



Merging Letters

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Merging Letters

A Microsoft Word merge consists of 2 files which are “merged” together **PLUS** a Scrap document.

1. **Shell Document:** You can merge Letters, E-mail messages, Envelopes, Labels and a Directory. (This class will cover merging a letter.) Notes for creating other types of merges can be found at the end of this document under the heading **How other types of merges differ from a letter merge.**
2. **Contact List:** Your list can originate in an Excel spreadsheet, an Access database or you can create a list inside Word. (These instructions assume the list is an Excel spreadsheet named **mergelist.xlsx**) If using Excel, each column must have a field name above it. The field names must be in the first row. You cannot insert any text above the field row. If your list doesn't already exist in Excel or Access, follow the instructions at the end of this document under the heading **Creating your contact list on the fly.**

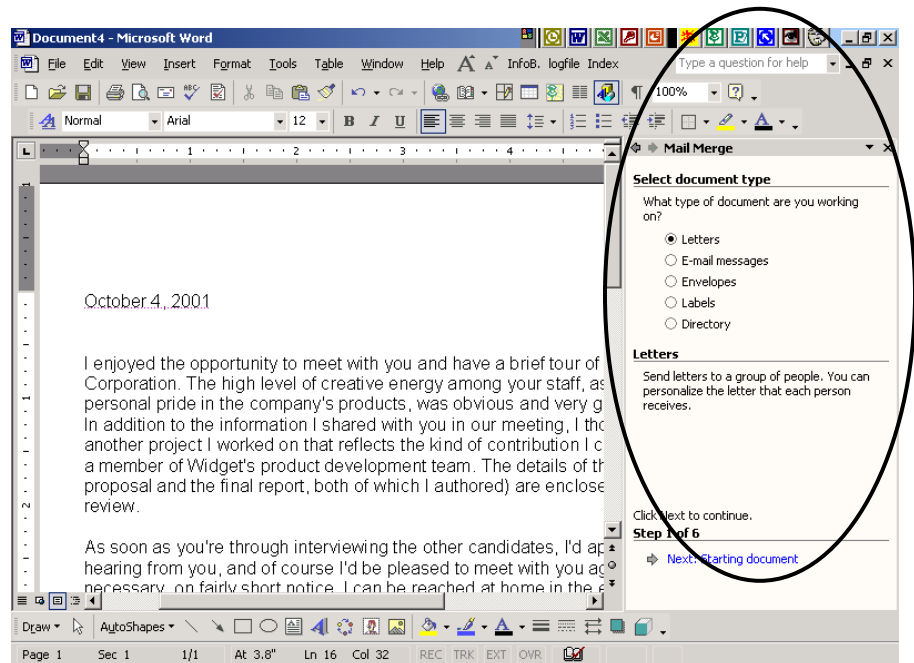
Setting up your Shell Letter

Open your letter. Your shell letter can be plain or highly formatted with graphics, fonts, colors. The sky's the limit! Don't forget to add your signature and even your letterhead.

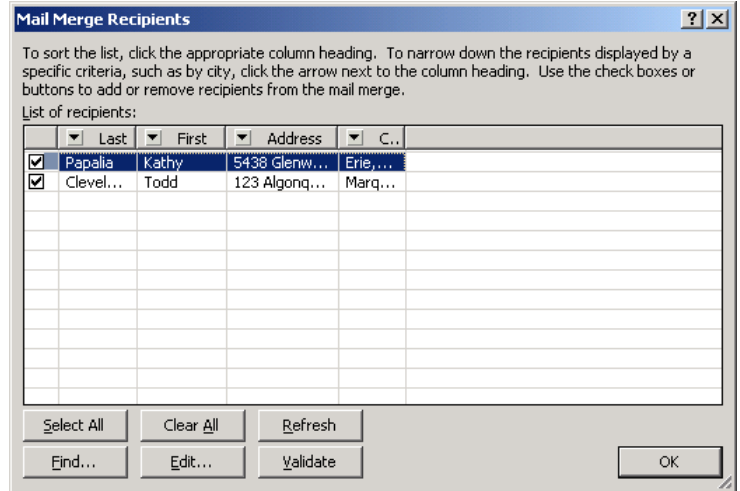
1. Click the **Mailings** ribbon.
2. Click the **Start Mail Merge** button and choose **Step-by-Step Mail Merge Wizard**.

