

GSD. Word – How to Use Mail Merge in Microsoft Word

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General Information:

Possible symptoms/errors:

How to Use Mail Merge in Microsoft Word.

Alternative names of the system:

N/A

IMPORTANT NOTICE:

N/A

Solution:

Mail Merge is often used to print or email form letters to multiple recipients. This helps the user easily customize form letters for individual recipients. This article shows a guide on how to use mail merge in Microsoft Word.

Details:

1. In a blank Microsoft Word document, advise the user to click on the Mailings tab and select Start Mail Merge then Step-by-Step Mail Merge Wizard.
2. Ask the user to select their document type, then Click Next: Starting document.
3. Advise the user to select the starting document and then click Next: Select recipients.
4. Ask the user to select recipients and then click Create.

Ask them to create a list by adding data in the New Address List dialog box and clicking OK.

Then, to Save the list.

5. When a list has been created, the Mail Merge Wizard reverts to Use an existing list and the user has the option to edit the recipient list.

Selecting Edit recipient list opens up the Mail Merge Recipients dialog box, where the user can edit the list and select or unselect records. Tell the user to click OK to accept the list as is.

6. Advise the user to click Next: Write your letter.
7. Ask the user to write the letter and add custom fields.

Advise them to click Address block to add the recipients' addresses at the top of the document. In the Insert Address Block dialog box, tell the user to check or uncheck boxes and select options on the

left until the address appears the way they want it to, then to click OK. The user can use Match Fields to correct any problems.

Clicking Match Fields opens up the Match Fields dialog box, in which the user can associate the fields from their list with the fields required by the wizard.

8. Advise the user to click Greeting line... to enter a greeting.

9. In the Insert Greeting Line dialog box, ask the user to choose the greeting line format by clicking the drop-down arrows and selecting the options of their choice, and then to click OK.

10. Inform the user that the address block and greeting line are surrounded by chevrons (« »). Ask them to write a short letter and click Next: Preview your letters.

11. Ask the user to preview their letter and click Next: Complete the merge.

11. Advise the user to click Print to print their letters or Edit individual letters to further personalize some or all of the letters.

Assignment Group:

3rd Party e-mail address: One365Support@freseniusmedicalcare.com

Ticket Creation:

Template: N/A Categorization:

Configuration Item: N/A Category: N/A Subcategory: N/A

Important Links:

N/A