



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

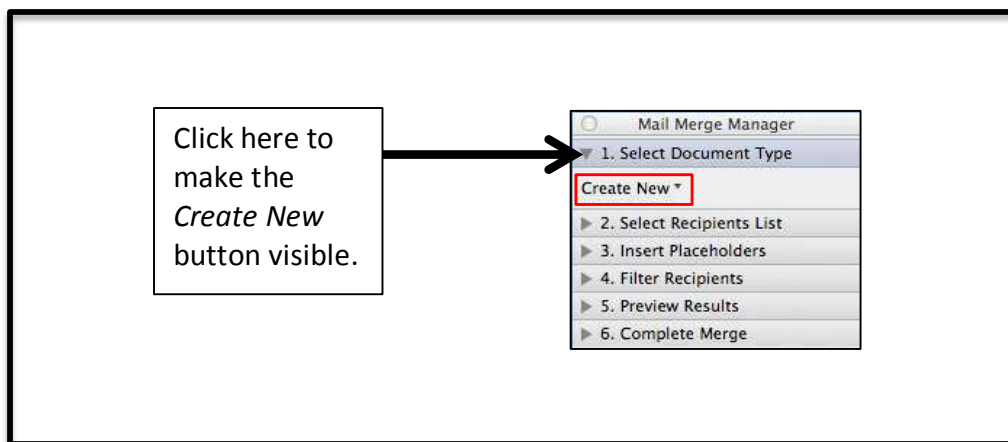


Figure 2 – Mail Merge Manager

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).

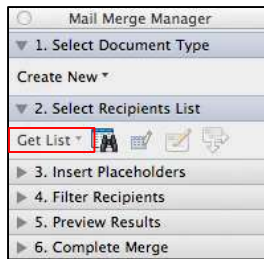


Figure 3 – Select Recipients List

- 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.

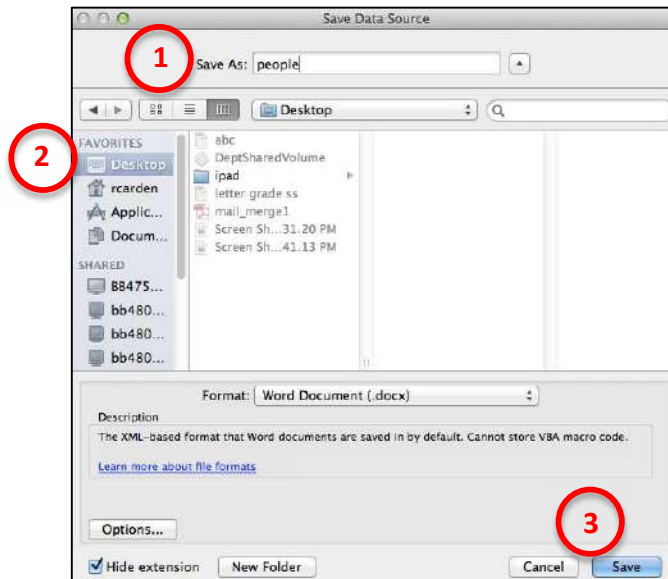


Figure 4 – Save Data Source

- 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.

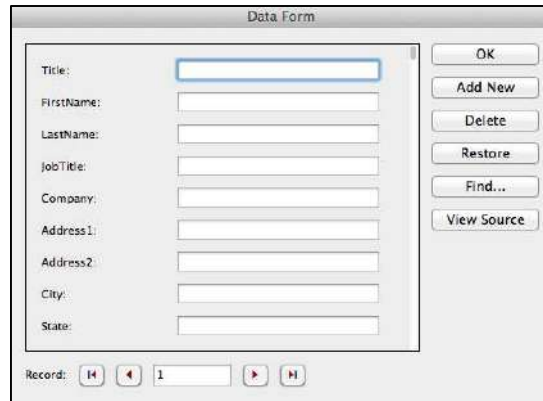


Figure 5 – Data Form

- 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.

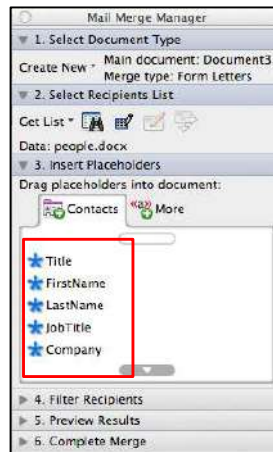


Figure 6 – Placeholders

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*).



