**Lab Task 4:**

**Create and print envelopes for a mass mailing**

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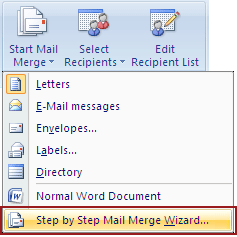
When you want to use envelopes to send a mass mailing to your address list, you can use mail merge to create a batch of envelopes. Each envelope contains an address from your list.

The mail merge process entails the following overall steps:

1. [Set up the envelope](ms-help://MS.WINWORD.12.1033/WINWORD/content/HA10109160.htm#1). You set up the layout of the envelopes one time, for all the envelopes in the mail merge. In a mail merge, the document that you use to do this is called the main document. In the envelope main document, you can also set up any content that you want repeated on each label, such as a return address, a company logo, or boilerplate text.
2. [Connect the envelopes to your address list](ms-help://MS.WINWORD.12.1033/WINWORD/content/HA10109160.htm#3). Your address list is the data source that Microsoft Office Word uses in the mail merge. It is a file that contains the addresses to be printed on the envelopes.
3. [Refine the list of recipients](ms-help://MS.WINWORD.12.1033/WINWORD/content/HA10109160.htm#2). Word generates an envelope for each address in your mailing list. If you want to generate envelopes for only certain addresses in your mailing list, you can choose which addresses, or records, to include.
4. [Add placeholders, called mail merge fields, to the envelopes](ms-help://MS.WINWORD.12.1033/WINWORD/content/HA10109160.htm#4). When you perform the mail merge, the mail merge fields are filled with information from your address list.
5. [Preview and complete the mail merge](ms-help://MS.WINWORD.12.1033/WINWORD/content/HA10109160.htm#5). You can preview each envelope before you print or send the whole set.

You use commands on the **Mailings** tab to perform a mail merge.

**Tip**  You can also perform a mail merge by using the **Mail Merge** [task pane (task pane: A window within an Office application that provides commonly used commands. Its location and small size allow you to use these commands while still working on your files.)](javascript:AppendPopup(this,'OfTaskPane_1')), which leads you step by step through the process. To use the task pane, in the **Start Mail Merge** group on the **Mailings** tab, click **Start Mail Merge**, and then click **Step by Step Mail Merge Wizard**. In Step 1 of the process, under **Select document type**, click **Envelopes**.



**Set up the envelope**

If you want to include a return address on the envelopes, you can set this up before you start working on the envelope main document. It is also a good idea to try printing a few test envelopes to verify that your printing options are configured correctly for your printer.

**Set up a return address**

1. Start Word.
2. Click the **Microsoft Office Button** Button image, and then click **Word Options**.
3. Click **Advanced**.
4. Scroll down, and under **General**, type your return address in the **Mailing address** box.

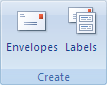
Word stores the address so that you can use it whenever you want to insert your return address in a document.

1. Click **OK**.

**Verify the printing options**

Before you run a batch of envelopes the wrong way through your printer, you can verify that the printer options are set up correctly.

1. On the **Mailings** tab, in the **Create** group, click **Envelopes**.

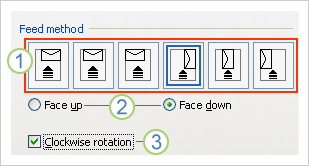


1. Click **Options**, and then click the **Envelope Options** tab.
2. In the **Envelope size** box, click the choice that matches the size of your envelopes.

If none of the choices matches your envelope size, scroll to the bottom of the list, click **Custom size**, and then type the dimensions of your envelope in the **Width** and **Height** boxes.

1. Click the **Printing Options** tab.

The printer driver sends the information to Word about which way the envelope should be loaded into the printer. This information is displayed on the **Printing Options** tab of the **Envelope Options** dialog box.

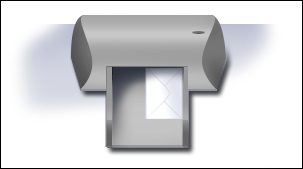


Callout 1The feed method determines the position of the envelope (right, middle, left) and whether the long or short edge is being fed into the printer.

Callout 2The envelope can be face up or face down. The face is the side that the address is printed on.

Callout 3If the envelope is fed short edge first, the envelope may need to be rotated to prevent the text from appearing upside down on the face of the envelope.

