

Mail Merge

Before you can complete a mail merge you need to create a database (address list) for the people you want to send to. This can be done in Excel or Works Spreadsheet. You can also use your Outlook or Outlook Express Address List if you have filled in all of the information in the required fields; most people do not send cards or letters to everyone in their Address Book.

With Mail Merge you can personalize the greeting line in letters, make address labels or envelopes for each recipient, and send a group email with the greeting line for each recipient. You can also create name tags, invitations and many other projects using Mail Merge.

Locating the Works Word Processor

If you use the Works Suite with Word you will need to locate and activate the Works Word Processor on your computer to prepare a mail merge.

1. Right click on the Start Button and choose Explore.
2. Click on the plus sign next to Program Files.
3. Double-click on Microsoft Works.
4. Right-click on the WksWp.exe icon, (they will be listed in alphabetical order) and click on Send To: and Desktop (create shortcut). This will create an icon on the Desktop for the program.

Database Set-up

You can add any field you want to your database such as Phone and Email addresses, a salutation (Mr. or Mrs.) or nicknames, only the ones you choose will be put on the labels. You can add fields to a database any time you need them.

Setting up a Database in Works

Create a database in the Works Database program by setting up **six** fields in the **Text** format, not the General format consisting of:

- First Name
 - Last Name
 - Address
 - City
 - State
 - Zip
1. Open Works Database and choose Blank Database and click OK.
 2. In the Field name type and add the field names in the order shown above
 3. Click on **Text** to place the dot in the Text radio button. Click Add.
 4. When you click Add, each field is created; you should see the field appear behind the Create Database dialog box.

5. Click Exit when done to view the Database.
6. Save the Database with a name such as Christmas List or Club Name List.

Using Excel 2003 or 2007 Spreadsheet as a Database

1. Make a Header Row making sure the Headings are spelled correctly and include:
 - First Name
 - Last Name
 - Address
 - City
 - State
 - Zip

You can always add others later. Press the **Tab** key to move across a row and press the **Enter** key to move down a column.

1. Type the information for each contact in the appropriate cell. For husband and wife in the First Name cell use as an Example: Bob and Betty or Bob & Betty, the First Name Field will be used as the Greeting Name on the letter.
2. Save your database using File and Save as in 2003, and in 2007 use the Office Button on the Command Bar then Save as and the format you want.

Customizing your Letter

After you write your letter you can add clipart, pictures, and fancy borders. You can also buy holiday letter paper, labels and envelopes to match if you want.

Add Clipart

There are thousands of free clipart available from Microsoft.

Works

You may need to download your clipart from the Works disks if not installed.

1. Place the cursor where you want to insert the clipart.
2. Click on Insert on the Menu bar then Picture and Clipart.
3. In the Select Category box choose a category.
4. In the Sub-Category box choose a theme.
5. Double-click your choice and it will be inserted at the cursor location.
6. Click on the piece of clipart and you should see handles on the sides and corners of the clipart. Use the corner handles to make it smaller or larger.
7. Right-click on the clipart and then click Format Object.
8. Click on Tight to wrap the text around the clipart and click OK. Now you can move the picture anywhere in the document and the text will wrap around it. Click outside the clipart to remove the handles.

Word 2003

1. Place the cursor where you want the clipart inserted.
2. Click on Insert on the Menu bar then Picture and Clipart.
3. Type the name of clipart you are looking for in the Search For: box and click Search.
4. Click on your choice and it will be inserted into the document.
5. Click on the piece of clipart and you should see handles on the sides and corners of the clipart. Use the corner handles to make it smaller or larger
6. Right-click on the clipart and click Format Picture.
7. Click on the Layout tab and choose Tight to wrap the text tight around the clipart click OK. Now you can move the picture anywhere in the document and the text will wrap around it. Click outside the clipart to remove the handles.

Word 2007

1. Place the cursor where you want the clipart inserted.
2. Click on Insert on the Command Bar and then the Clipart icon.
3. Type the name of the clipart you are looking for in the Search for: box and click Go
4. Click on your choice and it will be inserted into the document.
5. Click on the piece of clipart and you should see handles on the sides and corners of the clipart. Use the handles to make it smaller or larger. You need to use the corner handles to keep the original proportions of the picture.
6. Right-click on the clipart and then rest the mouse on Text Wrapping and click on Tight to wrap the text around the clipart. Click outside the clipart to remove the handles.

