MAIL MERGE MADE EASY A STEP-BY-STEP GUIDE FOR LABELS OR EMAIL MERGES







WHY MAIL MERGE?

Labels: Mail merge in Office lets you convert your contact list data into a sheet of mailing labels, with complete control over the results.

Email: You can also personalize your newsletters or flyers, and email them out automatically to a customized contact list.

This guide walks through both situations, with instructions for the programs you want to use.

(Note that the instructions and images are from Office 2010, but it's not much different in Office 2007, so you can use the same instructions.)



HOW TO USE THIS GUIDE:

This step-by-step guide walks you through different ways to perform a mail merge. To use it:

- Answer the questions for the type of mail merge you want.
- The links will take you to the section of this presentation that's right for you.
- Click through the slides as you perform your mail merge.



BUT FIRST, SOME QUESTIONS (CLICK ONE)

What do you want to do with Mail Merge?

Create labels

Email a newsletter or a flyer





WHERE DO YOU KEEP YOUR CONTACTS? (CLICK ONE)

<u>An Excel workbook</u>

Outlook Contacts

Another email program (like Gmail)

I need to create a contact list



WHERE DO YOU KEEP YOUR CONTACTS? (CLICK ONE)

<u>An Excel workbook</u> <u>Outlook Contacts</u> <u>Another email program (like Gmail)</u> <u>I need to create a contact list</u>





Word





Word





Word





Word





<u>Word</u>





<u>Word</u>





Word





Word





MAKING LABELS WITH WORD AND EXCEL

- Step 1: Prepare your data in Excel
- Step 2: <u>Set up your Word Doc</u>
- Step 3: Connect to your data
- Step 4: Insert the addresses
- Step 5: Preview and print





STEP 1: PREPARE YOUR DATA IN EXCEL

Your column headers in Excel will become the fields in the labels that mail merge will fill in automatically.





STEP 1: PREPARE YOUR DATA IN EXCEL

Make sure the right data is in the correct column.

	A1 - 🥑 🎜 First Name						
	А	В	С	D	E	F	
1	First Nam	Middle Name	Last Name	Title	Suffix	Initials	
2	Aaron		Siuda				
3	Adam		Hart				
4	Aki		Soga				
5	Alacia		Broussard				
6	Alan		MacDonald				
7	Albert		Kim				
8	Albert		Lee				
9	Alex		MacLeod				
10	Alexis		Tedford				

Don't worry if you have more column headers than you need for your labels; Word will let you choose the right ones.





If you have a field for ZIP codes, make sure you change the column format to text, Otherwise, Excel will strip out any zeros that begin a ZIP code.



STEP 2: SET UP YOUR WORD DOC

Click on the Mailings tab and click Start Mail Merge.



Then click Labels.





STEP 2: SET UP YOUR WORD DOC

Choose the label type that matches your label sheets, and click **OK**.

Label Options	8 22							
Printer information ○ Continuous-feed printers ◎ Page printers Tray: Default tray ▼ Label information Label vendors: Avery US Letter ▼ Find updates on Office.com								
Product number:	Label information							
5215 Print or Write Filing Labels 5226 Print or Write Hanging File Tabs 5227 Print or Write Top View Hanging File Tab 5260 Easy Peel Address Labels 5261 Easy Peel Address Labels 5262 Easy Peel Address Labels	Type: Easy Peel Address Labels Height: 1.33" Width: 4" Page size: 8.5" × 11"							
Details Delete	OK Cancel							

If you don't find your label type, <u>see the</u> <u>instructions</u> at Office.com.

STEP 2: SET UP YOUR WORD DOC

Word has just formatted your document for labels.

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Then, in the Table group, click View Gridlines.





STEP 3: CONNECT TO YOUR DATA

Click Select Recipients. Click Use Existing List.



Browse to your Excel workbook.

Click **Open**.

(If you're prompted again, click **Sheet1\$**, and then click OK.)



STEP 3: CONNECT TO YOUR DATA

Click Edit Recipient List to fine-tune your list



Clear the check boxes next to any names you **don't** want to include. Or use filtering.

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AddressList.xlsx	1	Dixon	Andrew	Mr.	456 Birch Boulevard	Det		
AddressList.xlsx	~	Dow	Jane	Ms.	8910 Rosemary Road	Red		
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BEST PRACTICE

Click Match Fields to confirm that your column headings match the column headings that Word will look for during the merge.

If they don't match, you can map them.

For more information, see <u>Make labels for a mass mailing</u>.



STEP 4: INSERT THE ADDRESSES

Click in the first label.

On the Mailings tab, in the Write & Insert Fields group, click Address Block.



Choose the format that you want for your address labels, and then click **OK**.

Then, in the same group, click **Update Labels**.





STEP 5: PREVIEW AND PRINT

To see all your labels, click **Preview Results**.



TIP: If Word shows the results in a new document, be sure to close that new document before you print.



STEP 5: PREVIEW AND PRINT

Make sure you've loaded your labels into your printer. Click **Finish and Merge**, and then click **Print Documents**.





STEP 5: PREVIEW AND PRINT

Finally, save your document.

The data will remain connected to your document, so that you can use it again.

The next time you open the document, Word will ask whether you want to keep that connection.

Click **Yes** to open the document, and then you're ready to run another mail merge.

You're done! Close this presentation, or click the **Home** button to return to the beginning.

More help at office.com



MAKING LABELS WITH PUBLISHER AND EXCEL

- Step 1: Prepare your data in Excel
- Step 2: Set up your publication
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STEP 2: SET UP YOUR PUBLICATION

Open Publisher.

Click Labels.





STEP 2: SET UP YOUR PUBLICATION

Scroll down to the Manufacturers section.

Manufacturers			
3M / Post-it®	Ace Label	Adetec	A-ONE

Click the folder for the manufacturer of your labels.

Click the label template for your label.

Click Create.





STEP 2: SET UP YOUR PUBLICATION

Click the Mailings tab.



Click Mail Merge.




STEP 3: CONNECT TO YOUR DATA

Click Select Recipients.

Click Use Existing List.



Browse to your Excel Workbook.

Click Open.

(If you're prompted again, click **Sheet1\$**, and then click OK.)



STEP 3: CONNECT TO YOUR DATA

The Mail Merge Recipients dialog box opens.

This is your chance to fine-tune your list.

Clear the check boxes next to any names you **don't** want to include. Or use filtering.

Mail Merge Recipier	nts					2	Filter an	d Sort					-9-1
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STEP 4: INSERT THE ADDRESSES

Click in the first label.

On the Mailings tab, in the Write & Insert Fields group, click Address Block.



Choose the format that you want for your address labels, and then click **OK**.



To see all your labels, click **Preview Results**.



Click the blue arrows to see each result.





If your addresses don't fit on the labels, or you want to change the formatting, click **Preview Results** again to turn off the preview and see the Address Block code.

Select the entire <<Address Block>> code, including the chevrons at the beginning and end.

