



### What is a Mail Merge?

A mail merge is generally used to personalize form letters, to produce mailing labels and for mass mailings. A mail merge can be very helpful if you have a list of multiple recipients that would be receiving the same letter but you would like to personalize it and do not want to type each letter individually.

A mail merge document has two pieces – a main document and a data source.

The *main document* contains information that will not change from one recipient to another like content, text and graphics.

Example: In a letter, it would be the main body of the letter and the closing.

The *data source* is the file that contains the information that is to be merged with the main document. This file can contain names, addresses, dates and other information that you want to include in your document. Example: Microsoft Excel workbook, Microsoft Access database file, or Microsoft Outlook contact list.

There are two ways to do a mail merge in Microsoft Word. You can either use the mail merge wizard or the mail merge toolbar.

In the following exercise we will use the mail merge wizard.

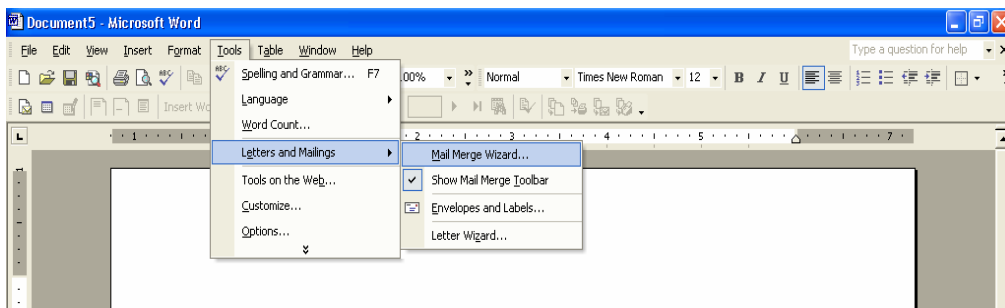
### How to use Microsoft Word Mail Merge Wizard

In this particular sample please download the Excel file “homemailinglist”. You can use this file as your data source to complete the following exercise.