Add a Picture**Works**

1. Place the cursor where you want the picture inserted.
2. Click on Insert, rest your mouse on Picture and click on From File and My Pictures will open.
3. Find the picture you want and double-click it to insert it, or highlight it and click Insert.
4. Click on the picture and you should see handles on the sides and corners of the picture. Use the corner handles to make it smaller or larger. Use the corner handles to keep the original proportions of the picture.
5. Right-click on the picture and click Format Object.
6. Click on Tight to wrap the text around the picture and click OK.. Now you can move the picture anywhere in the document and the text will wrap around it. Click outside the picture to remove the handles..

Word 2003

1. Place the cursor where you want the picture inserted.
2. Click on Insert, rest your mouse on Picture and click on From File and My Pictures will open.
3. Find the picture you want and double-click it to insert it, or highlight it and click Insert.
4. Click on the picture and you should see handles on the sides and corners. Use the handles to make the picture larger or smaller. You need to use the corner handles to keep the original proportion of the picture.
5. Right-click on the picture and then Format Picture.
6. Click on the layout tab and choose Tight to wrap the text tight around the picture Click OK. Now you can move the picture anywhere in the document and the text will wrap around it. Click outside the picture to remove the handles.

Word 2007

1. Place the cursor where you want the picture inserted.
2. Click on Insert on the Command Bar and then on the Picture icon.
3. Find the picture you want and double-click it to insert it, or highlight it and click Insert.
4. Use the corner handles to make the picture smaller. You need to use the corner handles to keep the original proportion of the picture.
5. Right-click on the picture and then rest the mouse on Text Wrapping and click on Tight to wrap the text around the picture. Now you can move the picture anywhere in the document and the text will wrap around it. Click outside the picture to remove the handles.

Border Art**Works**

There is no Border Art in Works Word Processor.

Word 2003

1. Click on Format on the Menu Bar and click Borders and Shading
2. Click on the Page Border tab at the top of window.
3. Click on the Art box drop-down arrow at the bottom of the window and click on the border of your choice and click OK.

Word 2007

1. Click on Page Layout on the Command Bar and then the Page Borders icon.
2. Click on the Art box drop-down arrow at the bottom of the window and click on the border of your choice and click OK.

Letter Merge

If the names in the Greeting Line are not in the correct format you may have to edit your database, or try to edit the individual ones that are not correct before printing.

Works

1. With your letter open, click at the end of your greeting line where you want the name to go.
2. Click on Tools then Mail Merge and Open Data Source.
3. Click on the icon: Merge information from another type of file .
4. Find and double-click your Works Database file to open it. An Insert Fields box will open.
5. Highlight First Name and click insert <<First Name>> will be added at the insertion point.
6. Click on View Results and use the arrow buttons to go through the list and make any corrections. Close the dialog boxes.
7. Click File and Print.

If the Insert Fields or View Results boxes do not open, you can find the options under Tools and Mail Merge.

Word 2003

1. Place your cursor where you want the name to go.
2. Click Tools on the Menu bar and Letters and Mailings then Mail Merge.
3. Letters should be selected. Click Next: Starting Document at the bottom
4. Make sure the dot is in: Use current document at the top then click Next: Select recipients
5. Click Browse in the center of Wizard. Find and double-click your Database to open it.
6. In the Select Table box click OK.
7. In the Mail Merge Recipient box you can un-check anyone you do not want to include. Click OK.
8. Click Next: Write your letter
9. Click Greeting line in the center of the Wizard.
10. In the Greeting line format drop-down boxes at the top you can choose a greeting line if you have not already typed one. If you have, then choose None also choose None for the Greeting line for invalid recipients names.
11. In the Name box choose the selection for First Name only (Joshua) and click OK. The words <<Greeting Line>> will show next to the greeting in your letter.
12. Click Next: Preview your letters

13. Check to see that the list is OK by clicking through the list using the arrows and make any corrections.
14. Click Next: Complete the merge and then click Print in the center of the Wizard.

Word 2007

1. Place your cursor where you want the name to go.
2. Click Mailings on the Command Bar
3. Click the Start Mail Merge icon and then Letters.
4. Click the Select Recipients icon and then Use Existing List.
5. Find and double-click your Database to open it.
6. In the Select Table box click OK.
7. Click the Greeting Line icon.
8. In the drop-down boxes at the top of the Insert Greeting Line dialog box you can choose a greeting line if you have not already typed one. If you have, then choose None also choose None for the Greeting line for invalid recipients list
9. In the Name format choose the selection for First Name (Joshua).
10. Check to see that the list is OK by clicking through the list using the arrows. If it is not in the correct format, click the Match Fields Button and make sure all fields except First Name are marked as Not Matched. Click OK. The words <<Greeting Line>> will show next to the greeting in your letter.
11. Click the Preview Results icon and click the Arrow buttons to go through the list and make any corrections.
12. Click the Finish and Merge icon then Print Documents.

