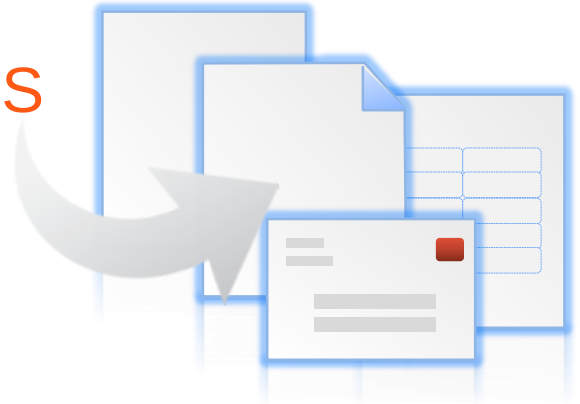
MAIL MERGE MADE EASY

A STEP-BY-STEP GUIDE

FOR LABELS OR EMAIL MERGES



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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.)

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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)

An Excel workbook

Outlook Contacts

Another email program (like Gmail)

I need to create a contact list

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(CLICK ONE)

An Excel workbook

Outlook Contacts

Another email program (like Gmail)

I need to create a contact list

WHAT'S YOUR LABEL PROGRAM?

(CLICK ONE)

Word

Publisher

WHAT'S YOUR LABEL PROGRAM?

(CLICK ONE)

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WHAT'S YOUR LABEL PROGRAM?

(CLICK ONE)

Word

Publisher

WHAT'S YOUR LABEL PROGRAM?

(CLICK ONE)

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Publisher

WHAT'S YOUR NEWSLETTER OR FLYER PROGRAM?

(CLICK ONE)

Word

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WHAT'S YOUR NEWSLETTER OR FLYER PROGRAM?

(CLICK ONE)

Word

Publisher

MAKING LABELS WITH WORD AND EXCEL

Step 1: Prepare your data in Excel

Step 2: Set up your Word Doc

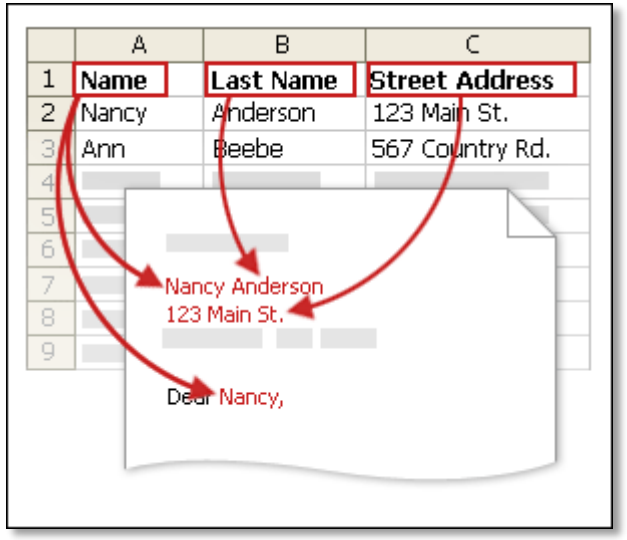
Step 3: Connect to your data

Step 4: Insert the addresses

Step 5: Preview and print

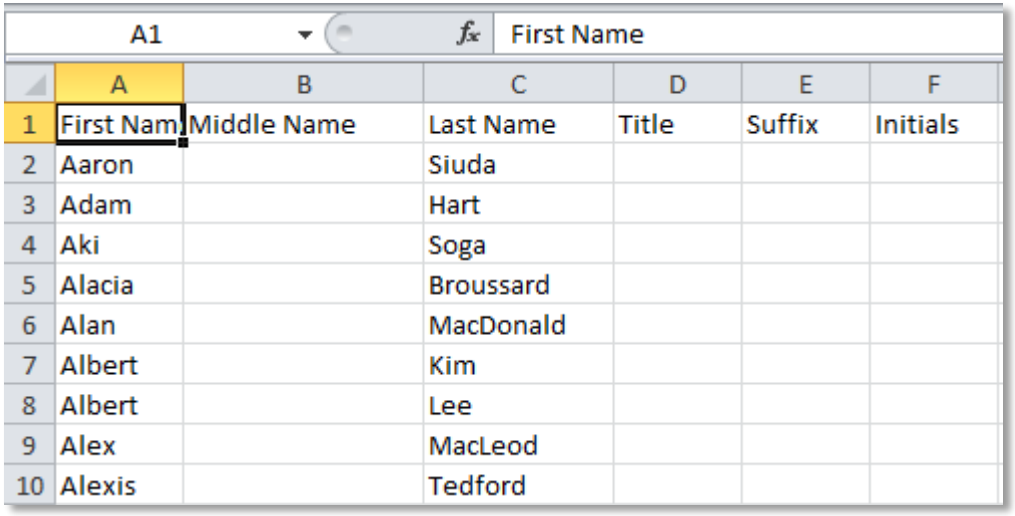
STEP 1: PREPARE YOUR DATA IN EXCEL

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

	A	B	C	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.

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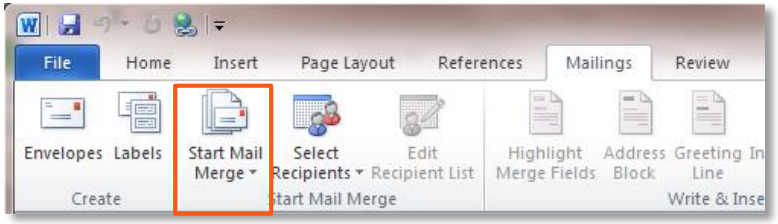
GOTCHA ALERT

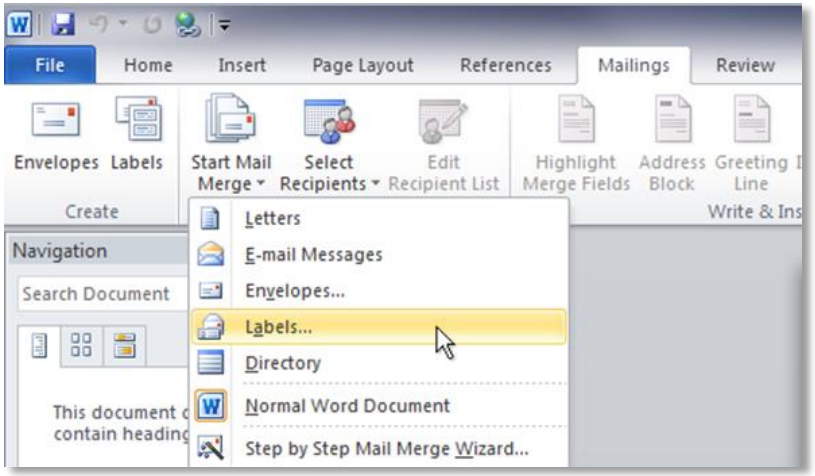
If you have a field for ZIP codes, make sure you change the column format to text, Otherwise, Excel will strip out any zeros that begin a ZIP code.

STEP 2: SET UP YOUR WORD DOC

Click on the **Mailings** tab and click **Start Mail Merge**.



Then click **Labels**.



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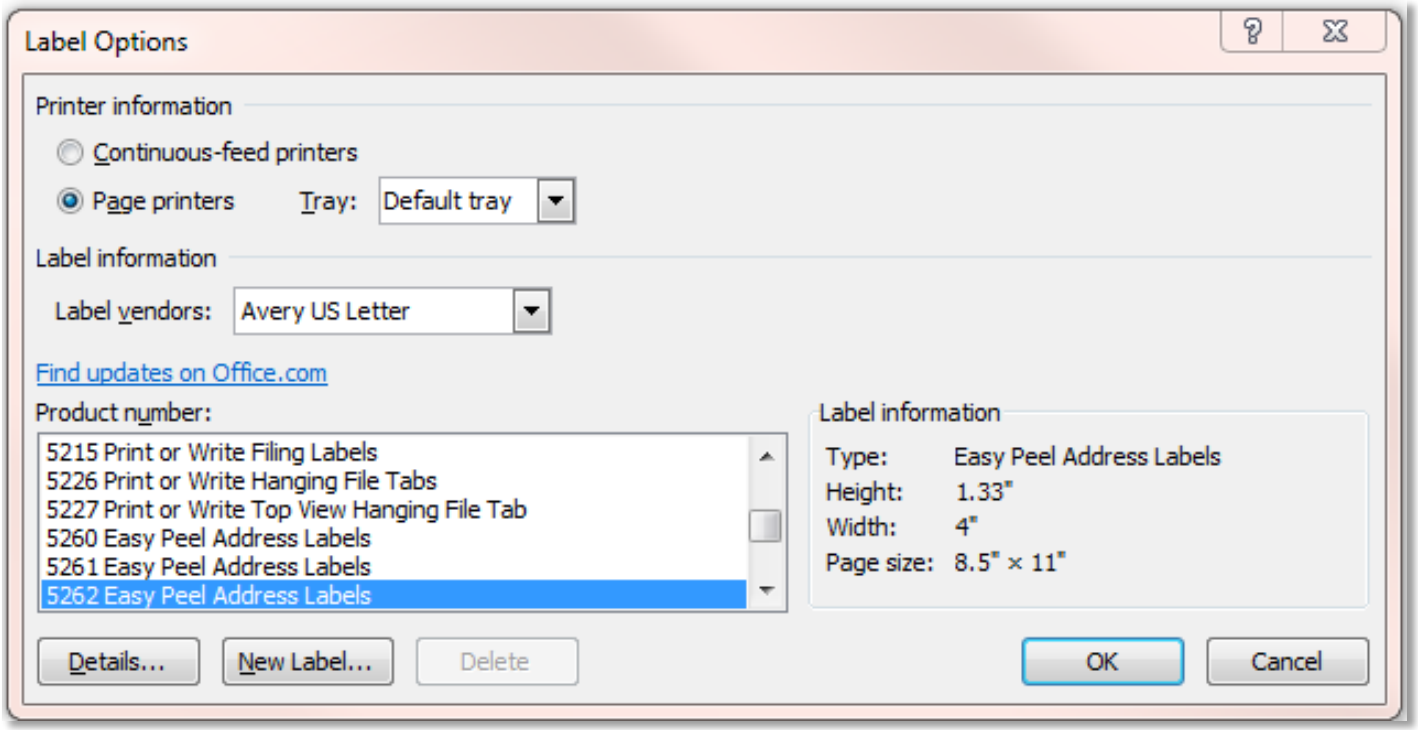
STEP 2: SET UP YOUR WORD DOC

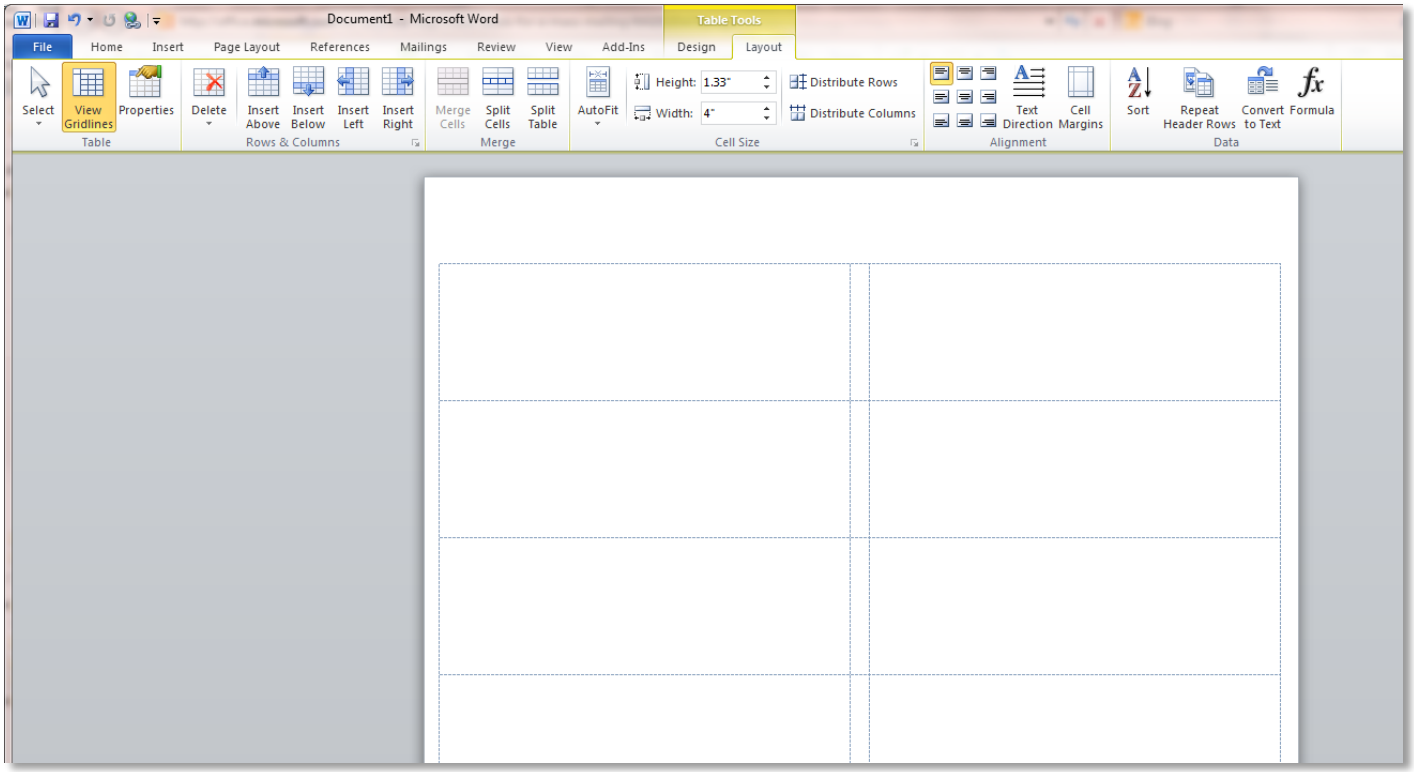
Choose the label type that matches your label sheets, and click **OK**.



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

STEP 2: SET UP YOUR WORD DOC

Word has just formatted your document for labels.



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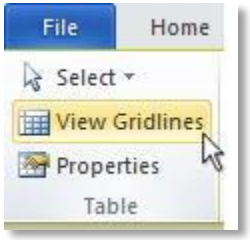
GOTCHA ALERT

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**.



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STEP 3: CONNECT TO YOUR DATA

Click **Select Recipients**.

Click **Use Existing List**.

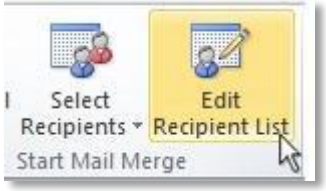
Browse to your Excel workbook.

Click **Open**.

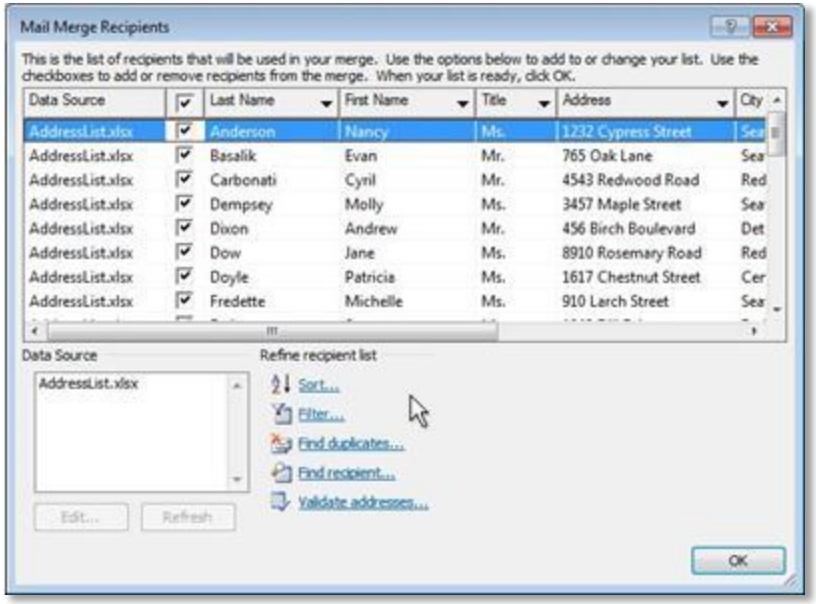
(If you're prompted again, click **Sheet1$**, and then click OK.)

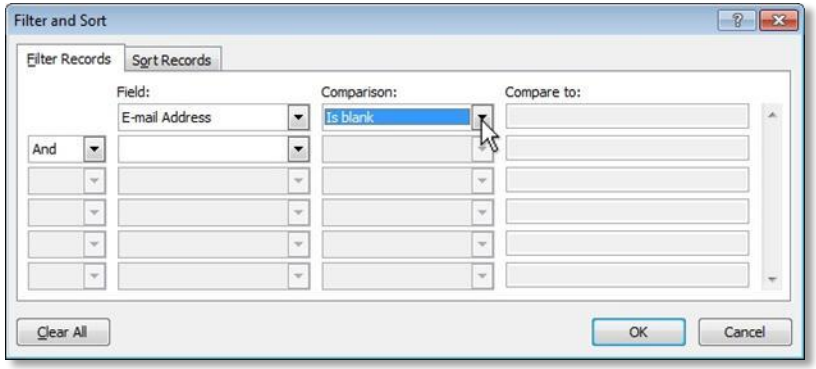
STEP 3: CONNECT TO YOUR DATA

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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BEST PRACTICE

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

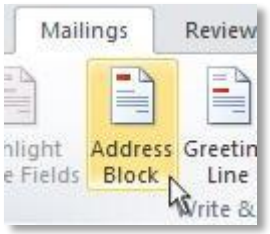
If they don't match, you can map them.

For more information, see Make labels for a mass mailing.

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

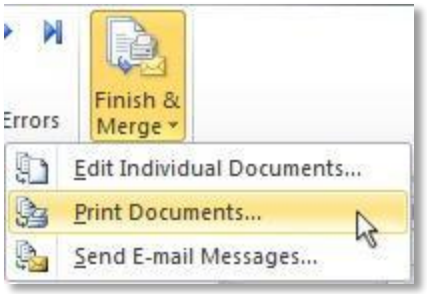
To see all your labels, click **Preview Results**.