«AddressBlock»

On the Home tab, adjust the font, size, color, and line spacing.



Make sure you've loaded your labels into your printer. Click **Finish and Merge**, and then click **Merge to Printer**.





Finally, save your publication.

The data will remain connected to your publication, so that you can use it again.

The next time you open the publication, Publisher will ask whether you want to keep that connection.

Click **Yes** to open the publication, and then you're ready to run another mail merge.

You're done! Close this presentation, or click the **Home** button to return to the beginning.

More help at Office.com



MAKING LABELS WITH WORD AND OUTLOOK

Step 1: <u>Set up your Word doc</u>

Step 2: <u>Connect to your data</u>

Step 3: Insert the addresses

Step 4: Preview and print







If you want to use custom categories of Outlook Contacts, you need to begin your mail merge in Outlook.

For more information, see <u>Make labels for a mass mailing</u>.



STEP 1: SET UP YOUR WORD DOC

Click on the Mailings tab and click Start Mail Merge.



Then click Labels.





STEP 1: SET UP YOUR WORD DOC

Choose the label type that matches your labels, and click **OK**.

Label Options	8 23
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Product number:	Label information
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Details New Label Delete	OK Cancel

If you don't find your label type, <u>see the</u> <u>instructions</u> at Office.com.

STEP 1: SET UP YOUR WORD DOC

Word has just formatted your document for labels.

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Then, in the Table group, click View Gridlines.

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STEP 2: CONNECT TO YOUR DATA

Click Select Recipients.

Click Select from Outlook Contacts.



If you have more than one account in Outlook, click the contacts list that you want to use, and then click **OK**.

The Mail Merge Recipients dialog box opens.



STEP 2: CONNECT TO YOUR DATA

This is your chance to fine-tune your list.

Clear the check boxes next to any names you **don't** want to include. Or use filtering.

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AddressList.xlsx	7	Dow	Jane	Ms.	8910 Rosemary Road	Red		*		Ŧ		×.		
AddressList.xlsx	1	Doyle	Patricia	Ms.	1617 Chestnut Street	Cer		-				w		
AddressList.xlsx	-	Fredette	Michelle	Ms.	910 Larch Street	Sea _								_
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BEST PRACTICE

Click Match Fields to confirm that your column headings match the column headings that Word will look for during the merge.

If they don't match, you can map them.

For more information, see <u>Make labels for a mass mailing</u>.



STEP 3: INSERT THE ADDRESSES

Click in the first label.

On the Mailings tab, in the Write & Insert Fields group, click Address Block.



Choose the format that you want for your address labels, and then click **OK**.

Then, in the same group, click **Update Labels**.





To see all your labels, click **Preview Results**.



TIP: If Word shows the results in a new document, be sure to close that new document before you print.



Make sure you've loaded your labels into your printer. Click **Finish and Merge**, and then click **Print Documents**.





Finally, save your document.

The data will remain connected to your document, so that you can use it again.

The next time you open the document, Word will ask whether you want to keep that connection.

Click **Yes** to open the document, and then you're ready to run another mail merge.

You're done! Close this presentation, or click the **Home** button to return to the beginning.

More help at office.com



MAKING LABELS WITH PUBLISHER AND OUTLOOK

Step 1: Set up your publication

- Step 2: <u>Connect to your data</u>
- Step 3: Insert the address
- Step 4: Preview and print





STEP 1: SET UP YOUR PUBLICATION

Open Publisher.

Click Labels.





STEP 1: SET UP YOUR PUBLICATION

Scroll down to the Manufacturers section.



Double-click the folder for the manufacturer of your labels.

Click the label template for your label.

Click Create.





STEP 1: SET UP YOUR PUBLICATION

Click the Mailings tab.



Click Mail Merge.





STEP 2: CONNECT TO YOUR DATA

Click Select Recipients.

Click Select from Outlook Contacts.



If you have more than one account in Outlook, click the contacts list that you want to use, and then click **OK**.

The Mail Merge Recipients dialog box opens.



STEP 2: CONNECT TO YOUR DATA

The Mail Merge Recipients dialog box opens.

This is your chance to fine-tune your list.

Clear the check boxes next to any names you **don't** want to include. Or use filtering.

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AddressList.xlsx	7	Dempsey	Molly		Ms.	3457 Maple Street	Sea		-				
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AddressList.xlsx	7	Doyle	Patricia		Ms.	1617 Chestnut Street	Cer		-	8	-	· ·	
AddressList.xlsx	7	Fredette	Michel	e	Ms.	910 Larch Street	Sea _		- Internal		-	L	
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STEP 3: INSERT THE ADDRESSES

Click in the first label.

On the Mailings tab, in the Write & Insert Fields group, click Address Block.



Choose the format that you want for your address labels, and then click **OK**.



To see all your labels, click **Preview Results**.



Click the blue arrows to see each result.





If your addresses don't fit on the labels, or you want to change the formatting, click **Preview Results** again to turn off the preview and see the Address Block code.

Select the entire <<Address Block>> code, including the chevrons at the beginning and end.

«AddressBlock»

On the Home tab, adjust the font, size, color, and line spacing.



Make sure you've loaded your labels into your printer. Click **Finish and Merge**, and then click **Merge to Printer**.





Finally, save your publication.

The data will remain connected to your publication, so that you can use it again.

The next time you open the publication, Publisher will ask whether you want to keep that connection.

Click **Yes** to open the publication, and then you're ready to run another mail merge.

You're done! Close this presentation, or click the **Home** button to return to the beginning.

More help at office.com



MAKING LABELS WITH WORD AND ANOTHER EMAIL PROGRAM

Step 1: Export your contact list

Step 2: <u>Set up your Word doc</u>

Step 3: Connect to your data

Step 4: Insert the addresses

Step 5: Preview and print





STEP 1: EXPORT YOUR CONTACT LIST

Open the email website where you keep your contact list (for example, hotmail.com or gmail.com).

Click Contacts.

Click Export, or click Manage and then click Export.



BEST PRACTICE: CHECK YOUR DATA IN EXCEL

Your .csv file might open in Excel automatically.

If the .csv file doesn't open automatically, it's good to open the file in Excel and check your data.



BEST PRACTICE: CHECK YOUR DATA IN EXCEL



Your column headers in Excel will become the fields in the labels that mail merge will fill in automatically.



BEST PRACTICE: CHECK YOUR DATA IN EXCEL

Make sure the right data is in the correct column.

	A1	- (*	<i>f</i> ∗ First Nar	ne		
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Don't worry if you have more column headers than you need for your labels; Word will let you choose the right ones.




If you have a field for ZIP codes, make sure you change the column format to text, Otherwise Excel will strip out any zeros that begin a ZIP code.



When your data is right, save any changes that you've made to the .csv file and close Excel.



STEP 2: SET UP YOUR WORD DOC

Click on the Mailings tab and click Start Mail Merge.