The envelope in the illustration below is positioned to the right, face down, flap at the top, and the short edge is being fed into the printer, in accordance with the settings in the dialog box shown above.



The above images were excerpted from [Training on Microsoft Office Online](http://r.office.microsoft.com/r/rlidAWSContentRedir?AssetID=ES790000501033&CTT=11&Origin=HA101091601033).

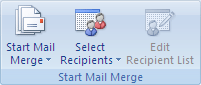
1. Load the envelope as indicated in the dialog box.
2. Click **OK**.
3. Type some test text in the **Delivery address** box, and then click **Print** to print the envelope.
4. Verify that the envelope was printed correctly.
5. If the envelope was not printed correctly, do any of the following:
   * Consult your printer information, if available, to find out how to load envelopes into the printer.
   * Update your printer driver.
   * Go back to the **Printing Options** tab in the **Envelope Options** dialog box, and make adjustments to the printing options. Print the envelope again. Repeat this process until you discover a configuration of printing options that yields the results that you want.
6. When you print the test envelope correctly, note the settings on the **Printing Options** tab in the **Envelope Options** dialog box so that you can replicate them later, during the mail merge.

**Work on the envelope main document**

1. Start Word.

A blank document opens by default. Leave it open. If you close it, the commands in the next step are not available.

1. On the **Mailings** tab, in the **Start Mail Merge** group, click **Start Mail Merge**.



1. Click **Envelopes**.
2. In the **Envelope Options** dialog box, click the **Envelopes Options** tab, and then in the **Envelope** size box, click the choice that matches the size of your envelopes.

If none of the choices matches your envelope size, scroll to the bottom of the list, click **Custom size**, and then type the dimensions of your envelope in the **Width** and **Height** boxes.

1. Make any formatting adjustments that you want in the **Delivery address** and **Return address** sections. You can see the result of your layout settings in the **Preview** section of the dialog box.
2. If your verification of the printing settings reveals that you need to make adjustments to the settings, click the **Printing Options** tab, and make the necessary adjustments.
3. When you finish, click **OK**.

Word creates a document where the page is sized to the specified envelope dimensions. If you have a return address set up in Word, the return address is displayed in a frame on the page. Another blank frame will contain the delivery address. To see the frame boundary, click in the body of the envelope where you expect the delivery address to appear.

**Resume a mail merge**

If you need to stop working on a mail merge, you can save the envelope main document and resume the merge later. Word retains the data source and field information. If you were using the **Mail Merge** task pane, Word returns to your place in the task pane when you resume the merge.

1. When you are ready to resume the merge, open the document.

Word displays a message that asks you to confirm whether you want to open the document, which will run an SQL command.

1. Because this document is connected to a data source and you want to retrieve the data, click **yes**. If you were opening a document that you did not realize was connected to a data source, you could click **No** to prevent potentially malicious access to data.

The text of the document appears, along with any fields that you inserted.

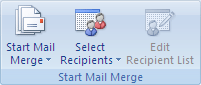
1. Click the **Mailings** tab, and resume your work.

**Connect the envelopes to your address list**

To merge information into your envelopes, you must connect the envelopes to your address list, also known as a data source or a data file. If you don't already have a data file, you can create one during the mail merge process.

**Choose a data file**

1. On the **Mailings** tab, in the **Start Mail Merge** group, click **Select Recipients**.



1. Do one of the following:
   * If you want to use your Contacts list in Microsoft Office Outlook, click **Select from Outlook Contacts**.

[[Show](javascript:ToggleDiv('divExpCollAsst_IDANK53C'))Tips for working with the Microsoft Office Outlook Contacts list](javascript:ToggleDiv('divExpCollAsst_IDANK53C')%20%20%20%20%20%20%20%20)

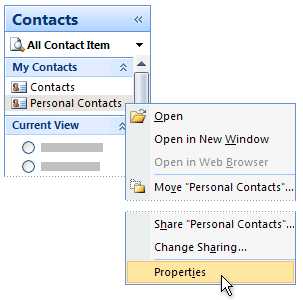
Connecting to your Outlook Contacts folder is usually a straightforward process, but sometimes you may encounter a problem. Here are solutions to common problems that you may encounter:

* + - [I can't find my Outlook Contacts folder to connect to it.](ms-help://MS.WINWORD.12.1033/WINWORD/content/HA10109160.htm#3.2)
    - [I get error messages about mail clients and tables.](ms-help://MS.WINWORD.12.1033/WINWORD/content/HA10109160.htm#3.3)
    - [I can't connect to an Outlook Contacts folder in Public Folders.](ms-help://MS.WINWORD.12.1033/WINWORD/content/HA10109160.htm#3.4)
    - [I want to use my Outlook Express address book as my Contacts folder, but I can't connect to it.](ms-help://MS.WINWORD.12.1033/WINWORD/content/HA10109160.htm#3.5)

**I can't find my Outlook Contacts folder**

You may need to turn on the **Show this folder as an e-mail Address Book** property in Microsoft Office Outlook, or you may need to change your Outlook user profile.