#### Select Tools

Click on Letters and mailings

Click on Mail merge wizard

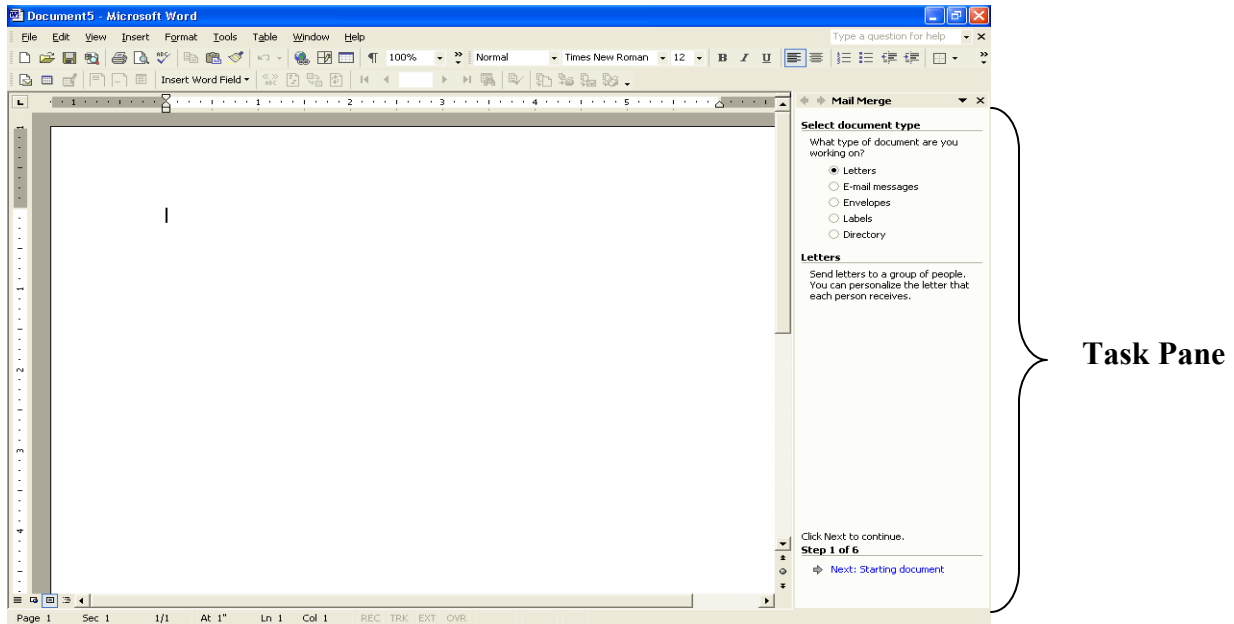


Notice that the mail merge task pane is on the right side of the screen. The mail merge wizard in this task pane takes you through six steps of the process. **All selections for this process are made in the mail merge task pane.**

## Step 1 Select document type

Click on [Letters](#)

Click on [Next: Starting document](#) (This is located at the bottom of the task pane.)

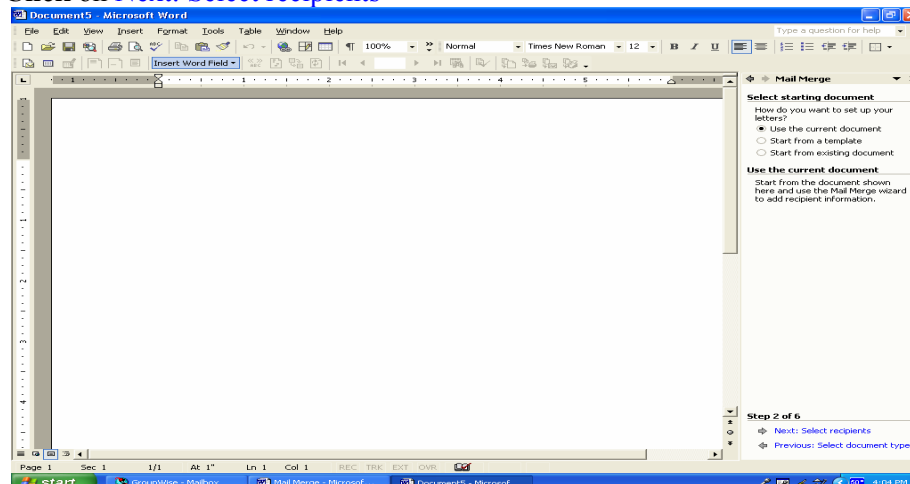


## Step 2 Select starting document

- *Use the current document* converts the active document to a mail merge document.
- *Start from a template* creates a new main document based on a template.
- *Start from existing document* creates a new main document based on an existing document.

Select [Use the current document](#)

Click on [Next: Select recipients](#)



### Step 3 Select recipients

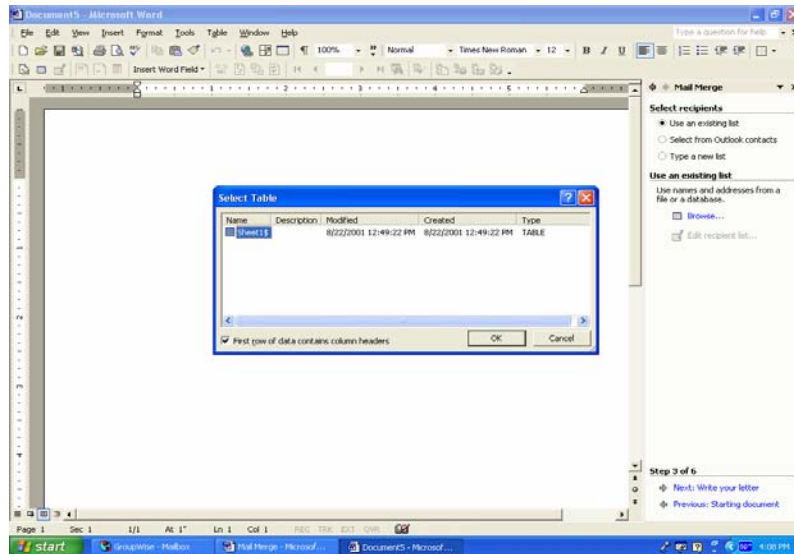
- *Use an existing list* uses an existing file that contains the data.
- *Select from Outlook contacts* uses a Microsoft Outlook contacts folder.
- *Type a new list* creates a new source by typing in the data. If you use this command the recipient list is saved as an access database file.