Then click Labels.

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STEP 2: SET UP YOUR WORD DOC

Choose the label type that matches your labels, and click **OK**.

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Printer information O Continuous-feed printers Image printers Image Tray: Default tray Label information Label vendors: Avery US Letter	
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Details New Label Delete	OK Cancel

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STEP 2: SET UP YOUR WORD DOC

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Your doc may appear blank. To see label margins, click on the **Layout** tab under **Table Tools**.

Click View Gridlines.





STEP 3: CONNECT TO YOUR DATA

Click Select Recipients.

Click Use Existing List.



Browse to your .csv file.

Click Open.



STEP 3: CONNECT TO YOUR DATA

To fine-tune your list, click Edit Recipient List.



Clear the check boxes next to any names you don't want to include. Or use filtering.

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If they don't match, you can map them.

For more information, see <u>Make labels for a mass mailing</u>.



STEP 4: INSERT THE ADDRESSES

Click in the first label.

On the Mailings tab, in the Write & Insert Fields group, click Address Block.



Choose the format that you want for your address labels, and then click **OK**.

Then, in the same group, click **Update Labels**.





To see all your labels, click **Preview Results**.



TIP: If Word shows the results in a new document, be sure to close that new document before you print.



Make sure you've loaded your labels into your printer. Click **Finish and Merge**, and then click **Print Documents**.





Finally, save your document.

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Click **Yes** to open the document, and then you're ready to run another mail merge.

You're done! Close this presentation or click the **Home** button to return to the beginning.





MAKING LABELS WITH PUBLISHER AND ANOTHER EMAIL PROGRAM

Step 1: Export your contact list

- Step 2: Set up your publication
- Step 3: Connect to your data
- Step 4: Insert the addresses
- Step 5: Preview and print





STEP 1: EXPORT YOUR CONTACT LIST

Open the email website where you keep your contact list (for example, hotmail.com or gmail.com).

Click Contacts.

Click Export, or click Manage and then click Export.



Your .csv file might open in Excel automatically.

If the .csv file doesn't open automatically, it's good to open the file in Excel and check your data.





Your column headers in Excel will become the fields in the labels that mail merge will fill in automatically.



Make sure the right data is in the correct column.

	A1	▼ (*	f_x	First Nar	me		
	А	В		С	D	E	F
1	First Nam	Middle Name	Last N	lame	Title	Suffix	Initials
2	Aaron		Siuda				
3	Adam		Hart				
4	Aki		Soga				
5	Alacia		Brous	sard			
6	Alan		MacD	onald			
7	Albert		Kim				
8	Albert		Lee				
9	Alex		MacL	eod			
10	Alexis		Tedfo	ord			

Don't worry if you have more column headers than you need for your labels; Word will let you choose the right ones.





If you have a field for ZIP codes, make sure you change the column format to text, Otherwise Excel will strip out any zeros that begin a ZIP code.



When your data is right, save any changes that you've made to the .csv file and close Excel.



STEP 2: SET UP YOUR PUBLICATION

Open Publisher.

Click Labels.





STEP 2: SET UP YOUR PUBLICATION

Scroll down to the Manufacturers section.



Double-click the folder for the manufacturer of your labels.

Click the label template for your label.

Click Create.





STEP 2: SET UP YOUR PUBLICATION

Click the Mailings tab.



Click Mail Merge.





STEP 3: CONNECT TO YOUR DATA

Click Select Recipients.

Click Use Existing List.



Browse to your Excel Workbook.

Click Open.

(If you're prompted again, click Sheet1\$, and then click OK.)



STEP 3: CONNECT TO YOUR DATA

The Mail Merge Recipients dialog box opens.

This is your chance to fine-tune your list.

Clear the check boxes next to any names you don't want to include. Or use filtering.

Mail Merge Recipier	nts					2	Filter an	d Sort					-0-6
This is the list of recip checkboxes to add or	ients th remov	at will be used in e recipients from	n your merge. Use to the merge. When y	ne options below to our list is ready, o	to add to or change your list. dick OK.	Use the	Eiter F	Records	Sgrt Records				
Data Source	17	Last Name	+ First Name	↓ Title	+ Address	· Chy ·			Field:	Co	imparison:	Compare to:	
AddressListadox	17	Anderson	Nancy	Ms	1232 Cypress Street	Sea			E-mail Address		s blank		
AddressList.xlsx	7	Basalik	Evan	Mr.	765 Oak Lane	Sea	And				3		
AddressList.xlsx	7	Carbonati	Cyril	Mr.	4543 Redwood Road	Red			1	-	4	E.	
AddressList.xlsx	~	Dempsey	Molly	Ms.	3457 Maple Street	Sea		-					
AddressList.xlsx	7	Dixon	Andrew	Mr.	456 Birch Boulevard	Det		1				-	
AddressListalsx	7	Dow	Jane	Ms.	8910 Rosemary Road	Red		*		*	*	i.	
AddressList.xlsx	7	Doyle	Patricia	Ms.	1617 Chestnut Street	Cer		*	6	-	¥.	1	
AddressList.xlsx	7	Fredette	Michelle	Ms.	910 Larch Street	Sea _		- Internal		- Intel Co			
41						5	Clear	Al					OK Cancel
Data sources:	_		Add to recipient I	st	Refine recipient	tlist	-						
AddressList.xlsx		*	 Selection Selectifier Type a new 	sisting list Outlook Contact Elist	21 Sertun Ann Yi Eiterun Mir Eind duel Mir Eind reck	kates sent							
Edt	Reno Katch P	ve lelds			G	×		1	Smart	Pat			

STEP 4: INSERT THE ADDRESSES

Click in the first label.

On the Mailings tab, in the Write & Insert Fields group, click Address Block.



Choose the format that you want for your address labels, and then click **OK**.



To see all your labels, click **Preview Results**.



Click the blue arrows to see each result.





If your addresses don't fit on the labels, or you want to change the formatting, click **Preview Results** again to turn off the preview and see the Address Block code.

Select the entire <<Address Block>> code, including the chevrons at the beginning and end.

«AddressBlock»

On the Home tab, adjust the font, size, color, and line spacing.



Make sure you've loaded your labels into your printer. Click **Finish and Merge**, and then click **Merge to Printer**.





Finally, save your publication.

The data will remain connected to your publication, so that you can use it again.

The next time you open the publication, Publisher will ask whether you want to keep that connection.

Click **Yes** to open the publication, and then you're ready to run another mail merge.

You're done! Close this presentation, or click the **Home** button to return to the beginning.

More help at office.com



MAKING LABELS WITH WORD AND A NEW CONTACTS LIST

- Step 1: <u>Set up your Word doc</u>
- Step 2: Create your contacts list
- Step 3: Insert the addresses
- Step 4: <u>Preview and print</u>





STEP 1: SET UP YOUR WORD DOC

Click on the Mailings tab and click Start Mail Merge.



Then click Labels.