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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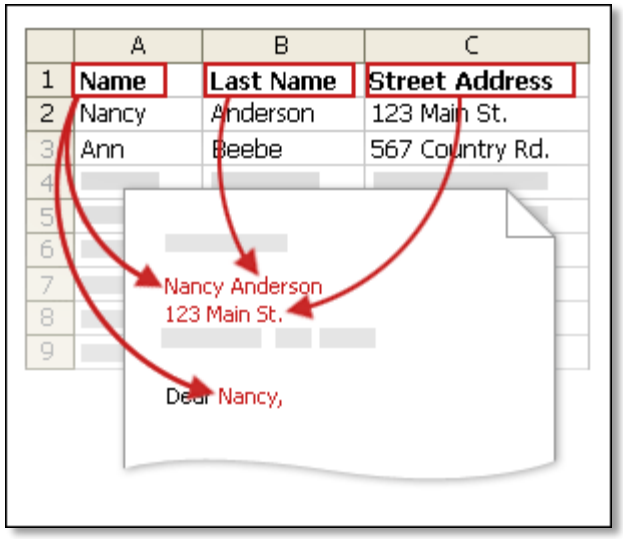
STEP 1: PREPARE YOUR DATA IN EXCEL



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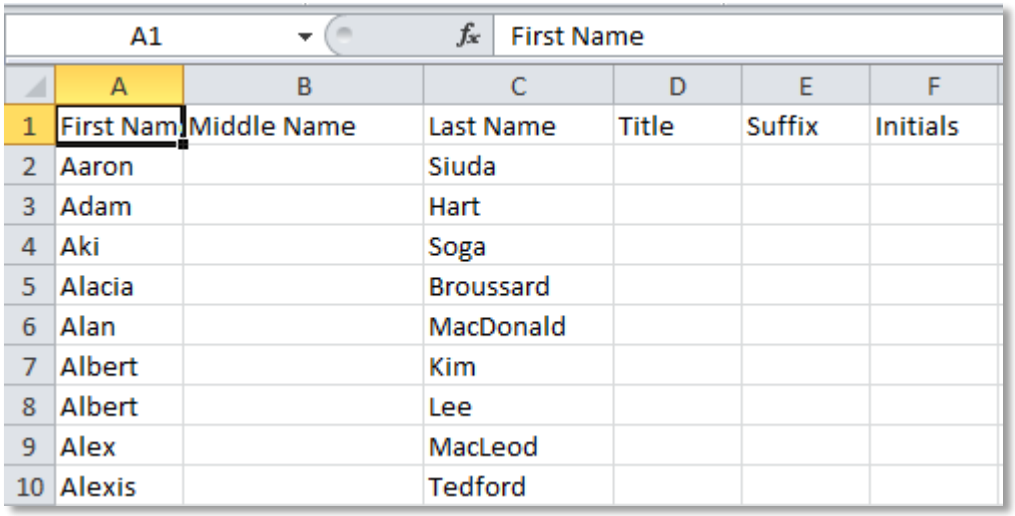
STEP 1: PREPARE YOUR DATA IN EXCEL

Make sure the right data is in the correct column.



A1 | First Name

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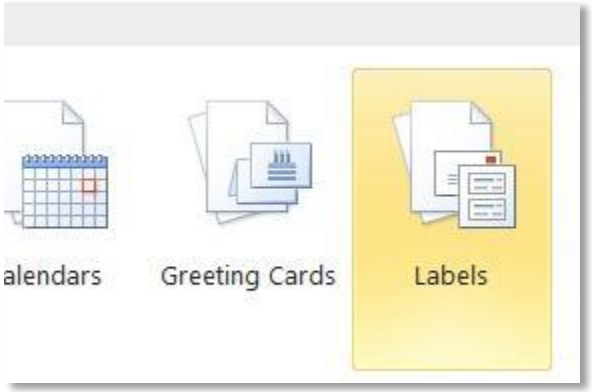
GOTCHA ALERT

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 **Labels**.



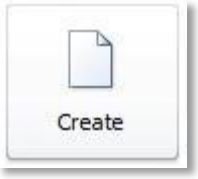
STEP 2: SET UP YOUR PUBLICATION

Scroll down to the **Manufacturers** section.

Click the folder for the manufacturer of your labels.

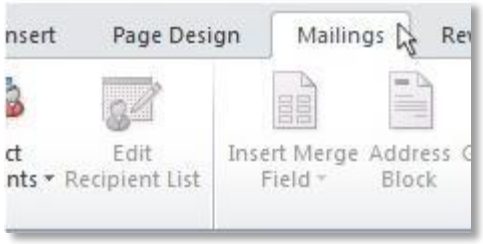
Click the label template for your label.

Click **Create**.

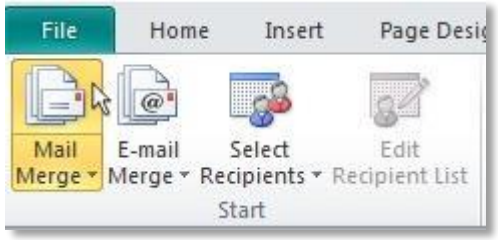


STEP 2: SET UP YOUR PUBLICATION

Click the **Mailings** tab.



Click **Mail Merge**.



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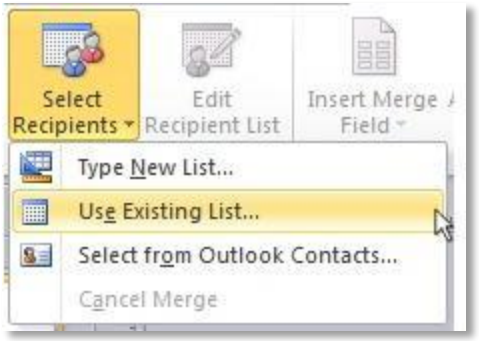
STEP 3: CONNECT TO YOUR DATA

Click **Select Recipients**.

Click **Use Existing List**.



Browse to your Excel Workbook.

Click **Open**.

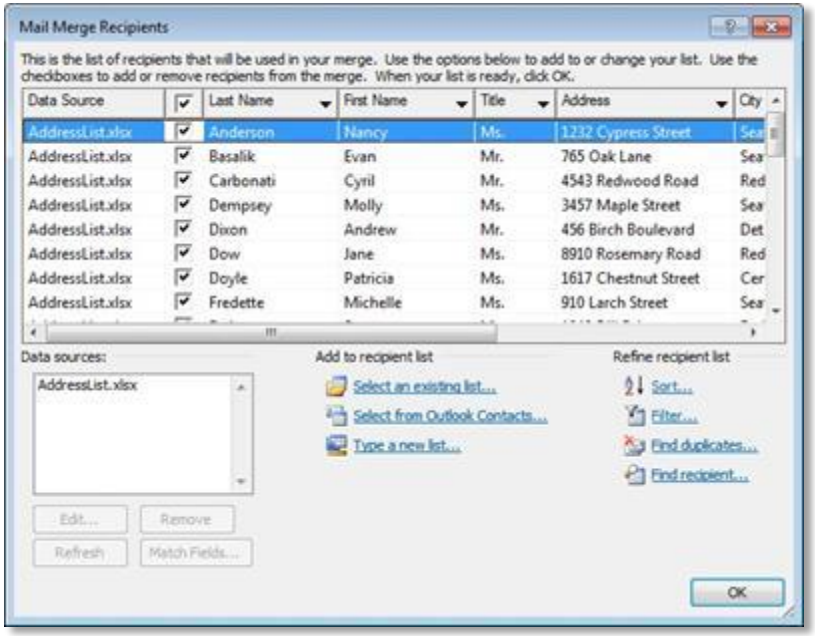
(If you're prompted again, click **Sheet1$**, and then click OK.)

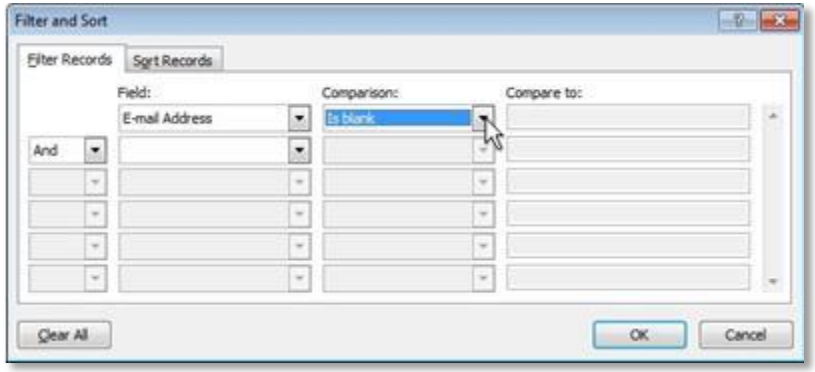
STEP 3: CONNECT TO YOUR DATA

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.





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STEP 4: INSERT THE ADDRESSES

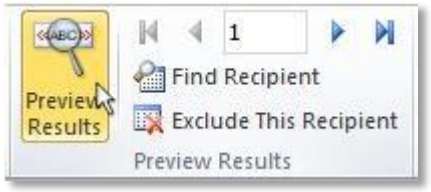
Click in the first label.

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**.

STEP 5: PREVIEW AND PRINT

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



Click the blue arrows to see each result.

GOTCHA ALERT

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.

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

STEP 5: PREVIEW AND PRINT

Make sure you've loaded your labels into your printer.

Click **Finish and Merge**, and then click **Merge to Printer**.

STEP 5: PREVIEW AND PRINT

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: Set up your Word doc

Step 2: Connect to your data

Step 3: Insert the addresses

Step 4: Preview and print

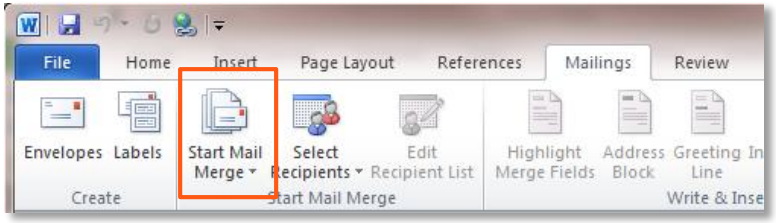
GOTCHA ALERT

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

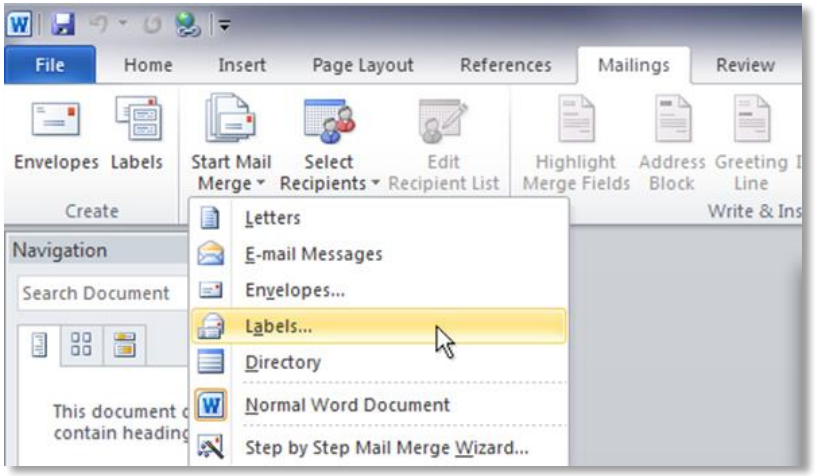
For more information, see Make labels for a mass mailing.

STEP 1: SET UP YOUR WORD DOC

Click on the **Mailings** tab and click **Start Mail Merge**.



Then click **Labels**.



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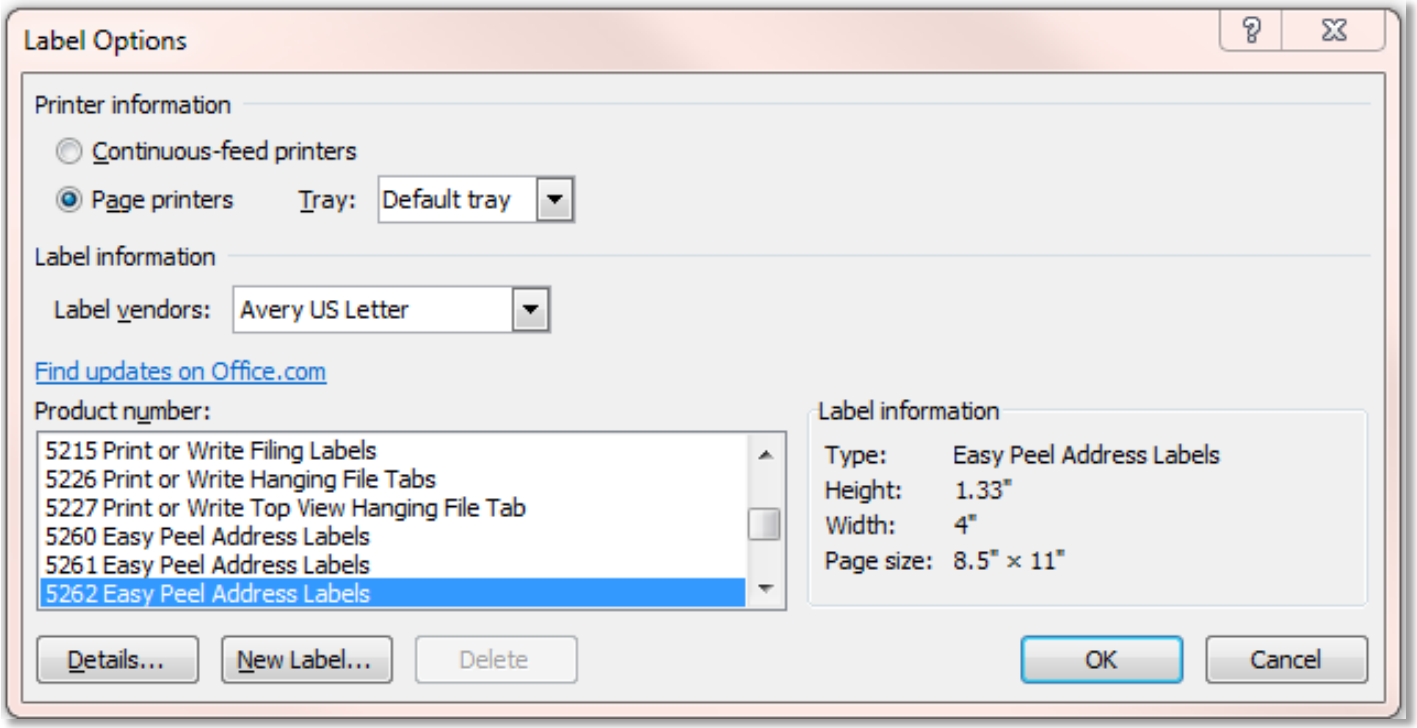
STEP 1: SET UP YOUR WORD DOC

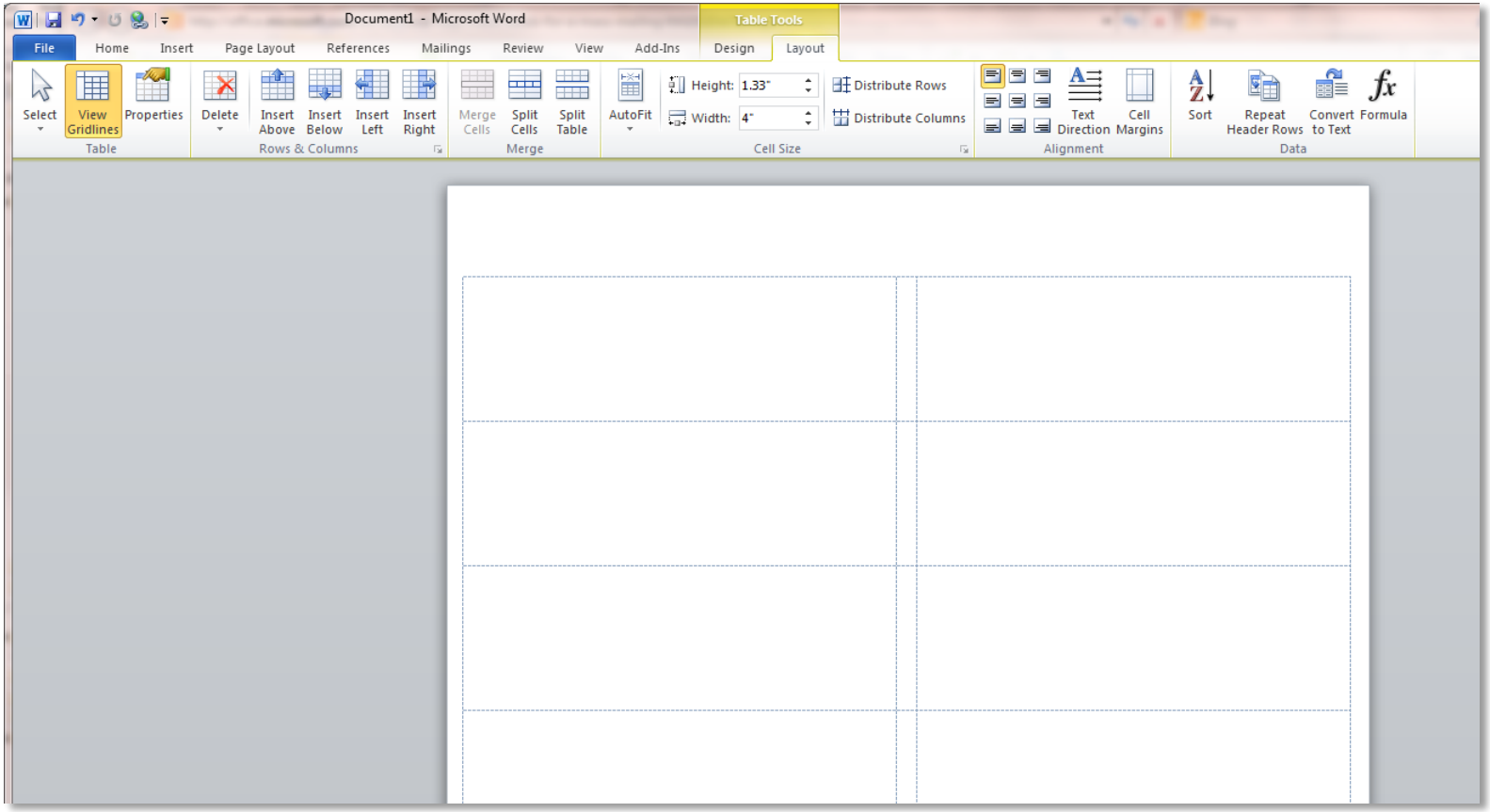
Choose the label type that matches your labels, and click **OK**.



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.



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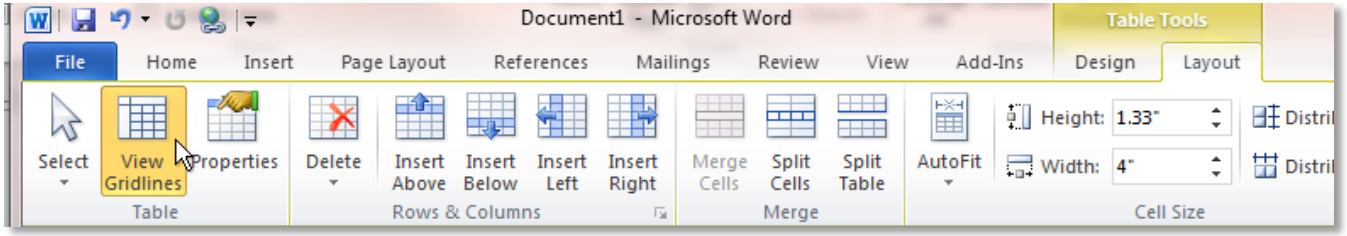
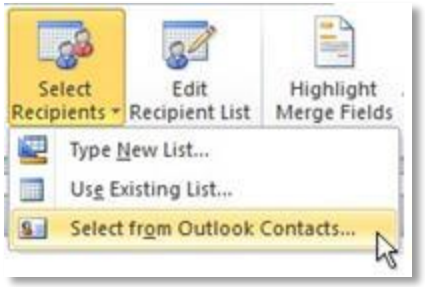


STEP 2: CONNECT TO YOUR DATA

Click **Select Recipients**.

Click **Select from Outlook Contacts**.



