Introduction

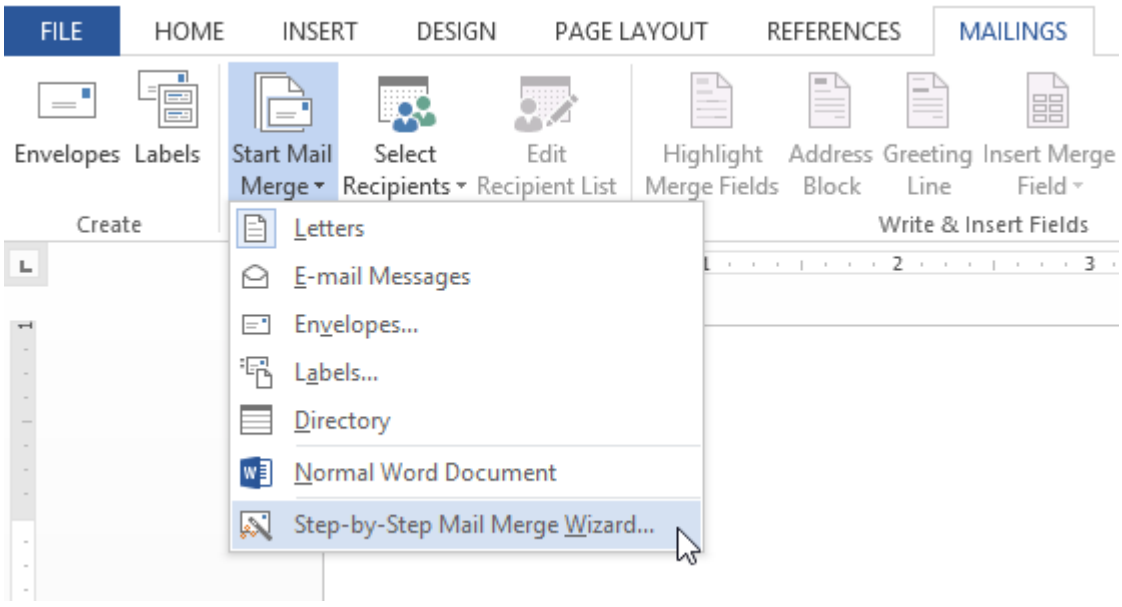
Mail Merge is a useful tool that allows you to produce multiple letters, labels, envelopes, name tags, and more using information stored in a list, database, or spreadsheet. When performing a **Mail Merge**, you will need a **Word document** (you can start with an existing one or create a new one) and a **recipient list**, which is typically an **Excel workbook**

Download and open the following documents

- **Merge Practice** (Word document)
- **Address list** (Excel workbook)

To use Mail Merge:

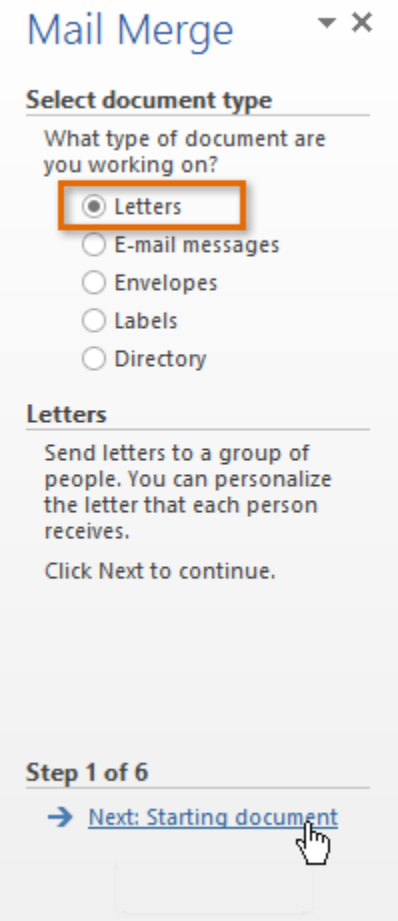
1. Open an **existing** Word document, or create a **new** one.
2. From the **Mailings** tab, click the **Start Mail Merge** command and select **Step by Step Mail Merge Wizard** from the drop-down menu.



The Mail Merge pane appears and will guide you through the **six main steps** to complete a merge. The following example demonstrates how to create a form letter and merge the letter with a **recipient list**.

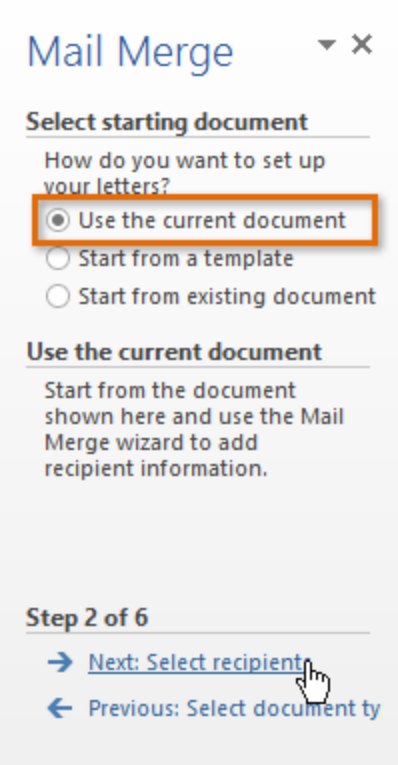
Step 1:

- Choose the **type** of document you want to create. In our example, we'll select **Letters**. Then click **Next: Starting document** to move to Step 2.



