Mass Mailing with Word 2010
Quick Reference Guide
Microsoft Office 2010 Series
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1.0 Overview

This document provides instructions on how to create the two mail merge documents used with the Mass Mailing with Word 2010 workshop and video. The first document uses data created in Excel to merge information into a donation letter. In the second document, you use data downloaded from a myCSUB query data and filters to select specific information for a student of the year letter. These instructions cover:

These instructions assume that you are familiar with basic Excel and Word 2010 features and functions.

1.1 Before you begin

Before you begin, you should download the companion materials. The companion materials consist of the Donation Letter and the SOTY Letter.

Companion Materials

- Donation Letter
- SOTY Letter
2.0 Mail Merge Overview

The Mail Merge feature is a powerful tool for creating personalized documents, such as letters, invitations, flyers, labels, envelopes, etc., quickly. The process requires three (3) elements: a shell document, a data source, and data source names. A shell document contains the standard text for each recipient. The data source holds the information that varies for each recipient, such as name, address, donation amount, GPA, etc. The data source names are the merge fields added to your shell document. To personalize your documents further, you can apply specific text based on logic, rules or conditions.

2.1 Mail Merge Terminology:

The Mail Merge feature uses specific terminology. The following table will assist you understanding the terminology used.

<table>
<thead>
<tr>
<th>Elements</th>
<th>Description</th>
<th>Alternate Names</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shell document</td>
<td>Document containing the standard text for each recipient</td>
<td>Main or form document</td>
</tr>
<tr>
<td>Data source</td>
<td>Spreadsheet or file containing the information that varies for each recipient</td>
<td>Recipient List</td>
</tr>
<tr>
<td>Data source names</td>
<td>The merge fields or special codes that tell the Mail Merge where to place the information from your data source.</td>
<td>Merge fields</td>
</tr>
</tbody>
</table>

2.2 How it Works

You create a shell document, as illustrated in Figure 1. You add your data source names, Figure 2, to your shell document. Afterwards, your document will resemble Figure 3. Once, the Mail Merge process completes, your personalized letters will look like Figure 4.

Dear :

We received your application on. Thank you for your applying for the program.

Sincerely,

Director

Figure 1: Shell Document

ID  Student   Date       Program
1   Ima Student  5/21/2012  MBA
2   Ida Know    5/23/2012  MPA

Figure 2: Data Source from Excel

Dear <<Student>>:

We received your application on <<Date>>. Thank you for your applying for the <<Programs>> program.

Sincerely,

Director

Figure 3: Data Source Names
Dear Ima Student:

We received your application on 5/21/2012. Thank you for your applying for the MBA program.

Sincerely,

Director

Dear Ida Know:

We received your application on 5/23/2012. Thank you for your applying for the MPA program.

Sincerely,

Director

Figure 4: Personalized Letter

The Mail Merge features make this process quick and easy. You can use either the Step-by-Step Wizard or the manual process to produce your personalized documents.
3.0 Mail Merge Wizard

In this section, you will use the Step-by-Step Wizard to create personalized letters for the Student of the Year. You will use the SOTY Letter as your shell document. For your data source, you will use query data from myCSUB.

3.1 Downloading and Editing myCSUB Query Data

These instructions will guide you in downloading query data from myCSUB and editing the data in Excel.

<table>
<thead>
<tr>
<th>Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Once you are logged into myCSUB, click the CSUB Query Dashboard link.</td>
</tr>
<tr>
<td>2. From the Faculty Queries, click the Students Enrolled</td>
</tr>
<tr>
<td>3. On the prompt page,</td>
</tr>
<tr>
<td>- Enter Term, such as 2128</td>
</tr>
<tr>
<td>- Enter Plan, such as BADM</td>
</tr>
<tr>
<td>- Click View Results</td>
</tr>
<tr>
<td>4. After your results display,</td>
</tr>
<tr>
<td>- Click the Excel Spreadsheet link to download your results.</td>
</tr>
<tr>
<td>- Save the file as SOTY to a location of your choice</td>
</tr>
<tr>
<td>5. Open Excel by double-clicking the</td>
</tr>
</tbody>
</table>

Download results in: Excel Spreadsheet, CSV Text File
6. Click the File tab and then click Open

7. Navigate to the file your saved above, such as SOTY.xls and click Open

8. Edit your query data,
   - Highlight the first row
   - Press Delete on your keyboard

9. Save your changes
   - Click File
   - Click Save

10. Exit Excel
    - Click File
    - Click Exit

3.2 Step-by-Step Wizard

You will merge the Student of the Year (SOTY) letter with your myCSUB query data using the Step-by-Step wizard. These instructions will guide you through the process.
1. Open **Word**