#### Select Use an existing list

Click on [Browse](#) to locate Mailing List spreadsheet.

Click on [Open](#) to select file. The Select Table window is displayed.

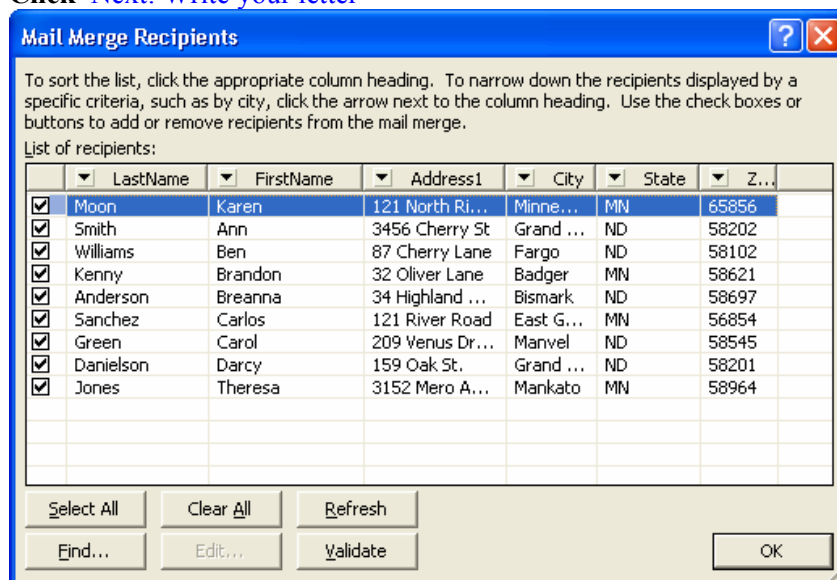
Click [Ok](#) to select the table



In the mail merge recipients dialog box you can sort or filter data.

Click [Ok](#)

Click [Next: Write your letter](#)

