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

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
ATTN:

Subject: SPECIAL OFFER FOR PURCHASE OF YOUR HOME

We wanted to wish you congratulations on moving in to our neighborhood and your lovely home.

Please accept our best wishes on the purchase of your home.

Come say hi, we would like to meet you and family and offer 4 free ice-cream cones on your first visit as our way of saying: "Nice to have you in our neighborhood, please make us your regular Ice-Cream stop shop".

Respectfully yours,
Northwind Ice Cream Shop
Northwind Ice Cream Company

George Vanilla

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:
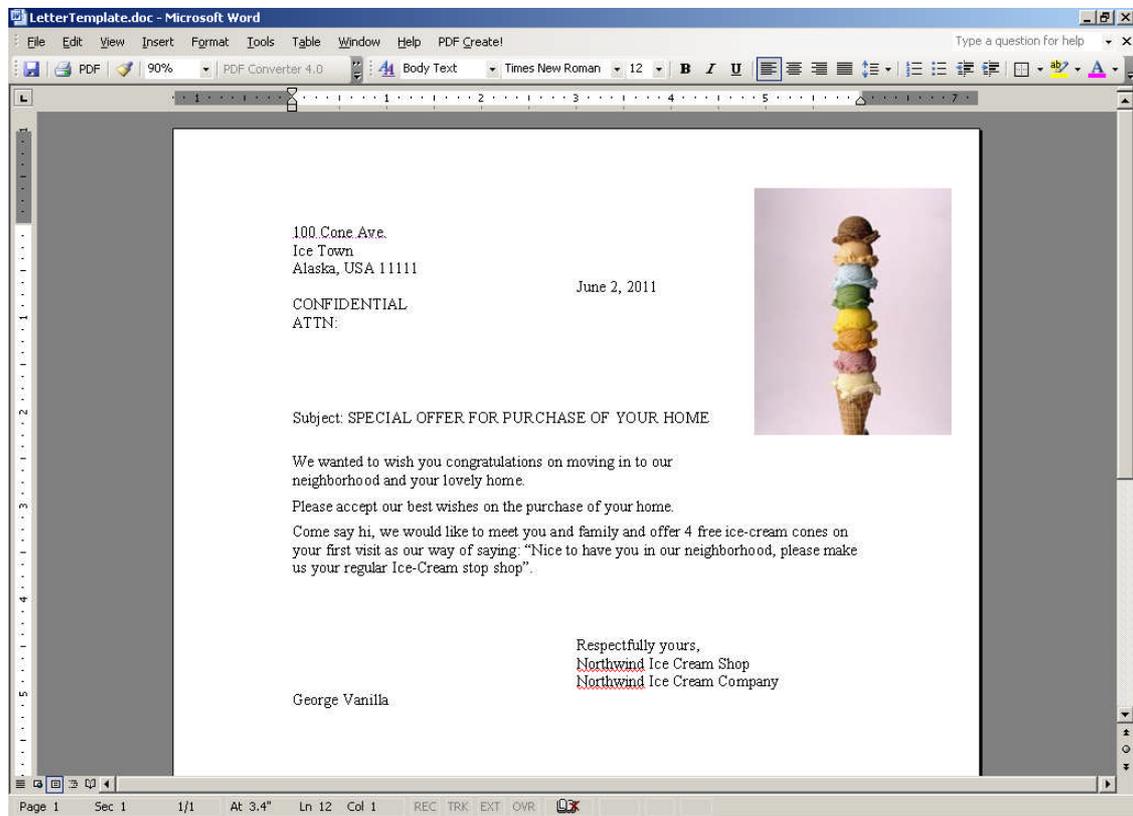
Important Note

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.