Mailing Labels

When choosing a label size you will use the number size that is on the box of labels so that the formatting is correct on your label.

The label sizes that are best suited for address and return address labels are 1"x 4". (Avery # 5161 or 8161) or 1" x 2.63" (Avery # 5160 or 8160) the number that is on the address label box is what you need to use to set up the template.

You can change the Font size and type by Clicking on Edit and Select All and changing it before printing. If you change them you may have a problem with long names or addresses fitting on the 1" x 2.63" size label.

Works

1. Open the Works Word Processor
2. Click Tools on the Menu bar.
3. Click on Labels and choose Mailing Labels and click OK.

4. In the Label Settings dialog box choose the label size you need and click New Document.
5. Click on the icon: Merge information from another type of file.
6. Find and double-click your Works Database file to open it.
7. In the Insert Fields Options dialog box insert in this order:
 - a. First Name - Insert - Space Last Name - Insert - Enter.
 - b. Address - Insert - Enter.
 - c. City - Insert - Comma (,) - Space, State - Insert - Space, and Zip - insert.
8. Click View Results and check to see that the list is OK by clicking through the list using the arrow buttons and making any corrections.
9. Close the dialog boxes and go to Print Preview to make sure they are correct, and go to File and Print.

Works Using Outlook Express Address Book

A label will be printed for everyone in your address book.

1. Open the Works Word Processor
2. Click Tools on the Menu bar.
3. Click on Labels and choose Mailing Labels and click OK
4. In the Label Settings dialog box choose the label size you need and click New Document.
5. Click on Merge from Address Book.
6. In the Insert Fields Options dialog box click Address Block and Insert. <<Address Block>> will show in your document.
7. Click View Results and check to see that the list is OK by clicking through the list using the arrow buttons and make any corrections.
8. Close the dialog boxes and go to Print Preview to make sure they are OK and go to File and Print.

Word and Excel 2003

1. Open Word
2. Click Tools on the Menu bar.
3. Click on Letters and Mailings and Mail Merge and choose Labels.
4. Click Next: Starting document at the bottom.
5. In the Label Settings dialog box choose the label size you need and click OK.
6. On the bottom click Next: Select recipients.
7. Click Browse and find your database file and double-click it to open it.
8. In the Select Table dialog box click OK.

9. In the Mail Merge Recipient box you can un-check any one you do not want to include. Click OK and the words <<Next Record>> will show in your document.
10. Click Next: Arrange your labels.
11. Click Address Block.
12. Make your choices from the Insert Address Block dialog box (un-check Insert company name if not needed)
13. Click Never include the country/region in the address.
14. Choose the name format you want. Check Print Preview to be sure the formatting is correct. If not, try to fix it by clicking the Match Fields button and fixing the fields by Matching or Not Matching and click OK, and <<Address Block>> will show in your document.
15. Under Replicate Labels click Update All Labels
16. Click Next: Preview your labels and make any corrections.
17. Click Next: Complete the Merge and Print.

Outlook Address Book 2003

1. Open Word and choose Tools on the Menu bar.
2. Click on Letters and Mailings and Mail Merge.
3. Click on Labels and then Next: Starting document.
4. In the Label Settings dialog box choose the label size you need and click OK.
5. Click Next: Select recipients.
6. Click Select from Outlook contacts and then click Next: Arrange your labels.
7. If the: Choose a Profile dialog box opens, make sure it has Outlook highlighted and click OK.
8. In the Select Contact List Folder dialog box click OK.
9. In the Mail Merge Recipient box you can un-check anyone you do not want to include. Click OK and the words <<Next Record>> will show in your document.
10. Click Next: Arrange your labels.
11. Click Address Block.
12. Make your choices from the Insert Address Block dialog box (un-check Insert company name if not needed) Click Never include the country/region in the address.
13. Choose the name format you want. Check Print Preview to see the labels are correctly formatted. If not, you can fix this by clicking the Match Fields button and fixing the fields by Matching or Not Matching and click OK, and <<Address Block>> will show in your document.

14. Under Replicate Labels Click Update All Labels
15. Click Next: preview your labels and make any corrections.
16. Click Next: Complete the Merge and Print.