**Turn on the Show this folder as an e-mail Address Book property**

* + - In Microsoft Office Outlook, on the **Go** menu, click **Contacts**.
    - Right-click the **Contacts** folder that contains the information that you want to use for a mail merge, and then click **Properties** on the shortcut menu.  
      
    - On the **Outlook Address Book** tab, make sure that the **Show this folder as an e-mail Address Book** check box is selected, and then click **OK**.

[Back to Outlook tips](ms-help://MS.WINWORD.12.1033/WINWORD/content/HA10109160.htm#3.1)

**Change your Outlook user profile**

A Microsoft Office Outlook user profile is a group of e-mail accounts and address books. Usually you need only one profile — but if you share your computer with other people or use different address books for different purposes, you can set up more than one profile. If, when you start your mail merge, you are using a profile that doesn't include the Contacts folder that you want to use, that folder won't be available.

To switch to a different user profile, just restart Outlook. When you are prompted for a profile, choose the profile that includes the Contacts folder that you want to use in the mail merge.

If you aren't prompted for a profile and you know that you have more than one profile, you may want to set up Outlook so that it prompts you. Here is how:

* + - Exit Outlook.
    - In Control Panel, switch to Classic View, and then click **Mail**.
    - Click **Show Profiles**.
    - To be prompted to select a profile each time you start Outlook, click **Prompt for a profile to be used**, and then click **OK**.

[Back to Outlook tips](ms-help://MS.WINWORD.12.1033/WINWORD/content/HA10109160.htm#3.1)

**I get error messages about mail clients and tables**

If you try to connect to your Contacts folder during a mail merge in Word, and Outlook is not set up as your default e-mail program in Windows Internet Explorer, you will get a message that says:

"Either there is no default mail client or the current mail client cannot fulfill the messaging request. Please run Microsoft Office Outlook, and set it as the default mail client."

To avoid getting this message during a mail merge, do the following:

* + - Exit Word.
    - On the Internet Explorer **Tools** menu, click **Internet Options**, and then click the **Programs** tab.
    - Under **E-mail**, click **Microsoft Office Outlook**, and then click **OK**.

Start Word again, open your mail merge document, and connect to your Outlook Contacts folder.

[Back to Outlook tips](ms-help://MS.WINWORD.12.1033/WINWORD/content/HA10109160.htm#3.1)

**I can't connect to an Outlook Contacts folder in Public Folders**

If you start a mail merge in Word and try to connect to an Outlook Contacts folder in Public Folders, you get a message that says:

"The operation cannot be completed because of dialog or database engine failures. Please try again later."

If you try again later, you get the same message.

To use a Public Folders Contacts folder as the data file for your mail merge, you have to start the mail merge from within Microsoft Office Outlook.

[Back to Outlook tips](ms-help://MS.WINWORD.12.1033/WINWORD/content/HA10109160.htm#3.1)

**I want to use my Outlook Express address book as my Contacts folder**

You can't connect to this type of address book directly during a merge. Instead, export your Microsoft Outlook Express address book as a .csv text file, and then connect to it in that form.

**Export your Outlook Express address book**

* + - Start Outlook Express.
    - On the **File** menu, point to **Export**, and then click **Address Book**.
    - In the **Address Book Export Tool** dialog box, click **Text File (Comma Separated Values)**, and then click **Export**.
    - In the **Save exported file as** box, type a file name for your exported file, and then click **Browse**.
    - In the **Save As** dialog box, in the **Save in** list, choose where you want to save the file, and then click **Save**. It is handy to save data files in the **My Data Sources** folder in your **My Documents** folder. That is where Word searches first for data files when you browse for them during a merge.
    - Click **Next**. Select the check boxes next to the fields that you want to export, and then click **Finish**.