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…**
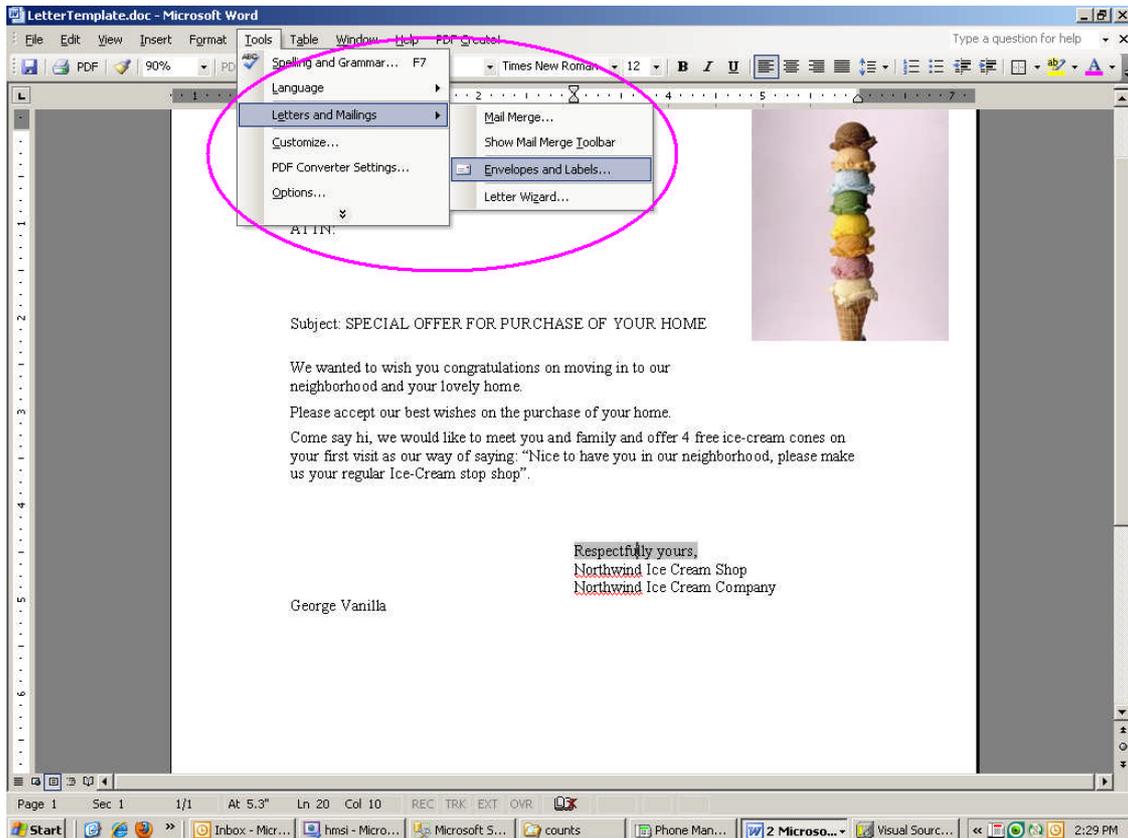
Your first window should look like the one below:
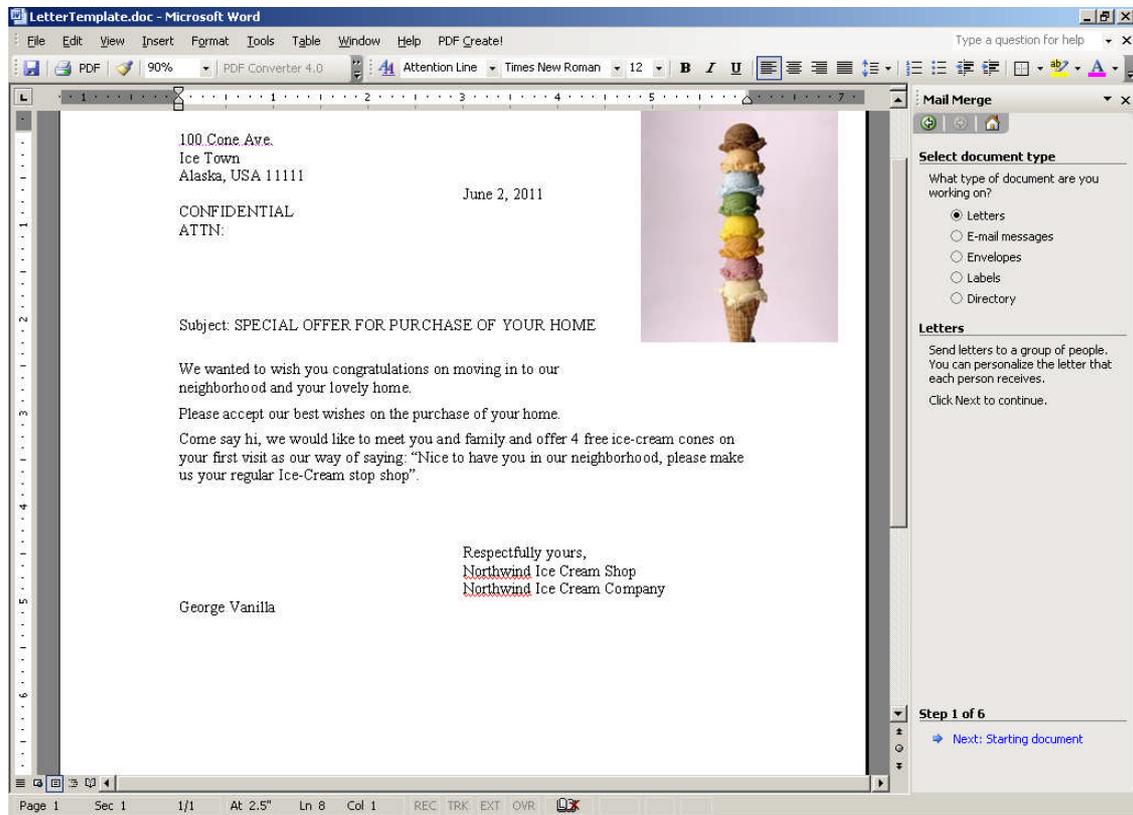
STEP 4