Figure 7 – View Merged Data

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

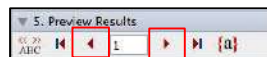


Figure 8 – View Merged Data

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*).

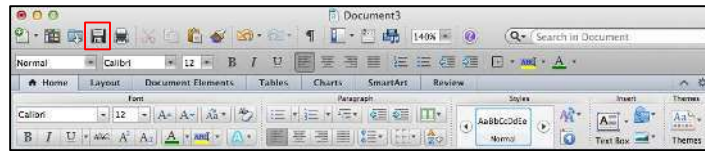


Figure 10 – Save Icon

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*).

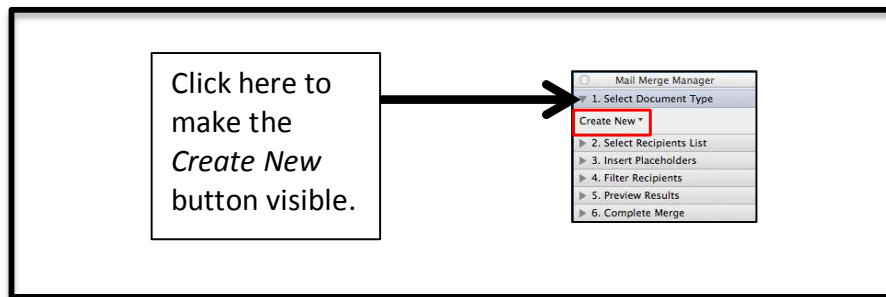


Figure 11 – Mail Merge Manager

2. In the window that appears, click *Labels*.
3. 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.

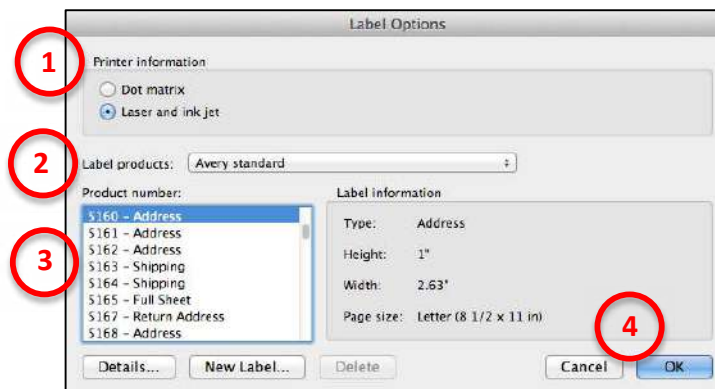


Figure 12 – Label Options

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

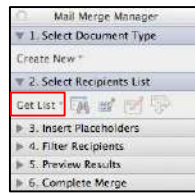


Figure 13 – Select Recipients List

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

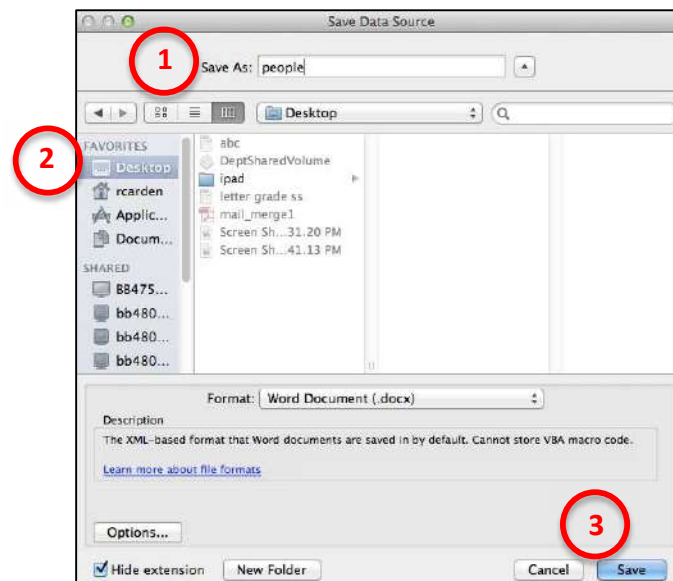


Figure 14 – Save Data Source

- 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.

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.

Click here to select the various fields.

The label will be built here.

Figure 16 – Building Your Labels

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



Figure 17 – Viewing Your Data

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

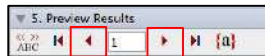


Figure 18 – View Merged Data

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*).

