

Microsoft Mail Merge Tool

• Creating labels from an Excel spreadsheet

The Excel spreadsheet file must contain headings (field names) in the first row then the data must follow in subsequent rows. The following headings may be included for address labels: First Name, Last Name, Address 1, Address 2, City, State, and Zip.

- 1) Open a new Word document
- 2) Select *Tools*
- 3) Select *Mail Merge*
- 4) **Step 1 Create**
 - Select *Mailing Labels*
 - Select *Active Window*
- 5) **Step 2 : Get Data**
 - Open Data source
 - Browse for the file stored on your hard drive, desktop or diskette. Be sure to change file type to *All Files* or *Excel Spreadsheet*. After you have highlighted your file, select *Open*.
 - A popup window titled *Microsoft Excel* will appear asking you to select the spreadsheet range. Select *Entire Spreadsheet* then click on *OK*
 - Next, you will return to MS Word and Select *Setup Main Document for Label*
 - The *Label Options* window appears; select type of label. The screen will default to *Print to Laser or Ink jet* and the Default Tray will be *Autofeed*. Then you will have to select the product name. I use *Avery 5160 Address* for 30 labels on a page. You will have to scroll down the list of options to select the product you would like to use, then select *OK*
 - In the *Create Label Window* select fields from spreadsheet to “Insert Merge Fields” to place the fields on the label. Click on *Insert Merge Field* and select the first field to appear on the label. Then, select either the space bar for a space between fields (ie: <<First_Name>> <<Last_Name>>) or select Enter/Return to go to the next row. Continue selecting all the fields you would like to appear on the label and then choose *OK*. You will then return to *Mail Merge Window*.
- 6) Select **Step 3 Merge**
 - Select *Merge*, accepting the default settings.
 - Save file and print labels.

• **Creating labels from Access database**

The Access database file may contain the following fields for the address labels: First Name, Last Name, Address 1, Address 2, City, State, and Zip.

- 1) Open a new Word document
- 2) Select *Tools*
- 3) Select *Mail Merge*
- 4) **Step 1 Create**
 - Select *Mailing Labels*
 - Select *Active Window*
- 5) **Step 2 : Get Data**
 - Open Data source
 - Browse for the file stored on your hard drive, desktop or diskette. Be sure to change file type to *All Files* or *Access Database*. After you have highlighted your file, select *Open*.
 - A popup window titled *Microsoft Access* will appear asking you to select the table or query. Make your selection then click on *OK*
 - Next, you will return to MS Word and Select *Setup Main Document for Label*
 - The *Label Options window* appears; select type of label. The screen will default to *Print to Laser or Ink jet* and the Default Tray will be *Autofeed*. Then you will have to select the product name. I use *Avery 5160 Address* for 30 labels on a page. You will have to scroll down the list of options to select the product you would like to use, then select *OK*
 - In the *Create Label Window* select fields from spreadsheet to “Insert Merge Fields” to place the fields on the label. Click on *Insert Merge Field* and select the first field to appear on the label. Then, select either the space bar for a space between fields (ie: <<First_Name>> <<Last_Name>>) or select Enter/Return to go to the next row. Continue selecting all the fields you would like to appear on the label and then choose *OK*. You will then return to *Mail Merge Window*.
- 6) Select **Step 3 Merge**
 - Select *Merge*, accepting the default settings.
 - Save file and print labels.

• **Creating labels without a data source**

You can enter in data to save in a Microsoft Word document. This information will not be able to convert to Excel spreadsheet or Access database at a later time. You may select the following fields for the address labels: First Name, Last Name, Address 1, Address 2, City, State, and Zip.

- 1) Open a new Word document
- 2) Select *Tools*
- 3) Select *Mail Merge*
- 4) **Step 1 Create**
 - Select *Mailing Labels*
 - Select *Active Window*
- 5) **Step 2 : Get Data**
 - Create Data source
 - Select *OK* for the field names. Next, assign a file name for a Word document to store the addresses.
 - Select *Edit Data Source* and then you may enter in data for your labels. Then select *OK* after data is entered.
 - Select *Tools*
 - Select *Mail Merge*
 - Click on *Setup* in the Step 1 area.
 - The *Label Options window* appears; select type of label. The screen will default to *Print to Laser or Ink jet* and the Default Tray will be *Autofeed*. Then you will have to select the product name. I use *Avery 5160 Address* for 30 labels on a page. You will have to scroll down the list of options to select the product you would like to use, then select *OK*
 - In the *Create Label Window* select fields from spreadsheet to “Insert Merge Fields” to place the fields on the label. Click on *Insert Merge Field* and select the first field to appear on the label. Then, select either the space bar for a space between fields (ie: <<First_Name>> <<Last_Name>>) or select Enter/Return to go to the next row. Continue selecting all the fields you would like to appear on the label and then choose *OK*. You will then return to *Mail Merge Window*.
- 6) Select **Step 3 Merge**
 - Select *Merge*, accepting the default settings.
 - Save file and print labels.