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

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:
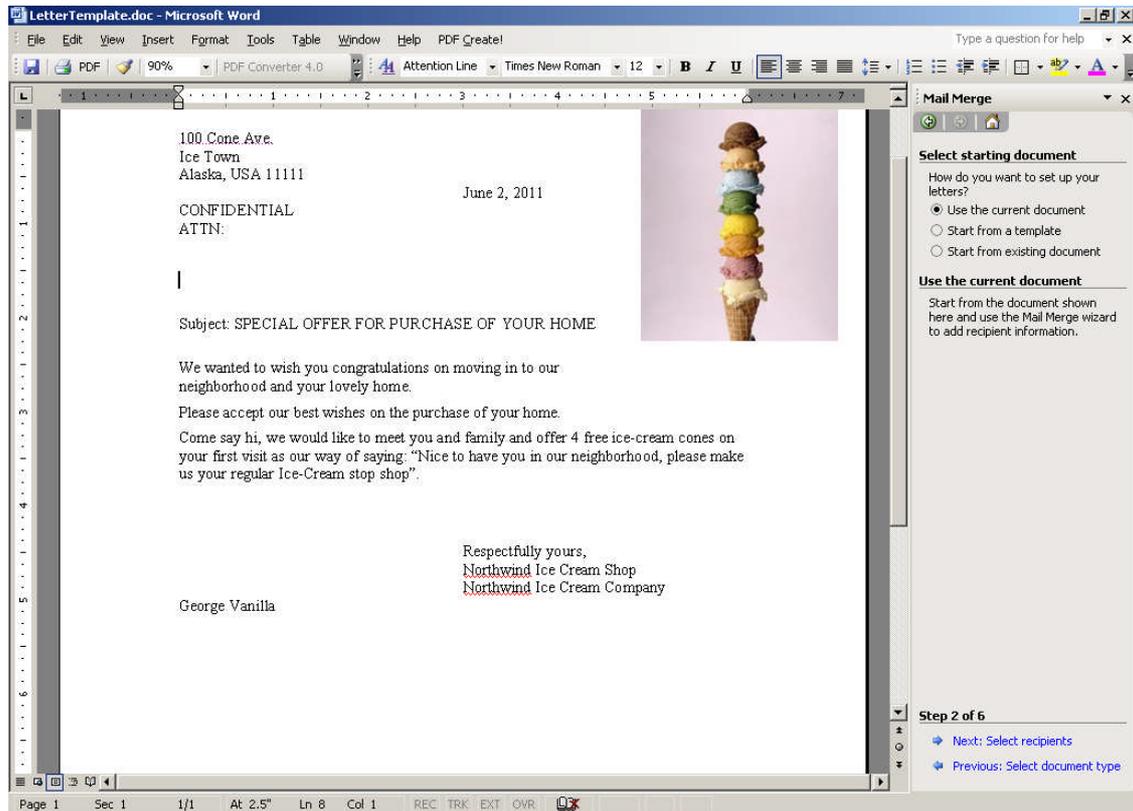
STEP 6