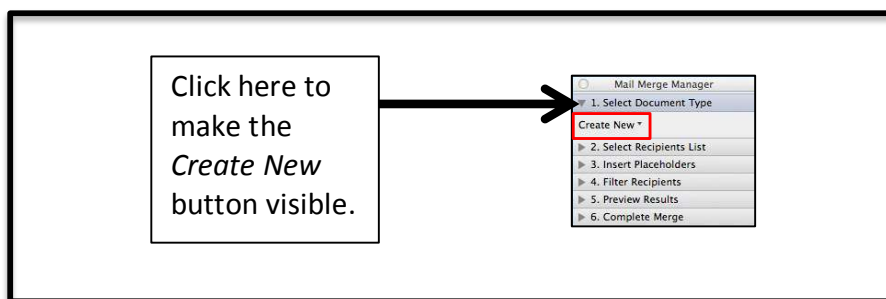


Figure 21 – Mail Merge Manager

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).

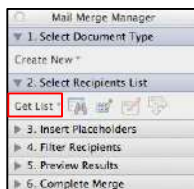


Figure 22 – Select Recipients List

- 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.

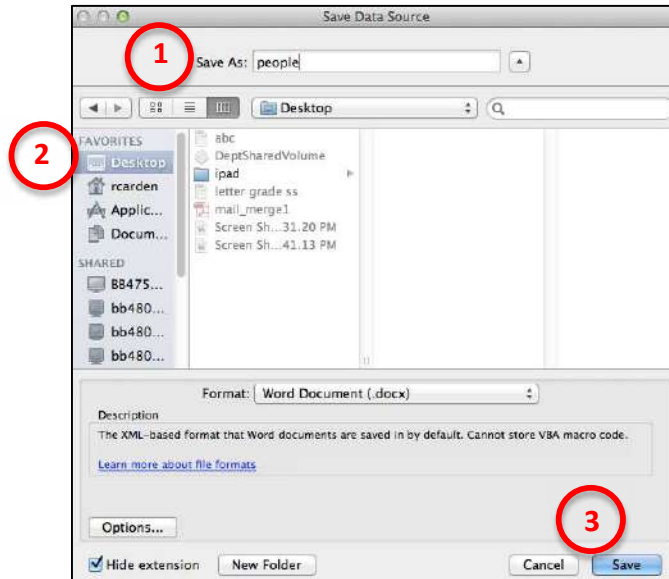


Figure 23 – Save Data Source

- 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.