Step 2:

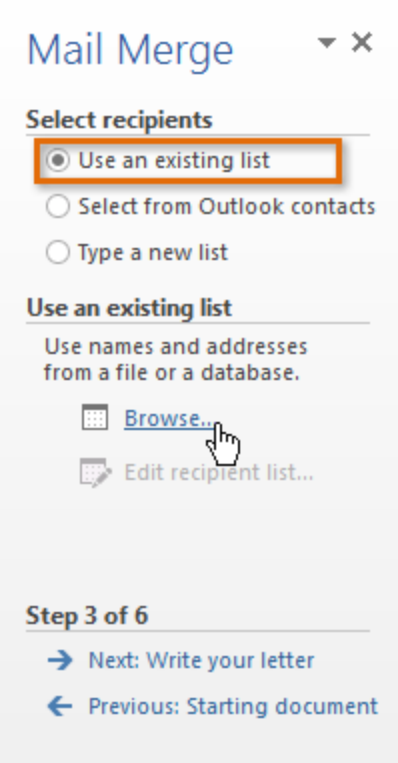
- Select **Use the current document**, then click **Next: Select recipients** to move to Step 3.



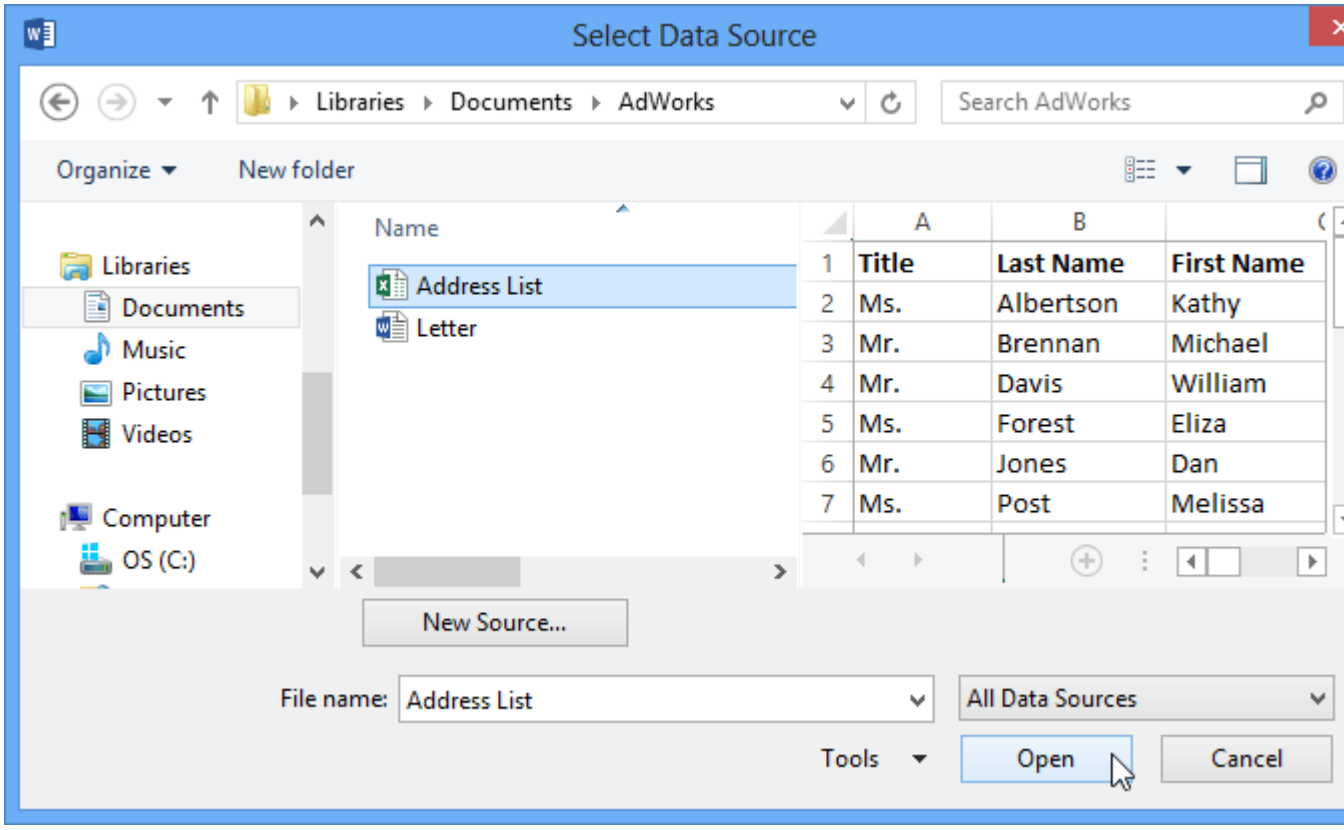
Step 3:

Now you'll need an address list so Word can automatically place each address into the document. The list can be in an existing file, such as an **Excel workbook**, or you can **type a new address list** from within the Mail Merge Wizard.

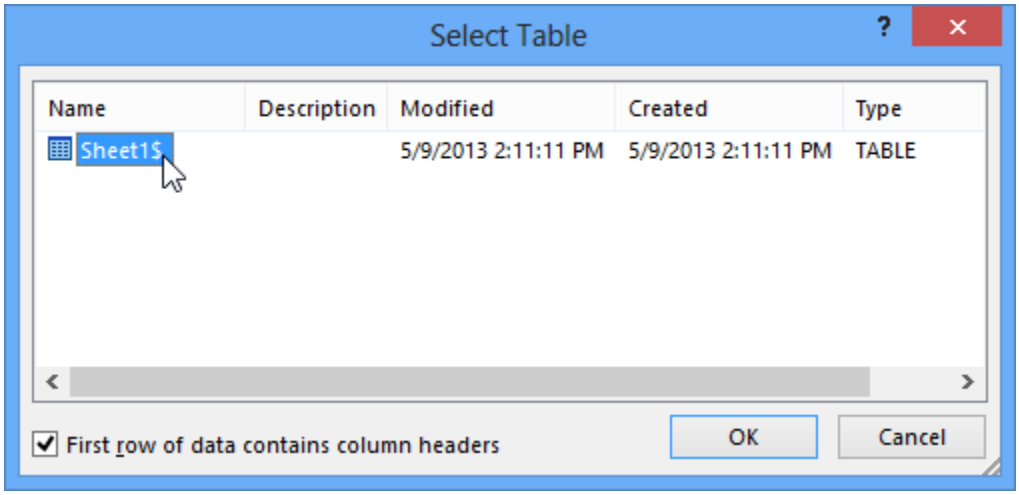
1. From the **Mail Merge** task pane, select **Use an existing list**, then click **Browse...** to select the file.