**Note**   When you are deciding which fields to export, think about the form letters, e-mail messages, or labels that you intend to create with the mail merge. For example, if you never include nicknames or personal Web sites in your merged documents, don't export those fields.

* + - When you receive the message that the export procedure is completed, click **OK**.
    - To close the **Address Book Export Tool** dialog box, click **Close**, and then exit Outlook Express.

When you are back in Word performing your mail merge and you come to the step where you connect to a data file, click the **Use an existing list** option, and browse to locate the .csv file that you just exported. Before the file opens, you may be asked to select which separator character will separate one column from another in your address list. Click **Comma**, and then click **OK**.

[Back to Outlook tips](ms-help://MS.WINWORD.12.1033/WINWORD/content/HA10109160.htm#3.1)

* + If you have a Microsoft Office Excel worksheet, a Microsoft Office Access database, or another type of data file, click **Use Existing List**, and then locate the file in the **Select Data Source** dialog box.

For Office Excel, you can select data from any worksheet or named range within a workbook. For Office Access, you can select data from any table or [query (query: A means of finding all the records stored in a data source that fit a set of criteria you name. Queries can contain operators, quotation marks, wildcard characters, and parentheses to help focus your search.)](javascript:AppendPopup(this,'IDH_wodefQuery_2')) that is defined in the database. For another type of data file, select the file in the **Select Data Source** dialog box. If the file is not listed, select the appropriate file type or select **All Files** in the **Files of type** box. In a mail merge, you can use the following types of data files:

* + - Files from single-tier, file-based database programs for which you have installed an [OLE DB (OLE DB: A component database architecture that implements efficient network and internet access to many types of data sources, including relational data, mail files, flat files, and spreadsheets.)](javascript:AppendPopup(this,'OfOleDb_3')) provider or [ODBC (Open Database Connectivity (ODBC): A standard method of sharing data between databases and programs. ODBC drivers use the standard Structured Query Language (SQL) to gain access to external data.)](javascript:AppendPopup(this,'ofdefOpenDatabaseConnectivity_4')) driver (a number of which are included with 2007 Microsoft Office system).
    - An HTML file that has a single table. The first row of the table must contain column names, and the other rows must contain data.
    - Electronic address books:
      * Microsoft Office Outlook Address Book
      * Microsoft Schedule+ 7.0 Contact List
      * Any similar address lists that were created with a [MAPI (MAPI: The Microsoft interface specification that allows different messaging and workgroup applications (including e-mail, voice mail, and fax) to work through a single client.)](javascript:AppendPopup(this,'ofdefMAPI_5'))-compatible messaging system, such as Microsoft Office Outlook.
    - A Microsoft Office Word document. The document should contain a single table. The first row of the table must contain headings, and the other rows must contain the records that you want to merge. You can also use a [header source (header source: A document that contains the header row (or header record) to be used with the data source specified for a mail-merge main document.)](javascript:AppendPopup(this,'wodefHeaderSource_6')) as a data source.
    - Any text file that has [data fields (data field: A category of information that corresponds to one column of information in a data source. The name of each data field is listed in the first row (header row) of the data source. "PostalCode" and "LastName" are examples of data field names.)](javascript:AppendPopup(this,'wodefdatafield_7')) separated (or delimited) by tab characters or commas and [data records (data record: A complete set of related information that corresponds to one row of information in the data source. All information about one client in a client mailing list is an example of a data record.)](javascript:AppendPopup(this,'wodefdatarecord_8')) separated by paragraph marks.

[[Show](javascript:ToggleDiv('divExpCollAsst_IDAAT53C'))Tips for formatting data in Office Excel](javascript:ToggleDiv('divExpCollAsst_IDAAT53C')%20%20%20%20%20%20%20%20)

If your data file is an Office Excel worksheet that includes percentages, currency values, or postal codes, you can preserve the numeric formatting of the data by using Dynamic Data Exchange (DDE) to connect to the Excel worksheet from Word. For example, you can make sure a five-digit postal code of 07865 from your data file is not displayed as the number 7865 (without the leading zero).

Before you connect to the worksheet, do the following in Word:

* + - Click the **Microsoft Office Button** Button image, and then click **Word Options**.
    - Click **Advanced**.
    - Scroll to the **General** section, and select the **Confirm file format conversion on open** check box.
    - Click **OK**.
    - With the mail merge main document open, in the **Start Mail Merge** group on the **Mailings** tab, click **Select Recipients**, and then click **Use Existing List**.
    - Locate the Excel worksheet in the **Select Data Source** dialog box, and double-click it.
    - In the **Confirm Data Source** dialog box, click **MS Excel Worksheets via DDE (\*.xls)**, and then click **OK**.

