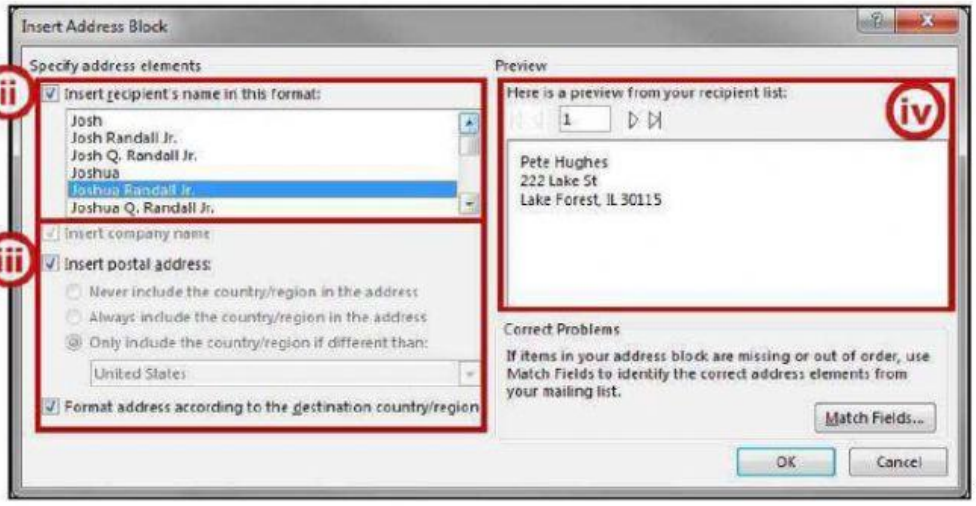
Lesson 6 Mail Merge Address Book and More Part 3

A. The *Address block* ..option will allow you to add address information to your letter .. Click on Address Book

i. The *Insert Address Block* window will open.**(1)**



1

Ii . Under the Insert recipient's name in this format field, you can select a format from the dropdown list for how you want the recipient's name to appear.

Iii. In this section, you can choose to insert a company's name, insert the country/region in the postal address, and to format the address according to the destination country/region.

Iv. The Preview field allows you to preview how your address will look in your letter. Use the arrow buttons to navigate through your list.

v. W hen finished, click the OK button. Your address will be inserted into your document at the location of your cursor.

B The *Greeting Block* option will allow you to add a personalized greeting to your letter.

Click on **Greeting Block (2).**

i. The *Insert Greeting Line* window will open.(2).

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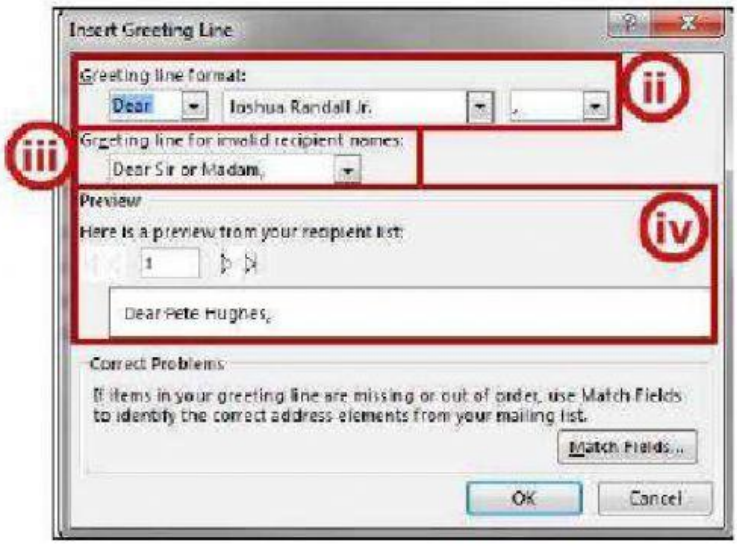

2

Ii. In the Greeting line format section, use the dropdown boxes to create the greeting line for your letter.

Iii. In the *Greeting line* for invalid recipient names, you can set a generic greeting that will display when Word cannot find a name for an entry,

iv. The Preview section allows you to see how your selections will look in the final mail merge. Use the arrows to navigate between records.

v. When finished, click that OK button. Your greeting lime will be inserted into your document at the location of your cursor.

C The Electronic Postage option will allow you to add electronic postage yo your letter; This will require the downloads of additional software that is not covered in the document.