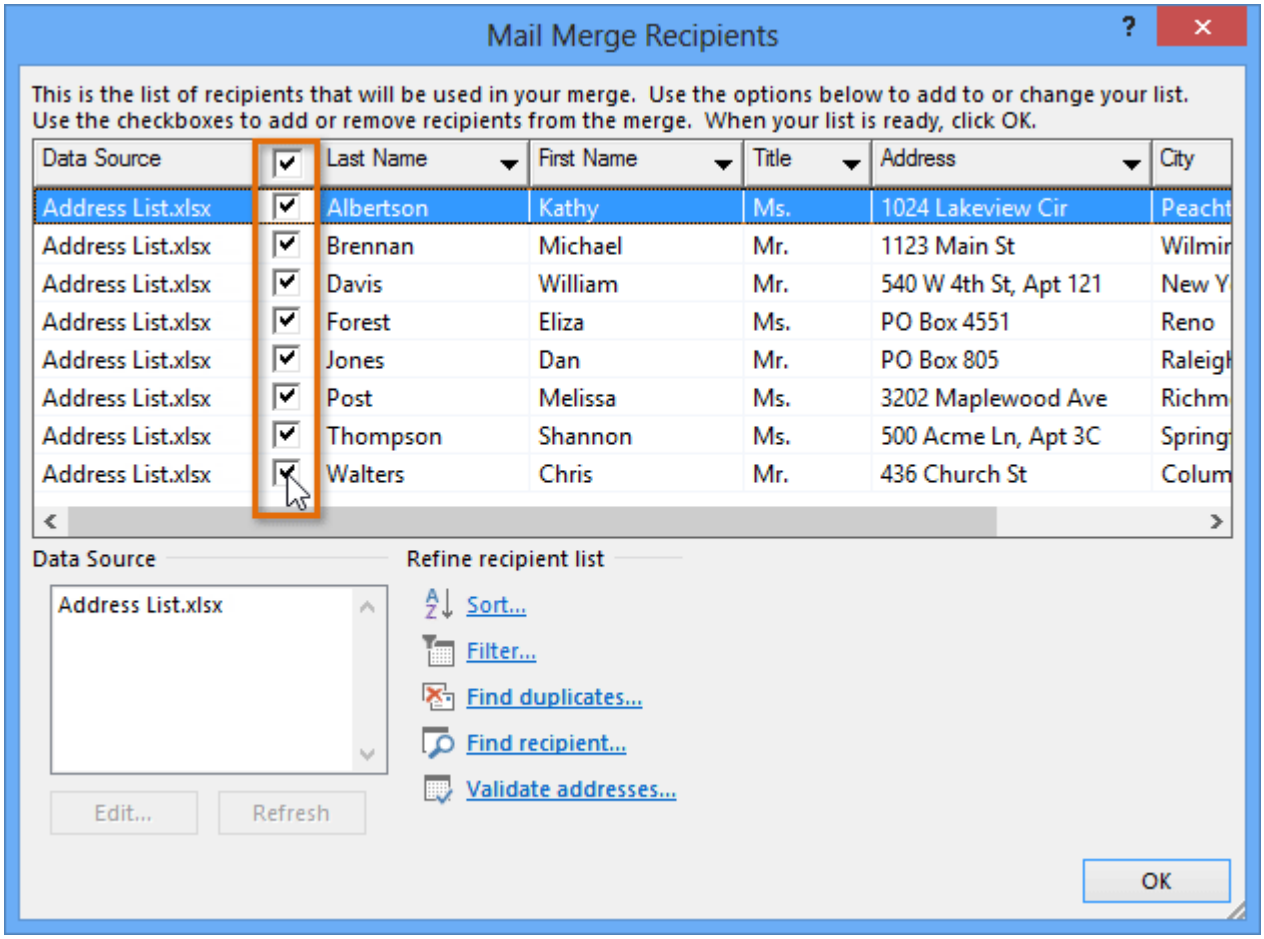
2. Locate your file and click **Open**.



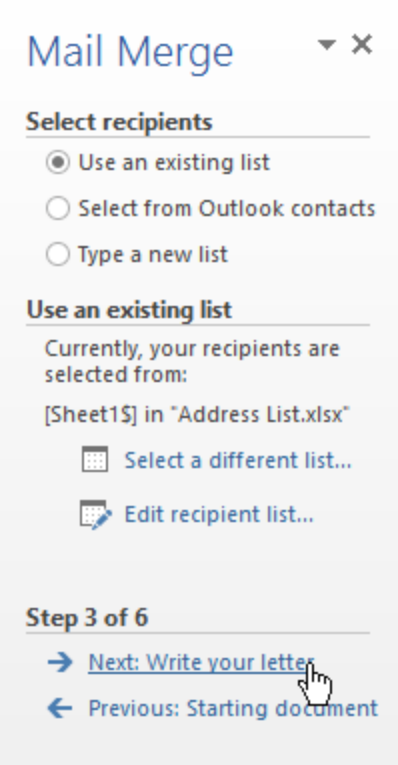
3. If the address list is in an Excel workbook, select the **worksheet** that contains the list and click **OK**.



