

# Introduction

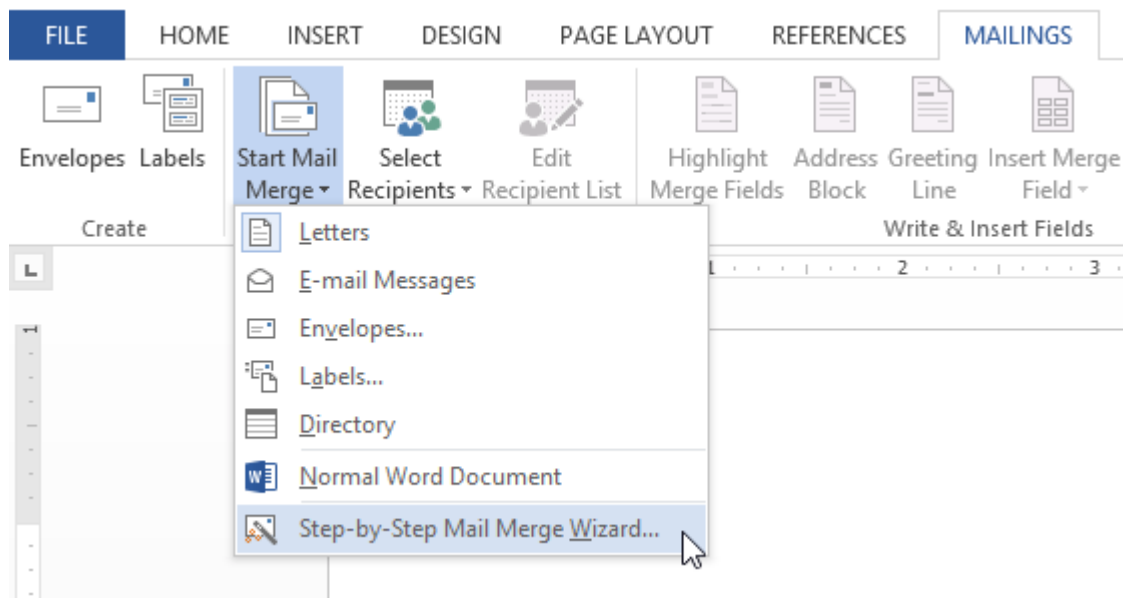
Mail Merge is a useful tool that allows you to produce multiple letters, labels, envelopes, name tags, and more using information stored in a list, database, or spreadsheet. When performing a **Mail Merge**, you will need a **Word document** (you can start with an existing one or create a new one) and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

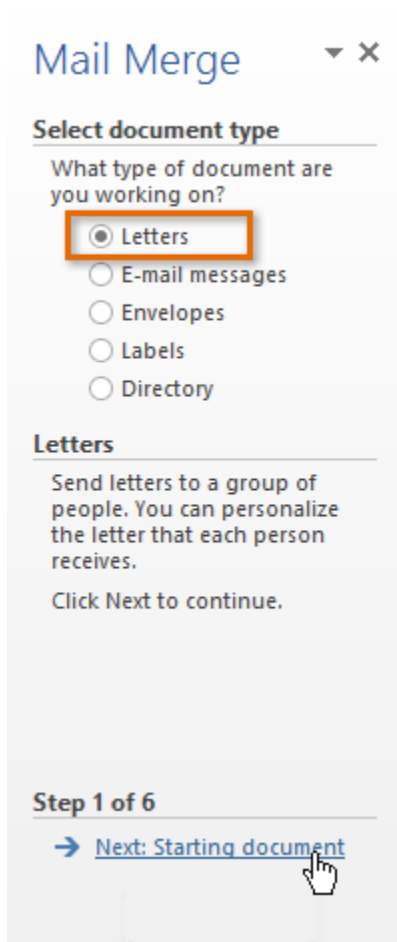
1. Open an **existing** Word document, or create a **new** one.
2. From the **Mailings** tab, click the **Start Mail Merge** command and select **Step by Step Mail Merge Wizard** from the drop-down menu.



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.



**Mail Merge** ▾ ✕

**Select document type**

What type of document are you working on?

☒ Letters

☐ E-mail messages

☐ Envelopes

☐ Labels

☐ Directory

**Letters**

Send letters to a group of people. You can personalize the letter that each person receives.