D. The **More Items** option will allow you enter specific fields into your letter, one field at a time. **(3)**

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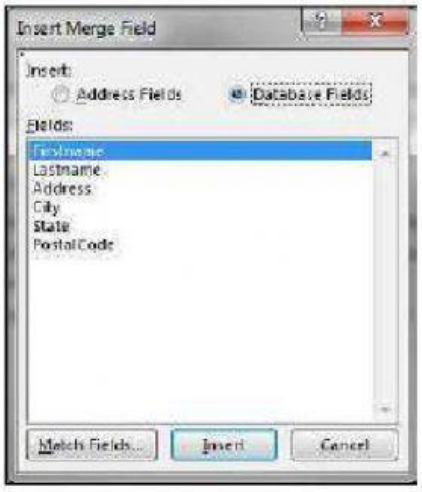

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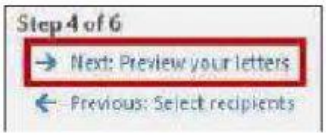
18. When finished adding fields to your document, under *Mail Merge*: *Write your letter*, click on **Next : Preview** your letters. (4)



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19. The Mil Merge: Preview your letters window will appear to the right side of your document. From here you can preview all letters before completing your mail merge, or exclude a recipient from the merge.. (5)

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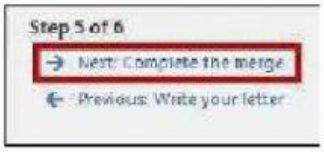
20 Click on **Next**: Complete the **Merge**. (6)



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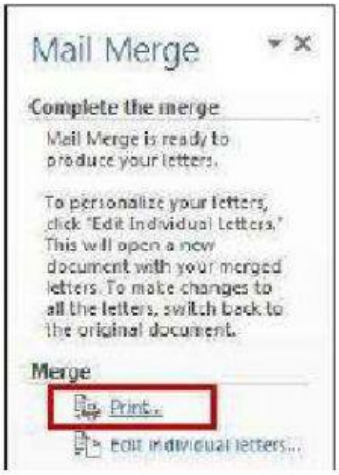
21. The Mail Merge: Complete the Merge window will appear to the right of your document. (7)



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22. The *Merge to Printer* window will appear. Use the option to print All letters, the current record (letter), or a *range of letters* (8)

8

23. After making your selection, click the OK button.

24. The Print windows will open. Adjust your settings for your printer and print your document.

Using the Mail Merge Wizard to create your own list of recipients.

If you do not have an exiting list of names and addresses saved as an Excel file or Access database, you can create your own list of recipients. When creating your mail merge using the wizard, you will be prompted to select recipients.

1. Select the option **Type a new list. (1)**

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2. **Click on Create**

3. The New Address : *List windows* will appear. Type your recipient information into the table provided, filling in the fields as needed (2)

3

4. To create a new entry, click the **New Entry** button.

5. To add custom columns to your table , click the **Customize Columns.**

A. The Customize Address List window will open. To add new fields, click on **Add.(5)**

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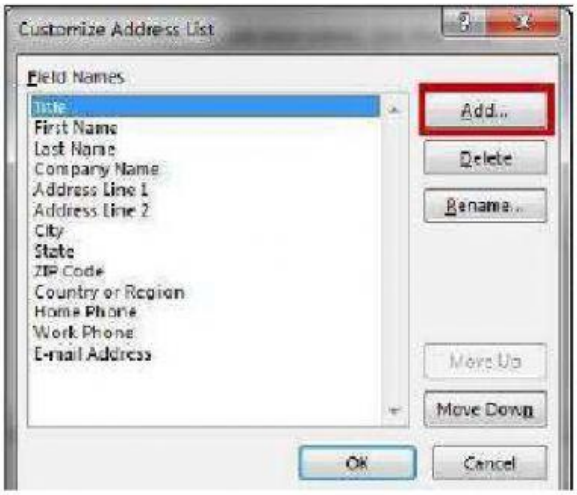

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B. The ***Add Field*** window will appear. **Type** a name for your field in the **box** provided.**(6)**

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C. Click on **OK.**

6. To delete an entry, elect the entry from the table and click on **Delete Entry.**

7. When you finished creating your recipient list, click the **OK** button.

8. You will be prompted to save your list, to your computer. Once saved, the **Mail Merge Wizard** will take you to the ***Mail Merge Recipients*** window to continue the mail merge process.***(See in previous lesson No 6 Step 14)*** under *Using the Mail Merge Wizard* for more information.

Matching Fields

If some of the information you imported to the Wizard is not properly matching up with the correct fields, you can assign the information to the proper field by using the Match Fields tool. Before using the **Match Fields** tool, you will have to import a *file/database* for your recipients, or have created one using Word. The following explains how to match fields:

1. Click the **Mailings** tab**. (1)**

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1

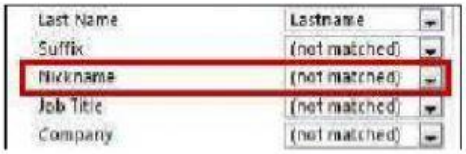
2. Under the ***Write & Insert Fields*** grouping, click on **Match Fields.(2)**

2

3. The **Match Fields *window will appear and display a list of fields with their match*** to you selected **file/database (3).**

3

4. Next to the *field* you wish to match, click on a **dropdown** list **(4).**



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5. A list of headers from your imported file/database will be listed. Select the header that is the closest match to the existing field.**(5)**

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6. When finished matching fields, click the **OK** button.

Questions.

1. **Explain the steps to create your own list of recipients**

2. **Explain the steps for Matching fields.**

3. **How do you add a name to the address book?**

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