**Note**   If you don't see **MS Excel Worksheets via DDE (\*.xls)**, select the **Show all** check box.

* + - In the **Microsoft Office Excel** dialog box, for **Named or cell range**, select the cell range or worksheet that contains the information that you want to merge, and then click **OK**.

**Note**   To prevent being prompted every time you open a data file, you can clear the **Confirm conversion at Open** check box after you connect to the worksheet.

* + If you don't have a data file yet, click **Type a new list**, and then use the form that opens to create your list. The list is saved as a database (.mdb) file that you can reuse.

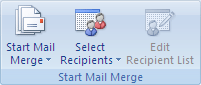
**Note**   If you installed the 2007 Microsoft Office system (instead of installing Office Word 2007 by itself), you can also use Microsoft Query to construct a [query (query: A means of finding all the records stored in a data source that fit a set of criteria you name. Queries can contain operators, quotation marks, wildcard characters, and parentheses to help focus your search.)](javascript:AppendPopup(this,'IDH_wodefQuery_9')) and retrieve the data that you want from an [external data source (external data source: A data source that contains the data a user wants to gain access to: for example, a Microsoft Excel list or a Microsoft Access database.)](javascript:AppendPopup(this,'IDH_wodefExternalDataSource_10')).

**Refine the list of recipients**

When you connect to a certain data file, you might not want to merge information from all the records in that data file into your envelopes.

To narrow the list of recipients or use a subset of the items in your data file, do the following:

1. On the **Mailings** tab, in the **Start Mail Merge** group, click **Edit Recipient List**.



1. In the **Mail Merge Recipients** dialog box, do any of the following:
   * **Select individual records**  This method is most useful if your list is short. Select the check boxes next to the recipients you want to include, and clear the check boxes next to the recipients you want to exclude.

If you know that you want to include only a few records in your merge, you can clear the check box in the header row and then select only those records that you want. Similarly, if you want to include most of the list, select the check box in the header row, and then clear the check boxes for the records that you don't want to include.

* + **Sort records**  Click the column heading of the item that you want to sort by. The list sorts in ascending alphabetical order (from A to Z). Click the column heading again to sort the list in descending alphabetical order (Z to A).

If you want more complex sorting, click **Sort** under **Refine recipient list** and choose your sorting preferences on the **Sort Records** tab in the **Filter and Sort** dialog box. For example, you can use this type of sorting if you want recipient addresses to be alphabetized by last name within each postal code and the postal codes listed in numerical order.

* + **Filter records** This is useful if the list contains records that you know you don't want to see or include in the merge. After you filter the list, you can select or clear the check boxes to include or exclude records.

To filter records, do the following:

* + 1. Under **Refine recipient list**, click **Filter**.
    2. On the **Filter Records** tab in the **Filter and Sort** dialog box, choose the criteria that you want to use for the filter.

For example, to generate envelopes only for addresses that list Australia as the country/region, you click **Country or Region** in the **Field** list, **Equal to** in the **Comparison** list, and **Australia** in the **Compare** to list.

* + 1. To refine the filter further, click **And** or **Or** and then choose more criteria.

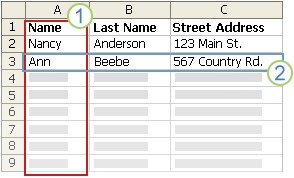
For example, to generate envelopes only for businesses in Munich, you filter on records whose **City** field contains **Munich** and whose **Company Name** field is not blank. If you use **Or** instead of **And** in this filter, your mail merge includes all Munich addresses as well as all addresses that include a company name, regardless of city.

**Note**   If you have installed address validation software, you can click **Validate addresses** in the **Mail Merge Recipients** dialog box to validate your recipients' addresses.

**Add placeholders, called mail merge fields, to the envelopes**

After you connect your envelopes to your address list, you are ready to add placeholders that indicate where the addresses will appear on each envelope. You can also add the content that you want repeated on each label, such as a picture or your return address.

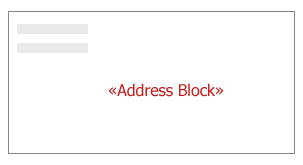
The placeholders for the addresses are called mail merge fields. Fields in Word correspond to the column headings in the data file that you choose.