STEP 1: SET UP YOUR WORD DOC

Choose the label type that matches your labels, and click **OK**.

Label Options	2 S
Printer information © Continuous-feed printers © Page printers Tray: Default tray Label information	
Label <u>v</u> endors: Avery US Letter Find updates on Office.com Product number:	Label information
5215 Print or Write Filing Labels 5226 Print or Write Hanging File Tabs 5227 Print or Write Top View Hanging File Tab 5260 Easy Peel Address Labels 5261 Easy Peel Address Labels	Type: Easy Peel Address Labels Height: 1.33" Width: 4" Page size: 8.5" × 11"
Details New Label Delete	OK Cancel

If you don't find your label type, see the instructions at Office.com.



STEP 1: SET UP YOUR WORD DOC

Word has just formatted your document for labels.

🔟 🛃 🤊 🕶 🖉 🌭 🖃	crosoft Word Table Tools	1 1 2 12 14
File Home Insert Page Layout References Mai	ings Review View Add-Ins Design Layout	
Select View Properties Delete Insert Insert Insert	Merge Split Split AutoFit Image: Split AutoFit Image: Split Image: Split <th>Rows Image: Second s</th>	Rows Image: Second s
	Cells Cells Table Cell Size	E E Direction Margins Header Rows to Text
	inerge centrate	
	-	





Your doc may appear blank. To see label margins, click on the **Layout** tab under **Table Tools**.



Then, in the Table group, click View Gridlines.





STEP 2: CREATE YOUR CONTACTS LIST

Click Select Recipients. Click Type New List.



In the New Address List dialog box, type your first contact.

Title	✓ First N	lame	▼ La:	st Name	•	Company Nam	e 🕶	Address	Line 1	
> Ms.	Nano		At	nderson		1				
New Entry	Find		1							


STEP 2: CREATE YOUR CONTACTS LIST

TIP: You can move between the columns by clicking or by pressing **TAB**

Click **New Entry**, and continue with the next contact.

Repeat for all your contacts, and then click **OK**.



STEP 3: INSERT THE ADDRESSES

Click in the first label.

On the Mailings tab, in the Write & Insert Fields group, click Address Block.



Choose the format that you want for your address labels, and then click **OK**.

Then, in the same group, click **Update Labels**.





To see all your labels, click **Preview Results**.



TIP: If Word shows the results in a new document, be sure to close that new document before you print.



Make sure you've loaded your labels into your printer. Click **Finish and Merge**, and then click **Print Documents**.





Finally, save your document.

The data will remain connected to your document, so that you can use it again.

The next time you open the document, Word will ask whether you want to keep that connection.

Click **Yes** to open the document, and then you're ready to run another mail merge.

You're done! Close this presentation, or click the **Home** button to return to the beginning.

More help at office.com



MAKING LABELS WITH PUBLISHER AND A NEW CONTACTS LIST

- Step 1: Set up your publication
- Step 2: Create your contacts list
- Step 3: Insert the addresses
- Step 4: Preview and print





STEP 1: SET UP YOUR PUBLICATION

Open Publisher.

Click Labels.







STEP 1: SET UP YOUR PUBLICATION

Scroll down to the Manufacturers section.

Manufacturers						
3M / Post-it®	Ace Label	Adetec	A-ONE	APLI	APLI-AGIPA	

Double-click the folder for the manufacturer of your labels.

Click the label template for your label.

Click Create.





STEP 1: SET UP YOUR PUBLICATION

Click the Mailings tab.



Click Mail Merge.





STEP 2: CREATE YOUR CONTACTS LIST

Click Select Recipients. Click Type New List.



In the New Address List dialog box, enter your first contact.

In	Critico Corri		10 80	u more enunes,	- CALA	C N		
Inie	- F	irst Name	•	Last Name	•	Company Name	 Address 	Line 1
	m							



STEP 2: CREATE YOUR CONTACTS LIST

TIP: You can move between the columns by clicking or by pressing **TAB**

Click **New Entry**, and continue with the next contact.

Repeat for all your contacts, and then click **OK**.



STEP 3: INSERT THE ADDRESSES

Click in the first label.

On the Mailings tab, in the Write & Insert Fields group, click Address Block.



Choose the format that you want for your address labels, and then click **OK**.



To see all your labels, click **Preview Results**.



Click the blue arrows to see each result.





If your addresses don't fit on the labels, or you want to change the formatting, click **Preview Results** again to turn off the preview and see the Address Block code.

Select the entire <<Address Block>> code, including the chevrons at the beginning and end.

«AddressBlock»

On the Home tab, adjust the font, size, color, and line spacing.



Make sure you've loaded your labels into your printer. Click **Finish and Merge**, and then click **Merge to Printer**.





Finally, save your publication.

The data will remain connected to your publication, so that you can use it again.

The next time you open the publication, Publisher will ask whether you want to keep that connection.

Click **Yes** to open the publication, and then you're ready to run another mail merge.

You're done! Close this presentation, or click the **Home** button to return to the beginning.

More help at office.com



EMAIL MERGE WITH WORD AND EXCEL

- Step 1: Prepare your data in Excel
- Step 2: <u>Set up your Word doc</u>
- Step 3: <u>Connect to your data</u>
- Step 4: Insert a greeting line
- Step 5: Preview and send





STEP 1: PREPARE YOUR DATA IN EXCEL



Your column headers in Excel will become the fields that mail merge will fill in automatically.

IMPORTANT: Be sure that the column of email addresses has a column header that says E-mail address.



STEP 1: PREPARE YOUR DATA IN EXCEL

Make sure the right data is in the correct column.

	A1	- (*	f _x	First Nar	ne		
	А	В		С	D	E	F
1	First Nam	Middle Name	Last N	lame	Title	Suffix	Initials
2	Aaron		Siuda				
3	Adam		Hart				
4	Aki		Soga				
5	Alacia		Broussard				
6	Alan		MacD	onald			
7	Albert		Kim				
8	Albert		Lee				
9	Alex		MacLe	eod			
10	Alexis		Tedfo	ord			

Don't worry if you have more column headers than you need for your labels; Word will let you choose the right ones.





If you have a field for ZIP codes, make sure you change the column format to text, Otherwise Excel will strip out any zeros that begin a ZIP code.



STEP 2: SET UP YOUR WORD DOC

Open the template that you want to use for your flyer or newsletter, or open a new document.

Click on the Mailings tab and click Start Mail Merge.



Then click E-mail Messages.





STEP 2: SET UP YOUR WORD DOC

Add the text and graphics that you want to appear on your email message.





STEP 3: CONNECT TO YOUR DATA

Click Select Recipients.

Click Use Existing List.



Browse to your Excel Workbook.

Click Open.

(If you're prompted again, click Sheet1\$, and then click OK.)



STEP 3: CONNECT TO YOUR DATA

Click Edit Recipient List to fine-tune your list.



