

## How to print a mail-merged letter using Microsoft Office Word 2002 (XP), 2003

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#### STEP 1

Your input file MUST be a *.CSV* file. Save your file somewhere on your PC that you will pull from in STEP 12 below.

### STEP 2

Creating a letter - Open Word and create your letter.

Our guide will refer to the following dummy template which we created for the sole purpose of this guide/demonstration.

Here is our creative, our idea. It represents the offer and the design (the way we intend for it to look):

	100 Cone Ave. Ice Town
	Alaska, USA 11111
	CONFIDENTIAL June 2, 2011
	Subject: SPECIAL OFFER FOR PURCHASE OF YOUR HOLE
r I P	We wanted to wish you congratulations on moving in to our heighborhood and your lovely home.
C ye us	ome say hi, we would like to meet you and family and offer 4 free ice-cream comes a your regular Ice-Cream saying: "Nice to have your in the say of saying in the say of saying in the say of saying in the say of say of say in the say of say of say in the say of s
	b an econes on stop shop".
eo	rge Vanilla Respectfully yours, Northwind Ice Cream Shop Northwind Ice Cream Company

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When our idea is all typed and shaped into a word document and opened inside Microsoft Word Editor, it ends up looking something like this:



#### **Important Note**

For the purpose of this guide we assume you already have a letter template ready (by template, we mean, the body and design in which we'll soon incorporate the addressing and personalization from the data file you received and saved in Step 1)

If you do not have a letter template, please put this guide aside, create your letter template as a document, and when you are ready, continue executing this guide from this spot...

The guide will now continue assuming you have a letter template which you created earlier. You are now "inside" the Word program with that template open (ready to edit your letter), as shown above.

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## STEP 3

On the main tool bar left-click on the **Tools** tab then scroll down to **Letters and Mailing**, and left-click on the **Mail Merge Wizard...** 



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Your first window should look like the one below:



### STEP 4

Under Select document type, left-click on the circle next to Letters

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## STEP 5

Under **Step 1 of 6**, left-click on the **Next: Starting document** Your next window should now look similar to the one below:



## STEP 6

Under Select starting document, left-click on the circle next to Use the current document

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## STEP 7

Under **Step 2 of 6**, left-click on the **Next: Select recipients** Your next window should now look similar to the one below:



### STEP 8

Under Select recipients, left-click on the circle next to Use an existing list

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## STEP 9

Under **Use an existing list**, left-click on **Browse...** A dialog window will open up looking something like this:

Select Data Sou	urce		? ×
Look in:	🞯 Desktop	💽 🕲 + 🖄 💐 🗙 🚰 🎹 + Tools +	
My Recent Documents	My Documents My Computer	♥ ~\$ilmerge_letter_template.doc ♥ mailmerge_letter_template.doc ♥ Mail Merge for Wordx.doc ■ data.CSV	
My Computer	File name: Files of type: All Data Sources (*.odc; *	▼ New Source Open *.mdb; *.mde; ▼ Cancel	

## STEP 10

Navigate to the file you saved to your PC as instructed in the beginning of this guide. In this case our file "data.csv" was saved to our desktop for easy navigation.

#### **Important Note**

If your file is not a .*CSV* file, make sure that the **Files of type:** is set to **All Files (\*,\*).** Once found highlight the desired file and left-click the **Open** button. However, we highly recommend making sure to ask for .CSV format so you can follow this guide step by step.



### Step 11

A **Mail Merge Recipients** window will appear similar to the one below, make sure all desired recipients are checked, and left-click the **OK** button.

#### **Important Note**

To make sure all recipients are selected, you may left-click the "Select All" button.

st c	of recipients:	ve recipients monit	ne mai merger				
	🗾 Lastname	🗾 Firstname	Address	🗾 City	💌 State	💌 Z	•
V	Beckett-Simm	Mercedes	801 Chats	Accok	MD		
~	Dew	Carol	13300 Arya	Brand	MD		
~	Flenoid	Joshua	14514 Whis	Brand	MD		
~	Andrews	Rufus	6306 Chath	Brand	MD		
~	Freeman	Antonio	7202 China	Brand	MD		
~	Bell	Arvise	9401 Caliph	Brand	MD		
~	Corbett	Kami	11411 Blue	Beltsville	MD		
~	Busangu	Fatuma	12029 Belts	Beltsville	MD		
~	Hernandez	David	4704 Saint	Beltsville	MD		
2	Bostic	Leicle	10001 Stall	Lanham	MD		
~	Testa	James	1107 11th St	Laurel	MD		
~	Brown	Glen	13813 Clar	Laurel	MD		
	2						

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Your next window should now look similar to the one below:



### STEP 12

Under Step 3 of 6, left-click on the Next: Write your letter

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Your next window should now look similar to the one below:

### **STEP 13**

Place the (mouse) cursor in the area of your letter where you wish to insert the address block.