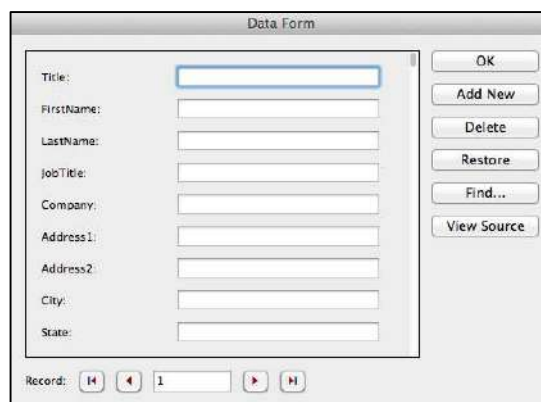


Figure 24 – Data Form

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

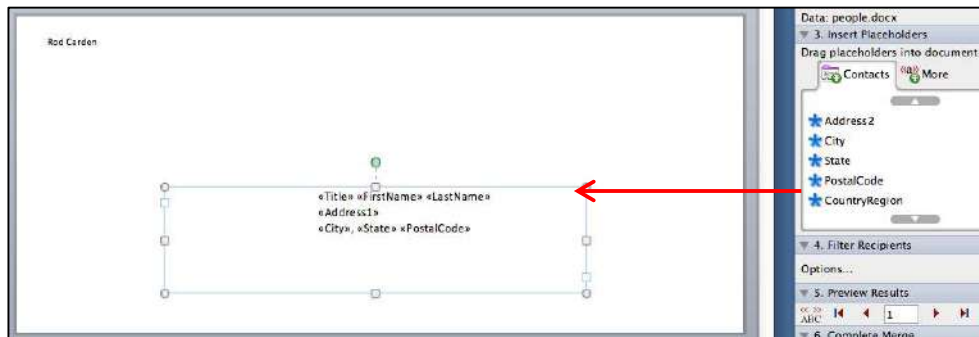


Figure 25 – Create the Envelope

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

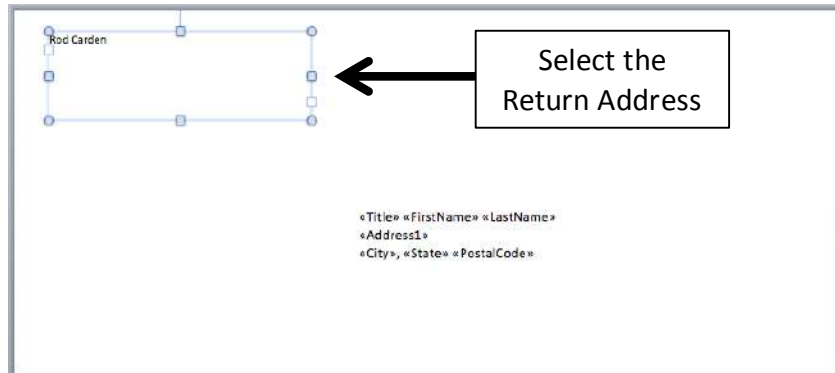


Figure 26 – Select the Return Address

- 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.
- Click the *View Merged Data* button (see *Figure 27*) to see the envelopes with your data.



Figure 27 – Viewing Your Data

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

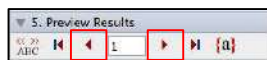


Figure 28 – View Merged Data

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

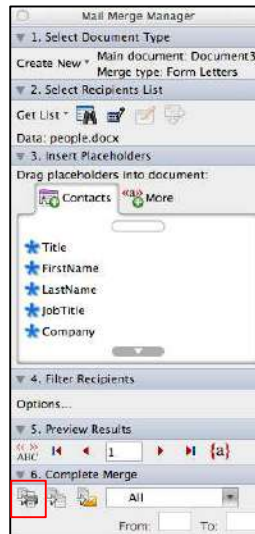


Figure 29 – Merge to Printer Button

- In the window that appears, press the *Print* button.
- 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

- 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.

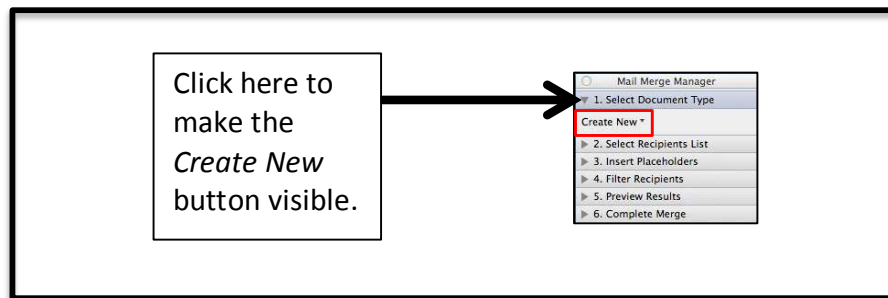


Figure 31 – Mail Merge Manager

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).

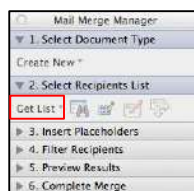


Figure 32 – Select Recipients List

- 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*).

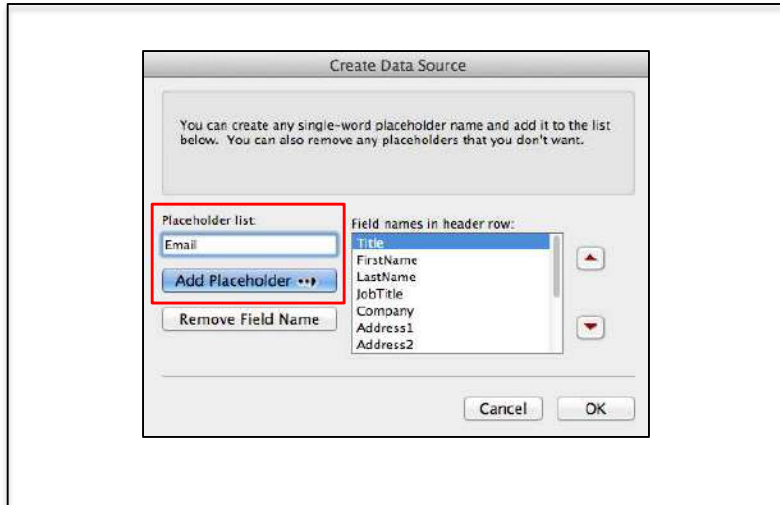


Figure 33 – Adding an Email Field

- 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.

