

Mail Merge Process

Project Development and Environmental Analysis Branch		Approved: 12/7/11 Version: 1.0
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Purpose

The purpose of this procedure is to provide instructions on performing a mail merge in Microsoft Word. The instructions include how to create letters and labels using mail merge.

Background

None

Responsibility

Project Planning Engineers are responsible for producing various project letters such as:

- Start of Study
- Project Initiation and Scoping Meeting letters
- Document Distribution letters
- Labels

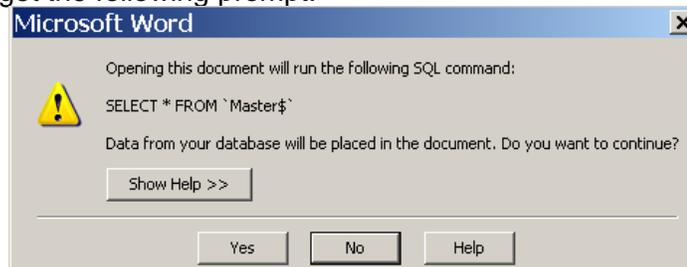
Procedures

Letters

1. The most current form letters for start of study, scoping meeting, and document distribution are located on the S:drive at the following address:

[S:\Start of Study & Document Distribution](#)

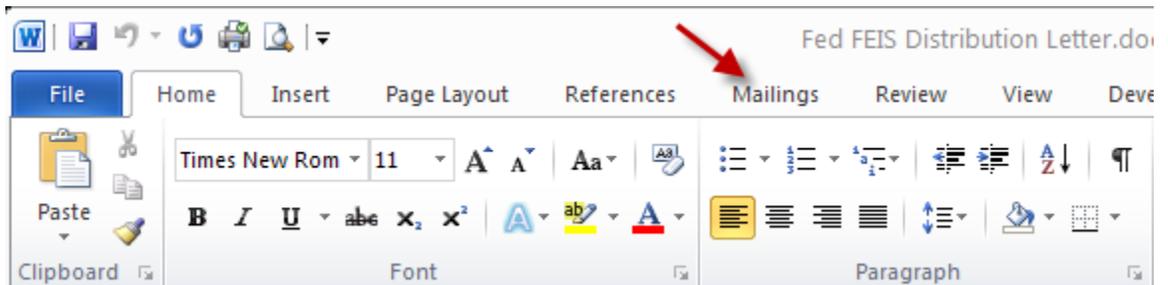
2. Open the above folder. You will find three folders in this main folder, "Doc Dist Letters", "Scoping Meeting Memo", and "Start of Study". The "Doc Dist Letters" folder is further broken down into the various document types. Open the appropriate folder and copy the form letter(s) to your directory on the S:drive. You will copy the final letters to the Project Store folder once you have completed the mail merge.
3. Edit the letter(s) as necessary for your specific project. When you first open the file, you may get the following prompt:



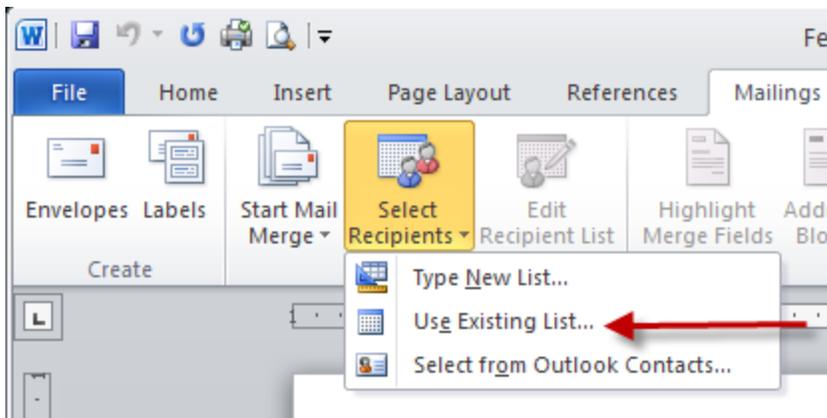
If you do get this prompt, click on “Yes” if you want to link to the “Contact Information.xlsm” file. If you want to link to another Microsoft Excel spreadsheet with contact information, you will click on “No”. All of the letters are currently connected with the above Excel file.

NOTE: If you use a different excel file for your contact information, you must make sure it uses the same headings as the “Contact Information.xlsm” file in order for the mail merge to work.

4. On the tool bar choose “Mailings”



If you are using your own Excel file, choose “Select Recipients” and “Use Existing List...”



