

University Information Technology Services

# Using Word 2011® at Kennesaw State University

Mail Merge

University Information Technology Services

Training, Outreach, Learning Technologies and Video Production

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## Introduction

*Office 2011* <sup>®</sup> has been designed specifically for the Mac<sup>®</sup> computer. Each Mac at Kennesaw State University includes the following *Office 2011* products: *Word* <sup>®</sup>, *Excel* <sup>®</sup>, and *PowerPoint* <sup>®</sup>. These packages will help you to develop useful documents, manage data, and create powerful presentations. This booklet, recommended for intermediate-level Macintosh<sup>®</sup> users, has been developed to help you use the Mail Merge feature with Word 2011.

#### **Learning Objectives**

The learning objectives in this document include:

- Having the ability to open the Mail Merge Manager.
- Knowing how to use Mail Merge Manager to create the following:
  - Letters
  - Labels
  - Envelopes
  - Email Messages

# **Opening the Mail Merge Manager**

The following explains how to open the *Mail Merge Manager* that will be used to create a mail merge.

- 1. From the menu options at the upper-left area of the screen, click *Tools*.
- 2. In the menu that appears, click *Mail Merge Manager*.
- 3. The Mail Merge Manager will appear on your screen (see Figure 1).



Figure 1 – Mail Merge Manager

#### Using Mail Merge to Create a Letter

The following explains how to use Mail Merge to create a letter.

1. If you don't see the *Create New* button (see *Figure 2*), allow your mouse pointer to hover over "1. Select Document Type" in the *Mail Merge Manager* and click once.

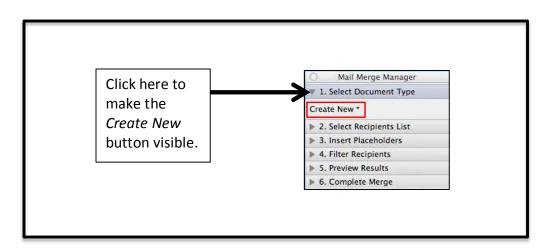


Figure 2 – Mail Merge Manager

- 2. Click the *Create New* button (see *Figure 2*).
- 3. In the menu that appears, click *Form Letters*.
- 4. Next, click *Get List* (see *Figure 3*) under *Select Recipients List* (this is *Step 2* in the *Mail Merge Manager* window).

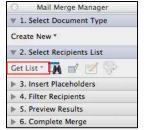


Figure 3 – Select Recipients List

- A. If you have a data file, click *Open Data Source*.
  - a. In the window that appears, browse to find the file.
  - b. When you find the file, click so that it is selected.
  - c. Click the *Open* button.
- B. If you don't have a data file, click *New Data Source*. The following explains how to enter your data.
  - a. The *Create Data Source* window will appear. Click the *OK* button.
  - b. As indicated in *Figure 4*, perform the following: 1) Enter a filename,
    2) Select where to save the file, and 3) Click the *Save* button.

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fault. Cannot store VBA macro co	de.
3	
	¢ stault. Cannot store VBA macro co Cancel

Figure 4 – Save Data Source

- C. The *Data Form* window will appear (see *Figure 5*). Enter information about your first contact and then click the *Add New* button.
- D. Continue entering your contacts as described in *Step C* above. When you have entered all of your contacts, click the *OK* button.

	ОК
Title:	Add New
FirstName:	Delete
LastName:	
jobTitle:	Restore
Company.	Find
Address1	View Source
Address2	
City:	
State	

Figure 5 – Data Form

5. At this point, type your letter. You can drag the placeholders (see *Figure 6*) from the *Mail Merge Manager* window to the document that you are typing. The placeholder that you drag and drop into the document will appear where your cursor is located.

D Mai	il Merge Manager
# 1. Select Do	cument Type
	Main document: Document3 Merge type: Form Letters
🛡 2. Select Red	ipients List
Cet List *	
Data: people.d	and the second sec
# 3. Insert Pla	
Drag placehold	lers into document:
Contac	ts *ag More
Title	
TirstName	8
tastName	
tobTitle	
+ Company	
	00.000
4. Filter Reci	
▶ 5. Preview R	esults
6. Complete	Morgo

Figure 6 – Placeholders

6. After you have finished typing your letter, you can merge the data into the document and preview the results by clicking the *View Merged Data* button (see *Figure 7*).