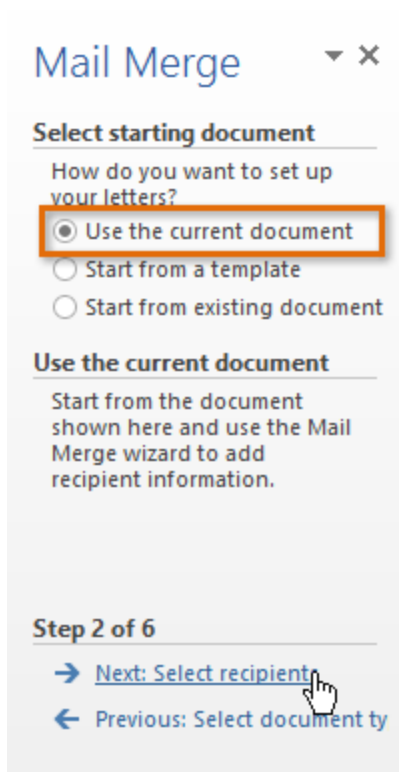
Click Next to continue.

**Step 1 of 6**

→ [Next: Starting document](#)

## 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.



## Mail Merge

**Select recipients**

☒ Use an existing list  
☐ Select from Outlook contacts  
☐ Type a new list

**Use an existing list**

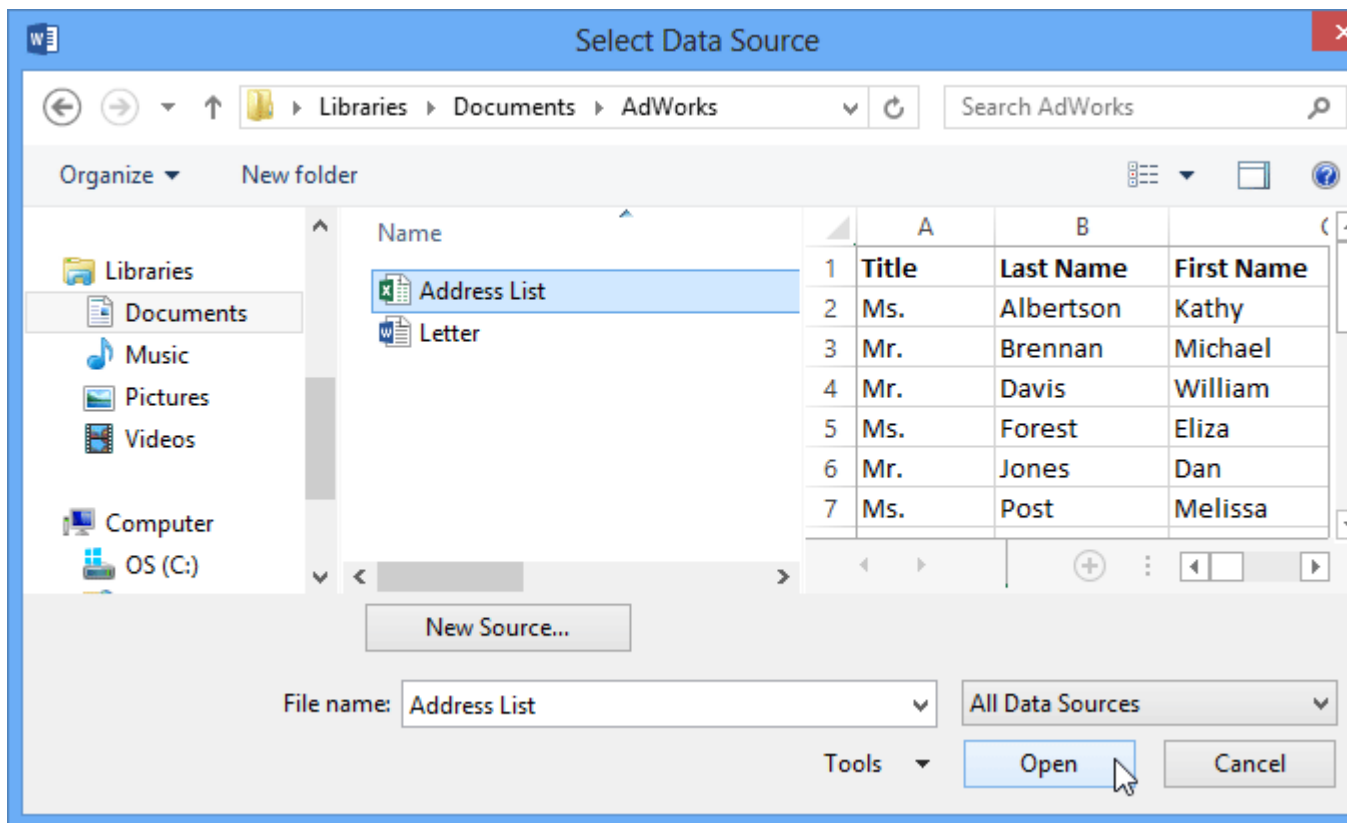
Use names and addresses from a file or a database.

