

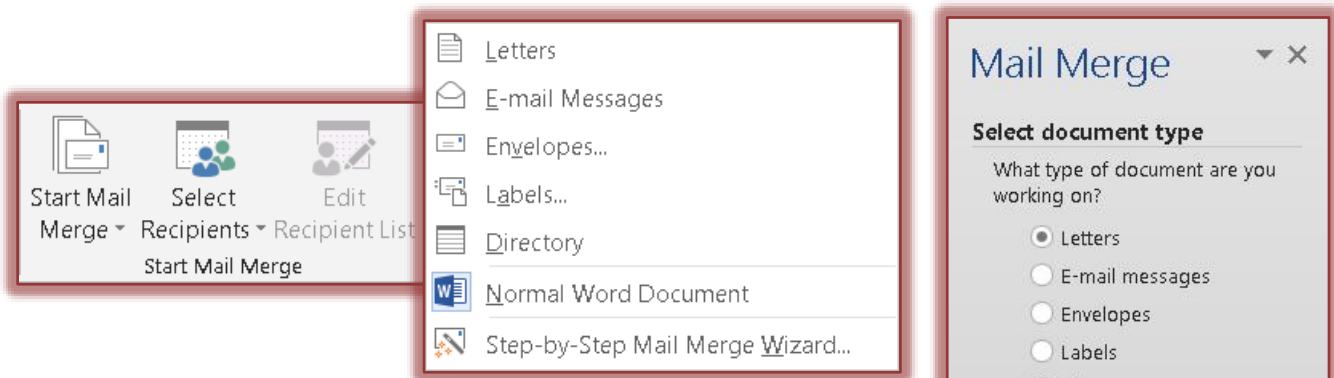
MAIL MERGE - ENVELOPES

USE MAIL MERGE WIZARD

When working with the Mail Merge feature, it is possible to create several types of documents, such as letters and envelopes. In this document, information on how to set up an envelope merge is explained.

START THE MERGE

- Click the **Mailings Tab**.
- In the **Start Mail Merge Group**, click the **Start Mail Merge** list arrow (see illustration below left).



- Click the **Step by Step Mail Merge Wizard** link at the bottom of the list.
- The **Mail Merge Task Pane** will appear, displaying the first step in the Mail Merge process (see illustration at right).
- Select Document Type** - The following choices will appear:

★ Letters

- This option is used to create letters and memos by inserting Boilerplate information and variable information from the Recipient List/Data Source.
- Each letter or memo is placed on a new page.

★ E-mail Messages


- Use this option to create a Mail Merge to send to e-mail recipients.
- The e-mail addresses contained in the Outlook contact list will be used.
- When using this feature, it is not possible to add an attachment to the letter.

★ Envelopes


- This option is used to create Envelopes by inserting the variable information from the Recipient List/Data Source.
- Each envelope appears on a new page.


★ Labels

- Use this option to create Mailing Labels by inserting variable information from the Recipient List/Data Source.
- Labels are placed one after another on a page.

 The size and type of label are defined when they are created.

★ **Directory**


 This option is used to create a document with variable information from the Recipient List/Data Source.


 Instead of each item appearing on a new page, the data is placed continuously on a page.


★ For this Tutorial, you need to select **Envelope**.

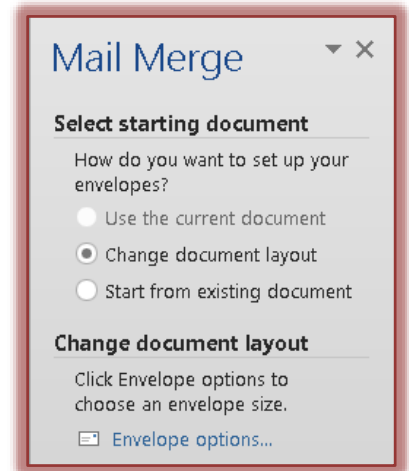
 **Click Next: Starting document.** This command appears at the bottom of the Mail Merge Task Pane.