0	Mail Merge Manager
w 1. 5	elect Document Type
Create	New * Main document: Document3 Merge type: Form Letters
¥ 2.5	elect Recipients List
Get Lis	er 🖪 🖬 📝 💬
	eople.docx
	sert Placeholders
Drag p	laceholders into document
6	Contacts Kan More
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Option	s
	review Results
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ABC	omplete Merge
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	All -
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Figure 7 – View Merged Data

7. Click the *Next* and *Previous* button to view the various documents (see *Figure 8*).

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55 322 ATT/22	H	4	1		H	{a

Figure 8 – View Merged Data

8. To send the document to the printer, press the *Merge to Printer* button (see *Figure 9*).



Figure 9 – Merge to Printer Button

- 9. In the window that appears, press the *Print* button.
- 10. When done, if you want to save the merged document, click the *Save* icon in the upper-left area of the window (see *Figure 10*).



Figure 10 – Save Icon

11. In the window that appears, enter a filename, select the location on your computer to save the file, and click the *Save* button.

## **Using Mail Merge to Create Labels**

The following explains how to use Mail Merge to create labels.

- 1. To view the *Mail Merge Manager*, follow steps 1-3 at the top of page 5 in the section, *Opening the Mail Merge Manager*.
- 2. Click the *Create New* button (see *Figure 11*).

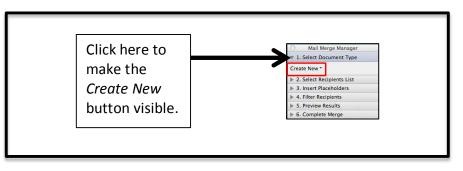


Figure 11 – Mail Merge Manager

- 2. In the window that appears, click *Labels*.
- In the next window that appears, apply settings for the following as indicated in *Figure 12*:
  1) Printer Information, 2) Label Products, 3) Product Number. Then, 4) Click the *OK* button.

	Label Options
Printer information	
O Dot matrix	
<ul> <li>Dot matrix</li> <li>Laser and ink jet</li> </ul>	
U Laser and ink jet	
Label products: Avery standa	rd ‡
Product number:	Label information
5160 - Address	Type: Address
5161 - Address	I THE. MUICES
\$162 - Address \$163 - Shipping	Height: 1"
\$164 - Shipping	Width: 2.63'
5165 - Full Sheet	
5167 - Return Address	Page size: Letter (8 1/2 x 11 in) 4
5168 - Address	
Details New Labe	L., Delete Cancel

Figure 12 – Label Options

4. Next, click *Get List* (see *Figure 13*) under *Select Recipients List* (this is *Step 2* in the *Mail Merge Manager* window).



Figure 13 – Select Recipients List

- A. If you have a data file, click *Open Data Source*.
  - a. In the window that appears, browse to find the file.
  - b. When you find the file, click so that it is selected.
  - c. Click the *Open* button.
- B. If you don't have a data file, click *New Data Source*. The following explains how to enter your data.
  - a. The *Create Data Source* window will appear. Click the *OK* button.
  - b. As indicated in *Figure 14*, perform the following: 1) Enter a filename, 2) Select where to save the file, and 3) Click the *Save* button.

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	Save As: peopl	d		
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Description	Format: Word	Document (.docx)	\$)	
The XML-bas	ed format that Word do	cuments are saved in by d	efault. Cannot store VBA macr	o code.
Options	].			3)
Hide exter	Ision New Fold	er 🔄	Cancel	Save

Figure 14 – Save Data Source

- C. The *Data Form* window will appear (see *Figure 15*). Enter information about your first contact and then click the *Add New* button.
- D. Continue entering your contacts as described in *Step C* above. When you have entered all of your contacts, click the *OK* button.

		ОК
Title:		Add New
FirstName:		Delete
LastName:	[	
JobTitle:		Restore
Company.	1	Find
		View Source
Address1:		
Address2		
City:		
State:		

Figure 15 – Data Form

5. A window will appear on your screen that will allow you to build your labels (see *Figure 16*). Click the *Insert Merge Field* button and all of the fields will appear on your screen. Select the various fields to build your label in the *Sample label* window.

Edit Labels	Click here to select
Choose the lineart Margo Field bottoe to insert marge fields into the sample label. You can edit and format the merge fields and text in the Sample Label box.	the various fields.
Insert Morge Field	
efficie	
	The label will be
Cancel OK	built here.