A **task pane** will appear to the right of the screen. It will say **Step 1 of 6**.

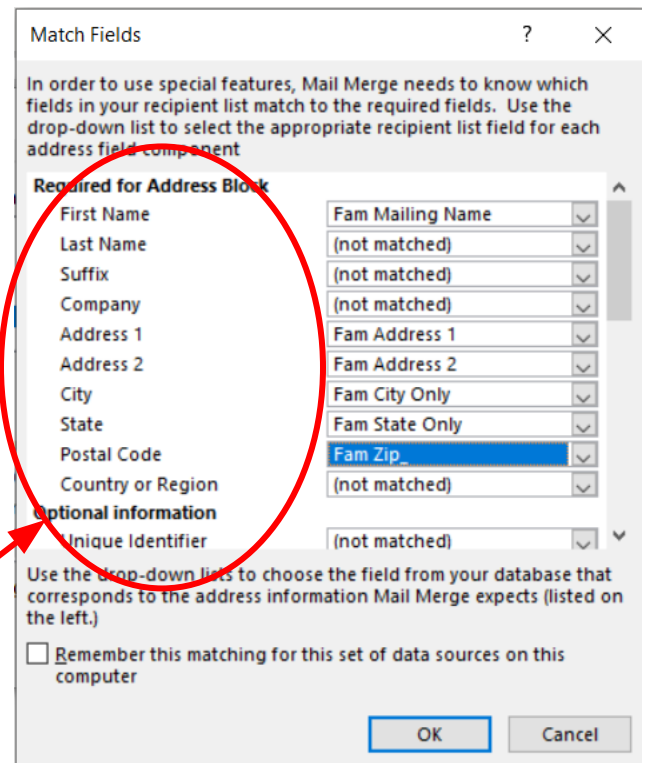
3. Click **Letters** at the top of the task pane and then click **Next: Starting Document** at the bottom of the task pane. The **Step 2 of 6** task pane will appear



4. Select **Use the current document**. And then click **Next: Select recipients** at the bottom of the task pane. The **Step 3 of 6** task pane will appear.
5. Click **Use an existing list** at the top of the task pane.
6. Click the **Browse** link on the task pane.
7. Click the **mergelist.xlsx** file name and click **Open**. The **Select Table** window will appear.
8. Click **OK**. The **Mail Merge Recipients** screen will appear.
9. Click **OK**. (More information about the Mail Merge Recipients can be found at the end of this document under the heading **Harnessing the power of the Mail Merge Recipients screen**.)



10. Click **Next: Write your letter**. at the bottom of the task pane. The **Step 4 of 6** task pane will appear.
11. Put your cursor in your letter where you want the date to appear and insert the date. Press Enter a few times to add some space between the date and the address block.
12. Put your cursor in your letter where you want the address block to appear.
13. Click the **Address Block** link at the top of the task pane.
14. Click the **Match Fields** button on the **Insert Address Block** screen.
15. Match the fields in your spreadsheet to Microsoft's fields.
16. Click **OK** twice.



17. Press the **Enter** key twice to put a blank line after the Address.
18. Type **Dear** and press the **spacebar** once.
19. Click the **More Items** link on the task pane.
20. Click **Salutation** and then click the **Insert** and then **Close** buttons.
21. Type a comma or colon and press Enter twice to put a blank line between the salutation and the body of the letter.
22. Click **Next: Preview your letters** at the bottom of the task pane. The **Step 5 of 6** task pane will appear.
23. Use the arrow buttons **<<** or **>>** on the task pane to scroll through your letters. Check for missing fields and punctuation.
24. Click **Next: Complete the Merge** at the bottom of the task pane. **The Step 6 of 6** task pane will appear.
25. Click **File** and choose **Save**. You've done a lot of work and should save your changes.
26. Click **Edit individual letters** at the top of the task pane. The **Merge to new document** pop-up will appear.
27. Click **All**. And choose **OK**. Your letters will build in another document named Letters#. (If you only want to print the current record or a range of letters, you can do that too on this pop up too.)
28. A new document named Letters1 will appear. This is what I refer to as a scrap document. I call it a scrap document because once you print the letters you can close this document without saving it.