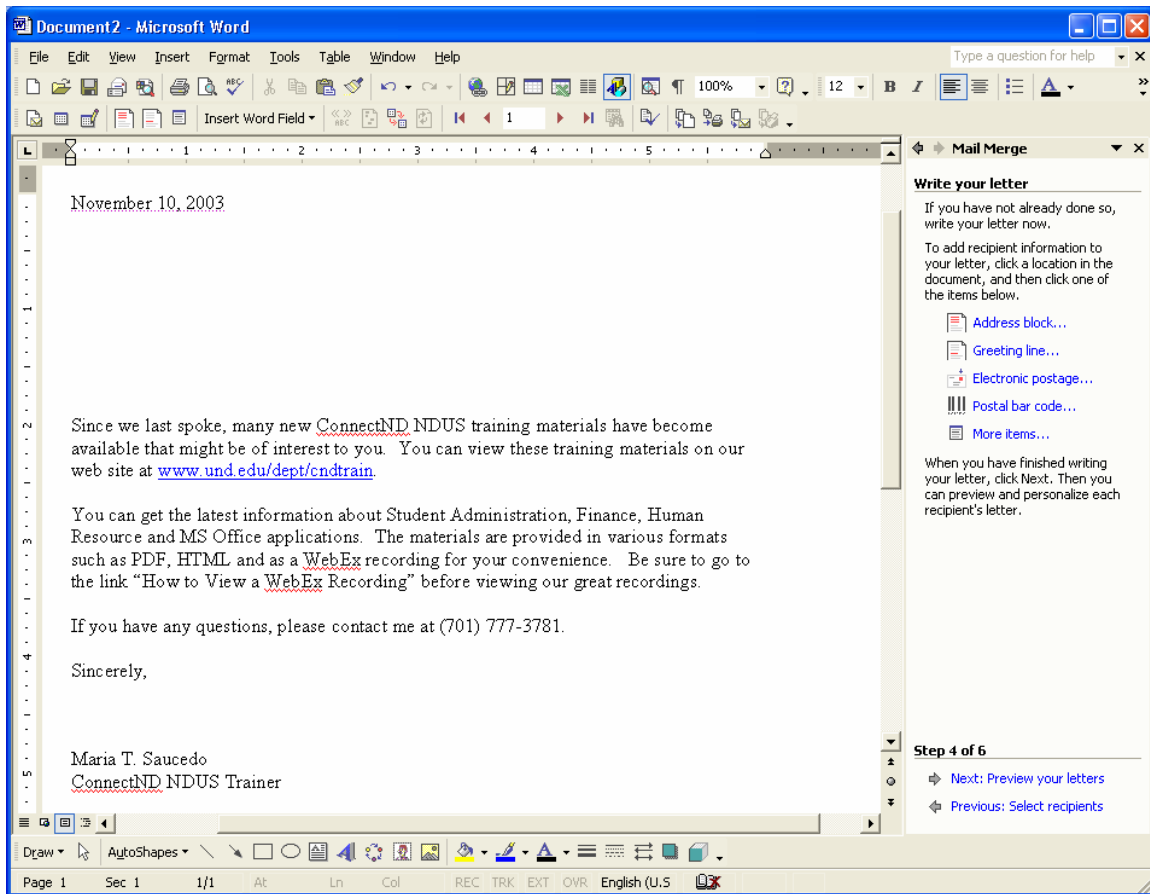


## Step 4 Write your letter

In this step you will type your information and insert merge fields to the document. Merge fields are placeholders that tells Microsoft Word where to insert text, page numbers, graphics and other information in the document.

- *Address Block* inserts formatted address related fields.
- *Greeting line* inserts formatted salutations fields.
- *Electronic Postage* inserts electronic postage fields.
- *Postal Bar Code* inserts the postal bar code.
- *Select more items* inserts data fields from the data source.

Type the following letter.



After typing the letter, we will insert the merge fields to the document. **Make sure to position your insertion point where you want the data to be entered prior to selecting the address block field.**

Click on **Address Block** to insert your merge fields. By default the address block field includes name, company name, street address, city, state, and zip code. You can also select your field names from your data source by selecting **More Items**.

Make your selections

Click **OK**

**Insert Address Block** [?] [X]

Specify address elements

Insert recipient's name in this format:

Joshua  
 Joshua Randall Jr.  
 Joshua Q. Randall Jr.  
 Mr. Josh Randall Jr.  
 Mr. Josh Q. Randall Jr.  
 Mr. Joshua Randall Jr.

Insert company name

Insert postal address:

Never include the country/region in the address  
 Always include the country/region in the address  
 Only include the country/region if different than:

Preview

Mr. Joshua Randall Jr.  
 Blue Sky Airlines  
 1 Airport Way  
 Kitty Hawk, NC 27700

Match Fields... OK Cancel

Click on [Greeting Line](#) to insert salutation

Make your selection

Click **OK**

Click on [Next: Preview your letters](#)

**Greeting Line** [?] [X]

Greeting line format:

Dear Mr. Randall,

Greeting line for invalid recipient names:

Dear Sir or Madam,

Preview

Dear Mr. Randall,

Match Fields... OK Cancel

## Step 5 Preview your letters

- In this step Microsoft Word matches the merge field in the main document with the text from your data source.
- You can preview the letters by clicking on the right and left arrows in the mail merge task pane.
- You can find specific information from your data source by clicking on find a recipient.
- To make changes to the recipient list, click the edit recipient list button. *Note: When you make changes to the recipient list, it affects the output data not the original data source.*
- You can also exclude a recipient by selecting Exclude this recipient button.

Click Next: Complete the merge

## Step 6 Complete the merge

Save the file

- You have two options to either print or edit individual letters.
- Do not choose print on the toolbar or file print menu.
- If you choose print in the task pane, the Merge to Printer dialog box pops up.
- You can print all records, a current record or a group of records.

Click Ok

Click Ok in the Print dialog box

