CASE MAIL

HOW TO USE MAIL MERGE WITH MS WORD

With MS Word you can create either Mailing Labels, Envelopes or Letters to use with the MS Excel File we email to you. Once you get familiar with this process, you can easily produce mailings for yourself each day.

The first step is to download the Daily Files we send to you. You will download the file(s) to a File Folder on your Computer. However, we don't recommend downloading them to your One Drive. Be sure you download it to a folder that you can access later. For example, your Download folder or My Documents folder.

Next, depending on what you would like to create, please watch a how- to video.

Create Mail Merge Labels: https://www.youtube.com/watch?v=O9IOY7-BKdE

Create Mail Merge Envelopes: https://www.youtube.com/watch?v=WAPCfTWSSzk

Create Mail Merge Letters: https://www.youtube.com/watch?v=yD4yf6mzeDI

If you would like to download a sample excel file to help with creating your Merge Document, below is the link. The Excel files we provide contain field names.

https://img1.wsimg.com/blobby/go/d5117205-53c3-47c7-a633-0e1e76de1d93/downloads/Case-Mail%20Sample.xls?ver=1710885240833

Once you have created your Mail Merge Document, each day you will Open your Document and you will need to select the Excel File you want to Merge your Document with. You will first receive this prompt and you will select Yes.

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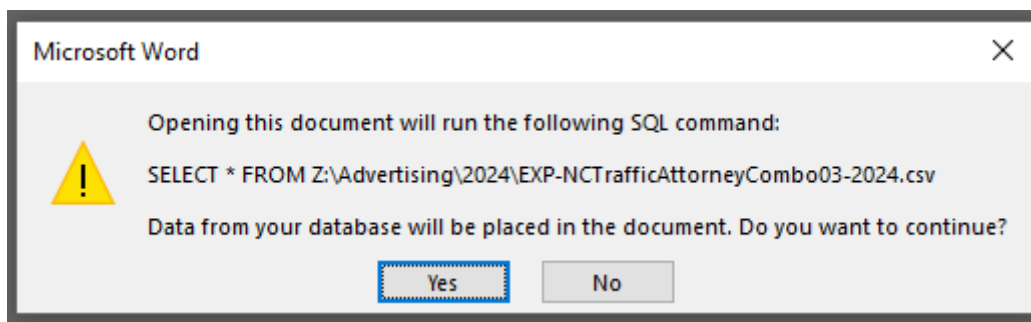
Next, you will receive this prompt, and you will select Find Data Source. Hence, you are telling Word you have an Excel File (data source) to use with the merge document.
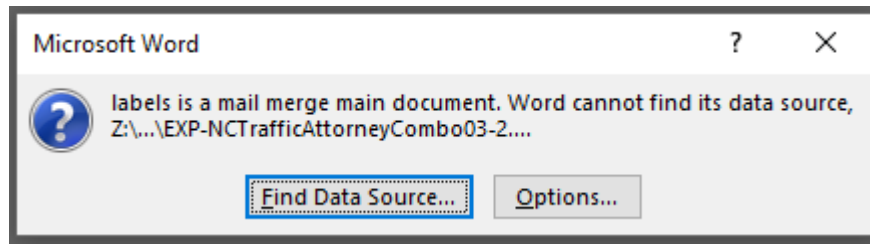
Next, you will receive the prompt below, here you will locate your Excel File. Your Excel File is located where you saved it when you downloaded the file(s). Once you select the file, you will select Open. You can only select 1 file at a time.
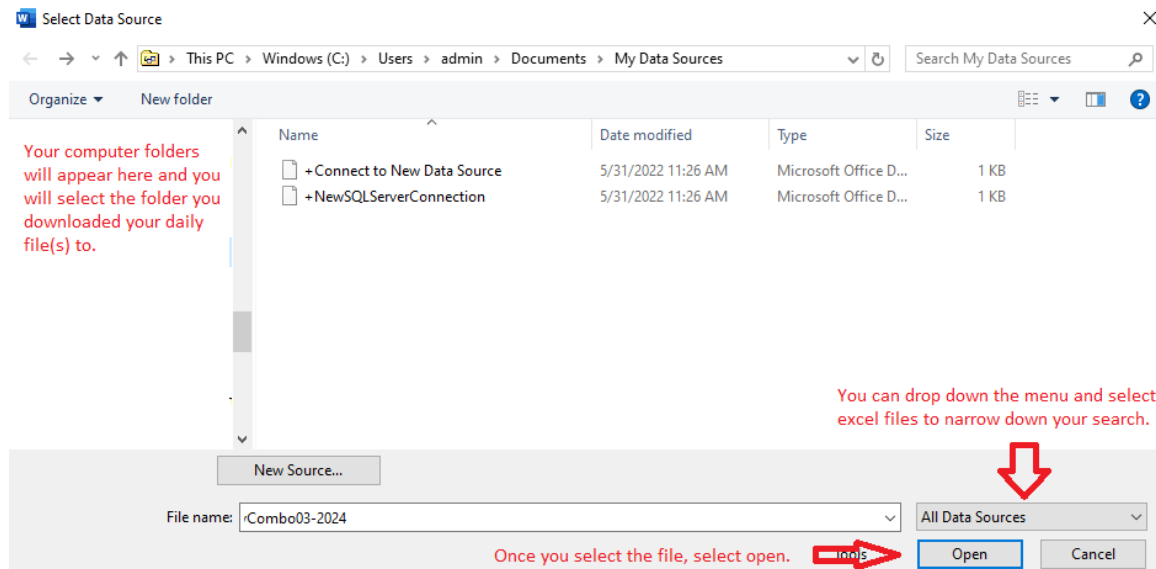
From the how-to videos made available, you should now be able to create merge documents with the Daily Files we provide.

We hope this document has provided you with adequate instruction to create MS Word Mail Merge documents.

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Get New Clients Every Day!