Figure 16 – Building Your Labels

6. Click the *View Merged Data* button (see *Figure 17*) to see the labels with your data.

0	Mail Merge Manager
	elect Document Type
Create	New - Main document: Document3 Merge type: Form Letters
¥ 2.5	elect Recipients List
	e 🖪 🖬 🖉 🖗
- here a service and	eople.docx
	sert Placeholders
Drag p	laceholders into document:
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* Fi	rstName
*La	stName
*10	oTitle
+ C	mpany
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Option	S
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\$6.33	
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¥ 6. C	omplete Merge
	All 🔹
	From: To:

Figure 17 – Viewing Your Data

7. Click the *Next* and *Previous* button to view the various pages (see *Figure 18*).

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AHC	н	4	1		H {	a

Figure 18 – View Merged Data

8. To send the document to the printer, press the *Merge to Printer* button (see *Figure 9*).



Figure 19 – Merge to Printer Button

- 10. In the window that appears, press the *Print* button.
- 11. When done, if you want to save the merged document, click the *Save* icon in the upper-left area of the window (see *Figure 20*).



Figure 20 – Save Icon

11. In the window that appears, enter a filename, select the location on your computer to save the file, and click the *Save* button.

# **Using Mail Merge to Create Envelopes**

The following explains how to use Mail Merge to create envelopes.

- 1. To view the *Mail Merge Manager*, follow steps 1-3 at the top of page 5 in the section, *Opening the Mail Merge Manager*.
- 2. Click the *Create New* button (see *Figure 21*).

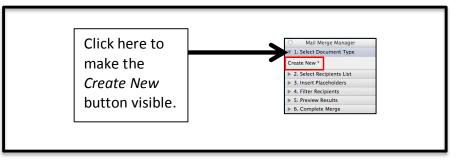


Figure 21 – Mail Merge Manager

- 3. In the window that appears, click *Envelopes*.
- 4. When the Envelope window appears on your screen, click OK.
- 5. Next, click *Get List* (see *Figure 22*) under *Select Recipients List* (this is *Step 2* in the *Mail Merge Manager* window).

0 M	ail Merge Manager
₩ 1. Sele	ct Document Type
Create Ne	w *
T 2. Sele	ct Recipients List
Get List *	
▶ 3. Inse	rt Placeholders
⊫ 4. Filte	r Recipients
> 5. Prev	iew Results
▶ 5. Com	plete Merge

Figure 22 – Select Recipients List

- A. If you have a data file, click *Open Data Source*.
  - a. In the window that appears, browse to find the file.
  - b. When you find the file, click so that it is selected.
  - c. Click the *Open* button.
- B. If you don't have a data file, click *New Data Source*. The following explains how to enter your data.
  - a. The *Create Data Source* window will appear. Click the *OK* button.
  - b. As indicated in *Figure 23*, perform the following: 1) Enter a filename, 2) Select where to save the file, and 3) Click the *Save* button.

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	Save As: people	
	= IIII ( 📄 Desktop	;) (Q
Applic bb480 bb480 bb480	abc ptpSharedVolume ipad letter grade ss mail_merge1 s Screen Sh31.20 PM Screen Sh41.13 PM	
Description	Format: Word Document (.docx)	()
The XML-based	format that Word documents are saved in b ut file formats	y default. Cannot store VBA macro cod
Options		3
Hide extens	ion New Folder	Cancel

Figure 23 – Save Data Source

- C. The *Data Form* window will appear (see *Figure 24*). Enter information about your first contact and then click the *Add New* button.
- D. Continue entering your contacts as described in *Step C* above. When you have entered all of your contacts, click the *OK* button.

		ОК
Title:		Add New
FirstName:		Delete
LastName:		
jobTitle:		Restore
Company:		Find
Address1:	[	View Sourc
Address2		
City:		
State:		

Figure 24 – Data Form

6. Next, drag the placeholders from the *Mail Merge Manager* window to the document window (see *Figure 25*) to create the envelope.

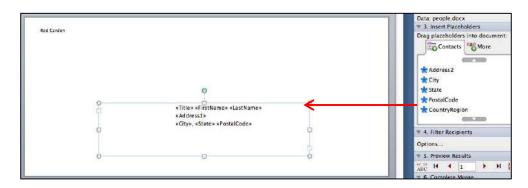


Figure 25 – Create the Envelope

7. Click to select the *Return Address* (see *Figure 26*).

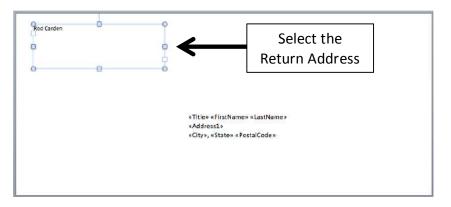


Figure 26 – Select the Return Address

- 8. You can either delete the return address (if your envelope already has the address printed on it) or type a return address in this area of the envelope.
- 9. Click the *View Merged Data* button (see *Figure 27*) to see the envelopes with your data.