4. In the **Mail Merge Recipients** dialog box, you can **check** or **uncheck** each box to control which recipients are included in the merge. By default, all recipients should be selected. When you're done, click **OK**.



5. From the **Mail Merge** task pane, click **Next: Write your letter** to move to Step 4.



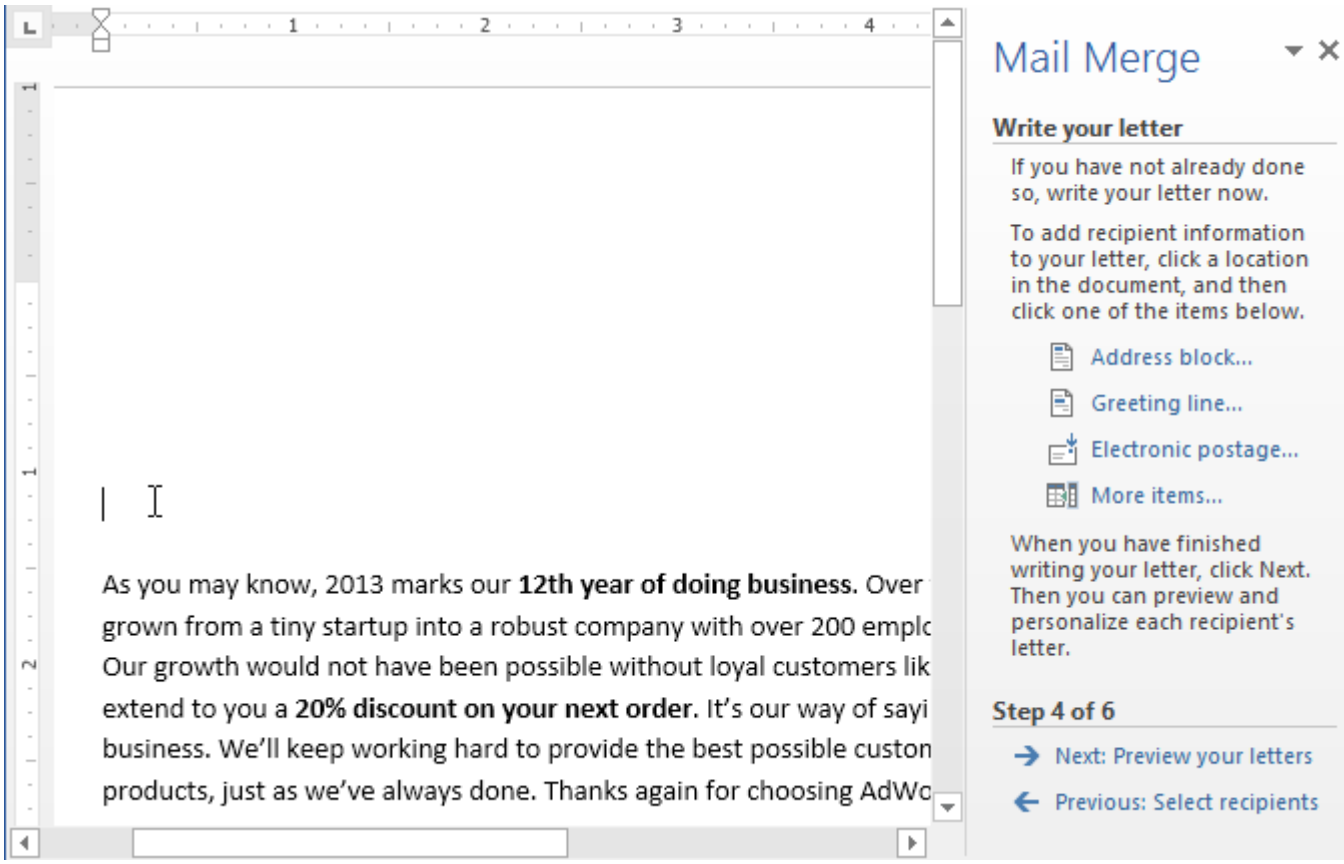
If you don't have an existing address list, you can click the **Type a new list**button and click **Create**. You can then type your address list.

Step 4:

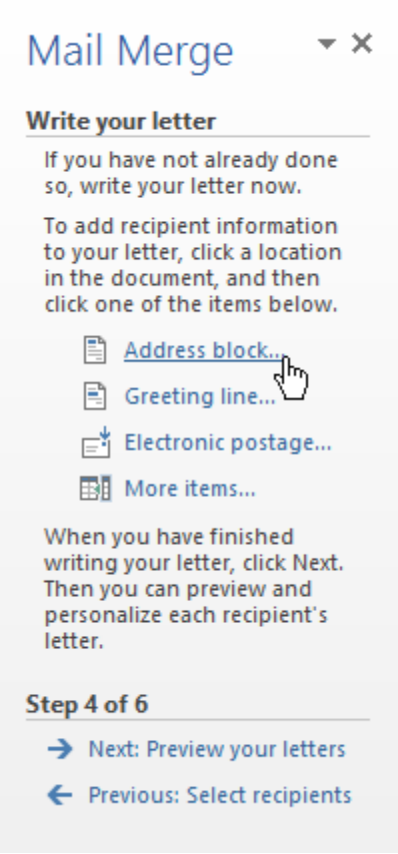
Now you're ready to write your letter. When it's printed, each copy of the letter will basically be the same; only the **recipient data** (such as the **name** and **address**) will be different. You'll need to add **placeholders** for the recipient data so Mail Merge knows exactly where to add the data.