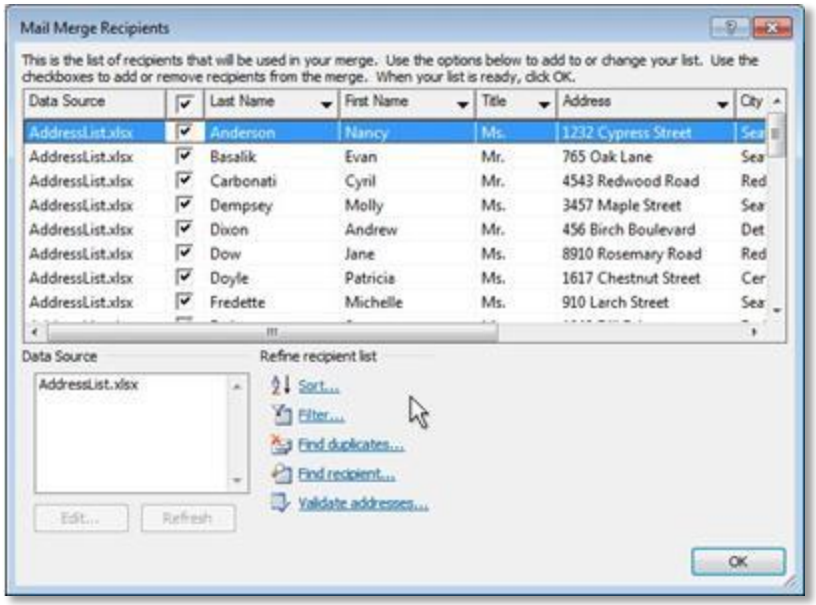
If you have more than one account in Outlook, click the contacts list that you want to use, and then click **OK**.

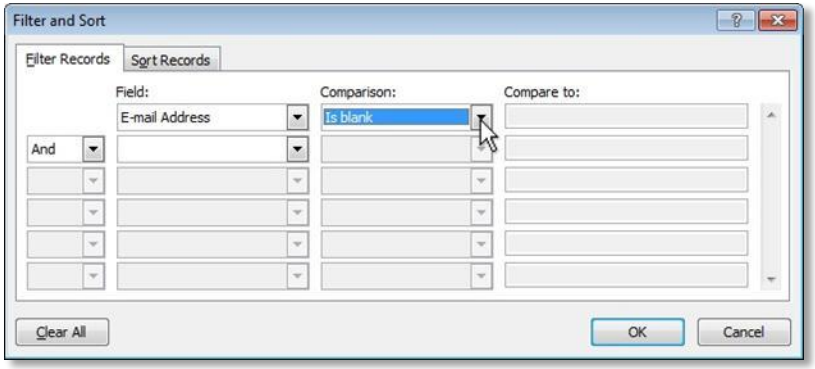
The **Mail Merge Recipients** dialog box opens.

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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BEST PRACTICE

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

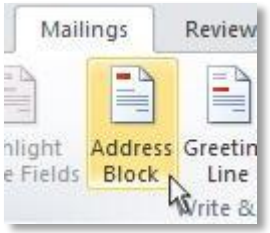
If they don't match, you can map them.

For more information, see Make labels for a mass mailing.

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**.

STEP 4: PREVIEW AND PRINT

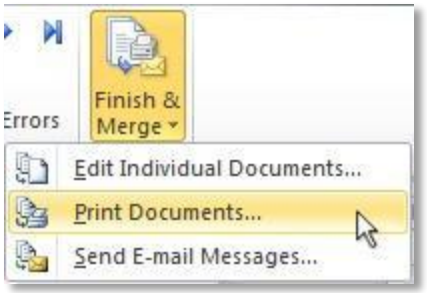
To see all your labels, click **Preview Results**.

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

STEP 4: PREVIEW AND PRINT

Make sure you've loaded your labels into your printer.

Click **Finish and Merge**, and then click **Print Documents**.



STEP 4: 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 OUTLOOK

Step 1: Set up your publication

Step 2: Connect to your data

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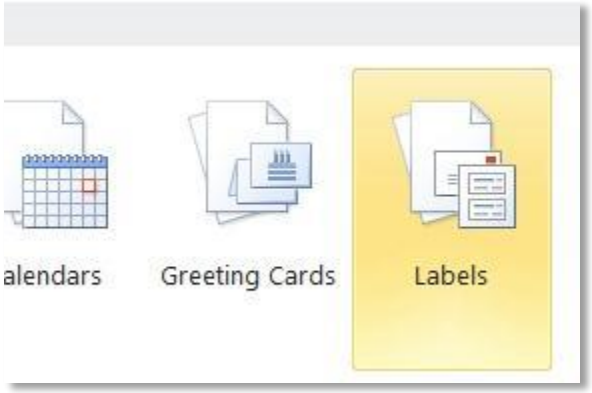
STEP 1: SET UP YOUR PUBLICATION

Open Publisher.

Click **Labels**.



STEP 1: SET UP YOUR PUBLICATION

Scroll down to the **Manufacturers** section.

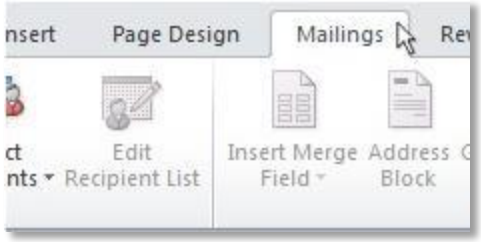
Double-click the folder for the manufacturer of your labels.

Click the label template for your label.

Click **Create**.

STEP 1: SET UP YOUR PUBLICATION

Click the **Mailings** tab.



Click **Mail Merge**.

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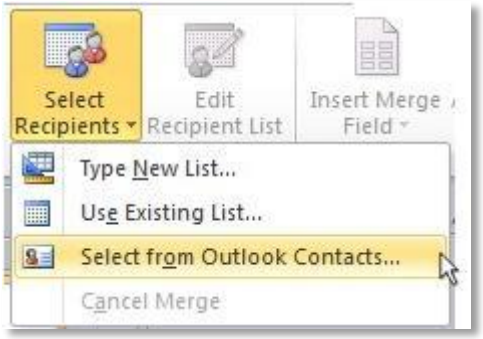
STEP 2: CONNECT TO YOUR DATA

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**.

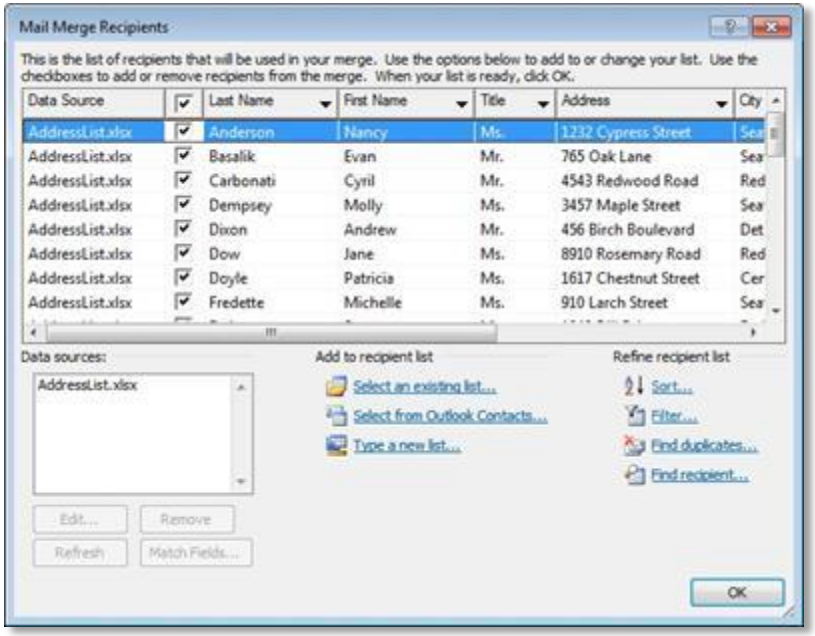
The **Mail Merge Recipients** dialog box opens.

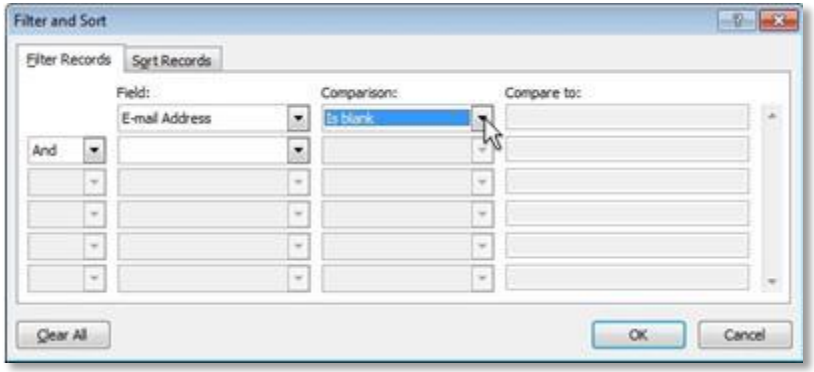
STEP 2: CONNECT TO YOUR DATA

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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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**.

STEP 4: PREVIEW AND PRINT

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

Click the blue arrows to see each result.

GOTCHA ALERT

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.

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

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STEP 4: PREVIEW AND PRINT

Make sure you've loaded your labels into your printer.

Click **Finish and Merge**, and then click **Merge to Printer**.

STEP 4: PREVIEW AND PRINT

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: Set up your Word doc

Step 3: Connect to your data

Step 4: Insert the addresses

Step 5: Preview and print

SmartPath TECHNOLOGIES
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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.

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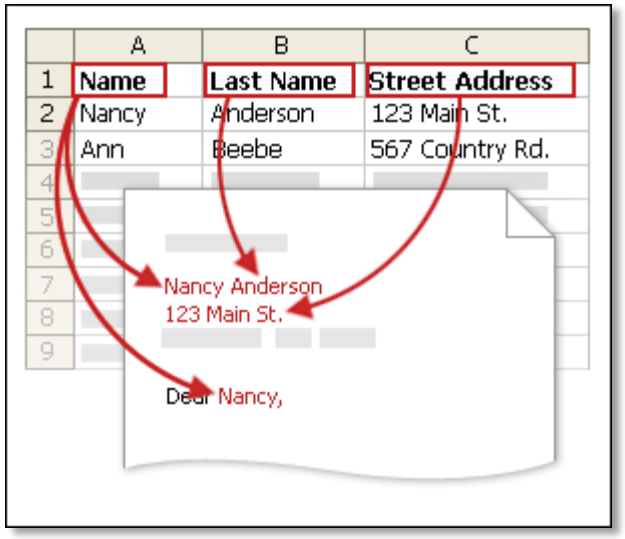
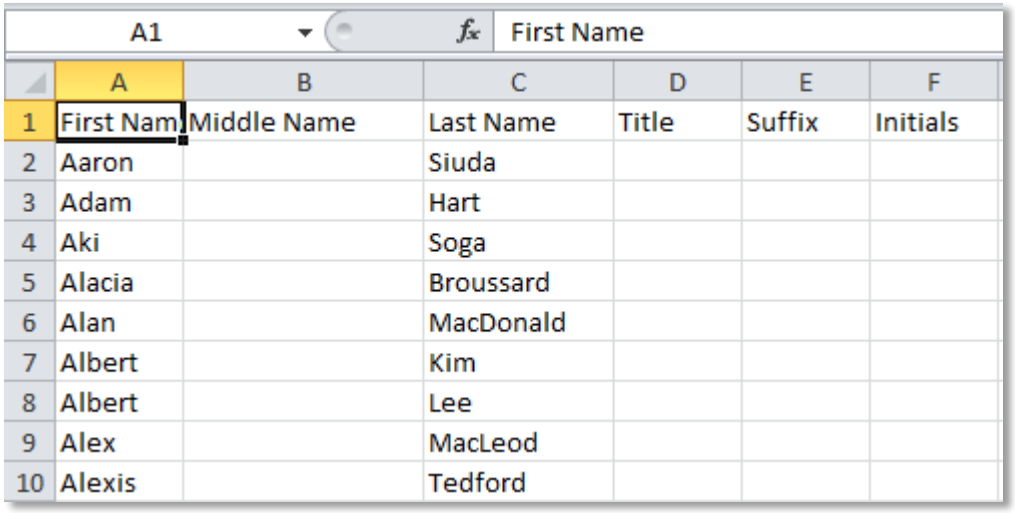
BEST PRACTICE: CHECK YOUR DATA IN EXCEL



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 | First Name

	A	B	C	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.

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GOTCHA ALERT

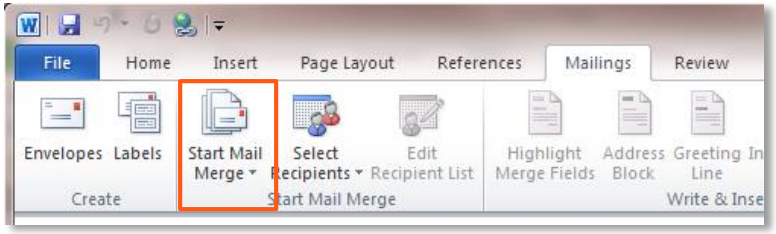
If you have a field for ZIP codes, make sure you change the column format to text, Otherwise Excel will strip out any zeros that begin a ZIP code.

BEST PRACTICE: CHECK YOUR DATA IN EXCEL

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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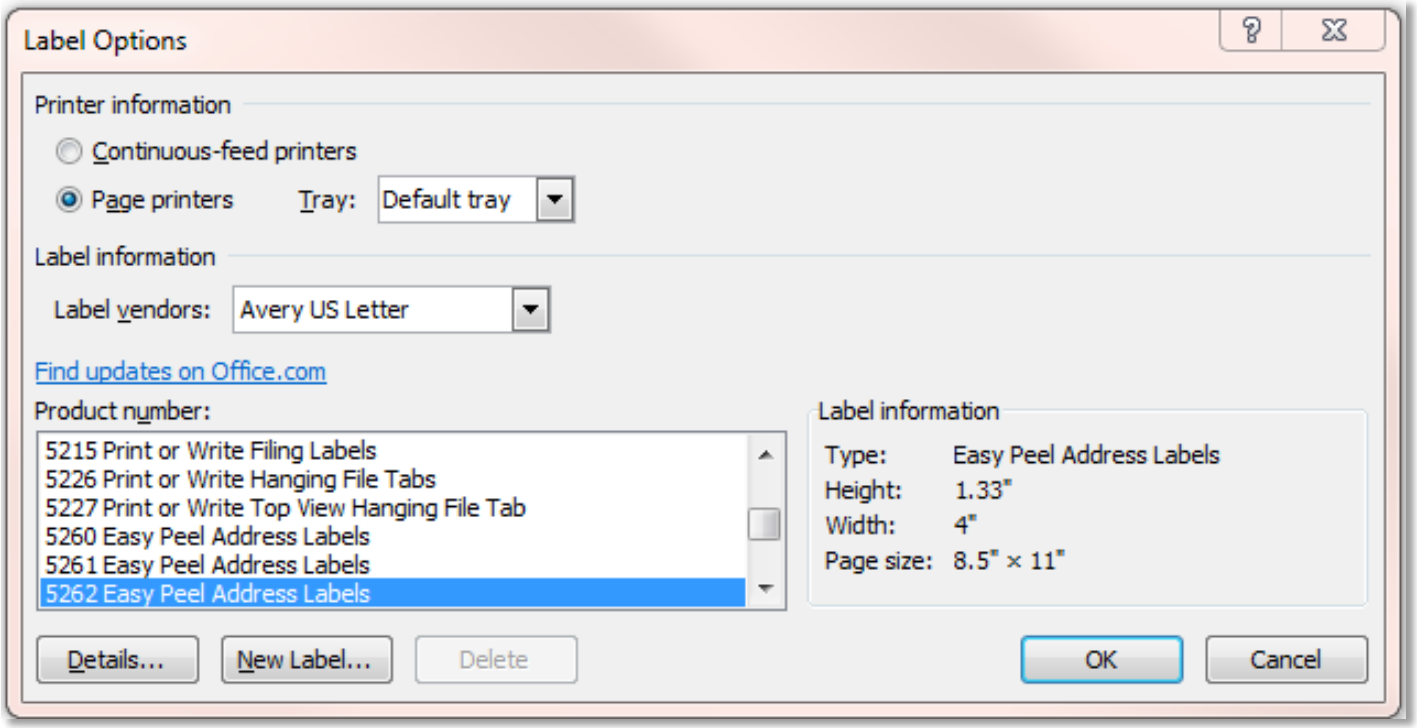
STEP 2: SET UP YOUR WORD DOC

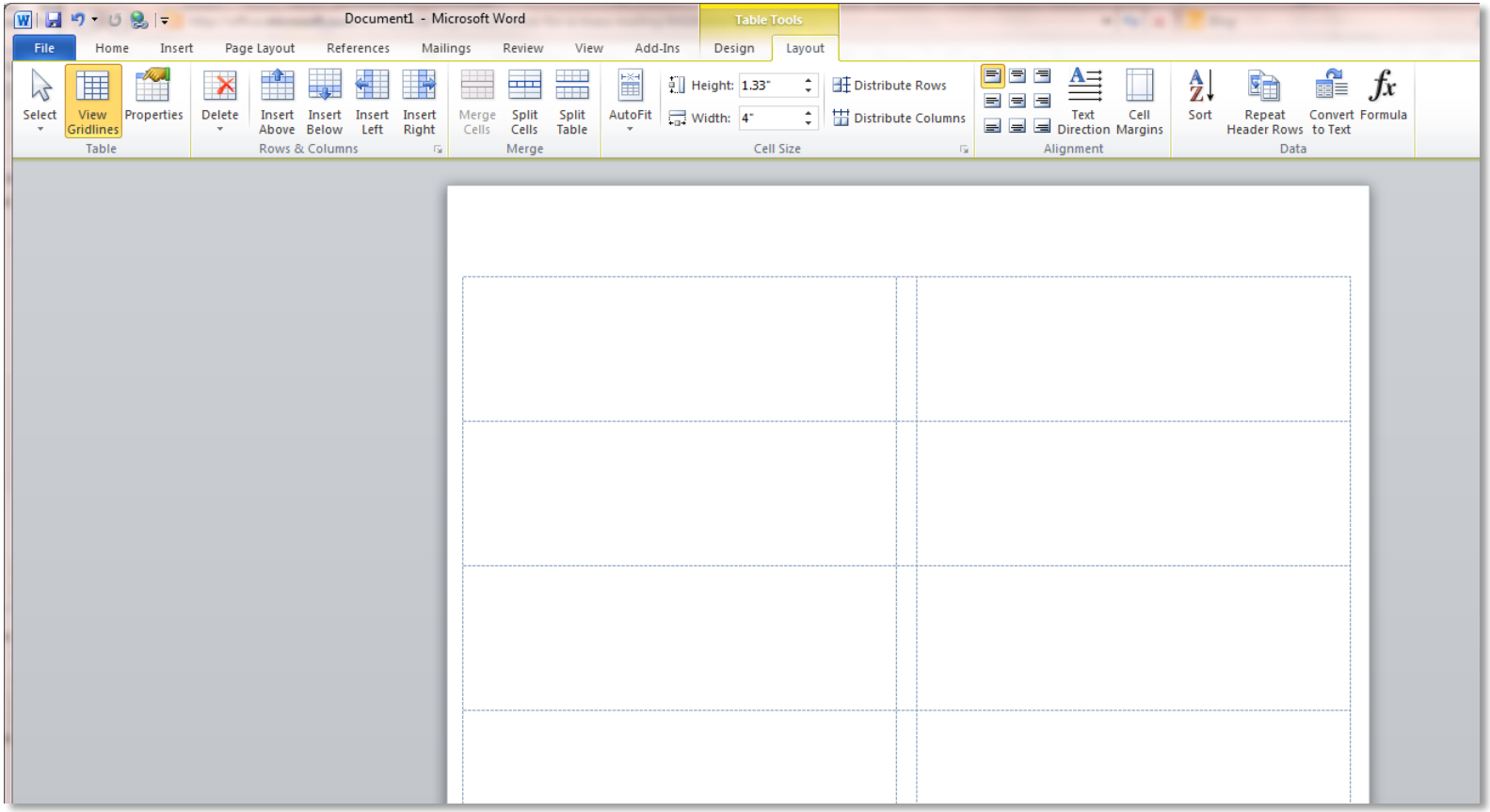
Choose the label type that matches your labels, and click **OK**.