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г Б,	Com	plete	Merge			
-	野		A	11		

Figure 27 – Viewing Your Data

10. Click the Next and Previous button to view the various pages (see Figure 28).

		 esults	-		
AHC	H	1		н	<b>{a}</b>

Figure 28 – View Merged Data

11. To send the envelopes to the printer, press the *Merge to Printer* button (see *Figure 29*).



Figure 29 – Merge to Printer Button

- 12. In the window that appears, press the *Print* button.
- 13. When done, if you want to save the merged document, click the *Save* icon in the upper-left area of the window (see *Figure 30*).



Figure 30 – Save Button

14. In the window that appears, enter a filename, select the location on your computer to save the file, and click the *Save* button.

#### **Generating Email Messages**

The following explains how to generate email messages.

- 1. Open the *Outlook* program on your Mac. You can minimize Outlook as you develop the message in Word that you plan to email. To learn more about setting up Outlook, please refer to *Appendix A* on page 22 of this document.
- 2. To view the *Mail Merge Manager*, follow steps 1-3 at the top of page 5 in the section, *Opening the Mail Merge Manager*.
- 3. If you don't see the *Create New* button (see *Figure 31*), allow your mouse pointer to hover over "1. Select Document Type" in the *Mail Merge Manager* and click once.

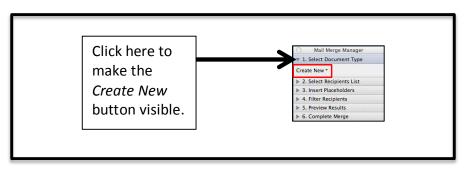


Figure 31 – Mail Merge Manager

- 4. In the menu that appears, click *Form Letters*.
- 5. Next, click *Get List* (see *Figure 32*) under *Select Recipients List* (this is *Step 2* in the *Mail Merge Manager* window).

<ul> <li>Ma</li> </ul>	ul Merge Manager
₩ 1. Selec	t Document Type
Create Ne	₩
v 2. Selec	t Recipients List
Get List "	
▶ 3. Inser	t Placeholders
⊫ 4. Filter	Recipients
▶ 5. Previ	ew Results
▶ 6. Com	plete Merge

Figure 32 – Select Recipients List

- A. If you have a data file, click *Open Data Source*.
  - a. In the window that appears, browse to find the file.
  - b. When you find the file, click so that it is selected.
  - c. Click the *Open* button.

- B. If you don't have a data file, click *New Data Source*. The following explains how to enter your data.
  - a. The Create Data Source window will appear.
  - b. In the *Placeholder list*, enter *Email* (see *Figure 33*).
  - c. Then, press the *Add Placeholder* button (see *Figure 33*).

Email Title FirstName Add Placeholder ••• JobTitle Remove Field Name Company Address1	C	eate Data Source	
Email FirstName Add Placeholder ••• JobTitle Remove Field Name Company Address1	You can create any single- below. You can also remo	word placeholder name and a e any placeholders that you c	dd it to the list don't want.
Address2	Add Placeholder •••	Title FirstName LastName JobTitle Company	

Figure 33 – Adding an Email Field

- d. Click the OK button.
- e. As indicated in *Figure 34*, perform the following: 1) Enter a filename, 2) Select where to save the file, and 3) Click the *Save* button.

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	Save As: people		
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FAVORITES Desktop rearden Applic Docum SMARED B8475 bb480 bb480 bb480	abc paptSharedVolume ipad letter grade ss mill_mergel Screen Sh41.13 PM		
	Format: Word Document (.docx)	(*)	
Description The XML-based Learn more abor	format that Word documents are saved in <u>at file formats</u>	oy default. Cannot store VBA macro	code.
Options		3	
Hide extensi	on New Folder	Cancel	Save

Figure 34 – Save Data Source

- C. The *Data Form* window will appear (see *Figure 35*). Enter information about your first contact and then click the *Add New* button (Be certain to enter an email address for each contact).
- D. Continue entering your contacts as described in *Step C* above. When you have entered all of your contacts, click the *OK* button.