To insert recipient data:

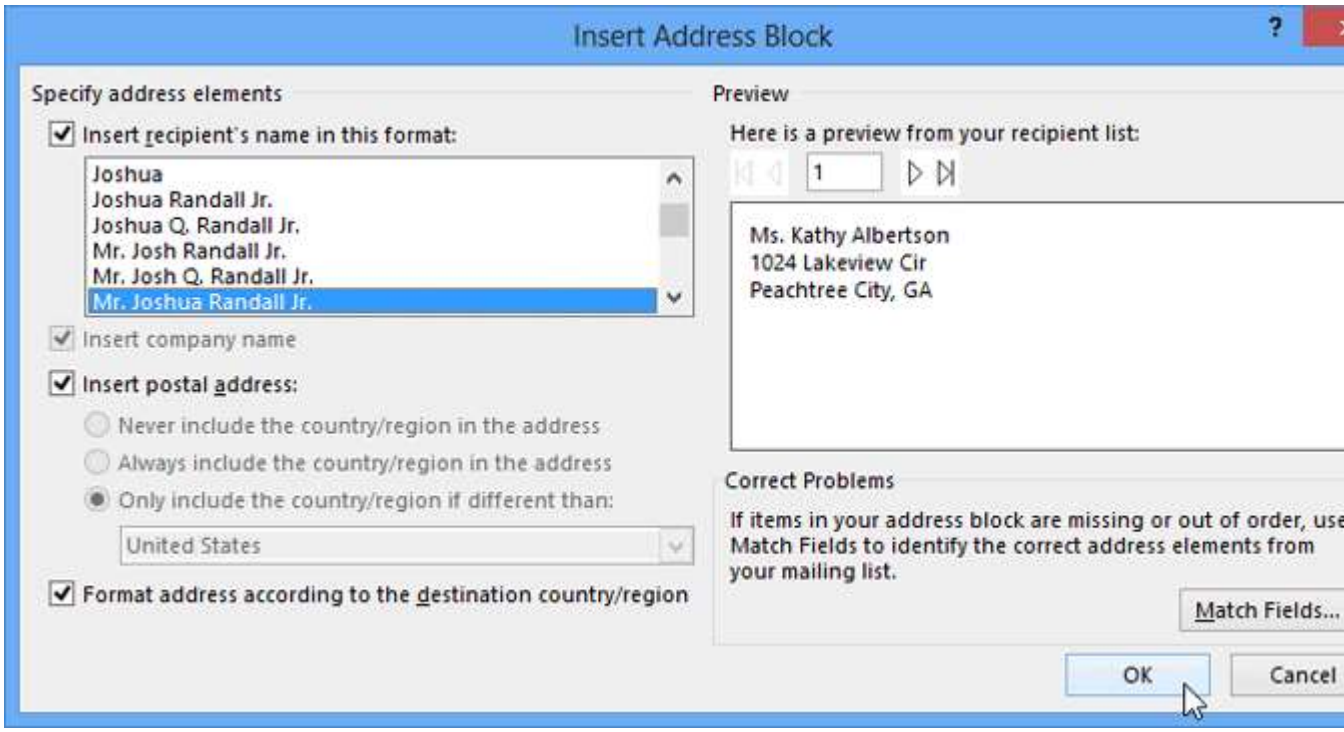
1. Place the insertion point in the document where you want the information to appear.



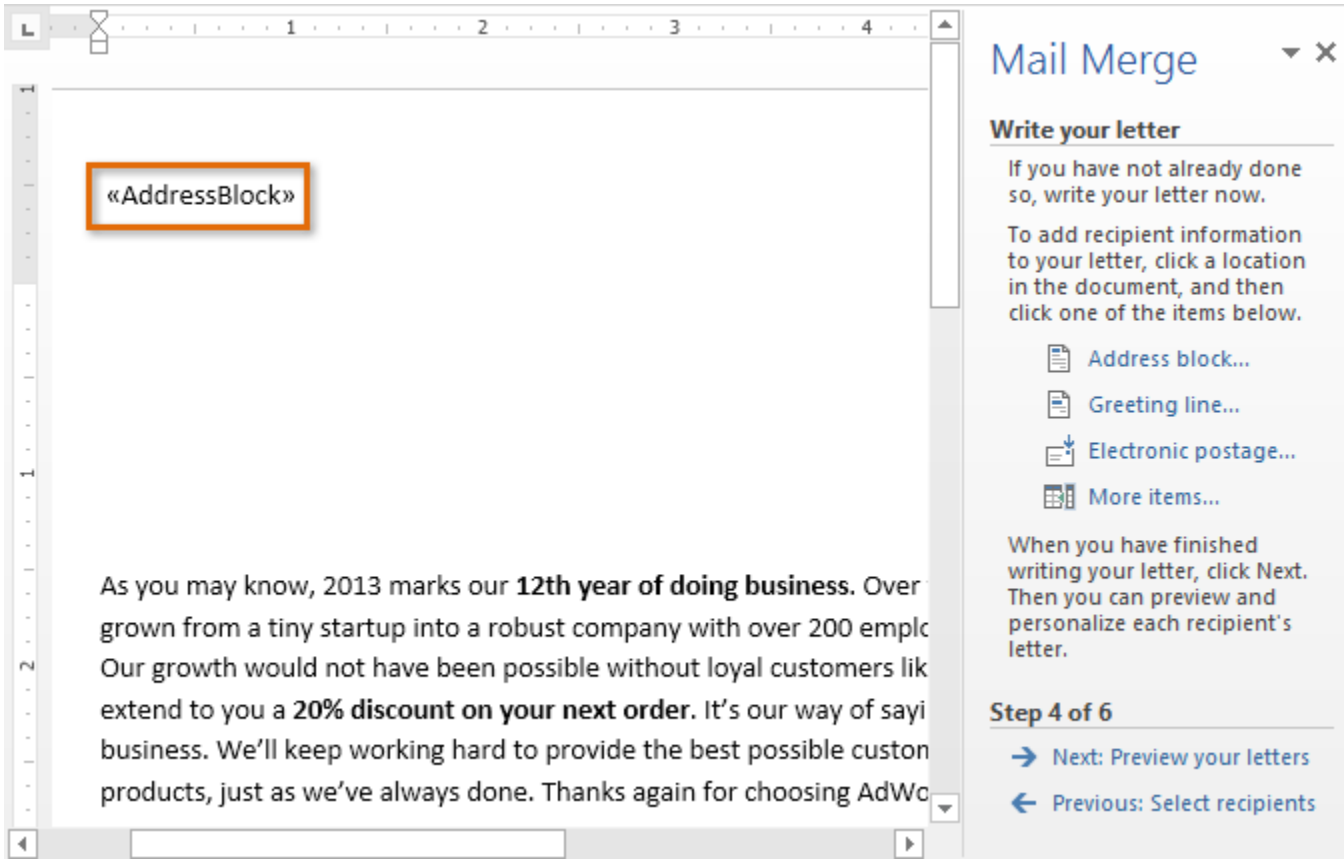
2. Choose one of the four **placeholder** options: **Address block**, **Greeting line**, **Electronic postage**, or **More items**.