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

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:
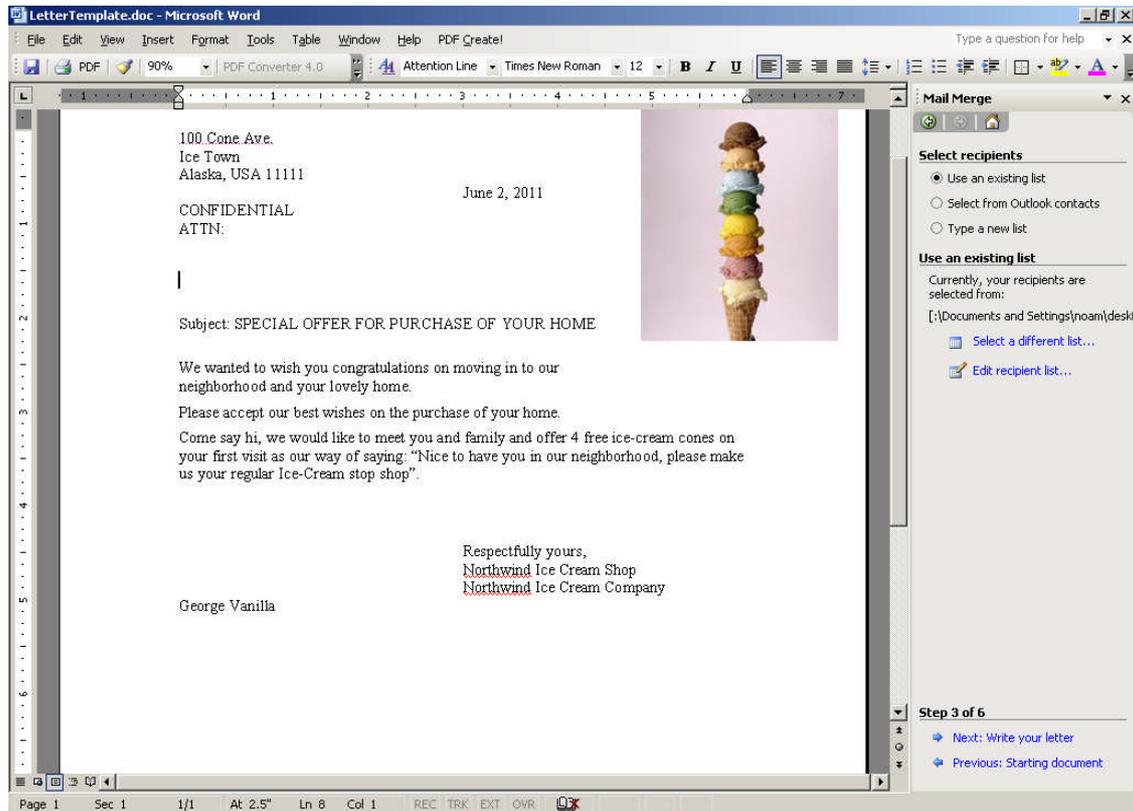
STEP 8

