Basic Mail/Merge
For Making Letters and Labels
Using Microsoft Word 2003

Based on a Presentation by Bill Wilkinson November 2005
Seminar presented by Paul Warman August 2009

If you are sending out holiday cards or letters to your friends, you may want to save the time that it would take to handwrite all the envelopes by creating a mailing label for each person on your mailing list. Granted, it will take some time to set up a list on your computer with the names and addresses of friends and family, but once it is done, you can save it to reuse in the future. You can use it every year. Updating the list can be done in minutes.

To begin the process, follow these steps:

Part 1

1. Open Microsoft Word
2. On the **Tools** menu - scroll down to **Letters and Mailings** then select **Mail Merge** . . . (A wizard will appear on the right side of the screen)
3. Select the **Labels** radio button from "Select document type" list
4. Select **Next: Starting document** (At bottom of Wizard)
5. Select **Label options . . .**
6. Under label options, select the correct label vendor from the label vendors dropdown list. "Avery US Letter" is a good selection (if you have Avery or Avery compatible labels).
7. Scroll through the "**Product number:**" dialog box and pick your label size, Select "5660 – Address" (if that is the label size indicated on your package of labels)
8. Click "**OK**" button
9. Click **Next: Select recipients**
   a. Select **Type a new list** radio button
      i. Click **Create . . .**
      ii. On the New Address List sub-window, **Click on Customize Columns. . .**
      iii. On the Customize Address List sub-window delete all the field Names (Click **Delete**, Click **Yes** on "Are you sure . . .", and repeat until list is empty)

  iv. Now click the **Add . . .** button

  v. In the **Add Field** dialog box type "Salutation" then click **OK**

  vi. Now repeat this process / **Add** button fill in **dialog box** and Click **OK** for "Addressee", "StreetAddress", "CityState", and "Zip" (note the lack of spaces in data names).

  vii. When all five (or as many as you want) entries are shown, Click "**OK**"

  viii. Now add the information for the first person on your list in each of the five fields. When each entry is complete, enter "**New Entry**" to start entering the next person's information; when complete click "**Close**"

  ix. The Save File dialog box will appear. Give the file a name like "Holiday Mailing List" and place it either on the desktop or in a folder where you can find it again. Then click **SAVE**

  x. When the file is saved, you will get a list of "Mail Merge Recipients". Review the list for accuracy, and **Click "OK"**.

 b. As an alternative to (a) above, if you already have a list on your computer, select the **Use an existing list** radio button

  i. **Browse . . .** for the existing list and **Double Click** on it

10. You will now have a label template with (some) control characters. You can **"Select Recipients"** from an existing list or use the list you just created.

11. Click **"Next: Arrange your labels"**.

12. Click on **"More items . . . ".** This will show you the "fields" that are available for use in the labels. (These are actually the column names shown in row 1 of the "list")

13. Select each Variable with the exception of "Salutation" one at a time and click "**Insert**" after selecting each. Then press **close**.

14. Click on **Postal bar code . . .** (this in field may not be available in Word 2007)

15. Now separate each "variable" by placing the cursor after the "»" and press **Enter**. If you want the zip code after the state, then just put a **Space** before the "«" in front of "Zip" and lastly place the Postal Bar Code on the last line of the label.

16. There is a button on the Mail Merge Toolbar **"« »/ABC"**. This is a toggle and lets you see your data in the label. Press once for data, press again for code. Check for spacing horizontally especially if you are using the Postal Bar Code.

17. Now that you label is arranged, and you are happy with the layout, Click on **"Update all labels"** to move the code to all the boxes.

18. Click on **"Next: Preview your labels"**

19. At this point you may "**Edit recipient list . . .** " and uncheck any recipient for whom you do not want a label. The recipient is still in the data file, just not printed.
20. Click on **"Next: Complete the merge "**.
21. You may now click **Edit individual labels . . .** to fix any errors including the **"invalid zip code"** for foreign addresses or click **Print . . .** Be sure you have label paper in the printer or you will have labels without adhesive :-).
22. Now **Save** the "Holiday Mailing Labels" into the folder where the Data file is stored or on the desktop.

Part 2

OK, we now have labels; now let's put together a letter with some personalization.

1. Open Microsoft Word
2. On the **Tools** menu - scroll down to **Letters and Mailings** then select **Mail Merge** . . . (A wizard will appear on the right side of the screen)
3. Select the **Letters** radio button from "Select document type" list
4. **Click** "Next: Start document" Sounds familiar, yes?
5. You can **select "Use the current document"** Radio Button. (This should give you a blank page.)
6. **Click** "Next: Select recipients"
7. Select "Use an existing list" Radio Button
8. **Click** "Browse . . ." and navigate to the folder (or your desktop) in/on which you stored the address list you created above
9. **Click** Edit Recipient List button and review the data; edit if you need to. Remove any individuals to whom the letter should not be sent.
10. **Click** "Next: write your letter"
11. When you have completed composing or copying your letter, it is time to put in your variables (also known as fields). Since this is a holiday letter and not a business letter, most probably you will only select the "salutation" variable.
    a. Put your cursor where you want the first variable and Click "More items . . ."
    b. **Click Insert** the variables from the list as we did above for the labels. **Click Close** when done and then position it/them accordingly
11. **Click** "Next: Preview your letters"
12. At this point you may "**Edit recipient list . . .**" and uncheck any recipient to whom the letter should not be sent. The recipient will remain in the data file; this letter will not be printed for individuals who are unchecked.
13. Click on **"Next: Complete the merge "**.
14. You may now select "**Edit individual letters"** . . . to fix any errors or select "**Print"** . . .   to print the letters. Be sure you have removed the label paper in the printer or you will have letters with adhesive :-).
15. Now **Save** the "Holiday Mailing Letters" into the folder where the Data file is stored or on the desktop.