★ In this step choose one of the three options:

 **Use the current document** – This option uses the document where the insertion point is currently at. If this option is chosen, when you click **Next**, the **Envelope Options** dialog box will appear.

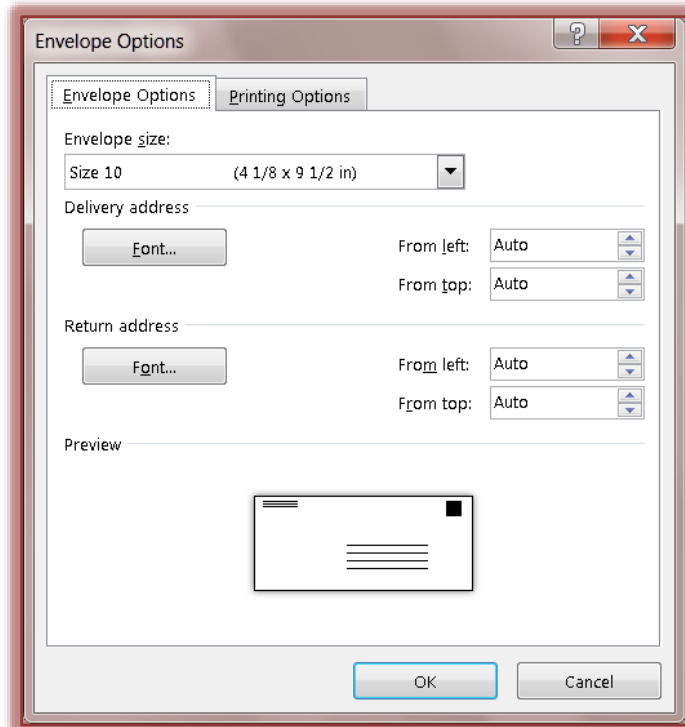
 **Change document layout** – Click **Envelope options** to change the Font sizes and other options for the Delivery Address and Return Address.

 **Start from existing document** – A list of documents will appear. Choose the document that is to be used for the merge.



 **Click Next: Select recipients.**

★ The **Envelope Options** dialog box will appear (see illustration below).