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

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North Hollywood, CA 91606

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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:
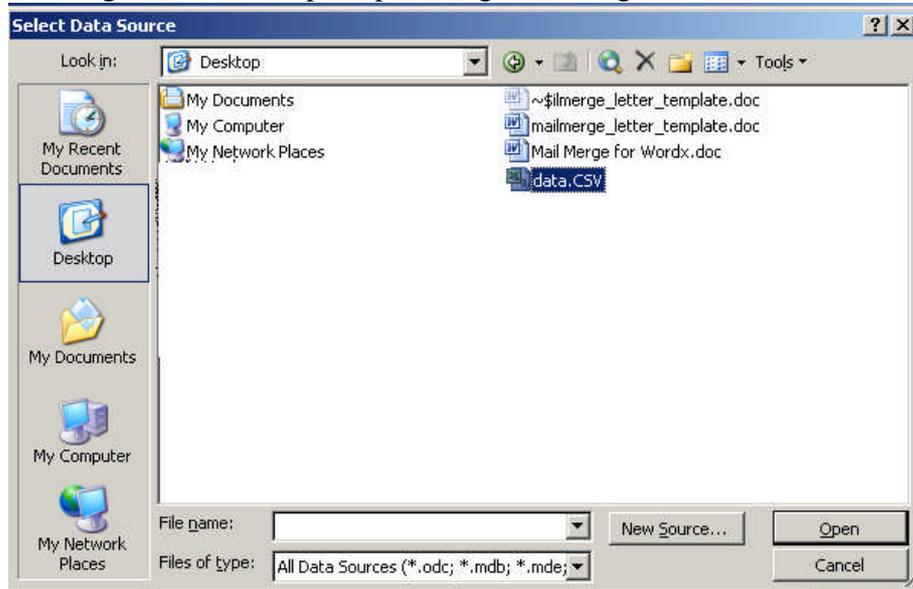
STEP 10

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.

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**

Your next window should now look similar to the one below:
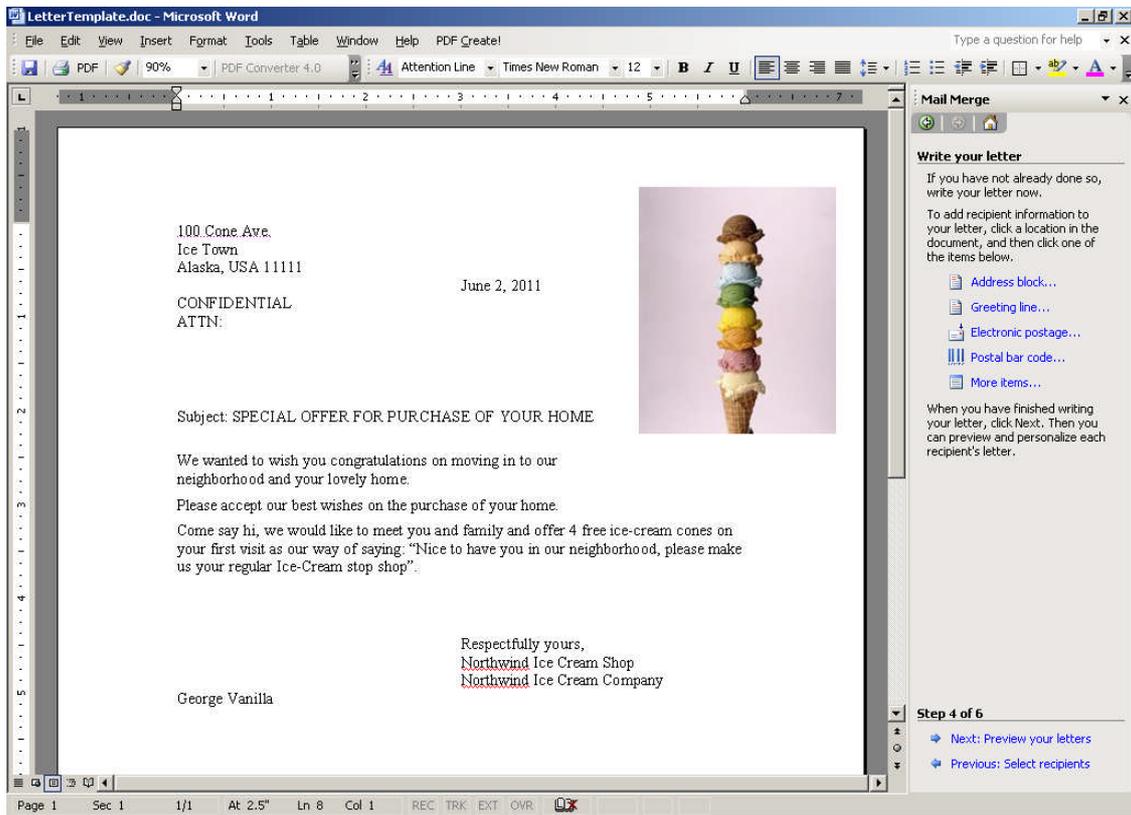
STEP 13

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.