The	-	ОК
Title:		Add New
FirstName:		Delete
LastName:		
lobTitle:		Restore
		Find
Company:		View Source
Address1		( new source
Address2		
City:		
State:		

Figure 35 – Data Form

6. At this point, type your email message. You can drag the placeholders (see *Figure 36*) from the *Mail Merge Manager* window to the document that you are typing. The placeholder that you drag and drop into the document will appear where your cursor is located.

	Mail Merge Manager
¥ 1. Sele	ect Document Type
Create N	lew + Main document: mail_merge2.docs Merge type: Form Letters
# 2. Sele	ect Recipients List
Get List	· 🙀 🖬 🛃 🖗
Data: per	ople.docx
* 3. Inse	ert Placeholders
Contraction of the local division of the loc	ceholders into document
- Jao	Contacts More
★ Last ★ JobT	tName Name Title
* Corr	
	er Recipients
# 4. Filte Options	
# 4. Filte Options	view Results
T 4. Filts Options. T 5. Prev	view Results
T 4. Filts Options. T 5. Prev	view Results

Figure 36 – Placeholders

7. After you have finished typing your letter, you can merge the data into the document and preview the results by clicking the *View Merged Data* button (see *Figure 37*).

C Mail M	erge Manager
# 1. Select Docum	nent Type
Create New * Mai	n document: Document5 ge type: Form Letters
* 2. Select Recipi	ents List
Get List * 🎆 🖀	1 1 1 1 1
Data: people2.dog	and the second sec
= 3. Insert Placeh	olders
Drag placeholders	into document:
Contacts	More More
Title	
* FirstName	
tastName	
tobTitle	
* Company	
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	4545
Options	
w. S. Preview Resu	
ABC H 4 1	н (a)
# 5. Complete Me	rge
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	From To:

Figure 37 – View Merged Data

8. Click the *Next* and *Previous* button to view the various documents (see *Figure 38*).



Figure 38 – View Merged Data

9. To send the email, press the *Generate Email* button (see *Figure 39*).



Figure 39 – Generate Email Button

- 10. In the *Mail Recipient* window that appears (see *Figure 40*), for "To:" click to select the field that contains the recipient's email address.
- 11. Type a *Subject* for the email (see *Figure 40*).
- 12. Determine one of the following for *Send As*: Text, Attachment, or HTML (see *Figure 40*).
- 13. Click the *Mail Merge to Outbox* button (see *Figure 40*) to send the email message.

	Mail Recipient	S
To:	Email	
Subject	1	
Send As:	Text	

Figure 40 – Mail Recipient

14. When done, if you want to save the merged document, click the *Save* icon in the upper-left area of the window (see *Figure 41*).

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Figure 41 – Save Icon

15. In the window that appears, enter a filename, select the location on your computer to save the file, and click the *Save* button.

#### **Additional Support**

If you have questions that arise as you work with the Mail Merge feature in Word 2011, the ITS department at KSU has a service desk that will provide you with technical support. The KSU Service Desk may be contacted in the following ways:

- Telephone for Staff: 770-423-6999
- Telephone for Students: 770-499-3555
- **Email Support:** *service@kennesaw.edu*

Additional information about the KSU Service Desk can be found at the following website: <u>http://its.kennesaw.edu/helpdesk/index.htm</u>

# Appendix A: Setting Up Outlook

The following explains how to set up Outlook.

- 1. Open the *Outlook* program on your Mac.
- 2. From the menu options in the upper-left area of the screen, click *Tools*.
- 3. In the menu that appears, click *Accounts*.
- 4. Choose *E-mail account*.
- 5. Enter the following information
  - a. E-mail Address: Your full email address
  - b. Password: The *password* associated with your e-mail account
  - c. Username: Your NetID
  - d. Type: IMAP
  - e. Incoming Server: email.kennesaw.edu
  - f. Select the following: Use SSL to connected (recommended)
  - g. Outgoing Server: zmta1.kennesaw.edu
  - h. Select the following: Use SSL to connected (recommended)
- 6. Click the *Add Account* button.
- 8. When done, click the red circle in the upper-left area of the *Accounts* window to close it.

Enter your ac	count information.	
E-mail addre	ss: juser@kennesaw.edu	
Passwo	rd: •••••	
	Configure automatically	
User nar	ne: Juser	
ту	e: IMAP \$	
Incoming serv	er: email.kennesaw.edu : 993	tions and
	Override default port  Use SSL to connect (recommended)	
Outgoing serv	er: zmta1.kennesaw.edu : 25	nternet
	Override default port  Use SSL to connect (recommended)	AOL, Gmail ers.
	Cancel Add Account	
		-

Figure 42 – Email Settings