If you don't find your label type, [see the instructions](#) at Office.com.

STEP 2: SET UP YOUR WORD DOC

Word has just formatted your document for labels.



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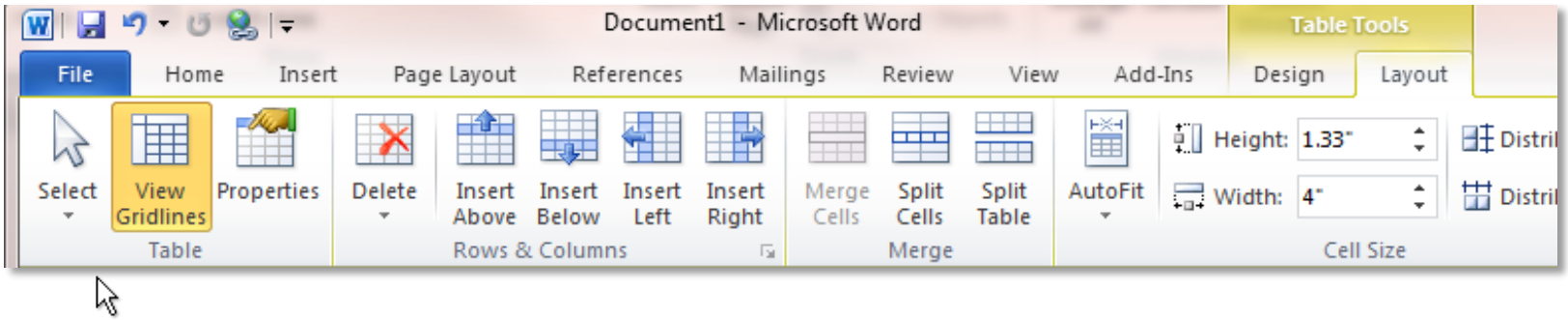
GOTCHA ALERT

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

Click **View Gridlines**.



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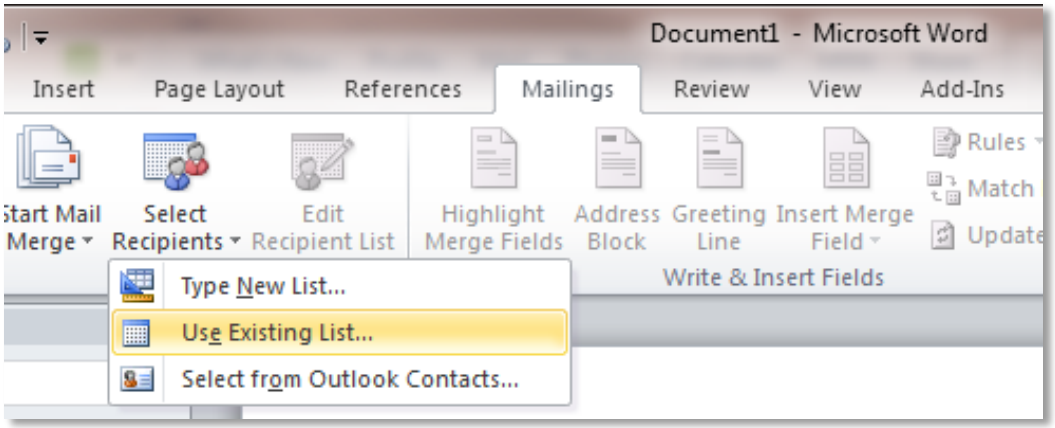
STEP 3: CONNECT TO YOUR DATA

Click **Select Recipients**.

Click **Use Existing List**.

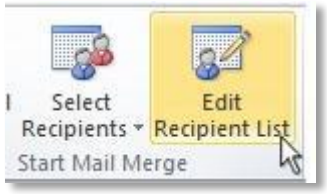


Browse to your .csv file.

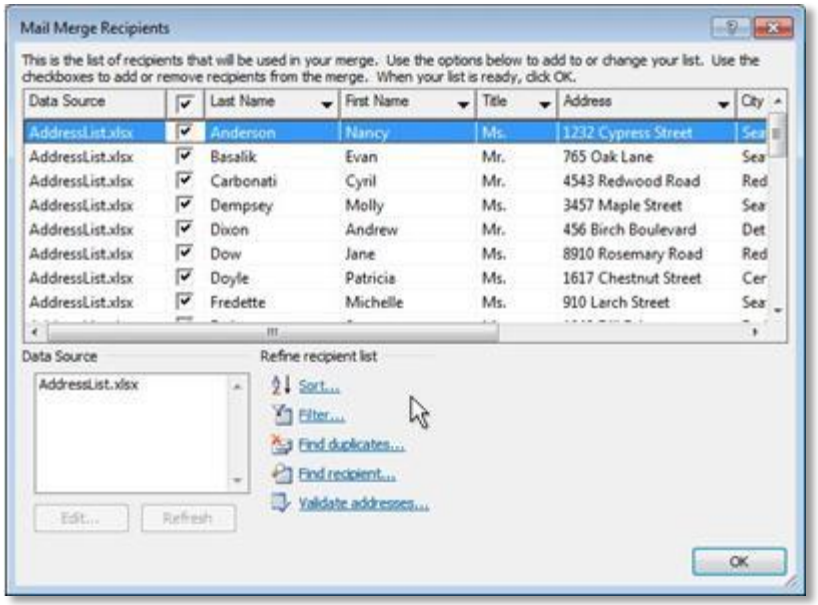
Click **Open**.

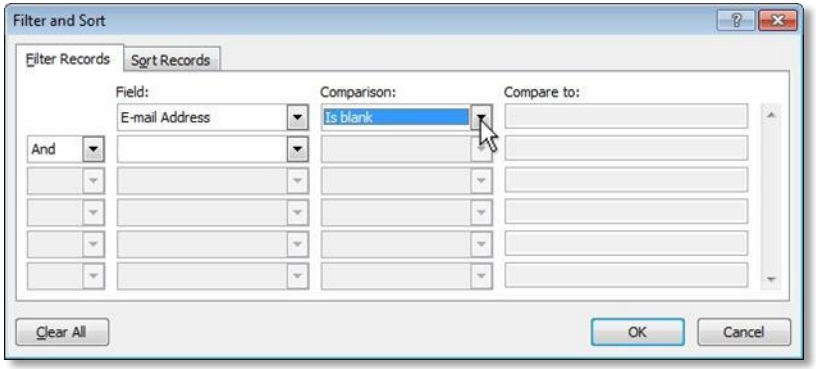
STEP 3: CONNECT TO YOUR DATA

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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BEST PRACTICE

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

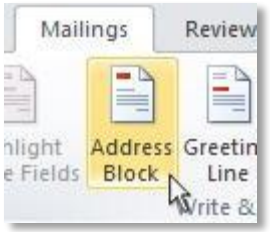
If they don't match, you can map them.

For more information, see Make labels for a mass mailing.

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**.

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STEP 5: PREVIEW AND PRINT

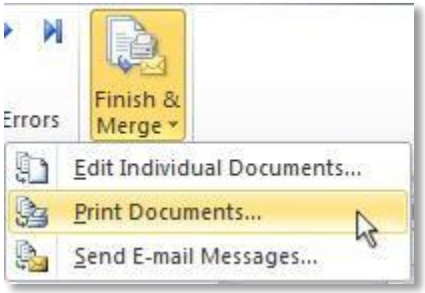
To see all your labels, click **Preview Results**.

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.

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

SmartPath TECHNOLOGIES
Business Computer and Network Specialists

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**.

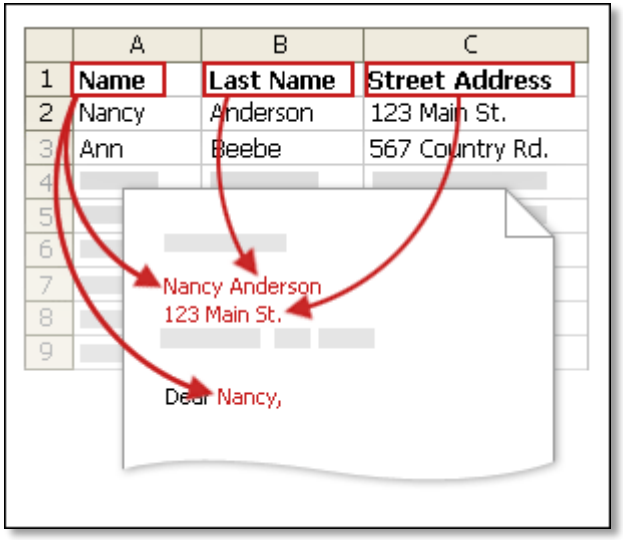
Click **Export**, or click **Manage** and then click **Export**.

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.

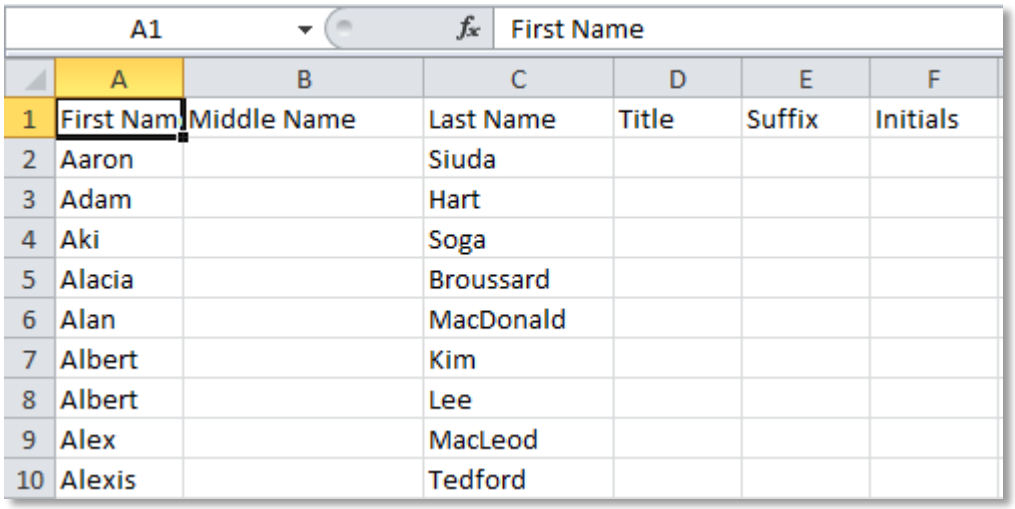
BEST PRACTICE: CHECK YOUR DATA IN EXCEL



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 | First Name

	A	B	C	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.

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GOTCHA ALERT

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.

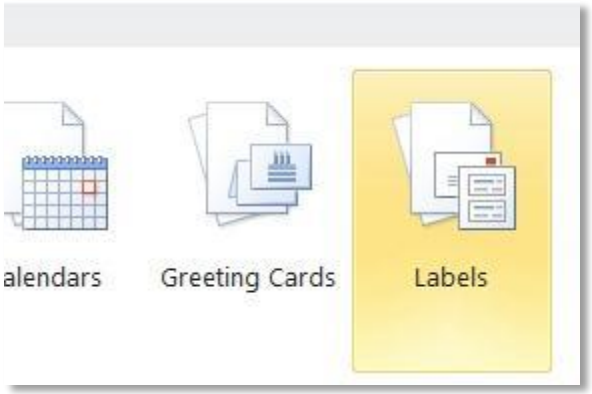
BEST PRACTICE: CHECK YOUR DATA IN EXCEL

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.

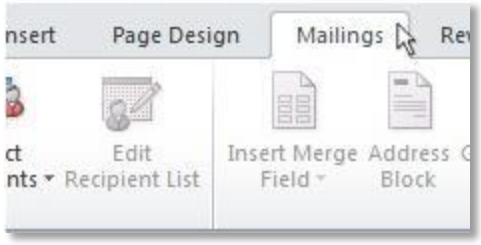
Double-click the folder for the manufacturer of your labels.

Click the label template for your label.

Click **Create**.

STEP 2: SET UP YOUR PUBLICATION

Click the **Mailings** tab.



Click **Mail Merge**.

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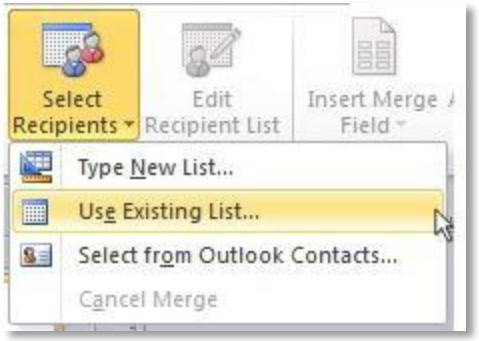
STEP 3: CONNECT TO YOUR DATA

Click **Select Recipients**.

Click **Use Existing List**.



Browse to your **Excel Workbook**.

Click **Open**.

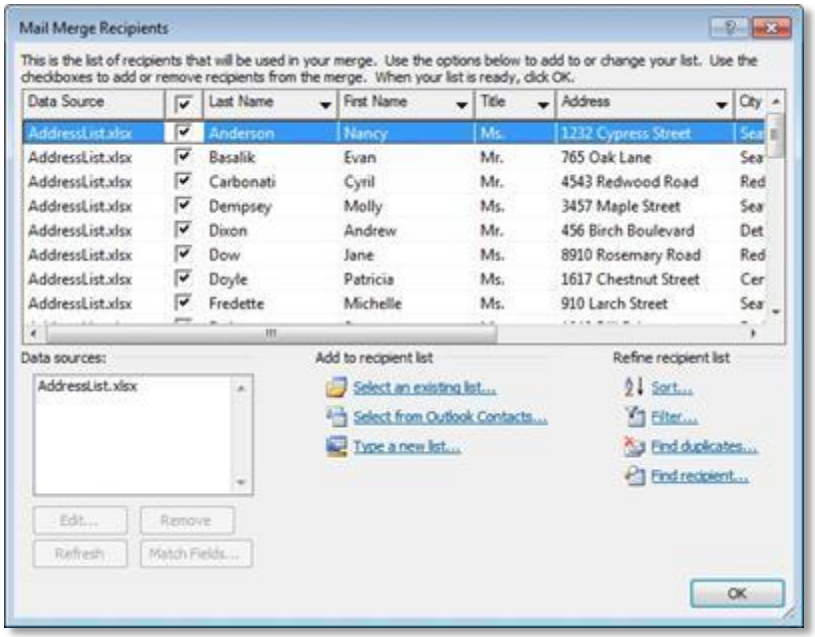
(If you're prompted again, click **Sheet1$,** and then click **OK**.)

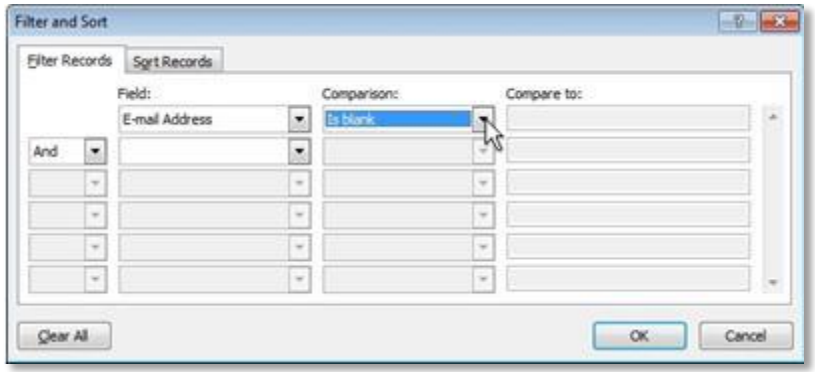
STEP 3: CONNECT TO YOUR DATA

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.





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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**.

STEP 5: PREVIEW AND PRINT

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

Click the blue arrows to see each result.

GOTCHA ALERT

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.

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

STEP 5: PREVIEW AND PRINT

Make sure you've loaded your labels into your printer.

Click **Finish and Merge**, and then click **Merge to Printer**.

STEP 5: PREVIEW AND PRINT

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: Set up your Word doc

Step 2: Create your contacts list

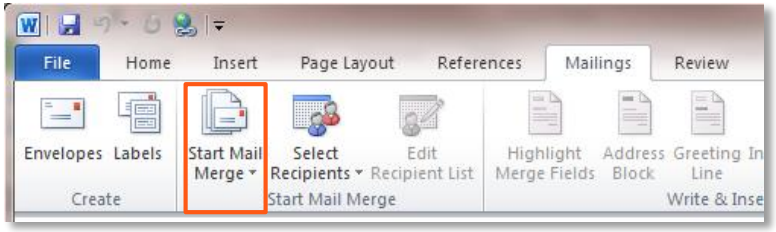
Step 3: Insert the addresses

Step 4: Preview and print

SmartPath TECHNOLOGIES
Business Computer and Network Specialists

STEP 1: SET UP YOUR WORD DOC

Click on the **Mailings** tab and click **Start Mail Merge**.



Then click **Labels**.