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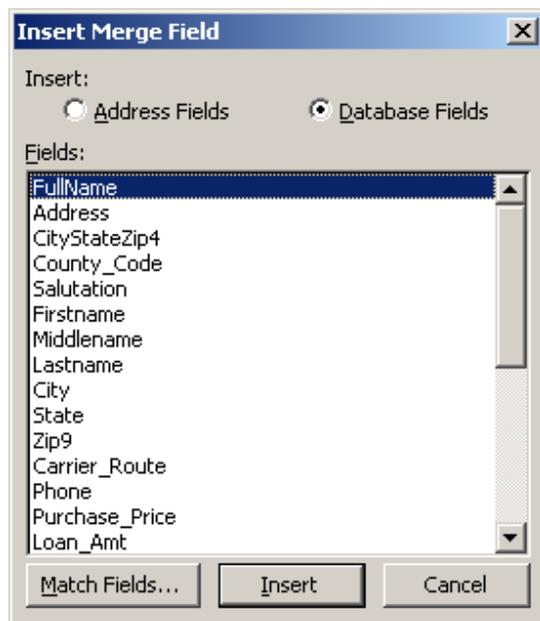
Now, select each field you wish to have inserted. When it's highlighted (as shown above for the field "FullName") you may press the "Insert" button to have it inserted into the letter, in the spot your cursor is located.

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:

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.

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

In the case of our sample letter we get something as such:
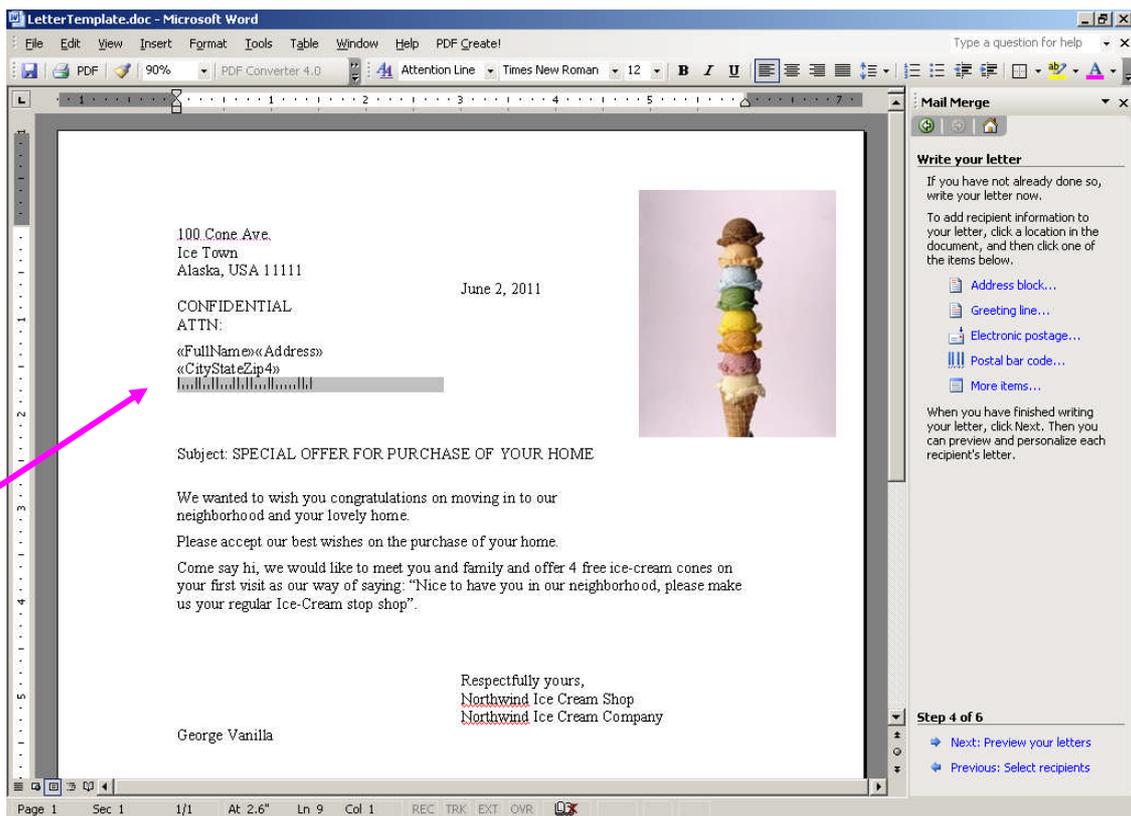
STEP 15