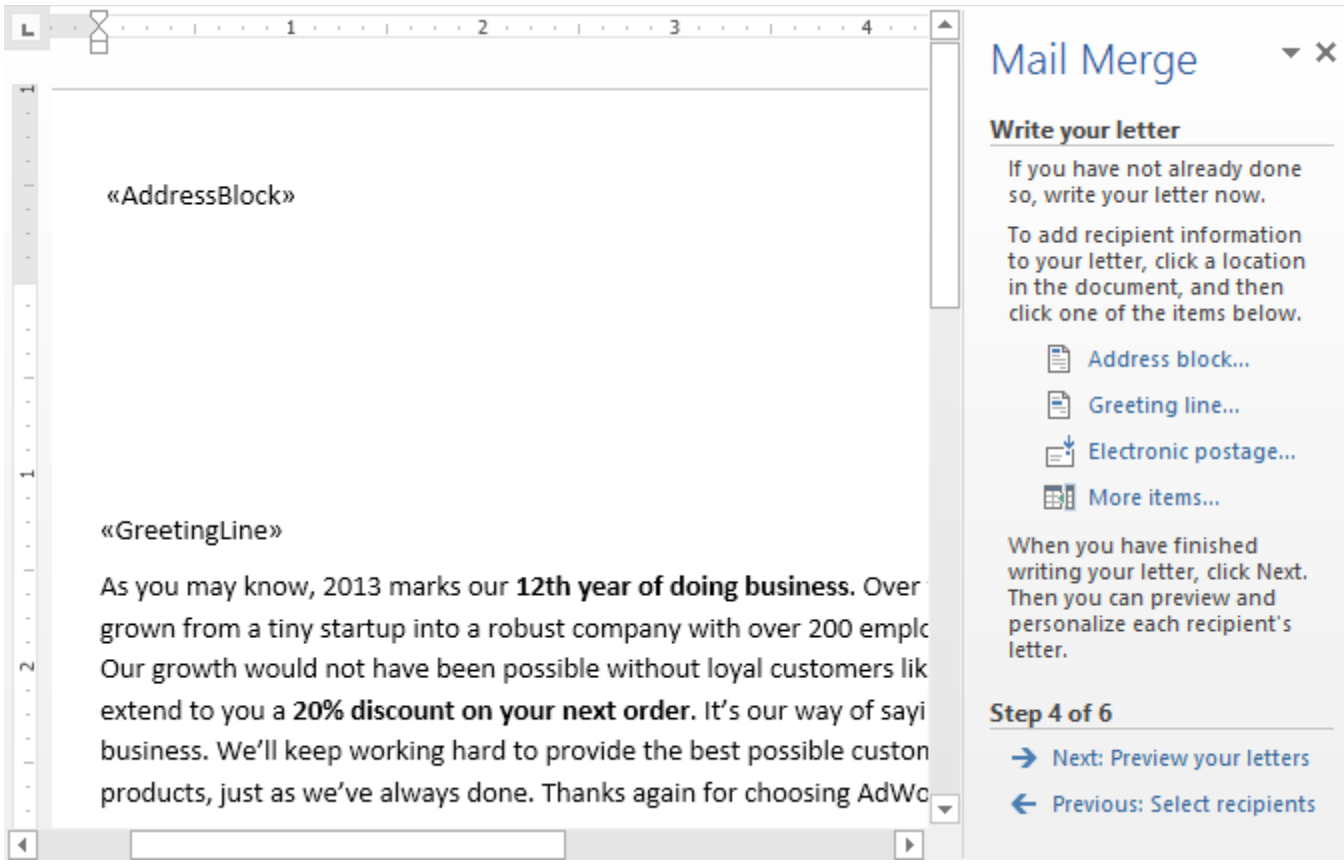
3. Depending on your selection, a dialog box may appear with various options. Select the desired options and click **OK**.