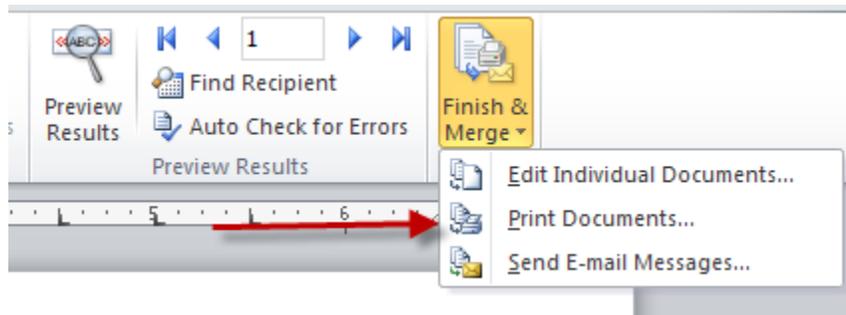
Navigate to the appropriate file and click “Open”. If for some reason you need to reconnect to the “Contact Information.xlsm” file, navigate to the S:\Start of Study and Document Distribution folder and choose “Contact Information.xlsm” file and the choose “Master\$” in the Select Table dialog box. Click “OK” to accept.

5. Select the appropriate letter recipients using the “Edit Recipient List”. You can either uncheck the ones you don’t want or uncheck all by unchecking the box between “Data Source” and “Last Name”, then checking the appropriate recipients.



6. Check to make sure the printer is set for single sided copies and not double sided copies. Then choose the “Finish & Merge” and “Print Documents.” You

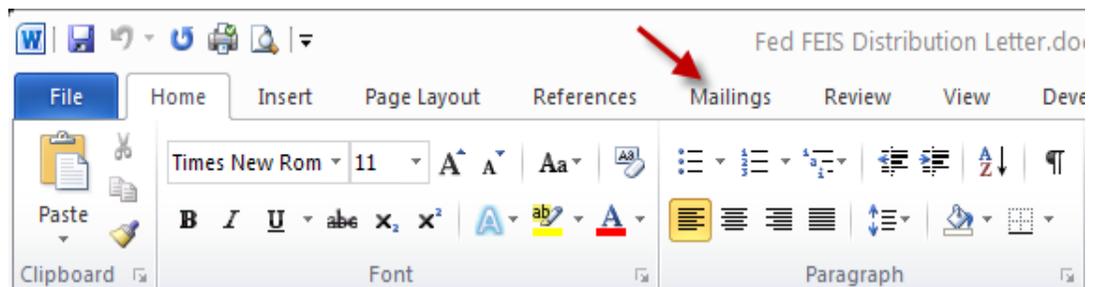
can also choose to preview the letters before printing by clicking on the “Preview Results” button.



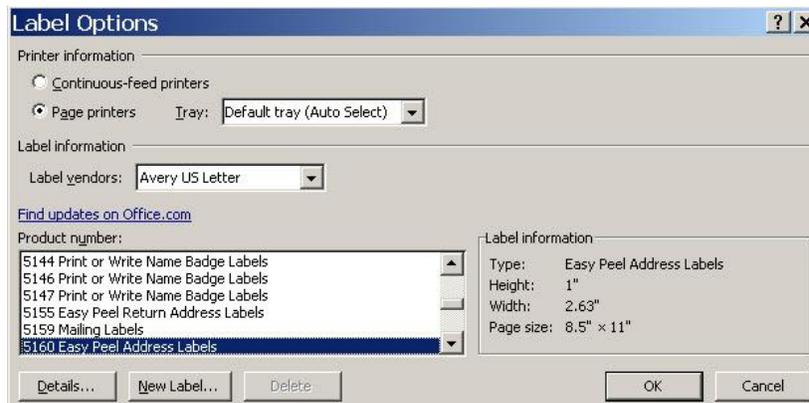
The individual letters will be printed out. When you close the file, you will be asked if you want to save changes. Click on “Yes”.

Creating Labels

1. Before you begin, determine the type of labels you will be using such as standard mailing labels versus large shipping labels. The Front Office staff can assist you in locating the appropriate labels.
2. To make labels, open a new Microsoft Word document, and choose “Mailings” from the toolbar.



3. Choose, “Start Mail Merge” and then “Step by Step Mail Merge Wizard.” A dialog box will appear on the right-hand side of the computer screen. Choose “Labels” and then click on “Next: Starting document” at the bottom of the dialog box.
4. The dialog box will then ask you to choose how you want to set up your document. Click beside “Change document layout” and then click on “Next: Select recipients” at the bottom of the dialog box.
5. The dialog box below will appear. You will use the choices under “Product number” to specify the type of label you are using. Then click on “OK.” The outline of the labels will be shown in the document.



- In the dialog box on the right, under Select recipients, choose “Use an existing list.”
6. Use the dialog box to navigate and open the Excel file with your contact information. Choose the recipients as in Step 5 under the instructions for letters. Then click on “Next: Arrange your labels.”
 7. Click on the first label (which will be blank). Select “Insert Merge Fields” and add the appropriate fields from the drop down list to create the desired look for your label.
 8. Make sure the printer is set for single sided copies and not double sided copies. Select “Finish and Merge” and then “Print Document.” Print the labels first on standard copy paper to make sure the labels are correct and that the merge was successful. Make any changes to the first label as needed.
 9. Finally, select “Finish and Merge” and then “Print Document.” Then place the label sheets in the manual feed of the printer.

Contacts

- For suggestions to change this procedure contact: Karen Capps, kbcapps@ncdot.gov
- For questions about performing this procedure contact: Tracy Walter, twalter@ncdot.gov