Clear the check boxes next to any names you don't want to include. Or use filtering.

Data Source	1	Last Name	 First Name 	▼ Title	→ Address → → →	- City
AddressListadsx	1	Anderson	Nancy	Ms.	1232 Cypress Street	Sea
AddressList.xlsx	5	Basalik	Evan	Mr.	765 Oak Lane	Sea
AddressList.xlsx	1	Carbonati	Cyril	Mr.	4543 Redwood Road	Red
AddressList.xlsx	~	Dempsey	Molly	Ms.	3457 Maple Street	Sea
AddressList.xlsx	1	Dixon	Andrew	Mr.	456 Birch Boulevard	Det
AddressList.xlsx	~	Dow	Jane	Ms.	8910 Rosemary Road	Red
AddressList.xlsx	2	Doyle	Patricia	Ms.	1617 Chestnut Street	Cer
AddressList.xlsx	1	Fredette	Michelle	Ms.	910 Larch Street	Sea
<	-	m				
ata Source		Refine r	ecipient list			
AddressList.xlsx	Datio	21 s 21 s 20 s 20 s	Itter C			

Citter Re	cords	Sort Records					
		Field:		Comparison:		Compare to:	
		E-mail Address		Is blank	K		
And	-				h		
	-		Ŧ		T		
	~		Ŧ		~		
	-		w		×		
	-		Ŧ		Ŧ		-



BEST PRACTICE

Click Match Fields to confirm that your column headings match the column headings that Word will look for during the merge. If they don't match, you can map them.

For more information, see <u>Use mail merge to send personalized</u> <u>e-mail messages to your e-mail address list</u>.



STEP 4: INSERT A GREETING LINE

Click where you want to add personalized information — for example, a greeting line to each recipient of your email message.

On the Mailings tab, in the Write & Insert Fields group, click Greeting Line.



Choose the format that you want for your greeting, and then click **OK**.



STEP 4: INSERT A GREETING LINE

To change the font, size, or color of your greeting line, select the entire field code, including the chevrons on each end.

«GreetingLine»

We're launching our new line of communications software this month and as a valued customer, you have the opportunity to save on bundled services.

Then choose the font, size, and color that you want in the **Font** group on the **Home** tab.



STEP 5: PREVIEW AND SEND

To see all your messages, click **Preview Results**.



You can use the arrows to click through the results.





Your document will be sent in the body of the email message, so readers don't need to have Word installed on their computers.

When you click **Send E-mail Messages**, you'll be prompted to provide a subject line.

Message option	s	
T <u>o</u> :	Email Address	-
Subject line:		
Mail format:	HTML	-
Send records	scord	

When you click **OK**, your email messages will be sent automatically.



STEP 5: PREVIEW AND SEND

Click Finish and Merge, and then click Send E-mail Messages.



Type a subject line for your message in the **Subject line** box, and then click **OK**.

Merge to E-m	ail 📀 🔜
Message option	is
T <u>o</u> :	Email Address
Subject line:	
Mail format:	HTML
Send records ⓐ <u>A</u> ll ⓒ Current re ⓒ Erom:	cord To: OK Cancel



STEP 5: PREVIEW AND SEND

Finally, save your document.

The data will remain connected to your document, so that you can use it again.

The next time you open the document, Word will ask whether you want to keep that connection.

Click **Yes** to open the document, and then you're ready to run another mail merge.

You're done! Close this presentation, or click the **Home** button to return to the beginning.



EMAIL MERGE WITH PUBLISHER AND EXCEL

- Step 1: <u>Prepare your data in Excel</u> Step 2: <u>Set up your publication</u>
- Step 3: <u>Connect to your data</u>
- Step 4: Preview and send





STEP 1: PREPARE YOUR DATA IN EXCEL



Your column headers in Excel will become the fields that mail merge will fill in automatically.



STEP 1: PREPARE YOUR DATA IN EXCEL

Make sure the right data is in the correct column.

	A1	▼ (*	f_{x}	<i>f</i> _x First Name					
	А	В		С	D	E	F		
1	First Nam	Middle Name	Last N	lame	Title	Suffix	Initials		
2	Aaron		Siuda						
3	Adam		Hart						
4	Aki		Soga						
5	Alacia		Broussard						
6	Alan		MacD	onald					
7	Albert		Kim						
8	Albert		Lee						
9	Alex		MacLe	eod					
10	Alexis		Tedfo	ord					

Don't worry if you have more column headers than you need for your labels; Word will let you choose the right ones.





If you have a field for ZIP codes, make sure you change the column format to text, Otherwise Excel will strip out any zeros that begin a ZIP code.



STEP 2: SET UP YOUR PUBLICATION

Open Publisher.

Click Newsletters or click Flyers.




Click the template that you want to use.

Click Download, or click Create.





Click the Mailings tab and click E-mail Merge.





Add the text and graphics that you want to appear in the email.

1/2-	Contoso, Inc. CONTOSO UPDATES	
-	SEPTEMBER 1	VOLUME 1, ISSUE 1
	New Savings for you. be a great way to market	SPECIAL POINTS OF INTER-



STEP 3: CONNECT TO YOUR DATA

Click Select Recipients. Click Use Existing List.



Browse to your Excel Workbook.

Click Open.

(If you're prompted again, click Sheet1\$, and then click OK.)



STEP 3: CONNECT TO YOUR DATA

The Mail Merge Recipients dialog box opens.

This is your chance to fine-tune your list.

Clear the check boxes next to any names you don't want to include. Or use filtering.

Mail Merge Recipier	its -					2 3	riner an	a sort						151
This is the list of recipi	ients th	at will be used in	your merge. Use the	options below t	o add to or change your list. 5-k OK	Use the	Eiter R	ecords	Sgrt Records					
Data Source	1	Last Name	 First Name 	Title		· City ·			Field:	_	Comparison:	Cor	mpare to:	
AddressListatist	1	Anderson	Nancy	Ms.	1232 Cypress Street	Sea			E-mail Address		Es blank	N		
AddressList.xlsx	7	Basalik	Evan	Mr.	765 Oak Lane	Sea	And					-20		
AddressList.xlsx	•	Carbonati	Cyril	Mr.	4543 Redwood Road	Red		-	6	-		4		
AddressListxlsx	7	Dempsey	Molly	Ms.	3457 Maple Street	Sea		-		H	-			
AddressList.xlsx	7	Dixon	Andrew	Mr.	456 Birch Boulevard	Det		-		1				
AddressList.xlsx	7	Dow	Jane	Ms.	8910 Rosemary Road	Red		*		*		Ψ.		
AddressList.xlsx	7	Doyle	Patricia	Ms.	1617 Chestnut Street	Cer		Ψ.		-		*		
AddressList.xlsx	7	Fredette	Michelle	Ms.	910 Larch Street	Sea _		- Internal		-		initial		
41			•			-5	Clear	Al					OK	0
Data sources:			Add to recipient list		Refine recipier	tlst		-		_				
AddressList.xlsx			Select an exis	ang list	21 Sort									
2010/02/02/02/02			An Select from O	utlook Contact	Vit Filter									
			These second h		Xa Ded da	Leaker .								
			ivpe a new g	Here	Carl Carlo Off	9.0523								
		-			Endred	pientaa								
1.0														
E01	HETTO:	ne l												
Refresh 1	Ketch F	eids												
						~								
						- m								



STEP 4: PREVIEW AND SEND

Click Finish and Merge, and then click Send E-mail Messages.