2. Open the shell document
   - Click **File**
   - Click **Open**

3. Navigate to the *SOTY Letter.docx* file
4. Click **Open**

5. Click **Mailings** tab

6. Click **Start Mail Merge**
7. Select **Step-by-Step Mail Merge Wizard**
8. The Mail Merge Wizard opens on the right.
   - In the Select document type, click Letters
   - Click Next: Starting document

9. In the Select starting document, click Use Current Document
10. Click Next: Select recipients

11. In the Select recipients, click Use an existing list
12. In the Use an existing list, click Browse

13. Navigate to the SOTY.xls spreadsheet
14. Select it
15. Click Open
16. On the Select Table,
   - Select sheet1$
   - Make sure the First row contains column headers is checked
   - Click OK

17. Click Filter

18. In Field, select Cum GPA
19. In Comparison, select Greater Than or Equal to
20. In Compare To, type 3.9
21. Click OK

22. Click Ok
23. Click **Next: Write your letter**

![Mail Merge dialog box](image)

24. Click **More items...**

![Mail Merge dialog box](image)

25. Place your cursor below the date
26. Insert Name, Address 1, Address 2, City, State, and Postal
27. Click **Close**

![Insert Merge Field dialog box](image)

28. Click **More items**
29. Place cursor after Student ID
30. Click **More Items**
31. Click **ID**
32. Click **Insert**
33. Repeat for remaining fields, when done, click **Close**
34. Click **Next: Preview your letters**

35. Click **Next: Complete the merge**

36. Click **Edit Individual letters**
37. On **Merge to New Document**, click All and Ok  
38. Make changes, if necessary  
39. When satisfied, print the documents.

![Merge to New Document dialog box](image)

**Figure 5: Completed SOTY Letter**
4.0 Mail Merge Manual

At times, you may want more control over the merge process. In that case, you personalize your document using the manual mail merge process. The steps for merging the document are similar.

In this section, you will use the manual mail merge to create personalized letters to thank your donors for their contributions. You will use the Donation Letter as your shell document. For this example, you will create your data source using Microsoft Excel.

4.1 Create Excel Data

These instructions will guide you in creating your data source in Excel.

<table>
<thead>
<tr>
<th>Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Open Excel by double-clicking the Microsoft Excel 2010 icon.</td>
</tr>
<tr>
<td>2. Excel should open with a new worksheet. In Rows 1-6, enter the following information in the cells:</td>
</tr>
<tr>
<td>Company</td>
</tr>
<tr>
<td>----------</td>
</tr>
<tr>
<td>Microsoft</td>
</tr>
<tr>
<td>Apple</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Facebook</td>
</tr>
<tr>
<td>Google</td>
</tr>
<tr>
<td>3. Save your changes</td>
</tr>
<tr>
<td>• Click File</td>
</tr>
<tr>
<td>• Click Save</td>
</tr>
<tr>
<td>• Name your file, Donation.</td>
</tr>
<tr>
<td>4. Exit Excel</td>
</tr>
<tr>
<td>• Click File</td>
</tr>
<tr>
<td>• Click Exit</td>
</tr>
</tbody>
</table>
### 4.2 Manual Mail Merge

You will merge the Donation Letter with your data source manually. These instructions will guide you through the process.

#### Steps

1. **Open Word**

2. **Open the shell document**
   - Click **File**
   - Click **Open**

3. **Navigate to the Donation Letter.docx file**

4. **Click Open**

5. **Click Mailings tab**

6. **Click Start Mail Merge**

7. **Select Letters**
8. On the **Mailings** tab,
   - Click **Select Recipients**
   - Click **Use Existing List**

9. Navigate to the **Donations.xlsx** spreadsheet
10. Select it
11. Click **Open**

12. On the **Select Table**,
    - Select **Sheet1**
    - Make sure the **First row contains column headers** is checked
    - Click **OK**

13. In next few steps, you will replace all the text in red with its corresponding merge field.
    - Highlight the red text, such as **First Name**

   Dear **First Name**, 
   Company
   Address 1
   Address 2
   City, State, Zip
14. Click Insert Merge Field

15. Select the appropriate merge field, such as First Name
16. Click Insert
17. Click Close
18. Repeat these steps for all the red text

19. Your letter should look like the illustration on the right

20. On the Mailings tab, click Preview Results

21. Your merged letters appears. You can use the arrow keys to preview each letter.

22. If you need to modify a single letter, click the Finish & Merge and select Edit Individual letters
23. Otherwise, if you are satisfied with the results, click the **Finish & Merge** and select **Print Documents**

24. Save your changes
   - Click **Save**

### 4.3 Rules

When you created your data source, one of the entries did not have a company name. To keep the letter from sounding irregular, you can add a rule to the Company Name, so it will use the word, *your*, when no company name is provided.