Callout 1Columns in a data file represent categories of information. Fields that you add to the envelopes are placeholders for these categories.

Callout 2Rows in a data file represent records of information. Word generates an envelope for each record when you perform a mail merge.

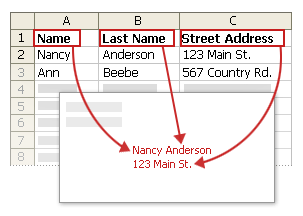
By putting a field in the initial envelope that you set up (envelope main document), you indicate that you want a certain category of information, such as name or address, to appear in that location.



**Note**   When you insert a mail merge field into the envelope main document, the field name is always surrounded by chevrons (« »). These chevrons do not show up in the final envelopes. They just help you distinguish the fields in the envelope main document from the regular text.

**What happens when you merge**

When you merge, information from the first row in the data file replaces the fields to create the first envelope. Information from the second row in the data file replaces the fields to create the second envelope, and so on.



**Working with fields: Examples**

You can add any column heading from your data file to the envelope as a field. This gives you flexibility when you design envelopes. For example, suppose your mailing list is for subscribers to your newsletter, and your data file includes a column, called ExpireDate, for storing the date that each subscription expires. If you place an «ExpireDate» field in the envelope main document before you run the mail merge, subscribers will each see their own expiration date on their envelope.

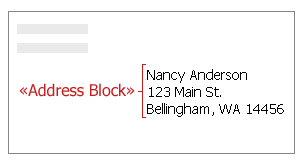
You can combine fields and separate them with punctuation marks. For example, to create an address, you can set up the fields in your envelope main document like this:

«First Name» «Last Name»

«Street Address»

«City», «State» «Postal code»

For things that you use frequently, like address blocks and greeting lines, Word provides composite fields that group a number of fields together. For example, the Address Block field is a combination of several fields, including first name, last name, street address, city, and postal code.

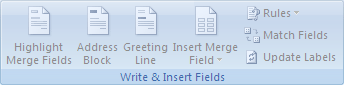


You can customize the content in each of these composite fields. For example, in the address, you may want to select a formal name format (**Mr. Joshua Randall Jr.**). In the greeting, you may want to use "To" instead of "Dear."

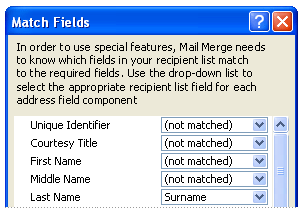
**Map the mail merge fields to your data file**

To make sure that Word can find a column in your data file that corresponds to every address element, you may need to map the mail merge fields in Word to the columns in your data file.

To map the fields, click **Match Fields** in the **Write & Insert Fields** group on the **Mailings** tab.



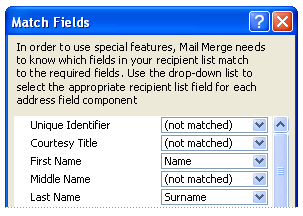
The **Match Fields** dialog box opens.



The elements of an address are listed on the left. Column headings from your data file are listed on the right.

Word searches for the column that matches each element. In the illustration, Word automatically matched the data file's **Surname** column to **Last Name**. But Word was unable to match other elements. From this data file, for example, Word can't match **First Name**.

In the list on the right, you can select the column from your data file that matches the element on the left. In the illustration, the **Name** column now matches **First Name**. It is okay that **Courtesy Title**, **Unique Identifier**, and **Middle Name** aren't matched. Your mail merge envelope doesn't need to use every field. If you add a field that does not contain data from your data file, it will appear in the merged document as an empty placeholder — usually a blank line or a hidden field.



**Type the content and add the fields**

You can add the boilerplate text and pictures to the initial envelope that you set up (your envelope main document). These elements appear the same on all of the envelopes in the merge. For example, you can include your company logo or your return address, if you haven't already configured a reusable return address in Word.

**Add the content**

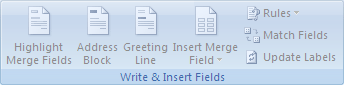
1. Position the cursor where you want to insert the content.
2. To add a return address if you haven't already configured one in Word, click in the return address area on the envelope. A frame boundary appears. Type your return address in the frame.
3. To add a picture, click in either the return address or the delivery address area on the envelope, or double-click outside of the address areas. Then, on the **Insert** tab, in the **Illustrations** group, click **Picture**. Locate the picture and double-click it. If you need to resize the picture, select it and then hold down SHIFT while you drag the corner sizing handle. Dragging the corner sizing handle maintains the height-to-width ratio. To position the picture, right-click it, point to **Text Wrapping** on the shortcut menu, and then click any of the wrapping choices except **In Line With Text**.