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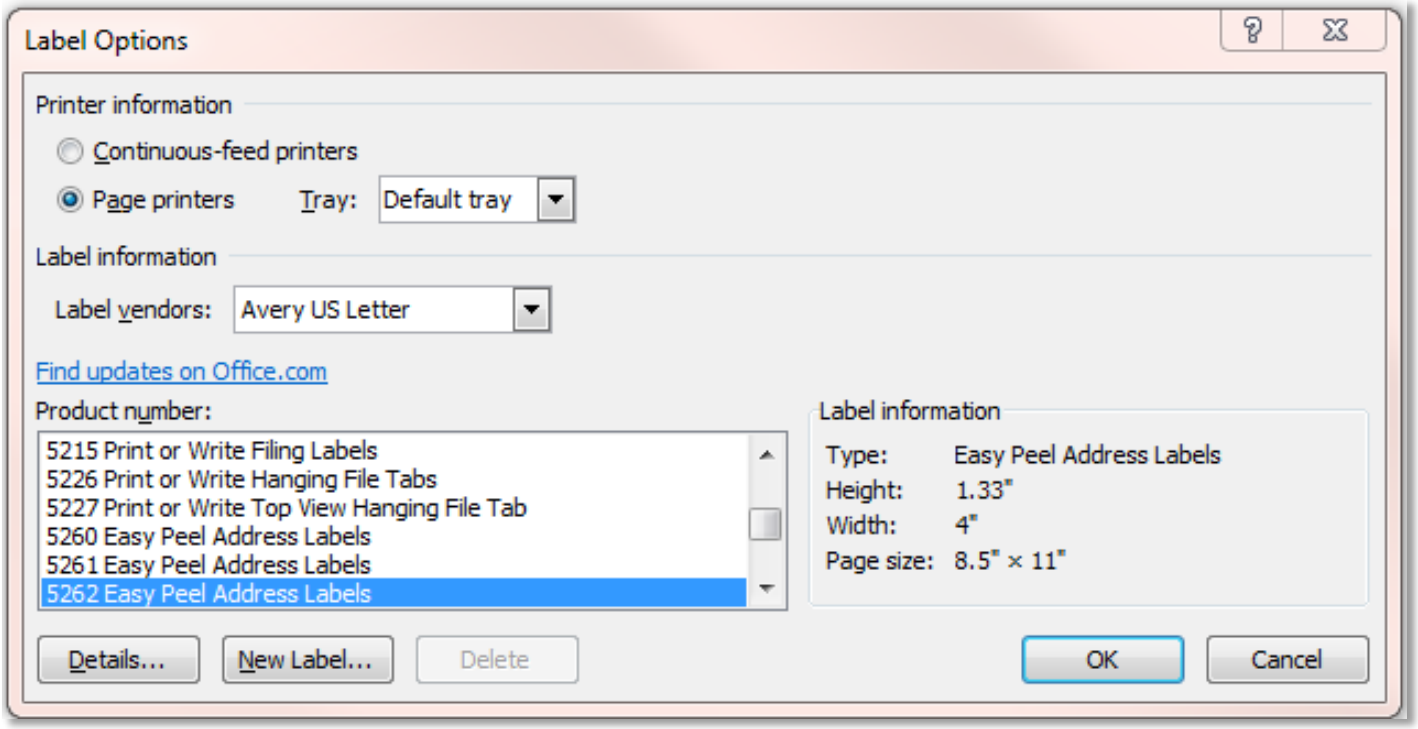
STEP 1: SET UP YOUR WORD DOC

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



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

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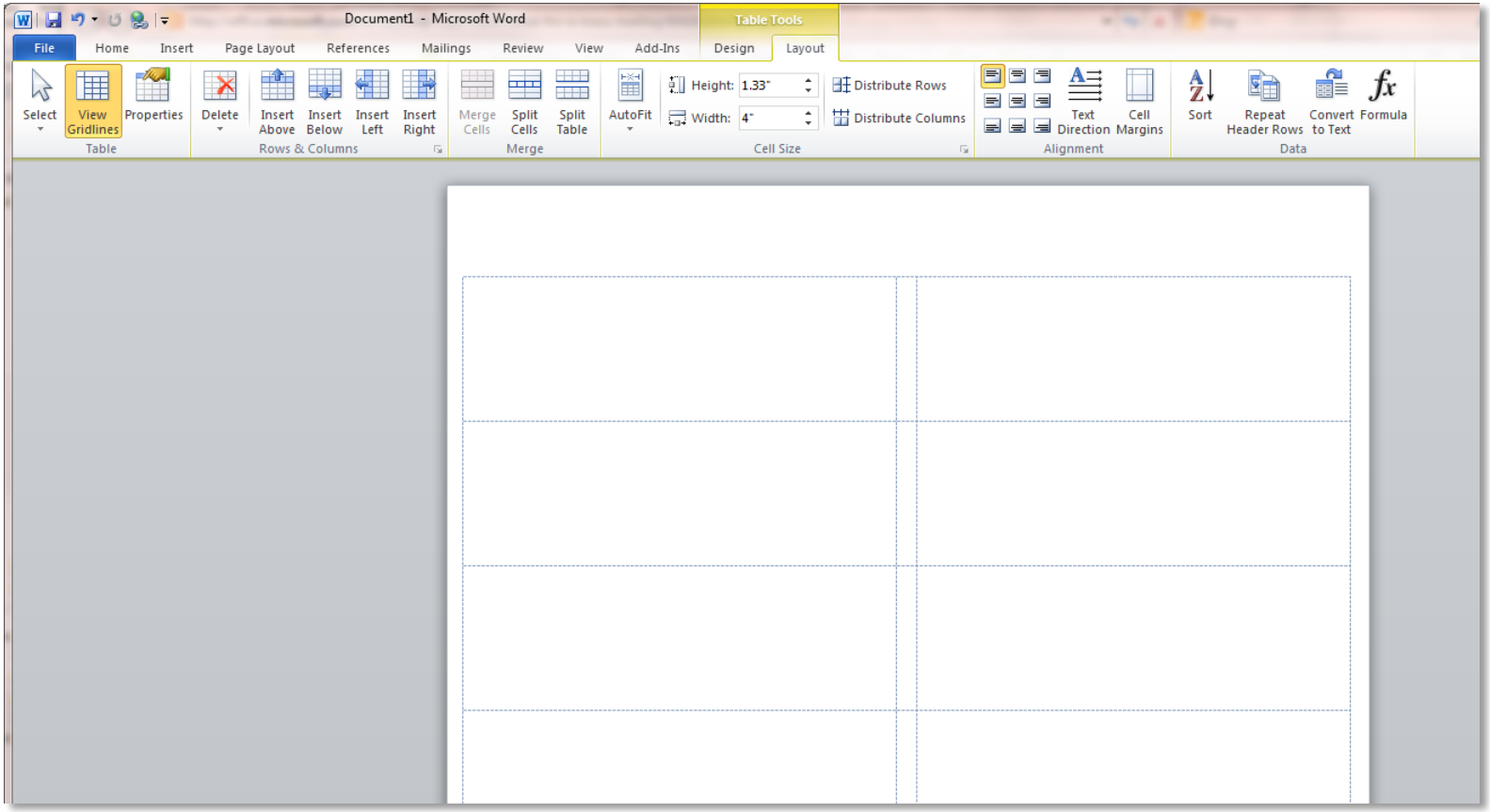
STEP 1: SET UP YOUR WORD DOC

Word has just formatted your document for labels.



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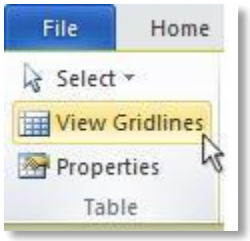
GOTCHA ALERT

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**.



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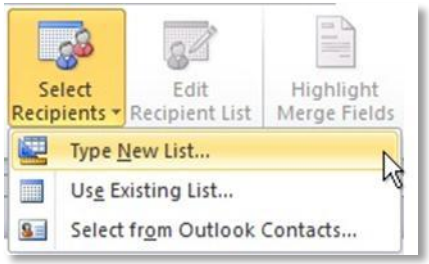
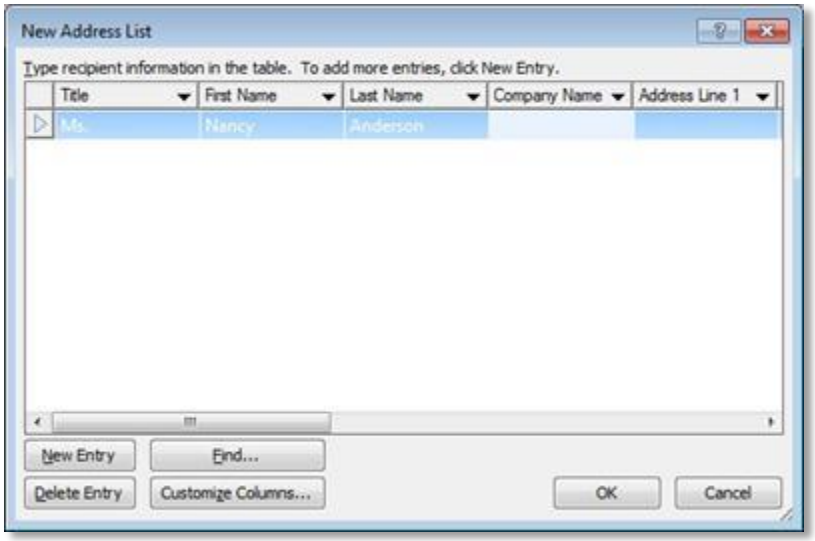
STEP 2: CREATE YOUR CONTACTS LIST

Click **Select Recipients**. Click **Type New List**.



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



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STEP 2: CREATE YOUR CONTACTS LIST

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

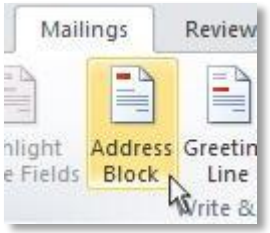
Click **New Entry**, and continue with the next contact.

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

STEP 3: INSERT THE ADDRESSES

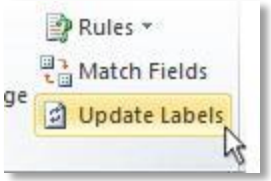
Click in the first label.

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**.



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STEP 4: 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.

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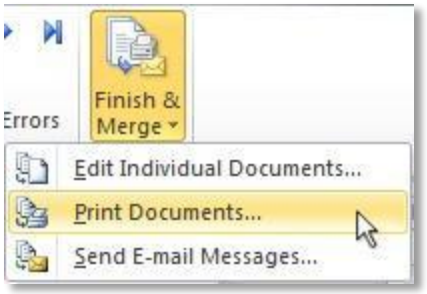
STEP 4: PREVIEW AND PRINT

Make sure you've loaded your labels into your printer.

Click **Finish and Merge**, and then click **Print Documents**.



STEP 4: 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.

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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

SmartPath TECHNOLOGIES
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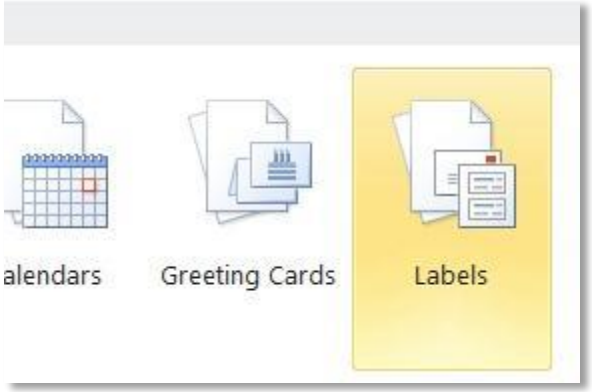
STEP 1: SET UP YOUR PUBLICATION

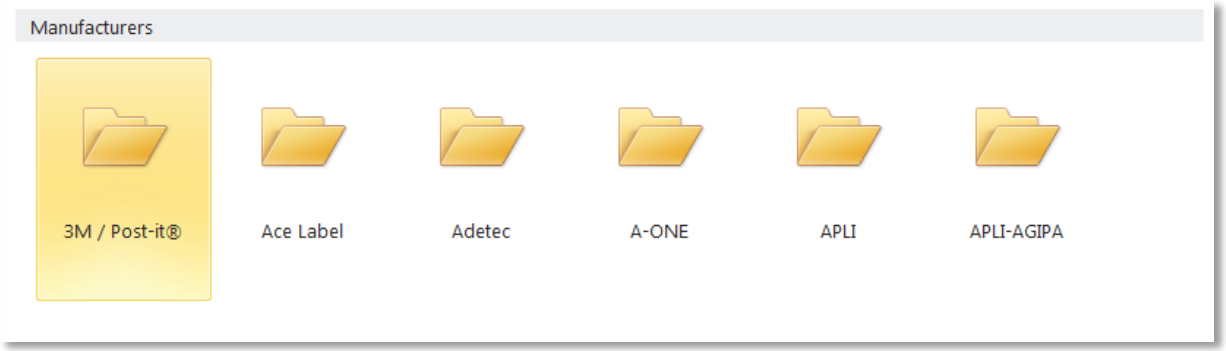
Open Publisher.

Click **Labels**.



STEP 1: SET UP YOUR PUBLICATION

Scroll down to the **Manufacturers** section.



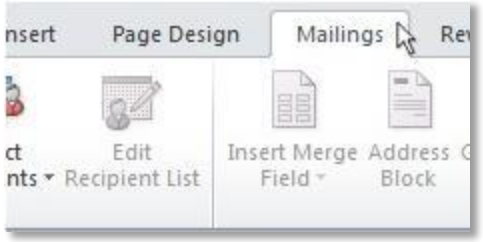
Double-click the folder for the manufacturer of your labels.

Click the label template for your label.

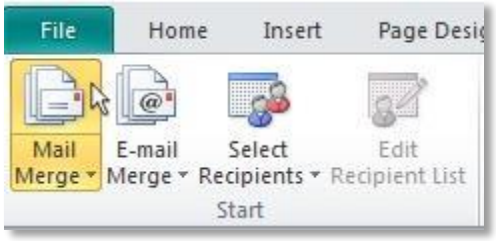
Click **Create**.

STEP 1: SET UP YOUR PUBLICATION

Click the **Mailings** tab.



Click **Mail Merge**.



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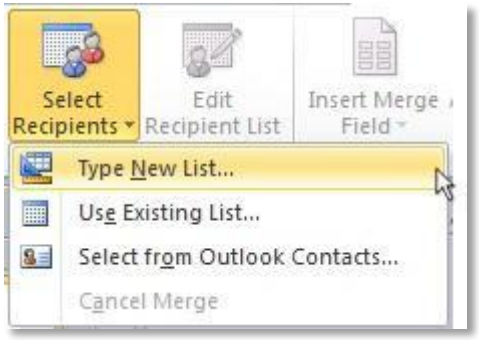
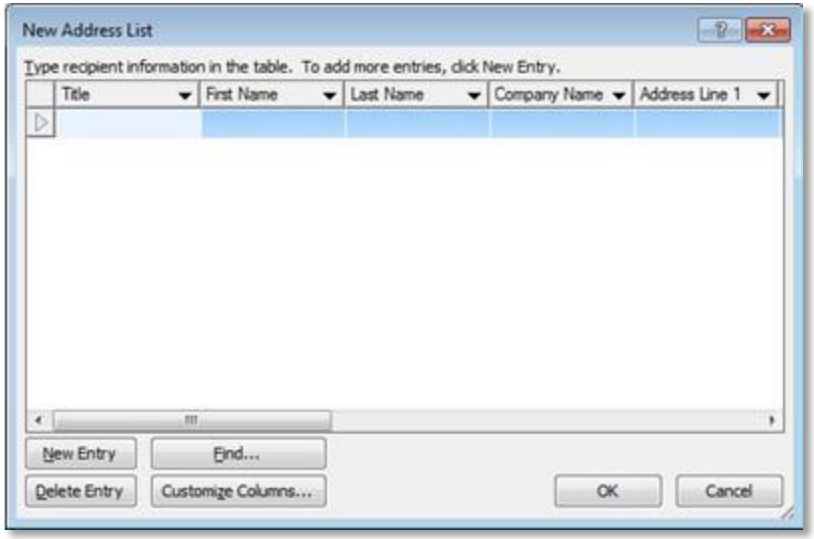
STEP 2: CREATE YOUR CONTACTS LIST

Click **Select Recipients**. Click **Type New List**.



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



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**.

STEP 4: PREVIEW AND PRINT

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

Click the blue arrows to see each result.

GOTCHA ALERT

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.

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

STEP 4: PREVIEW AND PRINT

Make sure you've loaded your labels into your printer.

Click **Finish and Merge**, and then click **Merge to Printer**.

STEP 4: PREVIEW AND PRINT

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.

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EMAIL MERGE WITH WORD AND EXCEL

Step 1: Prepare your data in Excel

Step 2: Set up your Word doc

Step 3: Connect to your data

Step 4: Insert a greeting line

Step 5: Preview and send

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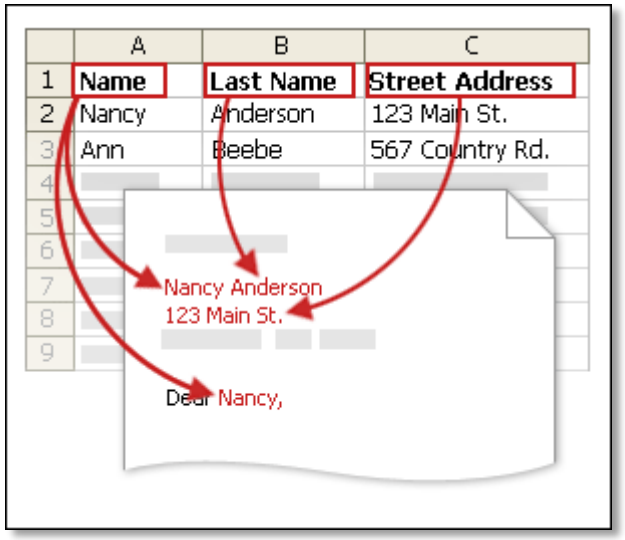
Business Computer and Network Specialists

STEP 1: PREPARE YOUR DATA IN EXCEL

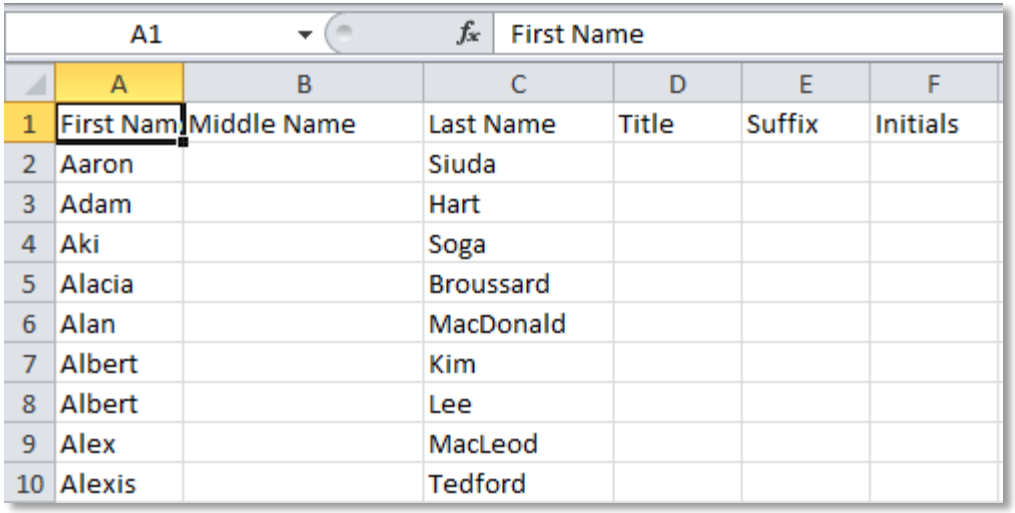


Your column headers in Excel will become the fields that mail merge will fill in automatically.

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 | First Name

	A	B	C	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.

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GOTCHA ALERT

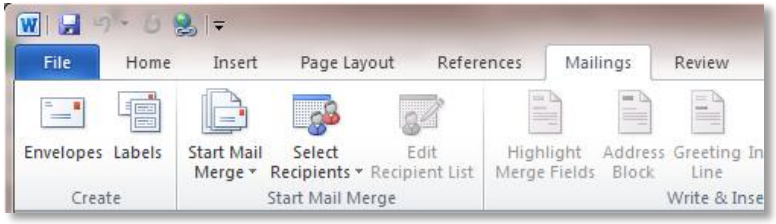
If you have a field for ZIP codes, make sure you change the column format to text, Otherwise Excel will strip out any zeros that begin a ZIP code.

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**.