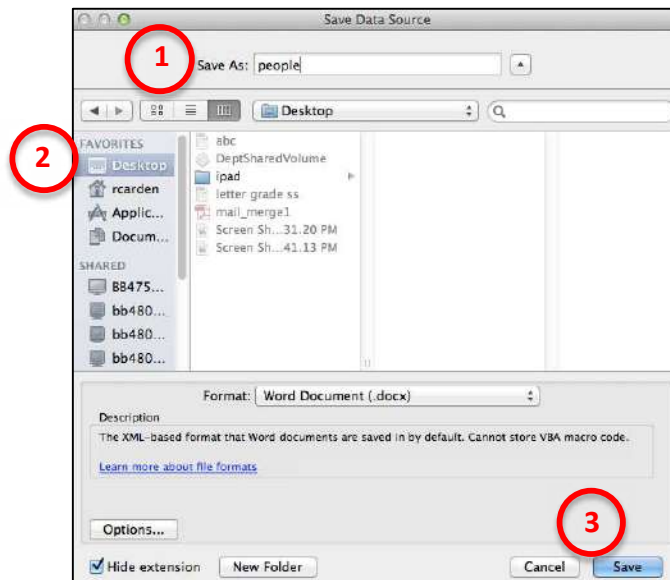


Figure 34 – Save Data Source

- 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.

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.

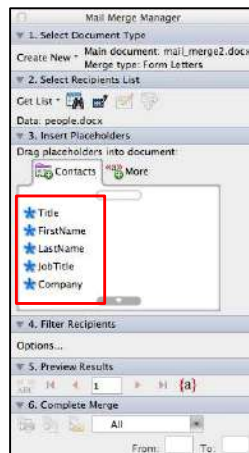


Figure 36 – Placeholders

- 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*).

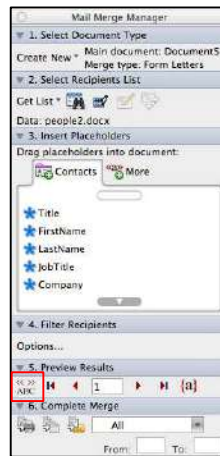


Figure 37 – View Merged Data

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

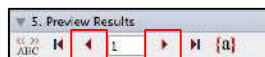


Figure 38 – View Merged Data

- 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.



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*).



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:
<http://its.kennesaw.edu/helpdesk/index.htm>

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.

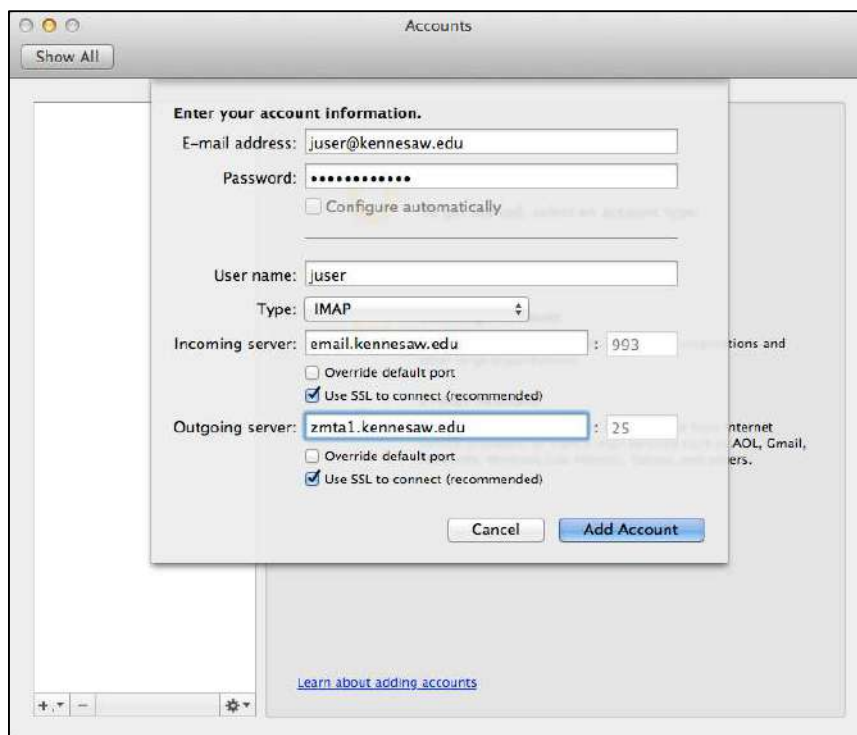


Figure 42 – Email Settings