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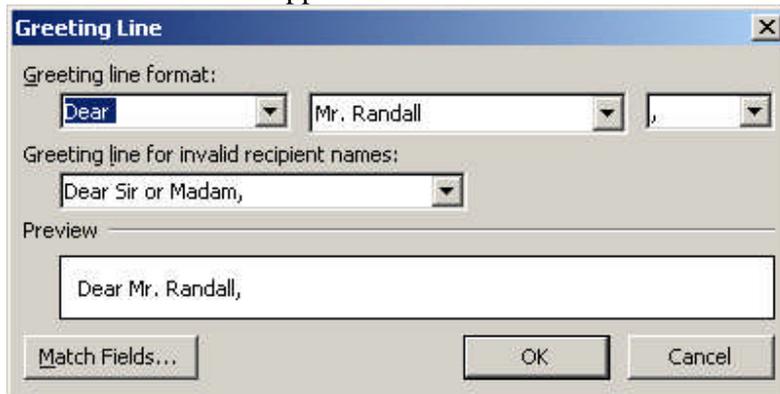
Press **OK** button to place the personalized greeting line within our template letter.
In the case of our sample letter we get something as such:
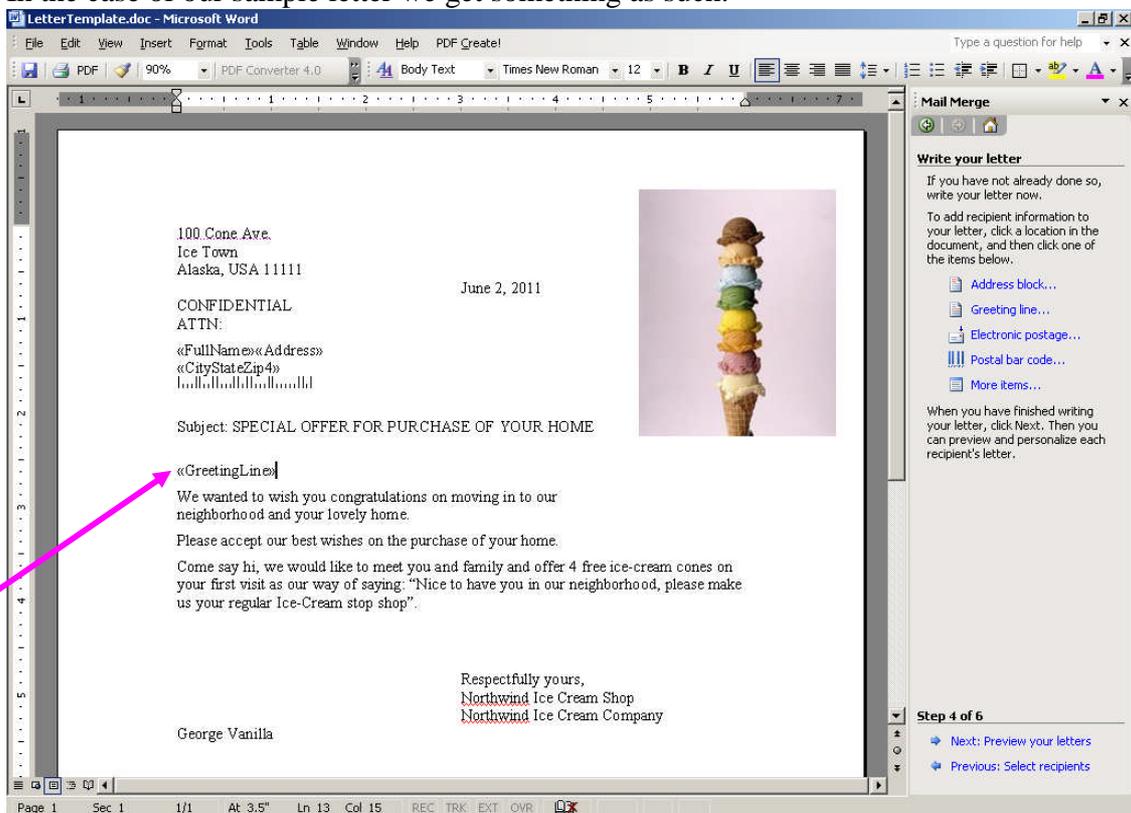
Important Note