Word and Excel 2007

1. Open Word. Click on Mailings on the Command Bar.
2. Click on the Start Mail Merge icon and Labels.
3. In the Labels Options dialog box choose the label size you need and click OK.
4. Click on the Select Recipients Icon and Use Existing List.
5. Navigate to your database file and double-click it to open it.
6. In the Select Table dialog box Click OK. The Words <<Next Record>> will show in your document.
7. Click the Address Block icon.
8. Choose the name format you want, the one highlighted is probably the best for address labels. Un-check both Insert company name and Format address according to the destination country/region.
9. Check to see the labels are formatted OK in the Preview area. If not you can fix this by clicking the Match Fields button and fixing the fields by Matching or Not Matching and click OK and <<Address Block>> will show in your document.
10. Click on the Update Labels icon.
11. Click on the Preview Results icon and use the arrows to go through the labels and make any corrections.
12. Click the Finish and Merge icon and Print Document.

Outlook Address Book 2007

1. Open Word and click Mailings on the Command bar.
2. Click the Start Mail Merge icon and then Labels.
3. In the Label Settings dialog box choose the label size you need and click OK.
4. Click the Select Recipients Icon and Select from Outlook Contacts
5. In the Choose Profile dialog box click OK.
6. In the Select Contacts dialog box click OK.
7. In the Mail Merge Recipients dialog box un-check anyone you do not want to include and click OK. The <<Next Record>> will now show in your document
8. Click the Address Block icon.
9. Choose the name format you want, the one highlighted is probably the best for address labels. Un-check both Insert company name and Format address according to the destination country/region.

10. Check to be sure the labels are formatted correctly in the Preview area. If not; correct this by clicking the Match Fields button and correcting the fields by Matching or Not Matching and click OK, and <<Address Block>> will show in your document.
11. Click the update labels icon.
12. Click the Preview Results icon and using the arrow button go through your list and make any corrections.
13. Click the Finish and Merge icon and Print Document.

Return Labels

You can Select All and change the font and font size as well as adjust where it starts to print on the label before printing, but check to be sure that long names still fit.

Works

1. Open the Works Word Processor.
2. Click Tools on the Menu Bar and Labels.
3. Choose Return address labels and click OK.
4. In the Label Settings dialog box choose the label size you need and New Document.
5. Type your return address on the first label.
6. Click on Print Preview to make sure they are correct.
7. Click on File and Print.

Word 2003

1. Open Word.
2. Click Tools on the Menu Bar and Letters and Mailings.
3. Click Envelopes and Labels
4. Make sure you are in the Labels tab.
5. Type your return address and click on Full page of same label.
6. Click Options and choose the label size you need and click OK.
7. Click New Document to view your document.
8. Make any changes and click File and Print.

Word 2007

1. Open Word.
2. Click Mailings on the Command Bar.
3. Click Labels
4. Type your return address and click on Full page of same label.
5. Click Options to choose label size.
6. Choose the label size you need and click OK.
7. Click New Document to view your document.

8. Make any changes and click the Office Button on the Command bar and rest your mouse on Print and click Print.

Envelopes

Works with Database

1. Open the Works Word Processor.
2. Click Tools on the Menu Bar and Envelopes.
3. Click Mail Merge envelopes and OK.
4. Choose envelope size and click New Document.
5. Click Merge information from another type of file.
6. Find your database and double-click it to open it.
7. With the address area highlighted insert the fields in the Insert Fields dialog box in this order.
 - a. First Name - Insert - Space, Last Name - Insert - Enter.
 - b. Address - Insert - Enter.
 - c. City – Insert- Comma (,) - Space, State - Insert - Space, and Zip Code - insert.
8. Click View Results and use the arrow buttons to check and make any corrections.
9. Click in the return address box and type your return address.
10. Click File and Print.

Works with Outlook Express Address Book

An envelope will be printed for everyone in your address book.

1. Open the Works Word Processor.
2. Click Tools on the Menu Bar and Envelopes.
3. Click Mail Merge envelopes and OK.
4. Choose envelope size and click New Document.
5. Click Merge from Address Book.
6. Click Address Block and Insert.
7. The <<Address Block >> will appear in the envelope.
8. Click View Results.
9. Use the arrow buttons to view and make any corrections.
10. Click in the return address box and type your return address.
11. Click File and Print.