**Add the fields**

1. In the initial envelope that you set up (your envelope main document), click in the delivery address area.

A frame border appears.

1. Use the **Write & Insert Fields** group on the **Mailings** tab.



1. Add any of the following:

[[Show](javascript:ToggleDiv('divExpCollAsst_IDA2353C'))Address Block with name, address, and other information](javascript:ToggleDiv('divExpCollAsst_IDA2353C')%20%20%20%20%20%20%20%20)

* 1. Click **Address Block**.
  2. In the **Insert Address Block** dialog box, select the address elements that you want to include and the formats you want, and then click **OK**.
  3. If the **Match Fields** dialog box appears, Word may have been unable to find some of the information that is required for the address block. Click the arrow next to **(not matched)**, and then select the field from your data source that corresponds to the field that is required for the mail merge.

[[Show](javascript:ToggleDiv('divExpCollAsst_IDAP453C'))Individual fields](javascript:ToggleDiv('divExpCollAsst_IDAP453C')%20%20%20%20%20%20%20%20)

You can insert information from individual fields, such as first name, telephone number, or the amount of a contribution from a list of donors. To quickly add a field from your data file to the envelope main document, click the arrow next to **Insert Merge Field**, and then click the field name.

For more options with inserting individual fields in the document, do the following:

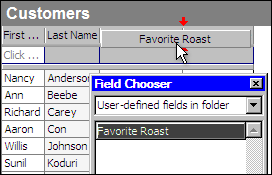
* 1. On the **Mailings** tab, in the **Write & Insert Fields** group, click **Insert Merge Field**.
  2. In the **Insert Merge Field** dialog box, do one of the following:
     + To select address fields that will automatically correspond to fields in your data source, even if the data source's fields don't have the same names as your fields, click **Address Fields**.
     + To select fields that always take data directly from a column in your data file, click **Database Fields**.
  3. In the **Fields** box, click the field that you want.
  4. Click **Insert**, and then click **Close**.
  5. If the **Match Fields** dialog box appears, Word may have been unable to find some of the required information to insert the field. Click the arrow next to **(not matched)**, and then select the field from your data source that corresponds to the field that is required for the mail merge.

**Note**   If you insert a field from the **Database Fields** list and then later switch to a data source that doesn't have a column with the same name, Word won't be able to insert that field information into the merged document.

[[Show](javascript:ToggleDiv('divExpCollAsst_IDAZ553C'))Custom fields from Office Outlook contacts](javascript:ToggleDiv('divExpCollAsst_IDAZ553C')%20%20%20%20%20%20%20%20)

The only way to include custom contact fields in your main document is to start the mail merge from within Microsoft Office Outlook. First set up a view of your contacts with the fields that you want to use in the merge. Then start the mail merge. After you choose the settings that you want, Word automatically starts, and you can complete the merge.

**Set up a view of your contacts that includes custom fields**

* 1. In Outlook Contacts, on the **View** menu, point to **Current View**, and then click **Phone List**.
  2. Right-click a column heading, and then click **Field Chooser** on the shortcut menu.
  3. In the drop-down list at the top of the **Field Chooser** dialog box, select **User-defined fields in folder**.
  4. Drag the field that you to add from the dialog box to the column headings. A little red arrow helps you place the field in the location that you want.  
     

**Note**   You can add a new field in the **Field Chooser** dialog box by clicking **New** at the bottom.

* 1. After you add all of your custom fields to the view, close the **Field Chooser** dialog box.
  2. To remove a field that you do not want included in the mail merge, click the field name in the column heading in Phone List view, and drag it off the column heading.