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 targeted 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 [<<] or [>>] buttons to 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.

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.
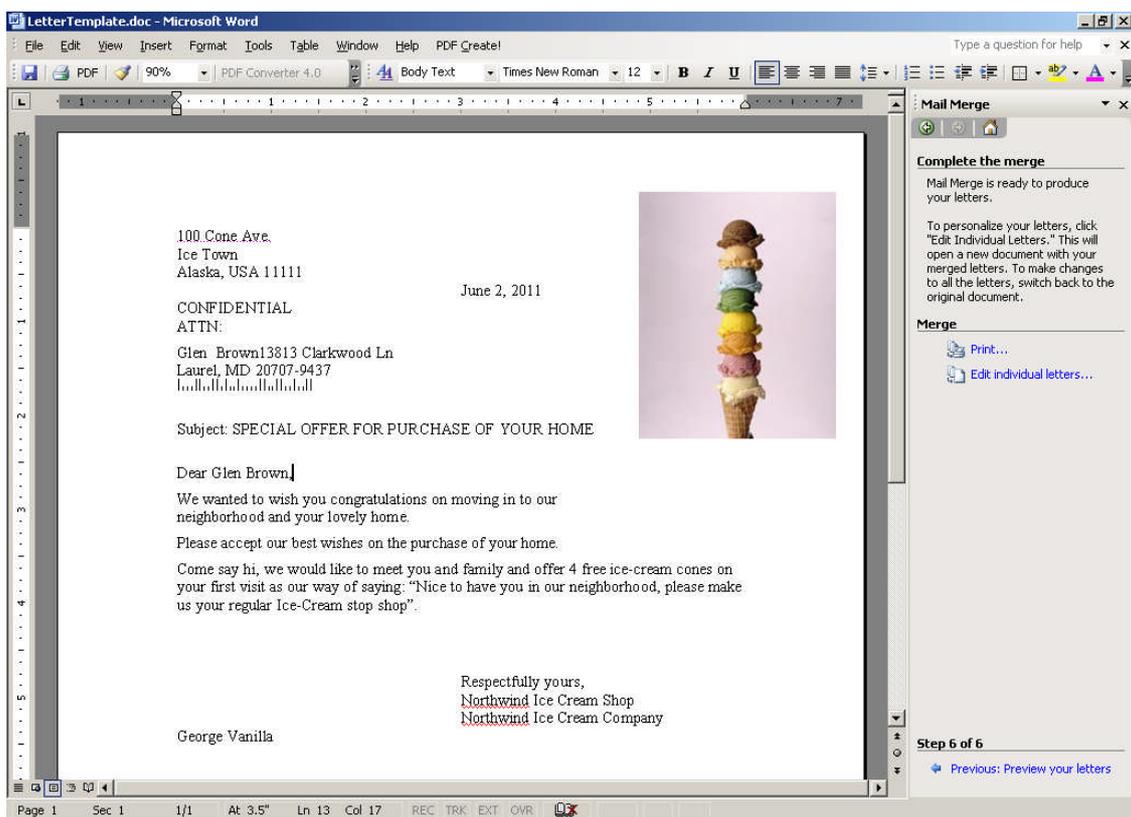
STEP 18

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**.

We wish to thank you for your time and business.

END OF GUIDE