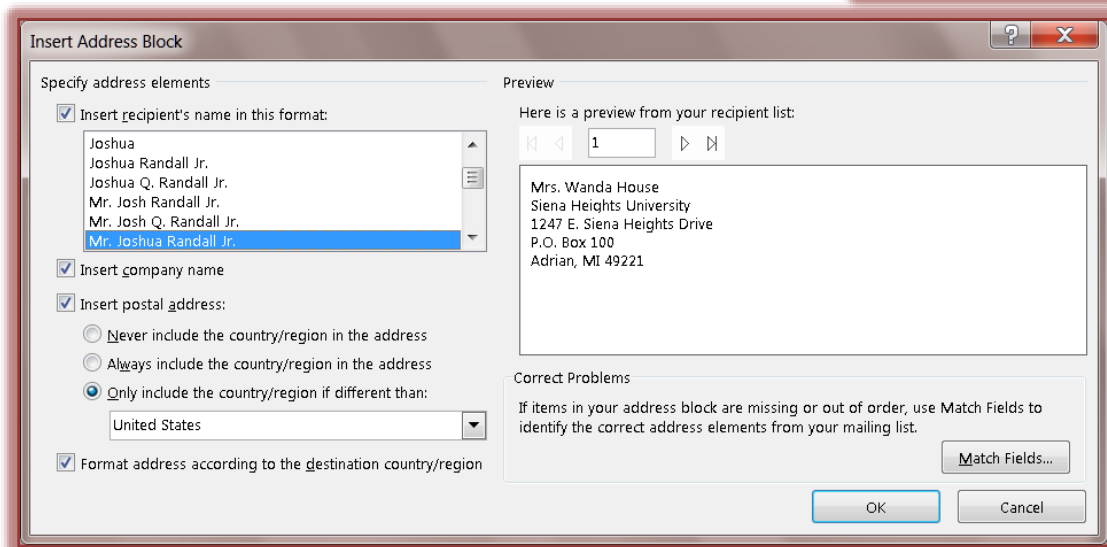
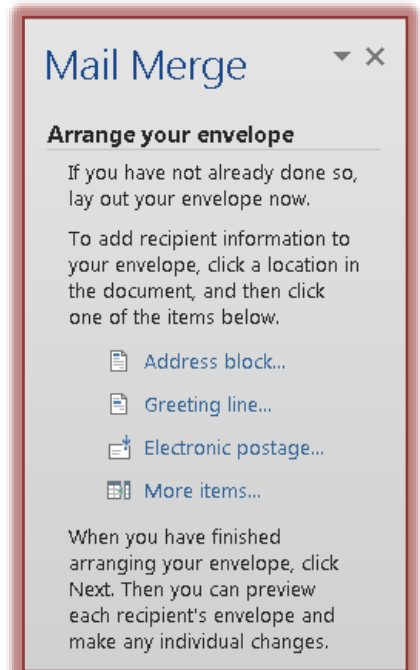
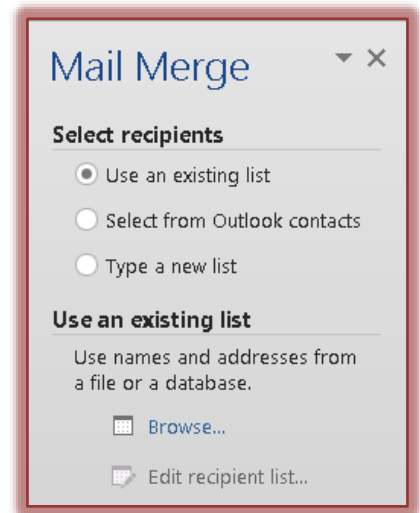
★ Make any desired changes to the envelope size or the fonts and then click **OK**.

★ A message will appear stating that accepting these changes will remove contents of the current document.

★ Click **OK**.

★ A profile of the envelope will appear in the Word window.

- ★ The **Select Recipients** step will appear (see illustration at right).
- ★ The options that are available in this step are:
 - 📄 **Use an existing list** – Click **Browse** to select the list that is to be used for the merge.
 - 📄 **Select from Outlook contacts** – Click the **Choose Contacts Folder**. A dialog box will appear asking which Contact Folder is to be used.
 - 📄 **Type a new list** – Click **Create**.
 - For information on creating a Recipient List, click the link on Create a Recipient List on the Word 2013 Web page.
- ★ Choose the option that is to be used for the Envelope Mail Merge.
- 📄 **Click Next: Arrange your envelope.**
 - ★ **Address Block** – When this option is chosen, the entire address, such as Last Name, First Name, etc. will be inserted. Options are available to choose the format for the names (see illustration below).
 - ★ These include:
 - 📄 **Insert recipient's name in this format** - Click a format to use from the list.
 - 📄 **Insert company name** – Click this option to deselect it if the company name is not to be included in the address block.
 - 📄 **Insert postal address** – Choose from one of the three options listed below this area. These include:
 - Never include the country/region in the address.
 - Always include the country/region in the address.
 - Only include the country/region if different than _____. When this option is chosen, specify the country or region in the box below the option.