#### Background

When creating a mailed offer, you can either use our other guide to create labels for placement on your mailed piece in order to facilitate its delivery by the USPS, or embed the address block directly into your letter when folded into a window-cut-out envelope. This section will show you how to achieve the latter. If you choose to go by the first, please see our guide for generating mailing labels or contact us to generate the labels for you and deliver them straight to you.

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#### H OMEOWNERS MARKETING SERVICES, INC.

### Mail Merge Guide (Letter)

We now go back to personalizing your letter, in the specific step of adding the address block such that it can be folded into a window-cut-out envelope for mailing.

Place the mouse cursor in the letter (document), exactly where you wish the addressing information to begin.

Under Write your letter, left-click on More Items...

You will be prompted with the window below:

Insert Merge Field		×
Insert: C <u>A</u> ddress Field	s 💽 <u>D</u> at	tabase Fields
Eields:		
FullName Address CityStateZip4 County_Code Salutation Firstname Middlename Lastname City State Zip9 Carrier_Route Phone Purchase_Price Loan_Amt		
Match Fields	Insert	Cancel

Now, select each field you wish to have inserted. When it's highlighted (as shown above for the field "FullName") you may press the "Insert" button to have it inserted into the letter, in the spot your cursor is located.

For example, we chose the full name and address to show in one line, then in the next line we inserted the city-state-zip information. The result looks something like this:

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#### **Important Note:**

If you intend to use this address block for placement in a window-cut-out envelope, please make sure the placement of the address block fits the window in the envelope you are using.

You can do so by experimenting with your template first, so you have a good sense of how to place the block within the constraints of your own design. Each letter & design has its own constraints and we strongly recommend NOT to print the entire batch prior to making sure your placement is correct via experimenting on a single copy.

### **STEP 14**

Next, we will place the address barcode for mailing, underneath the address block. This is usually only done if you intend to have this block used for a window-cut-out envelope. If your letter is mailed using a labeled envelope, you may skip/ignore this step.

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Under Write your letter, left-click on Postal bar code... and then press OK on the window looking like that shown below

0				
Insert Postal Bar Code	×			
Select the appropriate address fields below and click OK to insert a bar code at the insertion point.				
Merge field with <u>Z</u> IP code:				
Zip	•			
Merge field with street address:				
Address	•			
OK Cancel				

In the case of our sample letter we get something as such:



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### **STEP 15**

You may also personalize your letter, using the data that we provided. Since this guide does not intend to be a document on how to use Microsoft Word, we will limit this example to something minor such as creating a personal greeting line. Under **Write your letter**, left-click on **Greeting Line...** and a window like the one shown below should appear

Greeting Line		×
Greeting line format:		
Dear Mr. Randall	-	
Greeting line for invalid recipient names:		
Dear Sir or Madam, 📃 👻		
Preview		
Dear Mr. Randall,		
Match Fields		Cancel

Press **OK** button to place the personalized greeting line within our template letter. In the case of our sample letter we get something as such:



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#### **Important Note**

In general you may use ANY field from the data we provide to personalize the letter and the offer (such as creating totally different offers based on the sales amount of the house, or loan to value ratio etc etc). The more personal and targetted the letter, the better are the chances to elicit an engaged response.

### **STEP 16**

Under **Step 4 of 6**, left-click on the **Next: Preview your letters** Your next window should now look similar to the one below (the merged parts are highlighted for your convenience):



If you wish to preview other label pages just left-click the view other records inserted live into your letter template.

The final product (when you print the entire batch) will create one letter for each recipient (or record) in the data file.

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buttons to



#### **Important Note**

Each letter will be as many pages that your letter takes once the data is merged. Said differently, if you wish to keep your letters to a certain number of pages, it is recommended to leave a few empty lines at the bottom of the pages (empty = unused, without spaces or any characters). This will provide a margin for data as its merged into the letter to enlarge the letter length without forcing another page to be printed.

#### **STEP 17**

When finished previewing Under **Step 5 of 6**, left-click on the **Next: Complete the merge** 

Your final window should look similar to the one below.



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## **STEP 18**

Under **Merge**, left-click on **Print**... to print the merged letters (i.e. the entire batch of letters resulting from merging the data with the template. NOTE this may take a while to print depending on the number of recipients and the length of your letter template.)

#### **Important Note**

If you wish at any time to go back to reviewing previous steps in the process left-click **Previous: Preview your letters** under **Step 6 of 6**.

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We wish to thank you for your time and business.

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