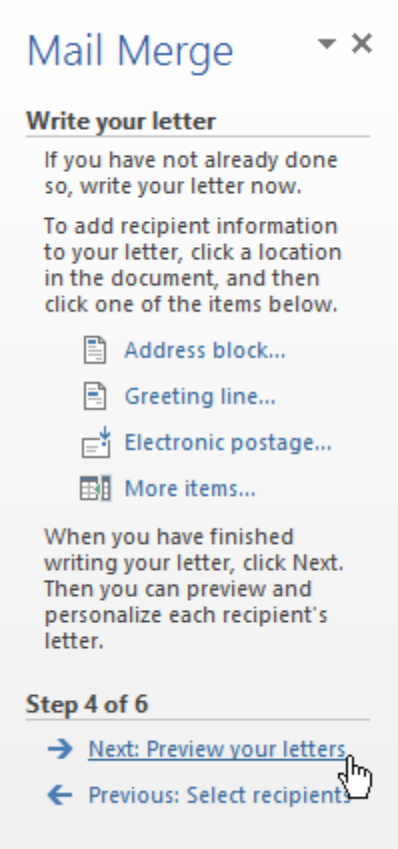
4. A placeholder will appear in your document (for example, **«AddressBlock»**).



5. Repeat these steps each time you need to enter information from your data record. In our example, we'll add a **Greeting line**.



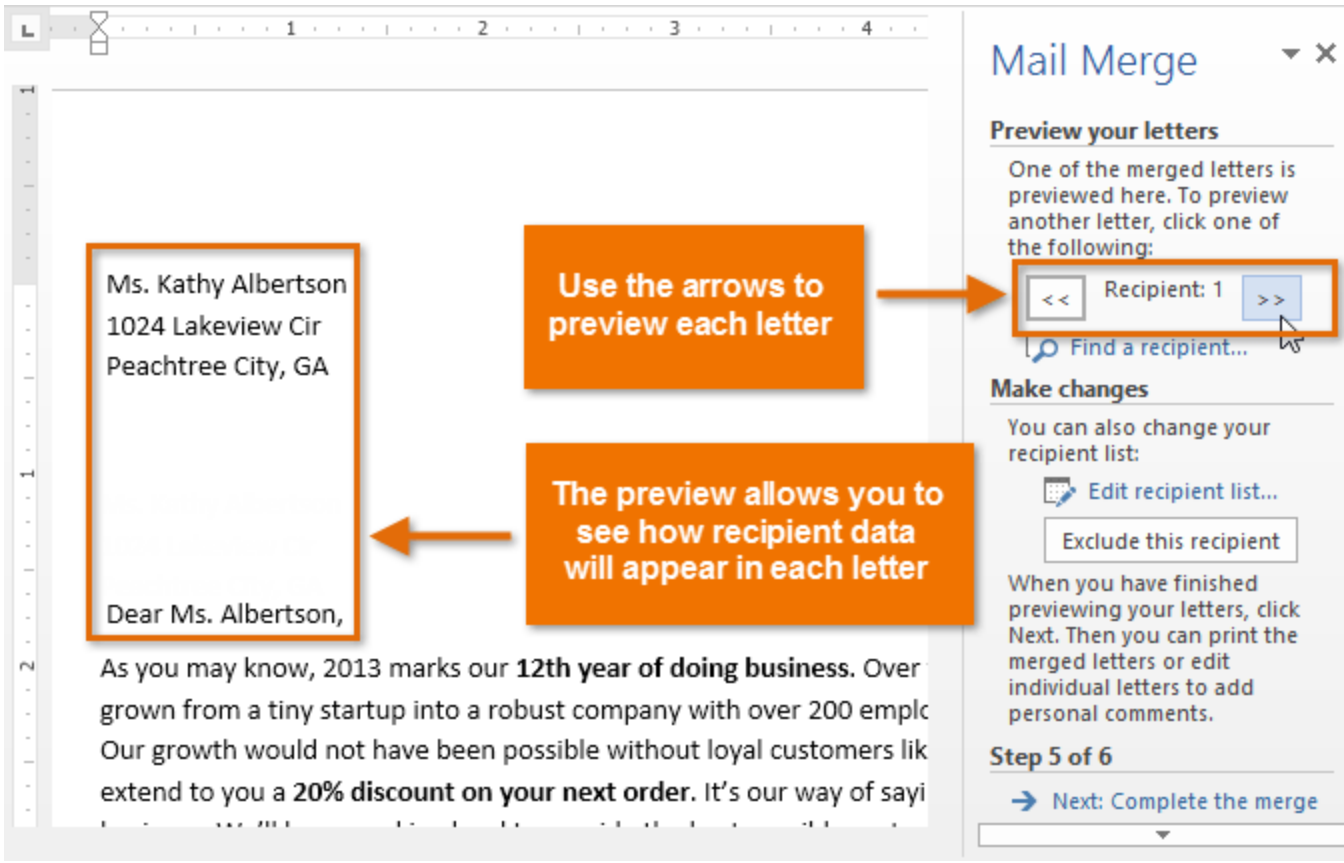
6. When you're done, click **Next: Preview your letters** to move to Step 5.



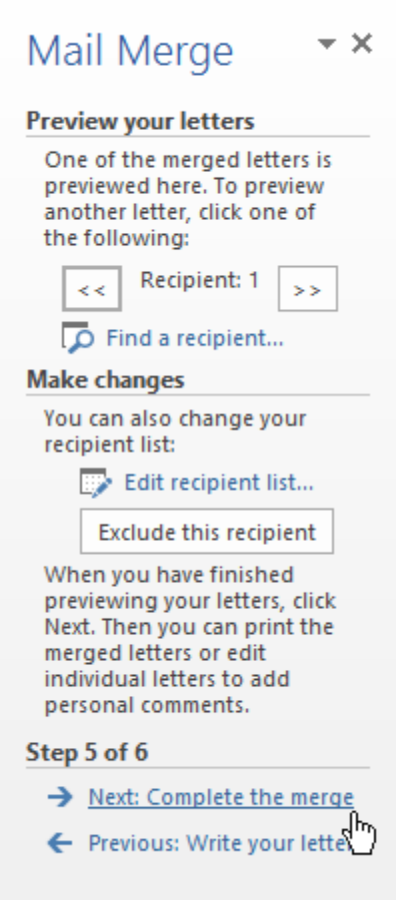
For some letters, you'll only need to add an **Address block** and **Greeting line**. Sometimes, however, you may want to place **recipient data** within the body of the letter to **personalize it** even further.