Type a subject line for your message in the **Subject** box, and then click **OK**.

Required 1	Information		
To:	E-mail Address		
Subject:			
	Clidy on items from the list to personalize the subject line of your email.	Title First Name Last Name Address	•
E-mail Pro	eview		
To: Subject:	someone@example.com	H 4 [1	D D



STEP 4: PREVIEW AND SEND

Finally, save your publication.

The data will remain connected to your publication, so that you can use it again.

The next time you open the publication, Publisher will ask whether you want to keep that connection.

Click **Yes** to open the publication, and then you're ready to run another mail merge.

You're done! Close this presentation, or click the **Home** tab to return to the beginning.

More help at office.com



EMAIL MERGE WITH WORD AND OUTLOOK

Step 1: <u>Set up your Word doc</u>
Step 2: <u>Connect to your data</u>
Step 3: <u>Insert a greeting line</u>
Step 4: <u>Preview and send</u>







If you want to use custom categories of Outlook Contacts, you need to begin your mail merge in Outlook.

For more information, see <u>Use mail merge to send personalized</u> <u>e-mail messages to your e-mail address list</u>.



STEP 1: SET UP YOUR WORD DOC

Open the template that you want to use for your flyer or newsletter, or open a new document.

Click on the Mailings tab and click Start Mail Merge.



Then click E-mail Messages.





STEP 1: SET UP YOUR WORD DOC

Add the text and graphics that you want to appear on your email message.





STEP 2: CONNECT TO YOUR DATA

Click Select Recipients.

Click Select from Outlook Contacts.



If you have more than one account in Outlook, click the contacts list that you want to use, and then click **OK**.

The Mail Merge Recipients dialog box opens.



STEP 2: CONNECT TO YOUR DATA

This is your chance to fine-tune your list.

Clear the check boxes next to any names you don't want to include. Or use filtering.

heckboxes to add or	remove	e recipients from	the merg	ge. When you	ar list i	s ready,	dick OK.			(7)						_
Data Source	~	Last Name	- F	int Name	-	Title	+ Address	+ Ct	y			Field:		Comparison:	Compare to:	
AddressListadsx	7	Anderson	1	lancy		Ms.	1232 Cypress Street	5			_	E-mail Address		Is blank		
AddressList.xlsx	7	Basalik	E	van	-	Mr.	765 Oak Lane	Se	8	And			-	2		
AddressList.xlsx		Carbonati	0	Syril		Mr.	4543 Redwood Road	Re	d				Ŧ	· · · · · · · · · · · · · · · · · · ·		
AddressList.xlsx	7	Dempsey	N	Molly		Ms.	3457 Maple Street	Se	a 👘		-		-	T		
AddressList.xlsx	1	Dixon	4	Andrew		Mr.	456 Birch Boulevard	De	s							
AddressList.xlsx	~	Dow	J	ane		Ms.	8910 Rosemary Road	Re	d		*		*	×		
AddressList.xlsx	2	Doyle	P	atricia		Ms.	1617 Chestnut Street	C	er 👘		-		w.	*		
AddressList.xlsx	~	Fredette	N	Aichelle		Ms.	910 Larch Street	Se	σ.,							_
•		III								Clear	All				OK	
ata Source		Refine	recipien	t list						1						_
AddressList.xlsx	Refre	- 21: 30: 30: 40: 40: 40: 40: 40: 40: 40: 40: 40: 4	iort itter ind dup ind reck aldate.	kcates cient addresses												



BEST PRACTICE

Click Match Fields to confirm that your column headings match the column headings that Word will look for during the merge.

If they don't match, you can map them.

For more information, see <u>Use mail merge to send personalized</u> <u>e-mail messages to your e-mail address list</u>.



STEP 3: INSERT A GREETING LINE

Click where you want to add personalized information—for example, a greeting line to each recipient of your email message.

On the Mailings tab, in the Write & Insert Fields group, click Greeting Line.



Choose the format that you want for your greeting, and then click **OK**.



STEP 3: INSERT A GREETING LINE

To change the font, size, or color of your greeting line, select the entire field code, including the chevrons on each end.

«GreetingLine»

We're launching our new line of communications software this month and as a valued customer, you have the opportunity to save on bundled services.

Then choose the font, size, and color that you want in the **Font** group on the **Home** tab.



STEP 4: PREVIEW AND SEND

To see all your messages, click **Preview Results**. You can use the arrows to click through the results.







Your document will be sent in the body of the email message, so readers don't need to have Word installed on their computers.

When you click **Send E-mail Messages**, you'll be prompted to provide a subject line.

Merge to E-m	ail	
Message option	s	
T <u>o</u> :	Email Address	-
Subject line:		
Mail format:	HTML	-
Send records All Current re Erom:	cord	
	ОК	Cancel

When you click **OK**, your email messages will be sent automatically.



STEP 4: PREVIEW AND SEND

Click Finish and Merge, and then click Send E-mail Messages.



Type a subject line for your message in the **Subject line** box, and then click **OK**.

Merge to E-ma	ail 🔗 🔜
Message option	is
T <u>o</u> :	Email Address
Subject line:	
Mail format:	HTML
Send records	ecord Io: OK Cancel



STEP 4: PREVIEW AND SEND

- Finally, save your document.
- The data will remain connected to your document, so that you can use it again.
- The next time you open the document, Word will ask whether you want to keep that connection.
- Click **Yes** to open the document, and then you're ready to run another mail merge.

You're done! Close this presentation, or click the **Home** button to return to the beginning.



EMAIL MERGE WITH PUBLISHER AND OUTLOOK

Step 1: <u>Set up your publication</u>Step 2: <u>Connect to your data</u>Step 3: <u>Preview and send</u>





Open Publisher.

Click Newsletters or click Flyers.







Click the template that you want to use.

Click Download, or click Create.





Click the Mailings tab. Click E-mail Merge.





Add the text and graphics that you want to appear on your email message.





STEP 2: CONNECT TO YOUR DATA

Click Select Recipients.

Click Select from Outlook Contacts.



If you have more than one account in Outlook, click the contacts list that you want to use, and then click **OK**.



STEP 2: CONNECT TO YOUR DATA

The Mail Merge Recipients dialog box opens.

This is your chance to fine-tune your list.

Clear the check boxes next to any names you don't want to include. Or use filtering.