#### Steps

1. Using the Donation Letter, unclick **Preview Results**, so that you can see the merge fields

2. To apply the rule, place your cursor to the left of **<<Company>>** in the first paragraph

3. On the **Mailings** tab,
   - Click **Rules**
   - Click **If...Then...Else...**
4. In the **Insert Word Field: IF** box,
   - Make sure the **Field Name** is *Company*
   - Make sure the **Comparison** is *Equal to*
   - Make sure the **Compare to** is empty
   - In the **Insert this text**, type *Your*
   - Click **OK**

5. Click **Preview Results** and view the letters. You should notice that the letter without a company name, now displays *Your*.

6. Save your changes, click **Save**

7. Close the Donation Letter
   - Click **File**
   - Click **Close**
5.0 Reusing Mail Merge Documents

Once you create a Mail Merge Document, you can reuse it in a number of ways. You can recreate the letters, make changes to the document, add new text, or change the data source. In addition, you can add and apply additional rules. Reusing Mail Merge Documents is a faster way to produce personalized documents.

In this section, you will change the document text to invite the donors to a dinner and update the data source to include more invitees.

5.1 Updating Data Source

These instructions will guide you through the process of updating your data source to include more invitees.

**Steps**

1. Open Excel by double-clicking the

2. Click the **File** tab and then click **Open**

3. Navigate to the file you saved earlier, such as *Donation.xlsx* and click **Open**

4. When the spreadsheet opens, add the following information to rows 7 and 8:

<p>| | | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>George</td>
<td>Washington</td>
<td>4444 Any St</td>
<td>Kernville</td>
<td>CA</td>
<td>99999</td>
<td>$100 Million</td>
</tr>
<tr>
<td>Warren</td>
<td>Harding</td>
<td>4444 Any St</td>
<td>Kernville</td>
<td>CA</td>
<td>99999</td>
<td>$100 Million</td>
</tr>
</tbody>
</table>
5. Save your changes
   - Click File
   - Click Save

6. In the Confirm Save As box, click Yes

7. Exit Excel
   - Click File
   - Click Exit

5.2 Editing Mail Merge Text

These instructions will guide you through the process of editing your Donation Letter to invite the donors to a dinner.

Steps

1. Open Word

2. Open the shell document
   - Click File
   - Click Open
3. Navigate to the Donation Letter.docx file

4. Click Open

5. When the Microsoft Word box appears, click Yes.
   Note: By clicking Yes, the Mail Merge process runs. It will include any changes you made to your data source. So, in our case it will include the information for George Washington and Warren Harding.

6. Click Mailings tab

7. On the Mailings tab, click Preview Results

8. Your merged letters appear including letters for the two new names.
   You can use the arrow keys to preview each letter.

9. When you are satisfied with viewing the letters, click Preview Results to return to the shell document.

10. In the body of your letter, change the contents to invite the donors to a dinner celebration. You can use any text or the sample text below.

Sample text
«First_Name», you are cordially invited to attend a dinner to celebrate and thank you for your generosity.

   Appreciation Dinner
   Wednesday, June 31, 2012
   7:00pm – 9:00pm
   Seven Rivers Country Club
   5900 Seven Rivers Dr
   Bakersfield CA 93311

   Please RSVP by Tuesday, June 30, 2012 at 661-555-1212. We look forward to seeing you.
11. On the **Mailings** tab, click **Preview Results**

12. Your merged invitations appear. You can use the arrow keys to preview each invitation.

13. If you need to modify a single invitation, click the **Finish & Merge** and select **Edit Individual letters**

14. Otherwise, if you are satisfied with the results, click the **Finish & Merge** and select **Print Documents**

15. Save your changes
   - Click **Save**
6.0 Now What?

Now that the session is complete, you may want additional information on the topics covered or on other topics. A wealth of information is available on the web on merging documents. The following link is just a sample.

**Using Mail Merge (Free tutorial)**
http://www.gcflearnfree.org/word2010/24

**Use Mail Merge to Create and Print Letters and Other Documents**

**Microsoft Word 2010 (Free tutorial)**
http://www.gcflearnfree.org/word2010

6.1 Google IT

Google is Campus Training’s preferred search engine. However, you may use the search engine of your choice. These keywords should work with most search engines. Use the following keywords in your search criteria.

Keywords: **How to mail merge Word 2010**

![Figure 6: Sample Google Search Results](image-url)
6.2 YouTube IT

YouTube has more than just entertainment. It has contains a wealth of information on information technology, education, and more. You can use the same keywords with it to find videos that help you Word 2010 features.

Keywords: How to mail merge Word 2010

![Figure 7: Sample YouTube Search Results](image-url)