Step 5:

1. Preview the letters to make sure the information from the recipient list appears correctly in the letter. You can use the left and right scroll arrows to view each document.

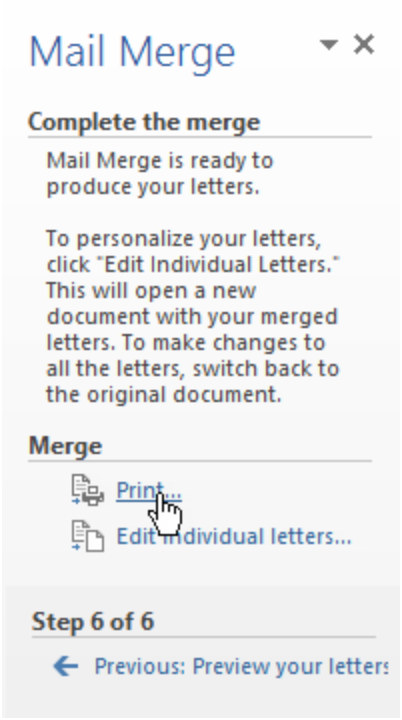


2. Click **Next: Complete the merge** to move to Step 6.

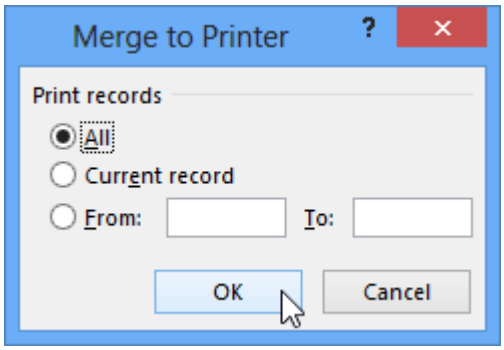


Step 6:

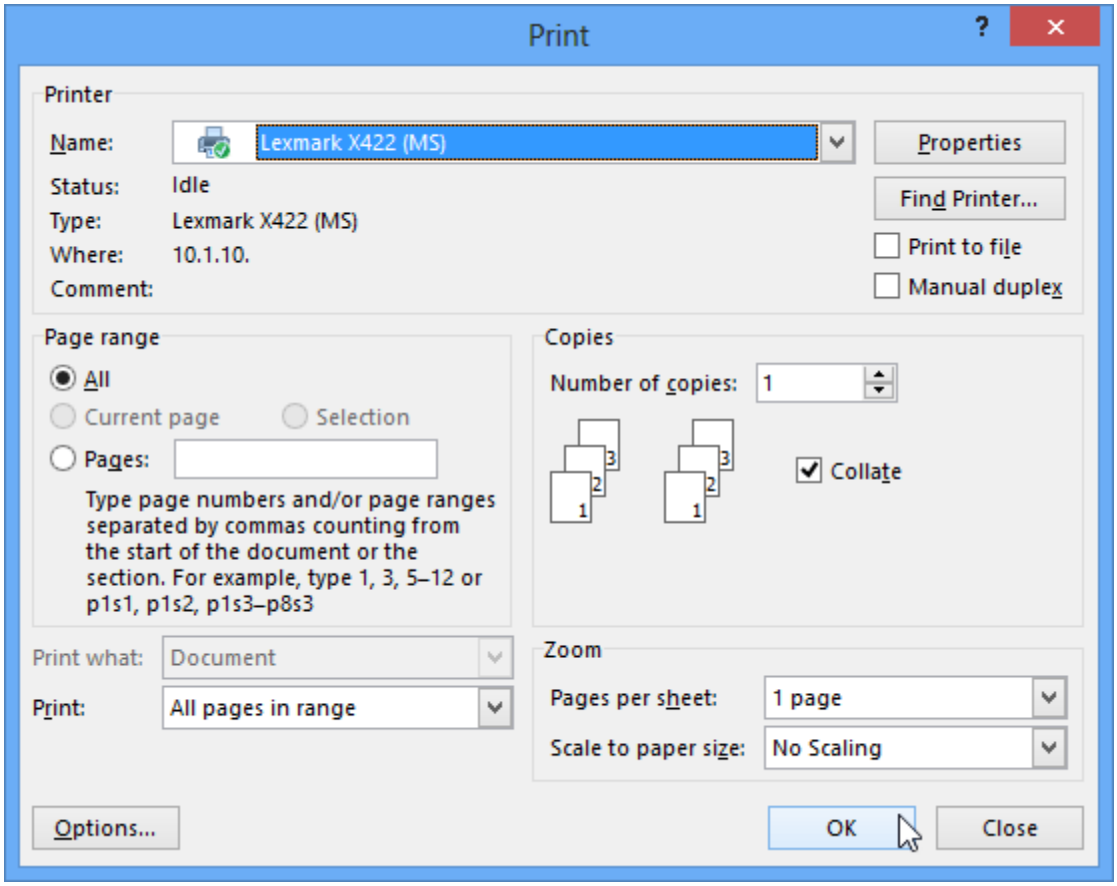
1. Click **Print...** to print the letters.



2. A dialog box will appear. Click **All**, then click **OK**.



3. The **Print** dialog box will appear. Adjust the print settings if needed, then click **OK**. The letters will be printed.



Challenge!

1. Open an **existing Word document**. If you want, you can use our **Practice document** (Word document) and **Address list** (Excel workbook).
2. Use the **Mail Merge Wizard** to merge the **letter** with the **recipient list**.
3. Place an **Address Block** at the top of the page and a **Greeting line** above the body of the letter.
4. **Print** the document.