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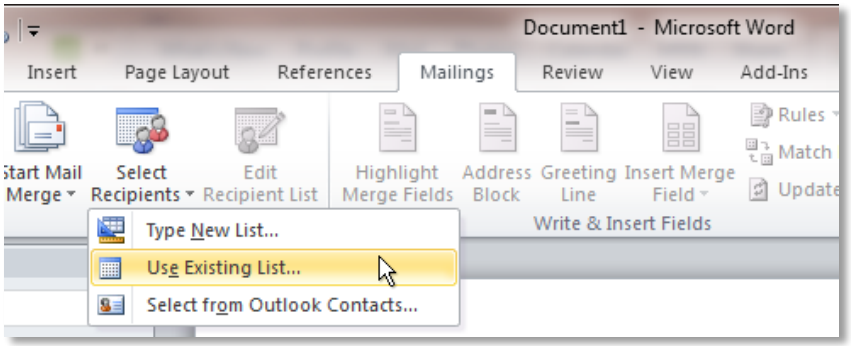
STEP 2: SET UP YOUR WORD DOC

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**.)

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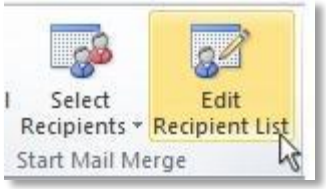
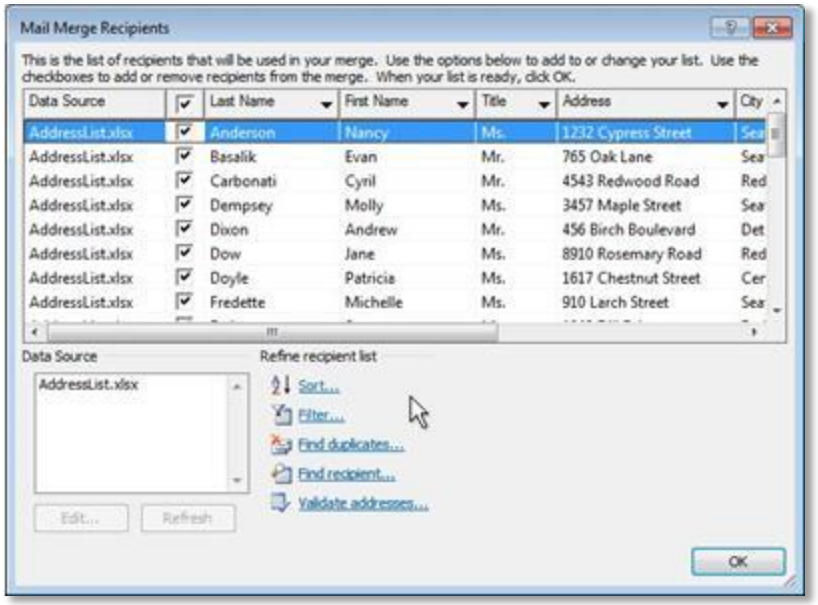
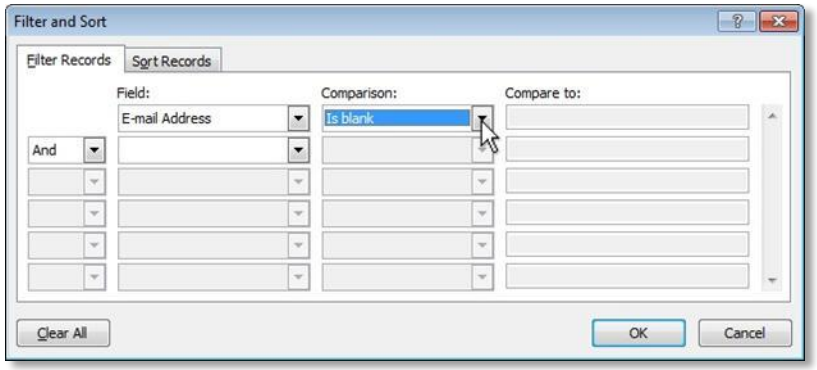
STEP 3: CONNECT TO YOUR DATA

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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BEST PRACTICE

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

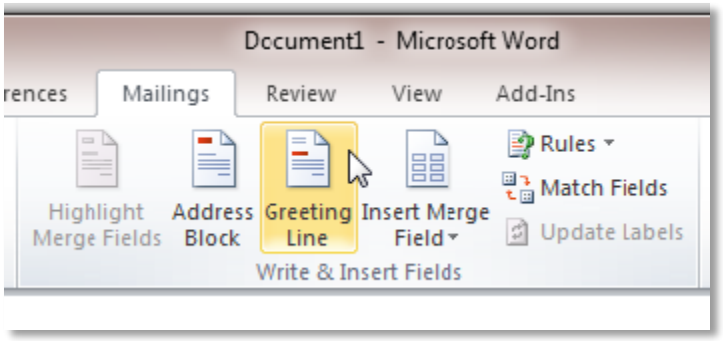
If they don't match, you can map them.

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

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.

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

STEP 5: PREVIEW AND SEND

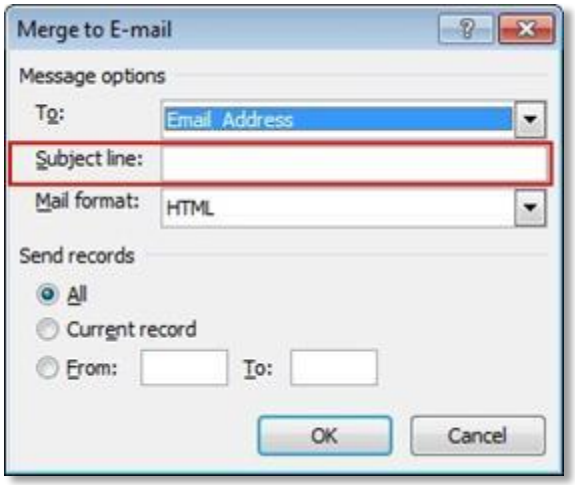
To see all your messages, click **Preview Results**.

You can use the arrows to click through the results.

GOTCHA ALERT

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

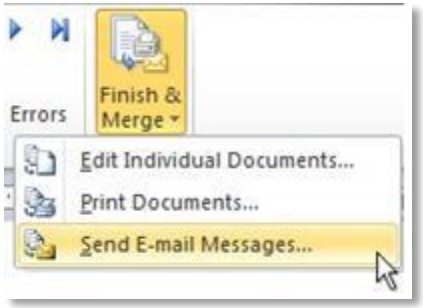
When you click **Send E-mail Messages**, you'll be prompted to provide a subject line.



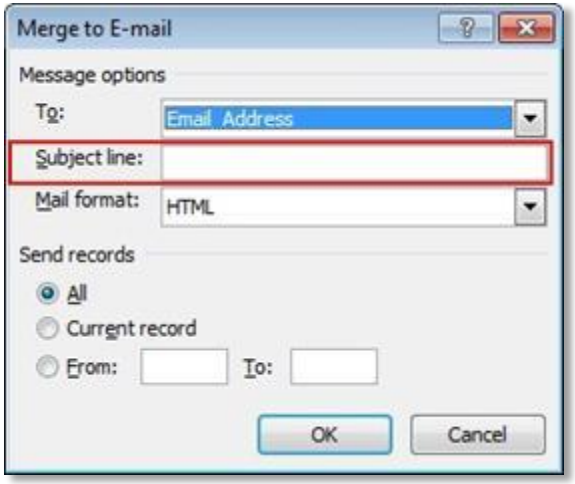
When you click **OK**, your email messages will be sent automatically.

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**.



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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: Prepare your data in Excel

Step 2: Set up your publication

Step 3: Connect to your data

Step 4: Preview and send

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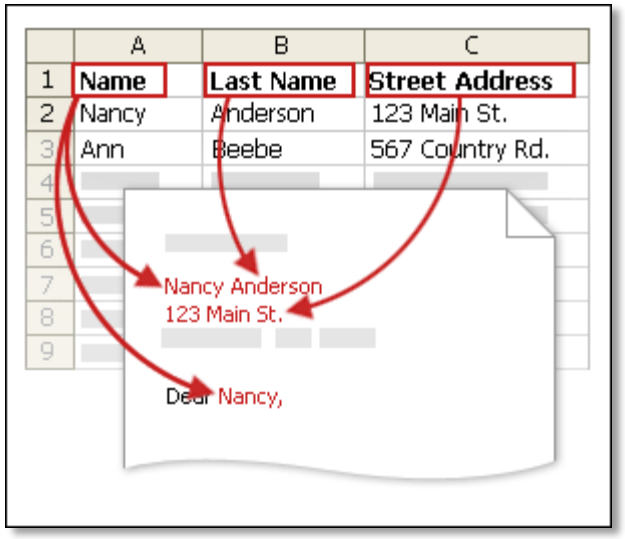
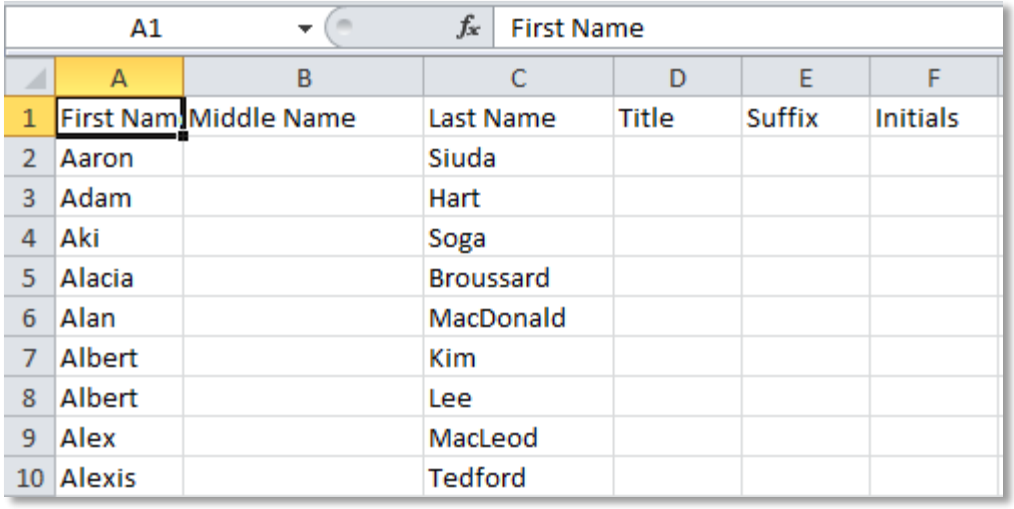
STEP 1: PREPARE YOUR DATA IN EXCEL



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 | First Name

	A	B	C	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.

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GOTCHA ALERT

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**.

STEP 2: SET UP YOUR PUBLICATION

Click the template that you want to use.

Click **Download**, or click **Create**.

STEP 2: SET UP YOUR PUBLICATION

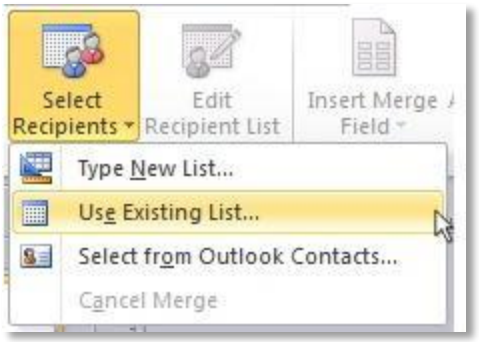
Click the **Mailings** tab and click **E-mail Merge**.

STEP 2: SET UP YOUR PUBLICATION

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 Excel Workbook.

Click **Open**.

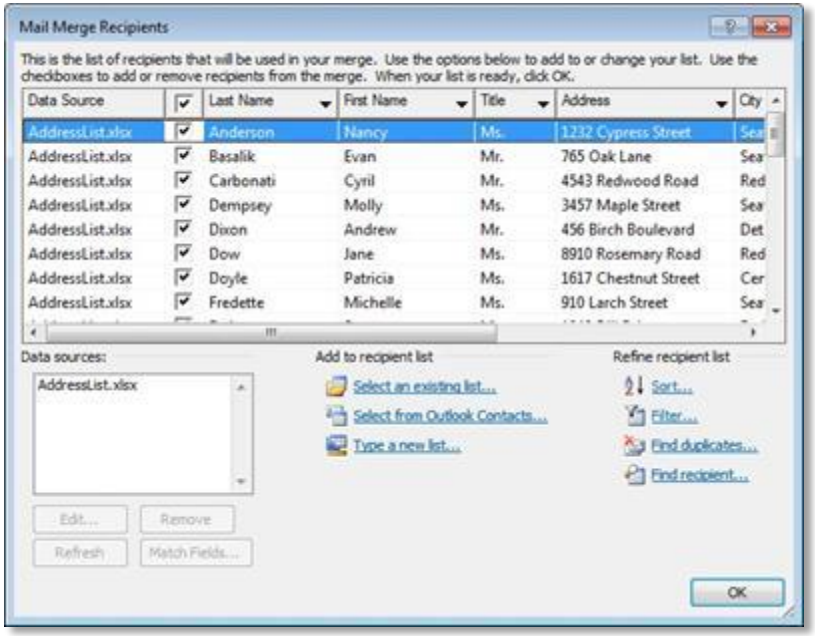
(If you're prompted again, click **Sheet1$**, and then click **OK**.)

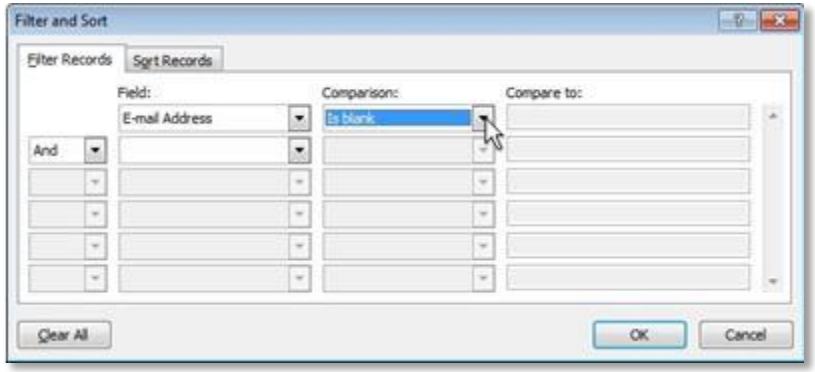
STEP 3: CONNECT TO YOUR DATA

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.

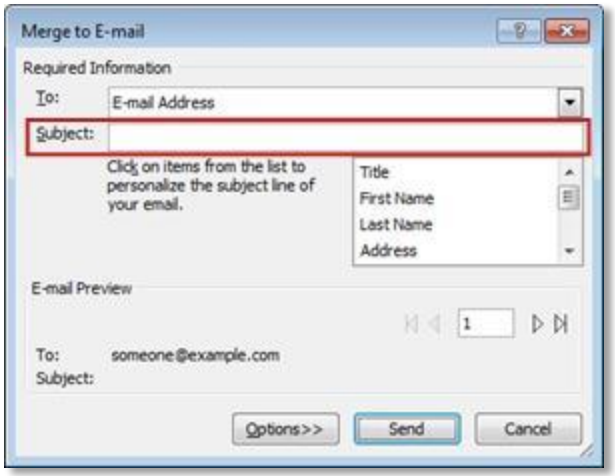




STEP 4: PREVIEW AND SEND

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**.



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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.

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EMAIL MERGE WITH WORD AND OUTLOOK

Step 1: Set up your Word doc

Step 2: Connect to your data

Step 3: Insert a greeting line

Step 4: Preview and send

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GOTCHA ALERT

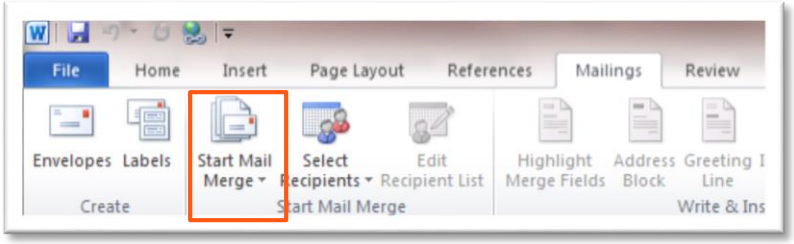
If you want to use custom categories of Outlook Contacts, you need to begin your mail merge in Outlook.

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

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**.

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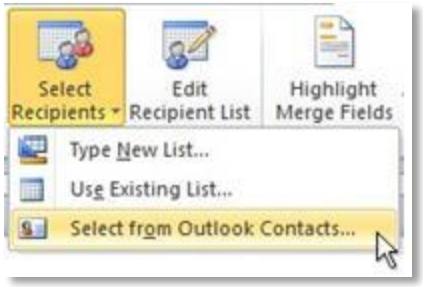
STEP 1: SET UP YOUR WORD DOC

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**.



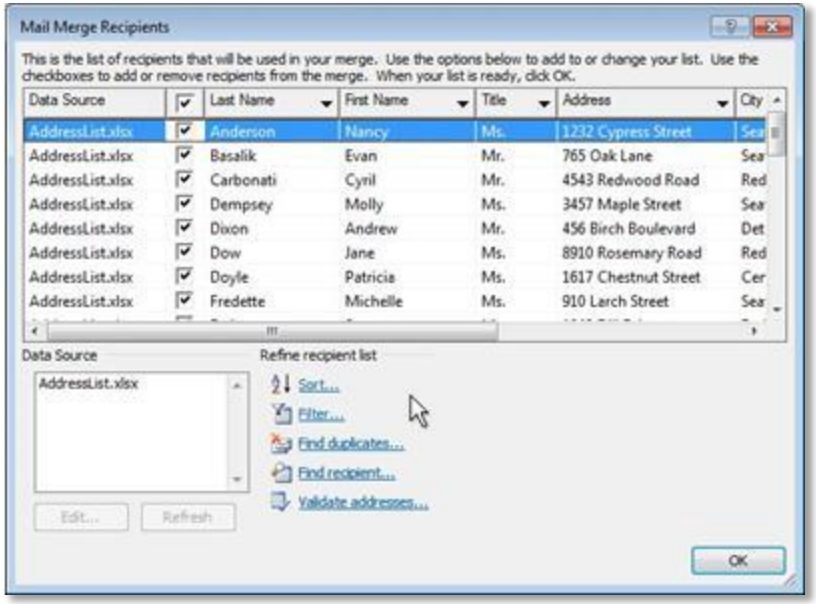
If you have more than one account in Outlook, click the contacts list that you want to use, and then click **OK**.

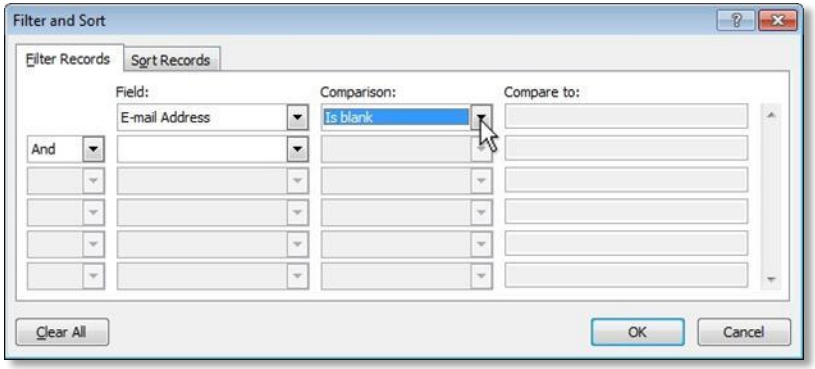
The **Mail Merge Recipients** dialog box opens.