Data Source	1	Last Name	 First Name 	▼ Title ▼	Address	- City
AddressListadsx	~	Anderson	Nancy	Ms.	1232 Cypress Street	Sea
AddressList.xlsx	7	Basalik	Evan	Mr.	765 Oak Lane	Sea
AddressList.xlsx	•	Carbonati	Cyril	Mr.	4543 Redwood Road	Red
AddressList.xlsx	~	Dempsey	Molly	Ms.	3457 Maple Street	Sea
AddressList.xlsx	7	Dixon	Andrew	Mr.	456 Birch Boulevard	Det
AddressListxlsx	7	Dow	Jane	Ms.	8910 Rosemary Road	Red
AddressList.xlsx	7	Doyte	Patricia	Ms.	1617 Chestnut Street	Cer
AddressList.xlsx	7	Fredette	Michelle	Ms.	910 Larch Street	Sea
*	-					- 1
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			1.11		P1 Find recipie	nt
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Elter Ra	ecords	Sgrt Records					
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	*	1			4		
	+	2			Ψ.	1	
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STEP 3: PREVIEW AND SEND

Click Finish and Merge, and then click Send E-mail Messages.



Type a subject line for your message in the **Subject** box, and then click **OK**.

Required	Information		
∐o:	E-mail Address		
Subjects	1		
*	Click on items from the list to personalize the subject line of your email.	Title First Name Last Name Address	•
E-mail Pr	eview		
To: Subject:	someone@example.com	1	D DI



STEP 3: PREVIEW AND SEND

Finally, save your publication.

The data will remain connected to your publication, so that you can use it again.

The next time you open the publication, Publisher will ask whether you want to keep that connection.

Click **Yes** to open the publication, and then you're ready to run another mail merge.

You're done! Close this presentation, or click the **Home** button to return to the beginning.

More help at office.com



EMAIL MERGE WITH WORD AND ANOTHER EMAIL PROGRAM

Step 1: Export your contact list

Step 2: <u>Set up your Word doc</u>

Step 3: Connect to your data

Step 4: Insert a greeting line

Step 5: Preview and send





STEP 1: EXPORT YOUR CONTACT LIST

Open the email website where you keep your contact list (for example, hotmail.com or gmail.com).

Click Contacts.

Click Export, or click Manage and then click Export.



Your .csv file might open in Excel automatically.

If the .csv file doesn't open automatically, it's good to open the file in Excel and check your data.





Your column headers in Excel will become the fields in the labels that mail merge will fill in automatically.

IMPORTANT: Be sure that the column of email addresses has a column header that says E-mail address.



Make sure the right data is in the correct column.

	Cipbouro	4 (A)	i viit	1.0		Augunici
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	А	В	С	D	E	F
1	First Nam	Middle Name	Last Name	Title	Suffix	Initials
2	Aaron		Siuda			
3	Adam		Hart			
4	Aki		Soga			
5	Alacia		Broussard			
6	Alan		MacDonald			
7	Albert		Kim			
8	Albert		Lee			
9	Alex		MacLeod			
10	Alexis		Tedford			

Don't worry if you have more column headers than you need for your labels; Word will let you choose the right ones.





If you have a field for ZIP codes, make sure you change the column format to text, Otherwise Excel will strip out any zeros that begin a ZIP code.



When your data is right, save any changes that you've made to the .csv file and close Excel.


STEP 2: SET UP YOUR WORD DOC

Open the template that you want to use for your flyer or newsletter, or open a new document.

Click on the Mailings tab and click Start Mail Merge.



Then click E-mail Messages.





STEP 2: SET UP YOUR WORD DOC

Add the text and graphics that you want to appear in the email.





STEP 3: CONNECT TO YOUR DATA

Click Select Recipients.

Click Use Existing List.



Browse to your .csv file.

Click Open.



STEP 3: CONNECT TO YOUR DATA

Click Edit Recipient List to fine-tune your list.



Clear the check boxes next to any names you don't want to include. Or use filtering.

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AddressListaist	17	Carbonati	Curil	Mr.	4542 Redwood Road	Red			F
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AddressList.xlsx	1	Dixon	Andrew	Mr.	456 Birch Boulevard	Det		*	1
AddressList.xlsx	7	Dow	Jane	Ms.	8910 Rosemary Road	Red		*	
AddressList.xlsx	7	Doyle	Patricia	Ms.	1617 Chestnut Street	Cer		-	
AddressList.xlsx	4	Fredette	Michelle	Ms.	910 Larch Street	Sea _		- income of	-
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BEST PRACTICE

Click Match Fields to confirm that your column headings match the column headings that Word will look for during the merge.

If they don't match, you can map them.

For more information, see <u>Use mail merge to send personalized</u> <u>e-mail messages to your e-mail address list</u>.



STEP 4: INSERT A GREETING LINE

Click where you want to add personalized information—for example, a greeting line to each recipient of your email message.

On the Mailings tab, in the Write & Insert Fields group, click Greeting Line.



Choose the format that you want for your greeting, and then click **OK**.



STEP 4: INSERT A GREETING LINE

To change the font, size, or color of your greeting line, select the entire field code, including the chevrons on each end.

«GreetingLine»

We're launching our new line of communications software this month and as a valued customer, you have the opportunity to save on bundled services.

Then choose the font, size, and color that you want in the **Font** group on the **Home** tab.



STEP 5: PREVIEW AND SEND

To see all your messages, click **Preview Results**. You can use the arrows to click through the results.







Your document will be sent in the body of the email message, so readers don't need to have Word installed on their computers.

When you click **Send E-mail Messages**, you'll be prompted to provide a subject line.

Merge to E-m	ail	? ×
Message option	s	
T <u>o</u> :	Email Address	-
Subject line:		
Mail format:	HTML	-
Send records All Current re Erom:	cord	
	ОК	Cancel

When you click **OK**, your email messages will be sent automatically.



STEP 5: PREVIEW AND SEND

Click Finish and Merge, and then click Send E-mail Messages.



Type a subject line for your message in the **Subject line** box, and then click **OK**.

Merge to E-ma	ail 🔹 💎 🛋
Message option	15
T <u>o</u> :	Email Address
Subject line:	
Mail format:	HTML
Send records	ecord



STEP 5: PREVIEW AND SEND

Finally, save your document.

The data will remain connected to your document, so that you can use it again.

The next time you open the document, Word will ask whether you want to keep that connection.

Click **Yes** to open the document, and then you're ready to run another mail merge.

You're done! Close this presentation, or click the **Home** button to return to the beginning.



EMAIL MERGE WITH PUBLISHER AND ANOTHER EMAIL PROGRAM

Step 1: Export your contact list

- Step 2: Set up your publication
- Step 3: <u>Connect to your data</u>
- Step 4: Preview and send





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Your .csv file might open in Excel automatically.

If the .csv file doesn't open automatically, it's good to open the file in Excel and check your data.





Your column headers in Excel will become the fields in the labels that mail merge will fill in automatically.