• **Creating a form letter from Excel spreadsheet**

The Excel spreadsheet file must contain headings (field names) in the first row then the data must follow in subsequent rows. The following headings may be included for the form letter: First Name, Last Name, Address 1, Address 2, City, State, and Zip.

- 1) Open a new Word document
- 2) Select *Tools*
- 3) Select *Mail Merge*
- 4) **Step 1 Create**
 - Select *Form Letters*
 - Select *Active Window*
- 5) **Step 2 : Get Data**
 - Open Data source
 - Browse for the file stored on your hard drive, desktop or diskette. Be sure to change file type to *All Files* or *Excel Spreadsheet*. After you have highlighted your file, select *Open*.
 - A popup window titled *Microsoft Excel* will appear asking you to select the spreadsheet range. Select *Entire Spreadsheet* then click on *OK*
 - Next, you will return to MS Word and Select *Edit Main Document*.
 - Then create form letter and add fields to Word document. The Mail Merge tools appear in the menu bar. Place your cursor where you would like a field to appear, next click on arrow in the “Insert Merge Fields” button to select field names and click on a field name to insert into document.
 - Once you have inserted all the necessary fields, return to the *Mail Merge Wizard* by selecting *Tools* from the *Title Bar*.
 - Select *Mail Merge*
- 6) Select **Step 3 Merge**
 - Select *Merge*, accepting the default settings.
 - Save file and print form letters.

• Create form letter from Access database

The Access database file may contain the following fields for the form letter: First Name, Last Name, Address 1, Address 2, City, State, and Zip.

- 1) Open a new Word document
- 2) Select *Tools*
- 3) Select *Mail Merge*
- 4) **Step 1 Create**
 - Select *Form Letter*
 - Select *Active Window*
- 5) **Step 2 : Get Data**
 - Open Data source
 - Browse for the file stored on your hard drive, desktop or diskette. Be sure to change file type to *All Files* or *Access Database*. After you have highlighted your file, select *Open*.
 - A popup window titled *Microsoft Access* will appear asking you to select the table or query. Make your selection then click on *OK*
 - Next, you will return to MS Word and Select *Edit Main Document*.
 - Then create form letter and add fields to Word document. The Mail Merge tools appear in the menu bar. Place your cursor where you would like a field to appear, next click on arrow in the “Insert Merge Fields” button to select field names and click on a field name to insert into document.
 - Once you have inserted all the necessary fields, return to the *Mail Merge Wizard* by selecting *Tools* from the *Title Bar*.
 - Select *Mail Merge*
- 6) Select **Step 3 Merge**
 - Select *Merge*, accepting the default settings.
 - Save file and print form letters.

• Create form letter without a data source

You can enter in data to save in a Microsoft Word document. This information will not be able to convert to Excel spreadsheet or Access database at a later time. You may select the following fields for the form letter: First Name, Last Name, Address 1, Address 2, City, State, and Zip.

- 1) Open a new Word document
- 2) Select *Tools*
- 3) Select *Mail Merge*
- 4) **Step 1 Create**
 - Select *Form Letters*
 - Select *Active Window*
- 5) **Step 2 : Get Data**
 - Create Data source
 - Select *OK* for the field names. Next, assign a file name for a Word document to store the addresses.
 - You can either Select *Edit Data Source* or *Edit Main Document*. Select *Edit Data Source first* and enter in data for your letters. Then select *OK* after data is entered.
 - Select *Tools*
 - Select *Mail Merge*
 - Click on *Edit* and then select *Form Letter* in the Step 1 area.
 - Next, you will return to MS Word and Select *Edit Main Document*.
 - Then create form letter and add fields to Word document. The Mail Merge tools appear in the menu bar. Place your cursor where you would like a field to appear, next click on arrow in the “Insert Merge Fields” button to select field names and click on a field name to insert into document.
 - Once you have inserted all the necessary fields, return to the *Mail Merge Wizard* by selecting *Tools* from the *Title Bar*.
 - Select *Mail Merge*
- 6) Select **Step 3 Merge**
 - Select *Merge*, accepting the default settings.
 - Save file and print form letters.