I. Prepare your materials
A. Have a form letter written with space left empty for the address and name (see the Guide to Resumes and Cover Letters, available as Tab 13 of the Professional Development Handbook). After the mail merge is complete, you can always go back and make any necessary minor customizations to individual letters before printing them.

B. Create a spreadsheet with all the contact info you need. Create column headings as shown in Figure 1 below. Note: Your spreadsheet must be saved in .XLS format and must include the headings exactly as they are shown in Figure 1.

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
<th>J</th>
<th>K</th>
<th>L</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Prefix</td>
<td>FirstName</td>
<td>LastName</td>
<td>Title</td>
<td>D</td>
<td>E</td>
<td>F</td>
<td>G</td>
<td>H</td>
<td>I</td>
<td>J</td>
<td>K</td>
</tr>
<tr>
<td>2</td>
<td>Mr.</td>
<td>John</td>
<td>Smith</td>
<td>Hiring Partner</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>New York</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td>Samuel</td>
<td>Jones</td>
<td>Recruiting Manager</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>New York</td>
<td>NY</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>10000</td>
<td></td>
</tr>
</tbody>
</table>

Also note that in Figure 1, there are separate columns for FirstName and LastName, as well as columns for Prefix (you will have to include “Mr.” or “Ms.” in the inside address of the letter when addressing a letter to a non-attorney), Suffix (you will need “, Esq.” after the name in the inside address when addressing a letter to an attorney), and Courtesy Title (you will need “Mr.” or “Ms.” after the “Dear” regardless of whether the recipient is an attorney). Of course, there are also columns for the Title, Employer Name, and the various address fields.

C. For the envelopes, we recommend that you purchase sheets of mailing labels as they work well with printers. You can attempt to print directly to envelopes, but the chance of experiencing a paper jam or crooked printing is high with large printers like he one in the Resource Library. Avery Labels work well, but most any mailing size label should work. (Avery, and other manufacturers, sell labels designed for laser printing and labels designed for inkjet printing; make sure that you buy the right kind of labels for the printer you will be using.)

D. To ensure that your Excel spreadsheet is saved in the correct format, click on the File menu, and select Save As. In the save menu, click on Format and select Excel 97-2004 Workbook (.xls).
II. **Performing a Mail Merge to create your Letters**

A. In Word, open your Form Letter, such as the example in **Figure 3** below.

```
Dear,

I am a second-year student at the Fordham University School of Law. I am seeking post-graduation employment and I am extremely interested in your organization.

My resume and transcript are enclosed. I look forward to hearing from you.

Sincerely,

Joe Student

Enclosures
```

B. Click on the **Tools** menu and select **Mail Merge Manager**, as you see below in **Figure 4**, which will open the Mail Merge Manager palette as shown in **Figure 5**.

C. In the Mail Merge palette, click on the arrow to the left of “1. Select Document Type.” Then click **Create New** and select the **Form Letters** option from the drop down menu, as shown in **Figures 6** and **7** on the next page.
D. In the “2. Select Recipients List” menu, click **Get List** and select **Open Data Source**…

E. Select your Excel spreadsheet and click **OK**. Your Mail Merge palette will now look like **Figure 10**; large blue asterisks will be to the left of each placeholder. Returning to your form letter, which should still be open and accessible, you will click on and drag each
individual placeholder to the desired field in your letter. Once you have successfully completed this step, your letter will look like Figure 11 below.

**Figure 11**

F. When you are done, your inside address should look like Figure 11 above. Note that there are spaces in between FirstName and LastName, there is a comma and a space after City, and spaces between State and Zip. **You have to insert those manually;** the Mail Manager will not do this automatically. However, no space has been manually inserted in between Prefix and FirstName. The reason is that you want a space in front of “FirstName” **only when** you are using a Prefix (i.e., if you are addressing the letter to a non-attorney); if you are addressing the letter to an attorney, there won’t be a Prefix and so you don’t want to include a space in front of FirstName. To ensure that a space appears in front of FirstName only when it ought to, use your cursor to select the Prefix placeholder in your form letter. Next click the More button on the Mail Merge palette as shown in Figure 12. From the More menu, arrow down and select the **If…Then…Else** option. The window in Figure 13 will appear.
G. In the open dialogue box, make sure Prefix is selected from the ‘Field name’ menu. Next select ‘is not blank’ from the Comparison dropdown menu. In the ‘Insert this text:’ field, hit the spacebar once. This will cause the Prefix field to be followed by a space only when the Prefix field is included.

H. Next, type “Dear” in the appropriate place in your form letter if it isn’t there already. Then drag yourCourtesyTitle and LastName placeholders in front of the salutation. When done, it should look like Figure 15 below:

![Figure 14]

Note that in Figure 15, there is a space after “Dear” and after Courtesy Title and a comma after LastName.

I. Under “5. Preview Results” on your Mail Merge palette, click the “ABC” button and then the inner left and right arrows, to scroll through a preview of each of your contacts’ information in your form letter. You can also jump to the end or beginning of your contacts, by using the outer arrows.
J. You may also filter certain recipients by clicking **Options...** under “4. Filter Recipients.” In the following window, you can specify the placeholders you would like to exclude from your batch mailing.

K. In our example, there are only two recipients in our mailing list; **Figures 16 and 17**, show the previews for those two letters:

![](image1.png)

Note that in **Figure 17**, attorney Smith has “, Esq.” after his name, while in **Figure 16**, layperson does not. Note also that in **Figure 16**, layperson Jones has “Mr.” in front of his name in the inside address, while in **Figure 17**, attorney Smith does not. On the other hand, both of them have “Mr.” in front of their names in the salutation.

L. Finally, once you are satisfied with the arrangement of your placeholders, click on the **Merge to New Document** button at the bottom of the Mail Merge Manager palette. As shown in **Figure 18**, this function will create an entirely new document with a letter for each of your contacts on a different page of the document. You are free to save the merged document as its own item and retain the original form letter for future mailings.
III. **Performing a Mail Merge to create your Mailing Labels**

A. Open a new document in Microsoft Word by going to your File menu and selecting **New Blank Document**.

B. On your Mail Merge palette under “1. Select Document Type,” click **Create New** and select the **Labels**... option.

C. In the Label Options dialog box, choose the model number of the labels you are using. In this case we are using Avery 5961.
D. Click **OK**, and Word will create a blank document formatted for the label type you have selected, as shown
E. In the Mail Merge palette, under “2. Select Document Type,” click on Get List and select Open Data Source.

![Figure 22](image)

F. Select your Excel contact spreadsheet from the Open dialog box, and click Open. If the alerts pictured in Figures 23 and 24 appear, click OK for both.

![Figure 23](image)

![Figure 24](image)
G. In the **Edit Labels** window, click on the **Insert Merge Field** drop down menu and select your placeholders one by one to insert into the sample label. Make any spacing or punctuation changes in the Sample Label field. Once you are happy with the arrangement of your label, click **OK**.
H. Your formatted label page should now look like Figure 27 below.
I. Finally, click on the **Merge to New Document** button on your Mail Merge palette. Word will then update each field of your label sheet with the contact information from your employer list. To finalize, select **Print** from the File menu (with your labels inserted into your printer). Your letters and envelopes are now ready to assemble.