**Run the mail merge from Outlook**

* 1. In Outlook Contacts, on the **Tools** menu, click **Mail Merge**.
  2. In Outlook Contacts, select individual contacts by holding down SHIFT and clicking to select a range or by holding down CTRL and clicking to select individuals. If you want to include all the contacts that are currently visible in the view, do not click any contacts.
  3. On the **Tools** menu, click **Mail Merge**.
  4. If you selected individual contacts to include in the mail merge, click **Only selected contacts**. If you want to include all the contacts that are currently visible in the view, click **All contacts in current view**.
  5. If you configured the Phone List view so that it displays exactly the fields that you want to use in the mail merge, click **Contact fields in current view**. Otherwise, click **All contact fields** to make all of the contact fields available in the mail merge.
  6. If you want to generate a new main document for the mail merge, click **New document**. Otherwise, click **Existing document**, and then click **Browse** to locate the document to use as the main document.
  7. If you want to save the contacts and fields that you selected so that they can be reused, select the **Permanent file** check box, and then click **Browse** to save the file. The data is saved in a Word document as comma-delimited data.
  8. Select **Envelopes**.
  9. Click **OK**. When the document opens in Word, on the **Mailings** tab, in the **Write & Insert Fields** group, click the arrow next to **Insert Merge Field**, and then click the fields that you want to add to the envelope main document.

**Notes**

* You can't type merge field characters («« »») manually or use the **Symbol** command on the **Insert** menu. You must use mail merge.
* If the merge fields appear inside braces, such as **{** MERGEFIELD City **}**, Word is displaying [field codes (field code: Placeholder text that shows where specified information from your data source will appear; the elements in a field that generate a field's result. The field code includes the field characters, field type, and instructions.)](javascript:AppendPopup(this,'offieldcode_11')) instead of [field results (field results: Text or graphics inserted in a document when Microsoft Word carries out a field's instructions. When you print the document or hide field codes, the field results replace the field codes.)](javascript:AppendPopup(this,'wodefFieldResult_12')). This doesn't affect the mail merge, but if you want to display the results instead, right-click the field code, and then click **Toggle Field Codes** on the shortcut menu.

**Format the merged data**

Database and spreadsheet programs, such as Microsoft Office Access and Microsoft Office Excel, store the information that you type in cells as raw data. Formatting that you apply in Access or Excel, such as fonts and colors, isn't stored with the raw data. When you merge information from a data file into a Word document, you are merging the raw data without the applied formatting.

To format the data in the document, select the mail merge field and format it, just as you would format any text. Make sure that the selection includes the chevrons (« ») that surround the field.

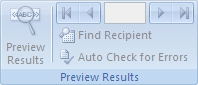
**Preview and complete the merge**

After you add the fields to the initial envelope that you set up (envelope main document), you are ready to preview the mail merge results. When you are satisfied with the preview, you can complete the mail merge.

**Preview the merge**

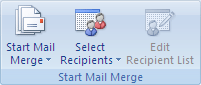
You can preview your envelopes and make changes before you actually complete the mail merge.

To preview, do any of the following in the **Preview Results** group of the **Mailings** tab:



* Click **Preview Results**.
* Page through each envelope by clicking the **Next Record** and **Previous Record** buttons in the **Preview Results** group.
* Preview a specific document by clicking **Find Recipient**.

**Note**   Click **Edit Recipient List** in the **Start Mail Merge** group on the **Mailings** tab to open the **Mail Merge Recipients** dialog box, where you can filter the list or clear recipients if you see records that you don't want to include.



**Complete the merge**

You can print the envelopes or modify them individually. You can print or change all or just a subset of the envelopes.

**Print the envelopes**

1. On the **Mailings** tab, in the **Finish** group, click **Finish & Merge**, and then click **Print Documents**.

Word Ribbon Image

1. Choose whether to print the whole set of envelopes, only the envelope that is currently visible, or a subset of the set, which you specify by record number.

**Change individual envelopes**

1. On the **Mailings** tab, in the **Finish** group, click **Finish & Merge**, and then click **Edit Individual Documents**.

Word Ribbon Image

1. Choose whether you want to edit the whole set of envelopes, only the envelope that is currently visible, or a subset of the set, which you specify by record number. Word saves the copies that you want to edit to a single file, with a page break between each envelope.

**Save the envelope main document**

Remember that the envelopes that you save are separate from the initial envelope that you set up (the envelope main document). It is a good idea to save the envelope main document itself if you plan to use it for another mail merge.

When you save the envelope main document, you also save its connection to the data file. The next time that you open the envelope main document, you are prompted to choose whether you want the information from the data file to be merged again into the envelope main document.

* If you click **Yes**, the document opens with the information from the first record merged in.
* If you click **No**, the connection between the envelope main document and the data file is broken. The envelope main document becomes a standard Word document. Fields are replaced with the unique information from the first record.