Word 2003

1. Open Word.
2. Click Tools on the Menu Bar and Letters and Mailings and Mail Merge.

3. Click Envelopes.
4. Click Next: Starting Document.
5. Click Envelope options.
6. Choose the size of envelope as well as the Font and Font size for both the Delivery and Return Addresses and click OK
7. Click Next: Select recipients.
8. Click Browse and find and double-click your database to open it.
9. In the Select Table dialog Box click OK.
10. In the Mail Merge Recipients dialog box un-check anyone you do not want to include and click OK
11. Click Next: Arrange your envelope.
12. Look to see where the cursor is blinking, it should be in the upper left corner of the envelope. Type your return address
13. Click in the lower center of the envelope to open the address box.
14. Click Address Block.
15. Make your choices from the Insert Address Block dialog box. The highlighted name is probably OK (un-check Insert company name) check the Preview to see they are correctly formatted. If not, fix this by clicking the Match Fields button and fixing the fields by Matching or Not Matching and click OK
16. The <<Address Block >> will appear in the envelope.
17. Click Next: preview your envelopes.
18. Use the arrow buttons to go through the addresses and make any corrections.
19. Click Next: Complete the merge and click Print.

Word 2003 with Outlook

1. Open Word.
2. Click Tools on the Menu Bar and Letters and Mailings and Mail Merge.
3. Click Envelopes.
4. Click Next: Starting Document.
5. Click Envelope options.
6. Choose size of envelope as well as the Font and Font Size for both the Delivery and Return Addresses and click OK
7. Next: Select recipients.
8. Click Select from Outlook contacts.
9. Click Next: Arrange your envelope.
10. In the Choose Profile dialog box click OK
11. In the Select Contacts List Folder click OK.

12. In the Mail Merge Recipients dialog box un-check anyone you do not want to include and click OK
13. Click Next: Arrange your envelope.
14. Check to see where the cursor is blinking; it should be in the upper left corner of the envelope. Type your return address
15. Click in the lower center of the envelope to open the address box.
16. Click Address Block.
17. Make your choices from the Insert Address Block dialog box (un-check Insert company name) check in the Preview to see they are correctly formatted. If not, fix it by clicking the Match Fields button and fix them by matching and un-matching using the drop-down arrows and click OK
18. The <<Address Block >> will appear in the envelope.
19. Click Next: preview your envelopes.
20. Use the arrow buttons to go through the addresses and make any corrections.
21. Click Next: Complete the merge and click Print.

Word 2007

1. Open Word.
2. Click Mailing on the Command Bar and click the Mail Merge icon and Envelopes.
3. In the Envelope dialog box Choose size of envelope as well as the Font and Font Size for both the Delivery and Return Addresses and click OK
4. Click the Select Recipients icon and Use Existing List.
5. Find and double-click the database to open it.
6. In the Select Table dialog box click OK.
7. Check to be sure the cursor is blinking in the upper left corner of the envelope.
8. Type your return address
9. Click in the lower center of the envelope to open the address box.
10. Click Address Block.
11. Make your choices from the Insert Address Block dialog box check in the Preview to see they are correctly formatted by using the arrow buttons. If not, fix this by clicking the Match Fields button and fix the fields by Matching or Not Matching and click OK
12. The <<Address Block >> will appear in the envelope.
13. Click the Preview the Results icon and use the arrow buttons to go through the addresses and make any corrections.
14. Click on the Finish and Merge icon and Print.

Word 2007 with Outlook

1. Open Word.
2. Click Mailing on the Command Bar and click the Mail Merge icon and Envelopes.
3. In the Envelope dialog box Choose size of envelope as well as the Font and Font size for both the Delivery and Return Addresses and click OK
4. Click the Select Recipients icon and Select from Outlook Contacts.
5. In the Choose Profile dialog box click OK
6. In the Select Contacts List Folder click OK.
7. In the Mail Merge Recipients dialog box un-check anyone you do not want to include and click OK
8. Check to be sure the cursor is blinking in the upper left corner of the envelope.
9. Type your return address
10. Click in the lower center of the envelope to open the address box.
11. Click the Address Block icon.
12. Make your choices from the Insert Address Block dialog box check in the Preview to see they are correctly formatted by using the arrow buttons. If not, you can try to fix this by clicking the Match Fields button and fixing the fields by Matching or Not Matching and click OK
13. The <<Address Block >> will appear in the envelope.
14. Click the Preview the Results icon and use the arrow buttons to go through the addresses and make any corrections.
15. Click on the Finish and Merge icon and Print.

Email Merge

There is an Email Merge in both Word 2003 and 2007 but this is best done from either Windows Mail or Outlook. In both email programs you can add stationery, clipart, pictures, music and your own voice. You can send the email to each recipient as a Blind courtesy copy (Bcc:) and they will not know you sent it to other people. If you are interested in learning how to do this please call Carol at 273-3029 about a workshop.

If you are interested in creating a holiday or other type of letters and using Mail Merge in a hands-on workshop using your Word Processing Program please call Carol.