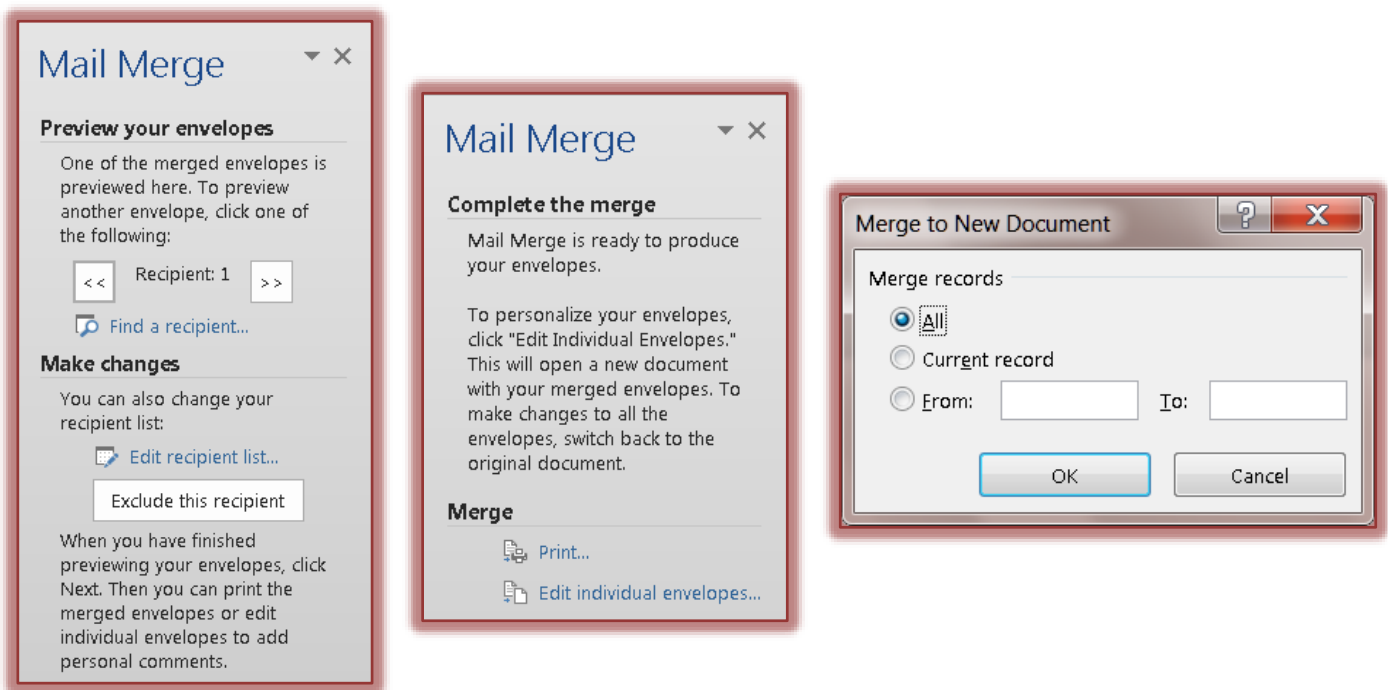


- ★ **Choose Postal Bar Code** – This option is used to insert the bar code used by the Post Office for delivery. Accept the defaults for this option.
- ★ **More Items** – To display a list of fields that are included in the data source, click this link.
 - 📄 This is used to insert additional fields into an envelope.
 - 📄 The fields can be inserted individually instead of using the Address Block option.
- ★ **When choosing any of these options, make sure the insertion point is in the correct location within the envelope so that the fields will be inserted in the proper location.**

🖥️ **Click Next: Preview your envelopes**

🖥️ The following options are available in this step.

- ★ **Left/Right Arrows** – These arrows allow you to move through the merge one envelope at a time.
- ★ **Find a Recipient** – This option allows you to look for a particular person in the recipient list.
- ★ **Edit Recipient List** – To display the recipient list so it can be edited, click this option.
- ★ **Exclude this recipient** – To remove a recipient from the Mail Merge results, but not from the recipient list, click this button.



🖥️ **Click Next: Complete the merge**

- ★ **Print** – To send the envelopes directly to the printer, choose this option.
- ★ **Edit Individual Envelopes** – To make changes to individual envelopes, click this option.
 - 📄 When this option is selected, another dialog box will appear (see illustration above right).
 - 📄 In this box, it is possible to choose whether to merge all the records or just part of the records.