Make sure the right data is in the correct column.

	A1	- (*	<i>f</i> ∗ First Nar	ne		
	А	В	С	D	E	F
1	First Nam	Middle Name	Last Name	Title	Suffix	Initials
2	Aaron		Siuda			
3	Adam		Hart			
4	Aki		Soga			
5	Alacia		Broussard			
6	Alan		MacDonald			
7	Albert		Kim			
8	Albert		Lee			
9	Alex		MacLeod			
10	Alexis		Tedford			

Don't worry if you have more column headers than you need for your labels; Word will let you choose the right ones.





If you have a field for ZIP codes, make sure you change the column format to text, Otherwise Excel will strip out any zeros that begin a ZIP code.



When your data is right, save any changes that you've made to the .csv file and close Excel.



Open Publisher.

Click Newsletters or click Flyers.





Click the template that you want to use.

Click Download, or click Create.





Click the Mailings tab. Click E-mail Merge.





Add the text and graphics that you want to appear the same way on each email message that you send.





STEP 3: CONNECT TO YOUR DATA

Click Select Recipients.

Click Use Existing List.



Browse to your .csv file. Click **Open**.



STEP 3: CONNECT TO YOUR DATA

The Mail Merge Recipients dialog box opens.

This is your chance to fine-tune your list.

Clear the check boxes next to any names you don't want to include. Or use filtering.

Data Source	1	Last Name		First Name		Title 👻	Address .	- City
AddressListadsx		Anderson	- J.	Nancy		Ms.	1232 Cypress Street	Sea
AddressList.xlsx	7	Basalik		Evan		Mr.	765 Oak Lane	Sea
AddressList.xlsx	7	Carbonati		Cyril		Mr.	4543 Redwood Road	Red
AddressList.xlsx	~	Dempsey		Molly		Ms.	3457 Maple Street	Sea
AddressList.xlsx	7	Dixon		Andrew		Mr.	456 Birch Boulevard	Det
AddressList.xlsx	1	Dow		Jane		Ms.	8910 Rosemary Road	Red
AddressList.xlsx	7	Doyle		Patricia		Ms.	1617 Chestnut Street	Cer
AddressList.xlsx	4	Fredette		Michelle		Ms.	910 Larch Street	Sea
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STEP 4: PREVIEW AND SEND

Click Finish and Merge, and then click Send E-mail Messages.



Type a subject line for your message in the **Subject** box, and then click **OK**.

lequired I	information		
To:	E-mail Address		
Subject:			
	Click on items from the list to personalize the subject line of your email.	Title First Name Last Name Address	* III •
E-mail Pro	eview		
To: Subject:	someone@example.com		D D



STEP 4: PREVIEW AND SEND

Finally, save your publication.

The data will remain connected to your publication, so that you can use it again.

The next time you open the publication, Publisher will ask whether you want to keep that connection.

Click **Yes** to open the publication, and then you're ready to run another mail merge.

You're done! Close this presentation, or click the **Home** button to return to the beginning.

More help at office.com



EMAIL MERGE WITH WORD AND A NEW CONTACTS LIST

Step 1: <u>Prepare your Word doc</u>Step 2: <u>Create your contacts list</u>Step 3: <u>Insert a greeting line</u>

Step 4: Preview and send





STEP 1: SET UP YOUR WORD DOC

Click on the Mailings tab and click Start Mail Merge.



Then click E-mail Messages.







STEP 1: SET UP YOUR WORD DOC

Add the text and graphics that you want to appear in the email message.





STEP 2: CREATE YOUR CONTACTS LIST

TIP: You can move between the columns by clicking or by pressing TAB

Click **New Entry**, and continue with the next contact.

Repeat for all your contacts, and then click OK.



STEP 2: CREATE YOUR CONTACTS LIST

Click Select Recipients. Click Type New List.



In the New Address List dialog box, enter your first contact.

Title	✓ First Name	• •	Last Name	-	Company Name 👻	Address Line 1	
NS.	Nancy		Anderson			-	
1	m						
New Entry							



STEP 3: INSERT A GREETING LINE

Click where you want to add personalized information—for example, a greeting line to each recipient of your email message.

On the Mailings tab, in the Write & Insert Fields group, click Greeting Line.



Choose the format that you want for your greeting, and then click **OK**.



STEP 3: INSERT A GREETING LINE

To change the font, size, or color of your greeting line, select the entire field code, including the chevrons on each end.

«GreetingLine»

We're launching our new line of communications software this month and as a valued customer, you have the opportunity to save on bundled services.

Then choose the font, size, and color that you want in the **Font** group on the **Home** tab.



STEP 4: PREVIEW AND SEND

To see all your messages, click **Preview Results**. You can use the arrows to click through the results.







Your document will be sent in the body of the email message, so readers don't need to have Word installed on their computers.

When you click **Send E-mail Messages**, you'll be prompted to provide a subject line.

Merge to E-m	ail	? X
Message option	s	
T <u>o</u> :	Email Address	-
Subject line:		
Mail format:	HTML	-
Send records All Current re Erom:	ecord Io:	Cancel

When you click **OK**, your email messages will be sent automatically.



STEP 4: PREVIEW AND SEND

Click Finish and Merge, and then click Send E-mail Messages.



Type a subject line for your message in the **Subject line** box, and then click **OK**.

Merge to E-m	ail 📀 🔜
Message option	is
T <u>o</u> :	Email Address
Subject line:	
Mail format:	HTML
Send records all Current re Erom:	ecord Io: OK Cancel


STEP 4: PREVIEW AND SEND

Finally, save your document.

The data will remain connected to your document, so that you can use it again.

The next time you open the document, Word will ask whether you want to keep that connection.

Click **Yes** to open the document, and then you're ready to run another mail merge.



EMAIL MERGE WITH PUBLISHER AND A NEW CONTACTS LIST

Step 1: Set up your publication

Step 2: Create your contacts list

Step 3: Preview and send





Open Publisher.

Click Newsletters or click Flyers.







Click the template that you want to use.

Click Download, or click Create.





Click the Mailings tab. Click E-mail Merge.





Add the text and graphics that you want to appear in the email message.





STEP 2: CREATE YOUR CONTACTS LIST

Click Select Recipients. Click Type New List.



In the New Address List dialog box, enter your first contact.

pe recipient inf	formation in	the table. To	0 800	a more enuies,	dick I	vew Entry.	- 36		
Title	▼ Fir	rst Name	-	Last Name	-	Company Name	▼ A	ddress Line	e 1
2									
-									
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TIP: You can move between the columns by clicking or by pressing **TAB**

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Type a subject line for your message in the **Subject** box, and then click **OK**.

Required In	formation				
Io:	E-mail Address				
Subject:					
	Clidy on items from the list to personalize the subject line of your email.	Title First Name Last Name Address	Î.		
E-mail Pre	view				
To: Subject:	someone@example.com)] 4 [1	D N		



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