You can print the scrap document in groups if you need to. You can edit specific letters here and there if you need to tweak their address or salutation. You can even add special notes for the pastor.
29. Put any special paper in the correct drawer in the printer.
30. Click **File** and choose **Print**.
31. Click **Close** and click **Don't Save** because you don't need to save your scrap document.

How other types of merges differ from a letter merge

E-mail messages

- On the **step 1** panel, choose **Email message**.
- On the **Step 6** panel, click the **Email Message** link. Select the email address field from your contact list using the downward pointing arrow in the **TO** field. Enter a **Subject line**. Click **OK** to send your email.

Envelopes

- On the **step 1** panel, choose **Envelopes**.
- On the **step 2** panel, click the **Envelope Options** link and select **Size 10** for standard envelopes.
- Enter a **Return Address** if you are not using pre-printed envelopes.

Labels

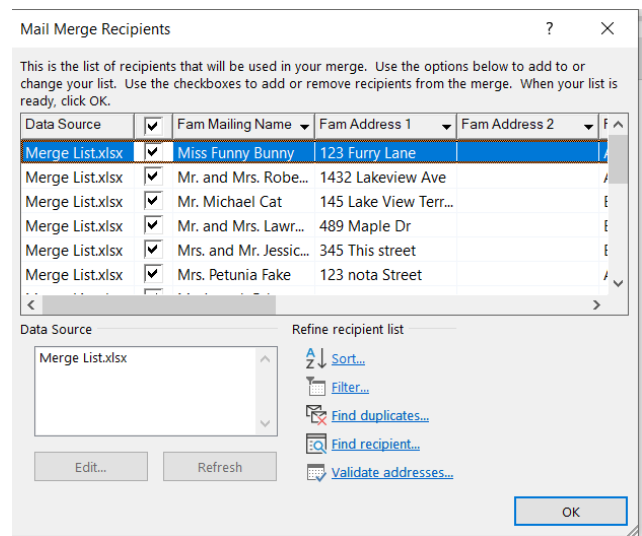
- On the **step 1** panel, choose **Labels**.
- On the **step 2** panel, click the **Label Options** link and select **5160** for standard labels. Click the downward pointing arrow next to **Label Vendor** and select **US Avery** to find all Avery label product numbers.
- On the **step 4** panel, build your first label by adding fields using the Address Block or More items links.
- On the **Step 4** panel, click the **Update Labels** button to apply that field layout to the rest of the labels.

Creating your contact list on the fly

- On the **step 3** panel, choose **Type A New List**
- Then click the **Create** link. The New Address List window includes common contact fields. You can click the **Custom Columns** button and then the **Add** button on the **Customize Address List** window to add additional fields as necessary.

Harnessing the power of the Mail Merge Recipients screen

- ❖ Resize the window by dragging the borders.
- ❖ Uncheck people you want to hide from the merge.
- ❖ Click a column heading to sort by the column.
- ❖ Click the arrow on a column heading to choose a **simple sorting option (A-Z and Z-A)** and to set some very **basic filtering**



- **All**
- **Blanks** (Includes people who have blanks in the column)
- **Non-blanks** (Hides people who have blanks in this column.)
- **Advanced** (see **Filter** below)

- ❖ Use links under the **Refine recipient list** heading
 - **Sort:** Allows you to designate up to 3 sort levels.
 - **Filter:** Use the **Filter** tab on the **Filter and Sort** screen to narrow down your list. Sample filter options are shown below.
 - **Find duplicates:** Identify duplicates you may wish to hide or remove.
 - **Find recipient:** Allows you to locate a particular record.
 - **Validate addresses:** Requires address validation add-ins.

Field:	Comparison:	Compare to:
Fam City Only	Equal to	Erie
Fam Address 1	Is not blank	
Donation	Greater than or equal	500

Nice youtube training

WITH the Step-by-Step Mail Merge wizard:

https://www.youtube.com/watch?v=nyc0B3_vqIQ

WITHOUT the Step-by-Step Mail Merge wizard:

https://www.youtube.com/watch?v=Efb_oMgxEs