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.





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.

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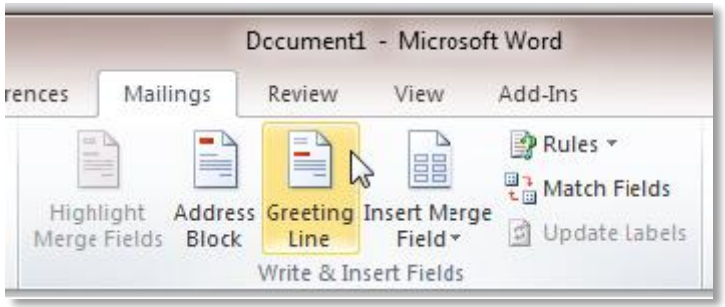
STEP 3: INSERT A GREETING LINE

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.

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

STEP 4: PREVIEW AND SEND

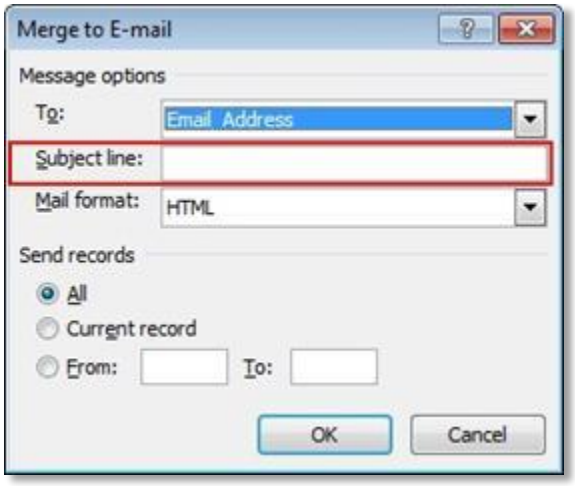
To see all your messages, click **Preview Results**.

You can use the arrows to click through the results.

GOTCHA ALERT

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

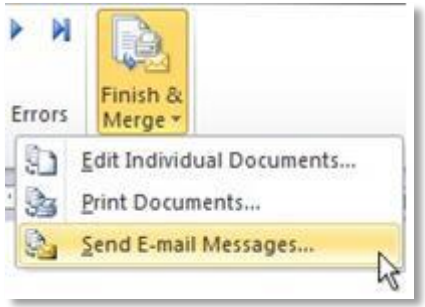
When you click **Send E-mail Messages**, you'll be prompted to provide a subject line.



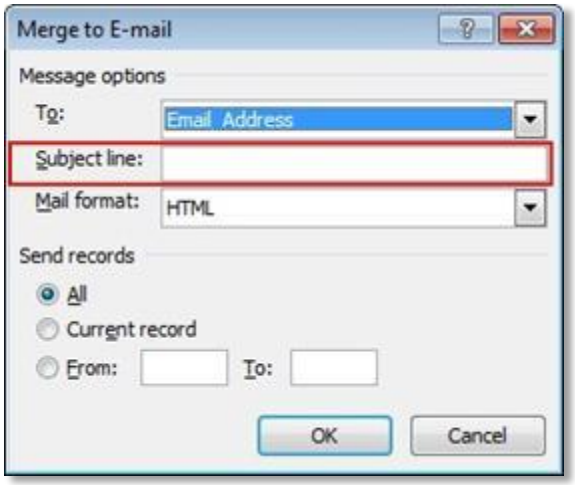
When you click **OK**, your email messages will be sent automatically.

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**.



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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: Set up your publication

Step 2: Connect to your data

Step 3: Preview and send

STEP 1: SET UP YOUR PUBLICATION

Open Publisher.

Click **Newsletters** or click **Flyers**.

STEP 1: SET UP YOUR PUBLICATION

Click the template that you want to use.

Click **Download**, or click **Create**.

STEP 1: SET UP YOUR PUBLICATION

Click the **Mailings** tab. Click **E-mail Merge**.

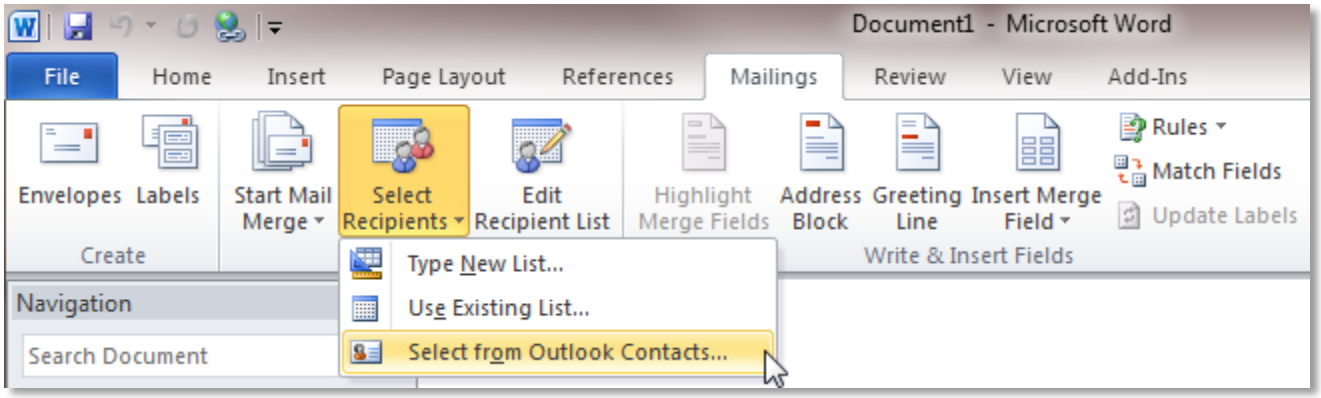
STEP 1: SET UP YOUR PUBLICATION

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**.



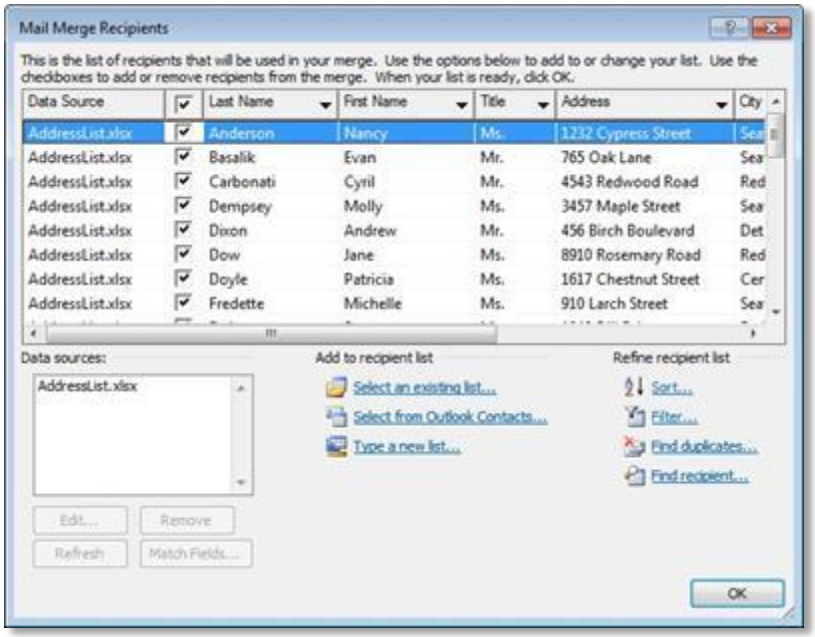
If you have more than one account in Outlook, click the contacts list that you want to use, and then click **OK**.

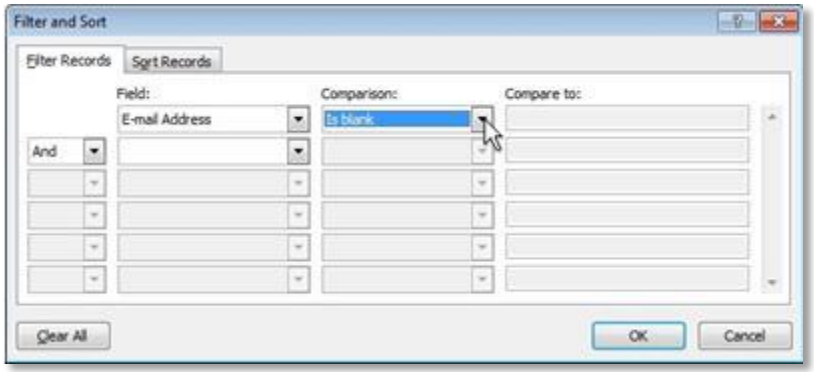
STEP 2: CONNECT TO YOUR DATA

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.





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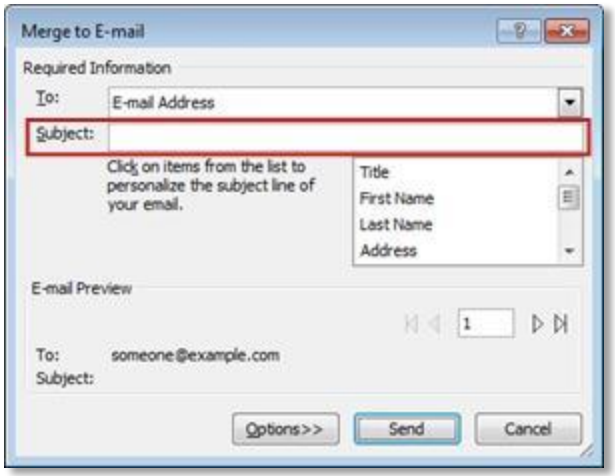
STEP 3: PREVIEW AND SEND

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**.



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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.

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EMAIL MERGE WITH WORD AND ANOTHER EMAIL PROGRAM

Step 1: Export your contact list

Step 2: Set up your Word doc

Step 3: Connect to your data

Step 4: Insert a greeting line

Step 5: Preview and send

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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.

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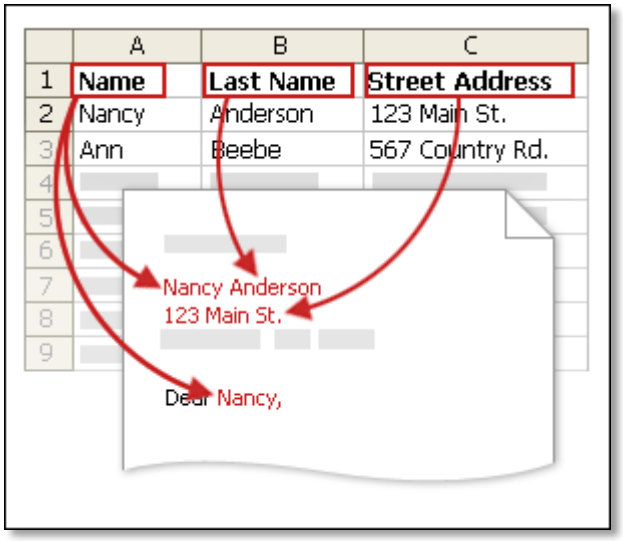
BEST PRACTICE: CHECK YOUR DATA IN EXCEL

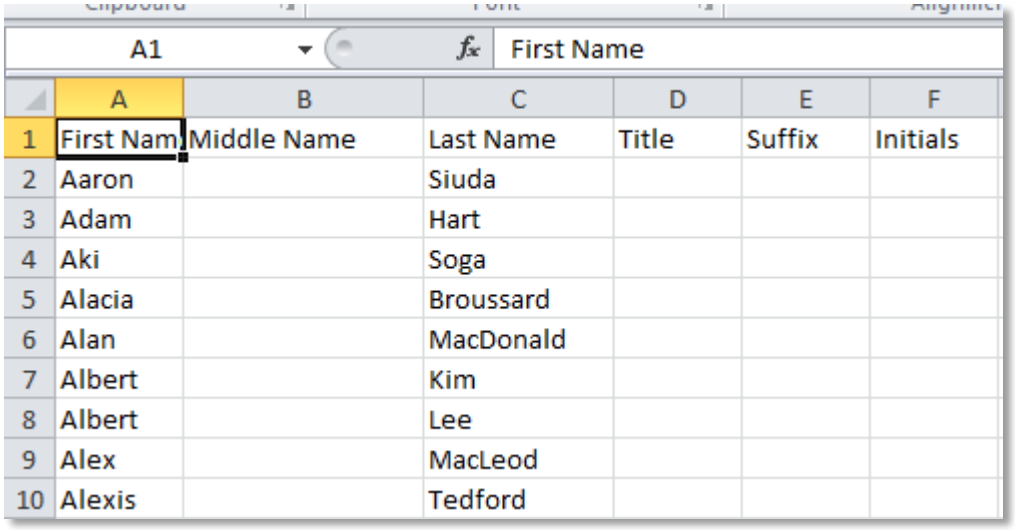


Your column headers in Excel will become the fields in the labels that mail merge will fill in automatically.

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

BEST PRACTICE: CHECK YOUR DATA IN EXCEL

Make sure the right data is in the correct column.



A1 | First Name

	A	B	C	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.

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GOTCHA ALERT

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.

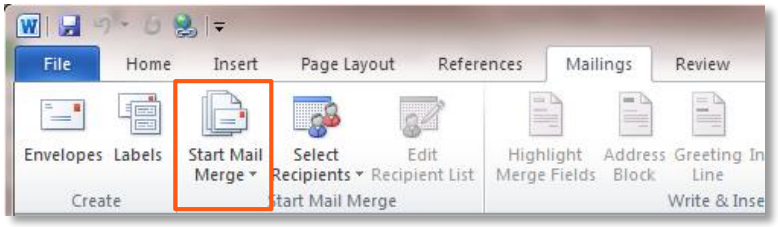
BEST PRACTICE: CHECK YOUR DATA IN EXCEL

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**.

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STEP 2: SET UP YOUR WORD DOC

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

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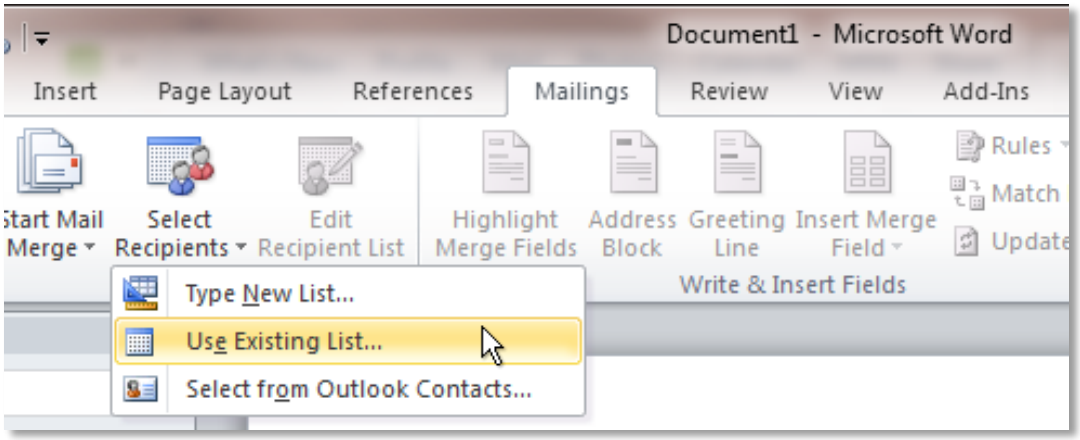
STEP 3: CONNECT TO YOUR DATA

Click **Select Recipients**.

Click **Use Existing List**.

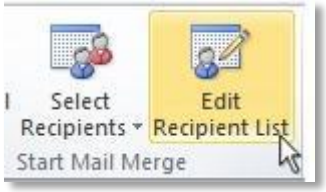


Browse to your .csv file.

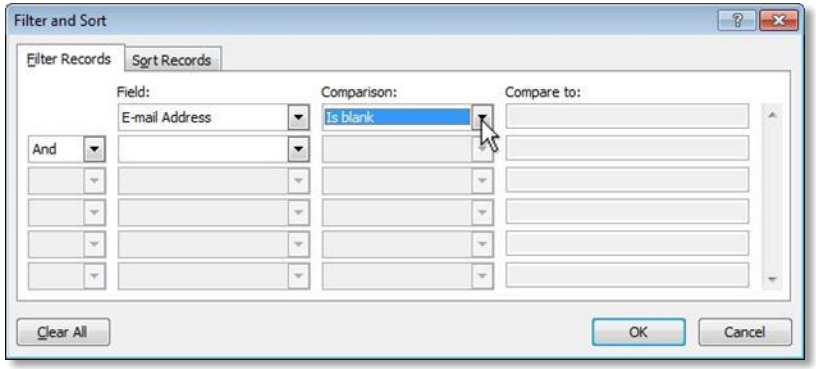
Click **Open**.

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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BEST PRACTICE

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

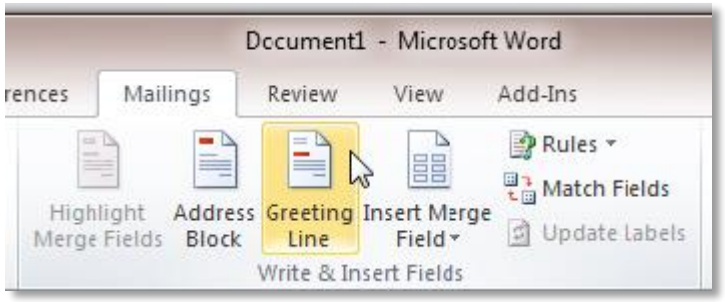
If they don't match, you can map them.

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

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.

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

STEP 5: PREVIEW AND SEND

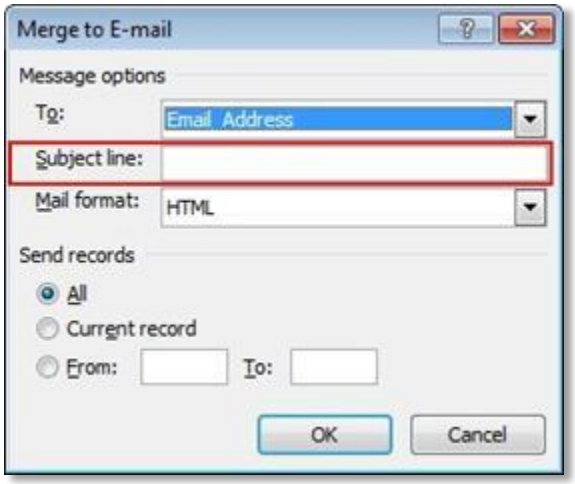
To see all your messages, click **Preview Results**.

You can use the arrows to click through the results.

GOTCHA ALERT

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.



