mail Merge group, click on Step-by-Step Mail Merge Wizard button and select Envelopes. Click on Next.
2. Within the Envelope Options dialog box, select envelope size and click OK.
3. **Select Recipients**: select existing list, Outlook contacts, or Type a new List.

![Select Recipients Dialog Box]

4. **Arrange your envelope**: select the area of the envelope where the Address Block will be inserted.

![Arrange your envelope]

5. Within the **Insert Address Block** dialog box, use this dialog box to specify address format, preview, and correct problems, when finished click on **OK**.

![Insert Address Block Dialog Box]
6. **Preview your envelopes**; use the right and left arrow keys to preview each individual envelope.

7. **Complete the merge**; print and edit envelopes
Create and print labels

1. On the Mailings tab, within the Start Mail Merge group, click on Step-by-Step Mail Merge Wizard and select Labels.

2. Within the Label Options dialog box, select a manufacturer and product number in the Label information section.

3. Click on OK.

4. Select Recipients; select use existing list, Outlook contacts, or new list.

5. Arrange your labels;
   - Within the Insert Address Block dialog box, use this dialog box to specify address format, preview, and correct problems, when finished click on OK.
   - Update labels -within the Write and Insert fields group, click on the Update Labels button.

6. Preview labels and Complete merge;
Connecting to a Data Source
Manually from the Mailings tab, within the Start Mail Merge group click on the Select Recipients button. The Mail Merge Wizard gives three choices to select recipients.

- **Use an Existing List**- an existing data source; Excel workbook or Access database can be used. Click Browse and locate the list.
- **Select from Outlook Contact**- data will be imported directly from Outlook. Click on Choose Contacts Folder and select the Contacts list.
- **Type a New List**- Create a data form to add names and addresses, if you need to modify click on the Customize button. Click on the Create button to enter data.

Within the Select Data Source dialog box to locate the list when choosing the, **Use an existing list** option.

Note: Within the Select Table dialog box, confirm the box indicating the “First row of data contains column headers”, this will ensure that field labels (Last Name, First Name, Address1, etc.) won’t be mistaken for data.

- **Within the Select Contacts** dialog box select the contact folder as your data source
- **Within the New Address List** dialog box enter names, addresses, etc. to create a data source.
Filter list of recipients

The data source can be refined by using the commands from within the **Mail Merge Recipients** dialog box.

Sort or Filter commands

1. **Filter Records**- allows you to filter a certain field and refined the recipient list. Click **OK**, to show refined list.

2. **Sort Records**- allows you to sort data in ascending or descending order, Click **OK** to view data.

3. Select an individual record-use checkboxes to add or remove recipients from list.
Fields

Fields can be added in step 4 of the Mail Merge Wizard task pane as well as from the Write & Insert Fields group, within the Mailings tab. Addresses, greetings, and other personalized merge fields can be added to the main document.

1. Click on the Address block command.
2. Within the Insert Address Block dialog box, include the address elements and formats and click OK.

3. Click on the Greeting line command. Includes the salutation, name format, and punctuation. Click OK.
4. Click on the **More items** command.
5. Select **Address Fields** even if the data source’s fields don’t have the same name as your fields.
6. Within the **Fields** section, click on a Field.
7. Click **Insert** and **Close**.
Preview and Complete
With fields added to your main document, using the Mail Merge Wizard step 5 or click on the Preview Results button will replace merged fields with actual data from the recipient list, giving you the option to modify, print and save.

1. From the Mail Merge pane, the Preview your letters section, click on the arrows to scroll through all letters.
   - Click on Exclude this recipient to modify the recipient list.

2. Click on Next: Complete the merge or from the Mailings tab, within the Finish group click on the Finish & Merge button.
   - Select Print or Edit individual letters. Selecting Print will produce your letters and Editing will allow changes to be made to merged letters.

Online Training and other Resources
1. Atomic Learning Online Tutorials:
   A. The Video Tutorials will guide you through the use of over a 130 common software applications.
   B. To access: From the home page (home.sjfc.edu), click on mySJFC (my.sjfc.edu) and enter your Network Credentials. Word 2013 - Mail Merge Training