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

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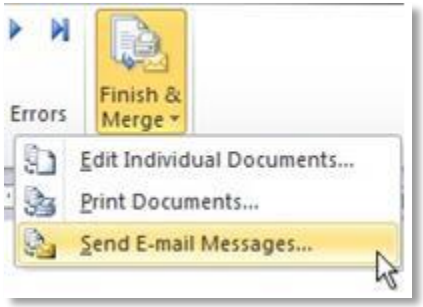
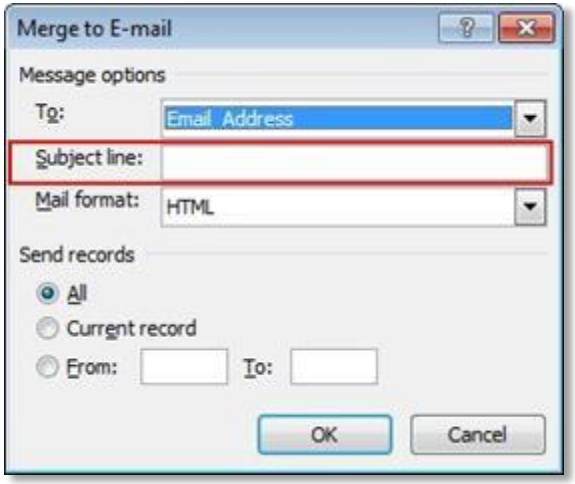
STEP 5: PREVIEW AND SEND

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**.



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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: Connect to your data

Step 4: Preview and send

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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.

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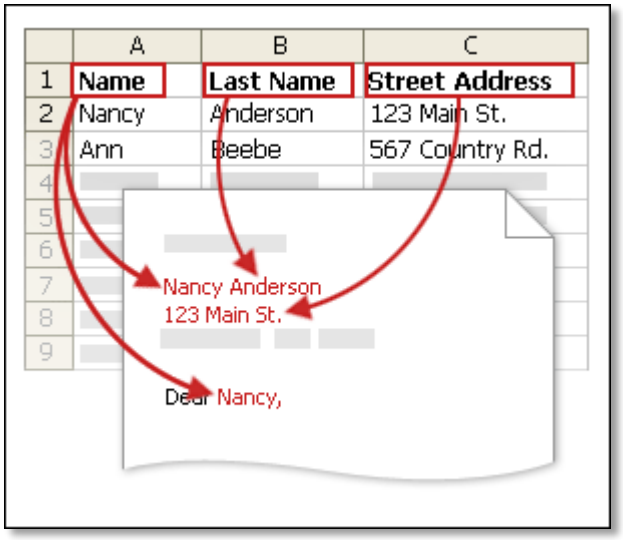
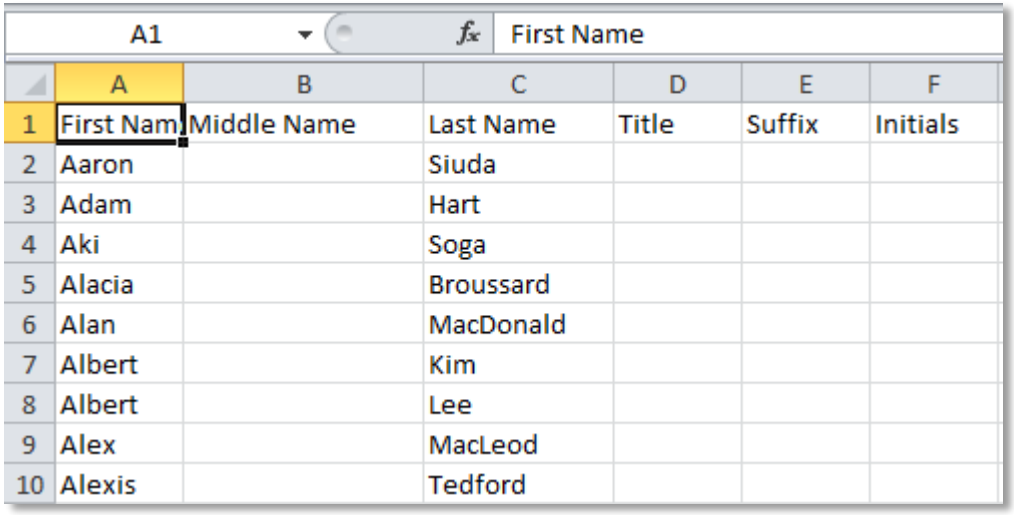
BEST PRACTICE: CHECK YOUR DATA IN EXCEL



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 | First Name

	A	B	C	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.

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GOTCHA ALERT

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.

BEST PRACTICE: CHECK YOUR DATA IN EXCEL

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 **Newsletters** or click **Flyers**.

STEP 2: SET UP YOUR PUBLICATION

Click the template that you want to use.

Click **Download**, or click **Create**.

STEP 2: SET UP YOUR PUBLICATION

Click the **Mailings** tab. Click **E-mail Merge**.

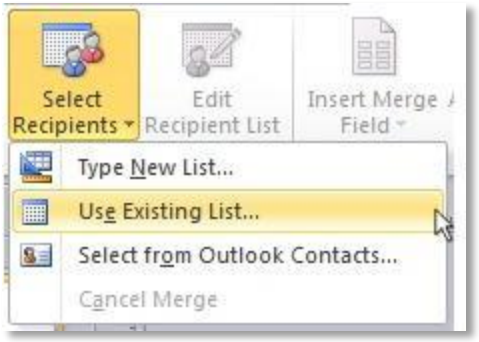
STEP 2: SET UP YOUR PUBLICATION

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.

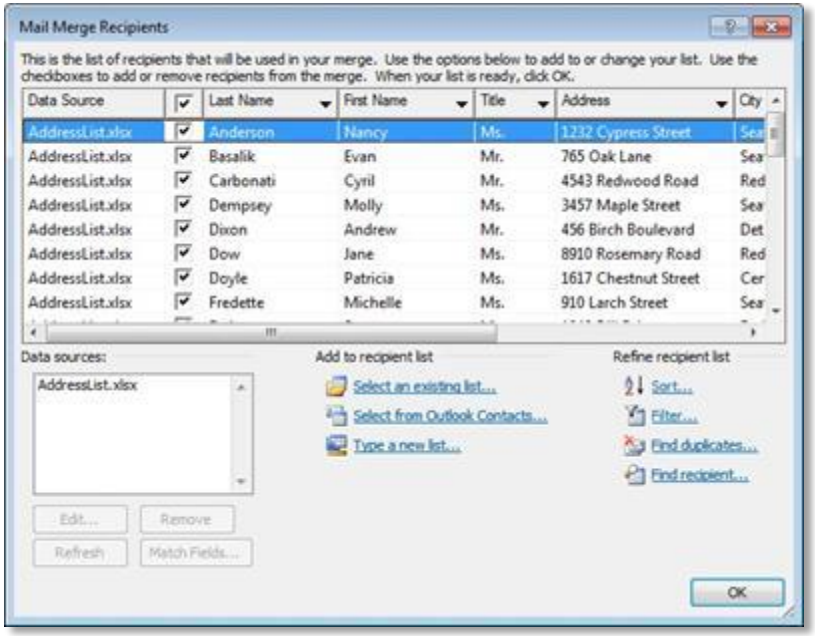
Click **Open**.

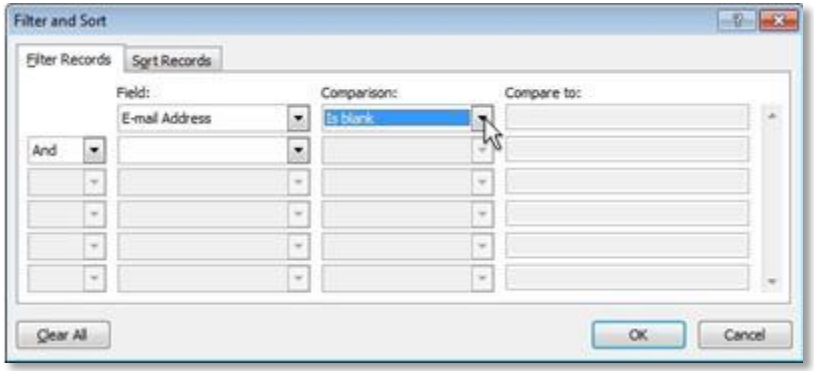
STEP 3: CONNECT TO YOUR DATA

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.





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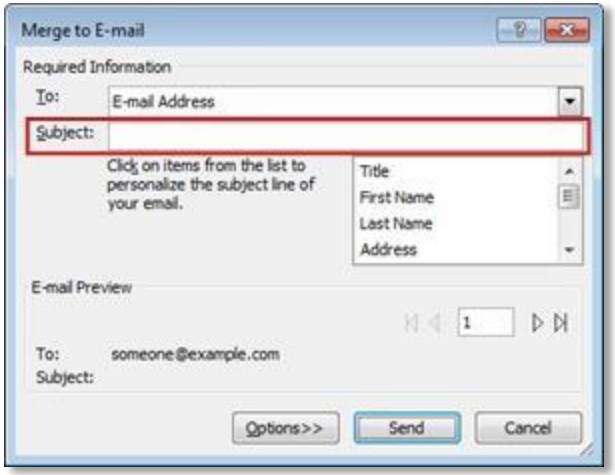
STEP 4: PREVIEW AND SEND

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**.



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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.

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EMAIL MERGE WITH WORD AND A NEW CONTACTS LIST

Step 1: Prepare your Word doc

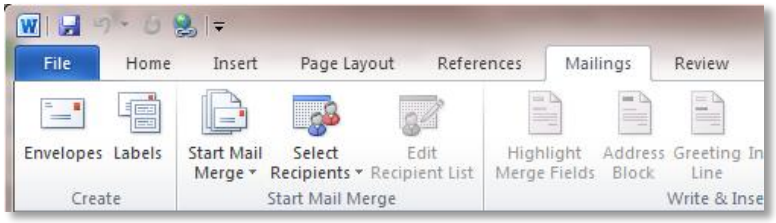
Step 2: Create your contacts list

Step 3: Insert a greeting line

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**.

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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

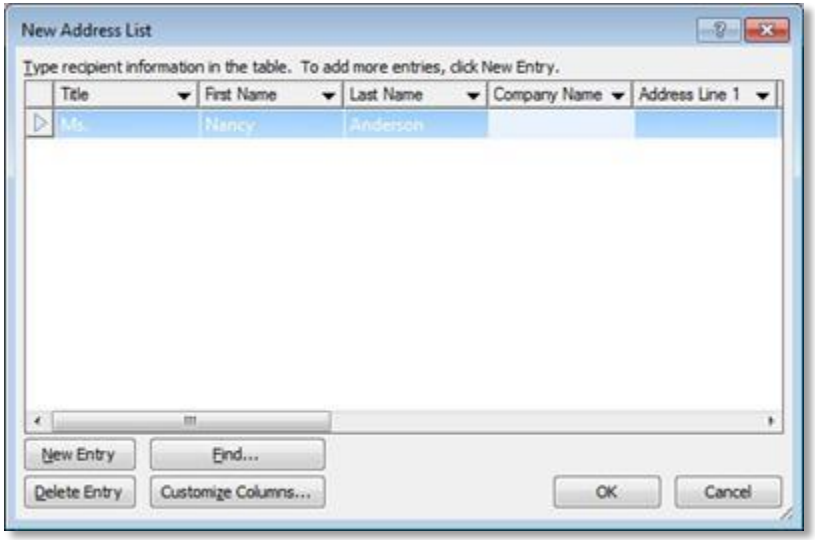
Click New Entry, and continue with the next contact.

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.



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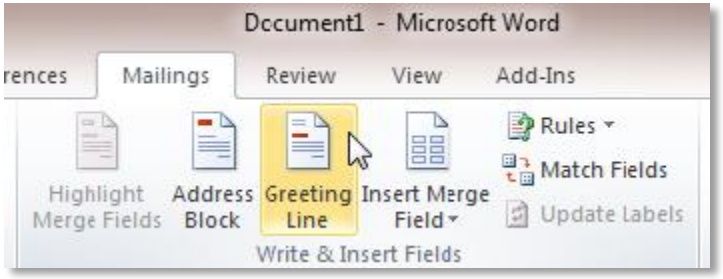
STEP 3: INSERT A GREETING LINE

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.

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

STEP 4: PREVIEW AND SEND

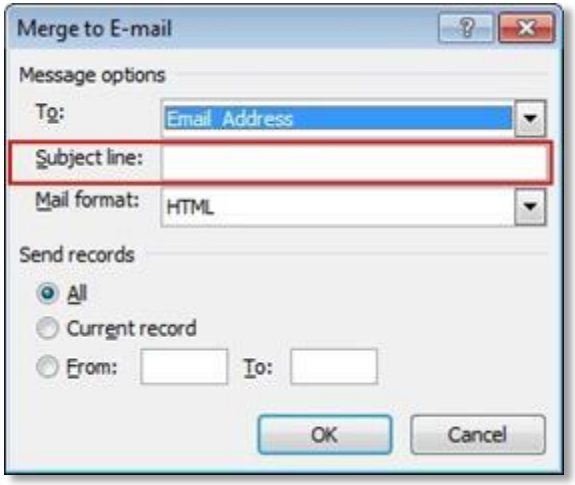
To see all your messages, click **Preview Results**.

You can use the arrows to click through the results.

GOTCHA ALERT

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.



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

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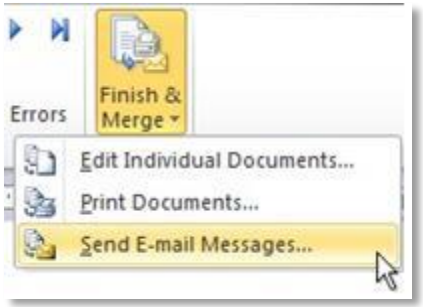
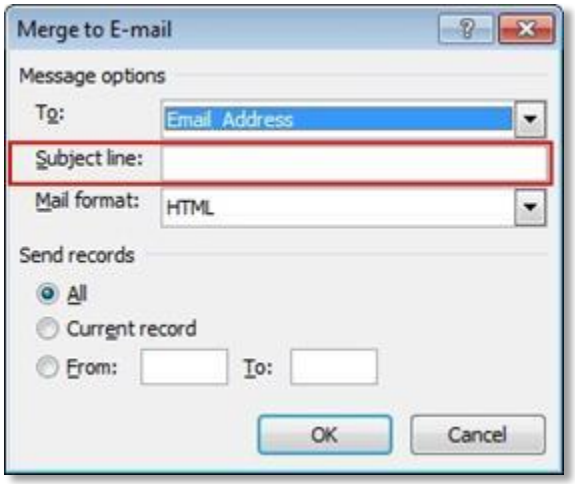
STEP 4: PREVIEW AND SEND

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



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



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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.

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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

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STEP 1: SET UP YOUR PUBLICATION

Open Publisher.

Click **Newsletters** or click **Flyers**.

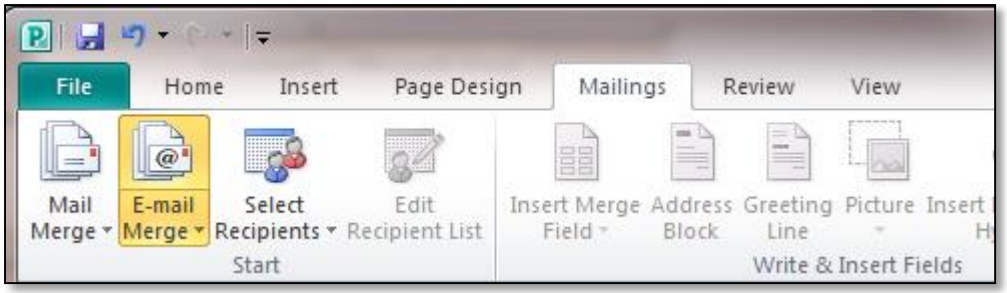
STEP 1: SET UP YOUR PUBLICATION

Click the template that you want to use.

Click **Download**, or click **Create**.

STEP 1: SET UP YOUR PUBLICATION

Click the **Mailings** tab. Click **E-mail Merge**.

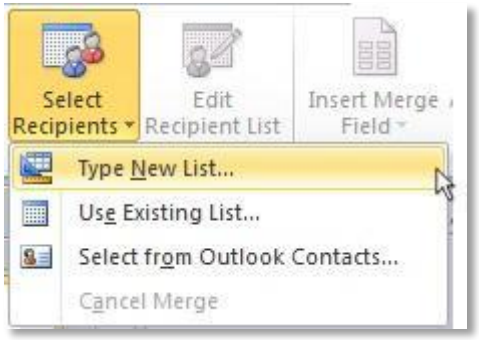


STEP 1: SET UP YOUR PUBLICATION

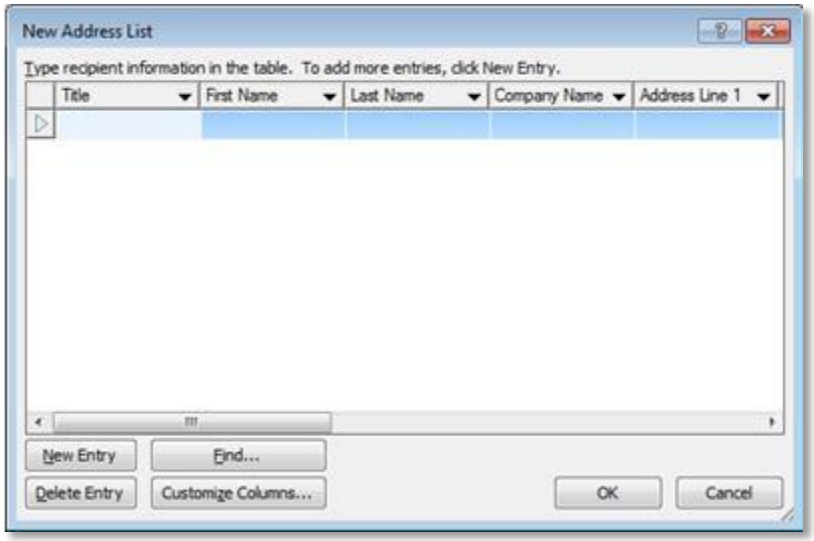
Add the text and graphics that you want to appear in the email message.

STEP 2: CREATE YOUR CONTACTS LIST

Click **Select Recipients**. Click **Type New List**.



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



STEP 2: CREATE YOUR CONTACTS LIST

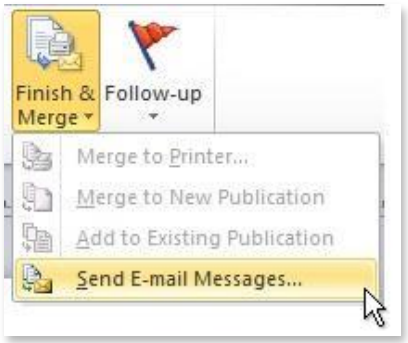
TIP: You can move between the columns by clicking or by pressing **TAB**

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

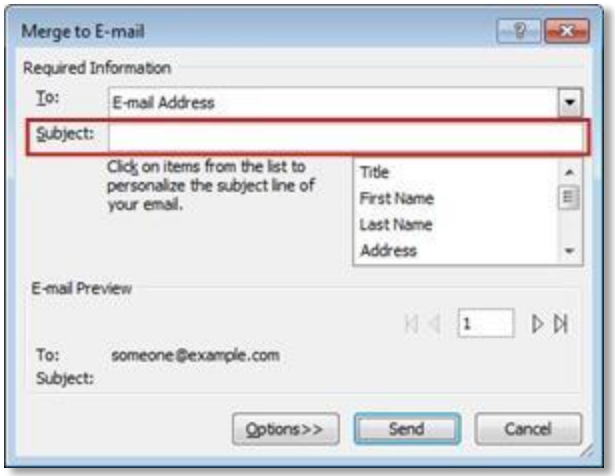
Repeat for all your contacts, and then click **OK**.

STEP 3: 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**.



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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.

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