 [Browse...](#)  
 [Edit recipient list...](#)

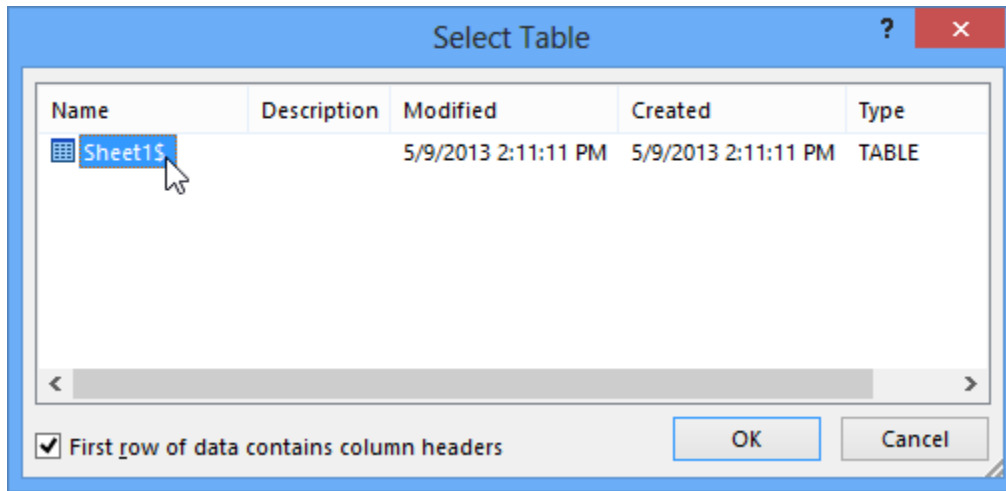
**Step 3 of 6**

[Next: Write your letter](#)  
[Previous: Starting document](#)

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**.

**Mail Merge Recipients** ? X

This is the list of recipients that will be used in your merge. Use the options below to add to or change your list. Use the checkboxes to add or remove recipients from the merge. When your list is ready, click OK.

Data Source	<input checked="" type="checkbox"/>	Last Name ▼	First Name ▼	Title ▼	Address ▼	City
Address List.xlsx	<input checked="" type="checkbox"/>	Albertson	Kathy	Ms.	1024 Lakeview Cir	Peacht
Address List.xlsx	<input checked="" type="checkbox"/>	Brennan	Michael	Mr.	1123 Main St	Wilmir
Address List.xlsx	<input checked="" type="checkbox"/>	Davis	William	Mr.	540 W 4th St, Apt 121	New Y
Address List.xlsx	<input checked="" type="checkbox"/>	Forest	Eliza	Ms.	PO Box 4551	Reno
Address List.xlsx	<input checked="" type="checkbox"/>	Jones	Dan	Mr.	PO Box 805	Raleigh
Address List.xlsx	<input checked="" type="checkbox"/>	Post	Melissa	Ms.	3202 Maplewood Ave	Richm
Address List.xlsx	<input checked="" type="checkbox"/>	Thompson	Shannon	Ms.	500 Acme Ln, Apt 3C	Spring
Address List.xlsx	<input checked="" type="checkbox"/>	Walters	Chris	Mr.	436 Church St	Colum

< >

Data Source

Address List.xlsx

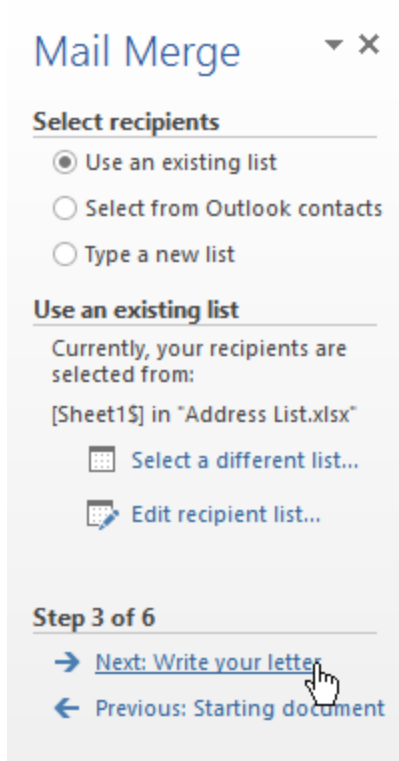
Edit... Refresh

Refine recipient list

[Sort...](#)  
[Filter...](#)  
[Find duplicates...](#)  
[Find recipient...](#)  
[Validate addresses...](#)

OK

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



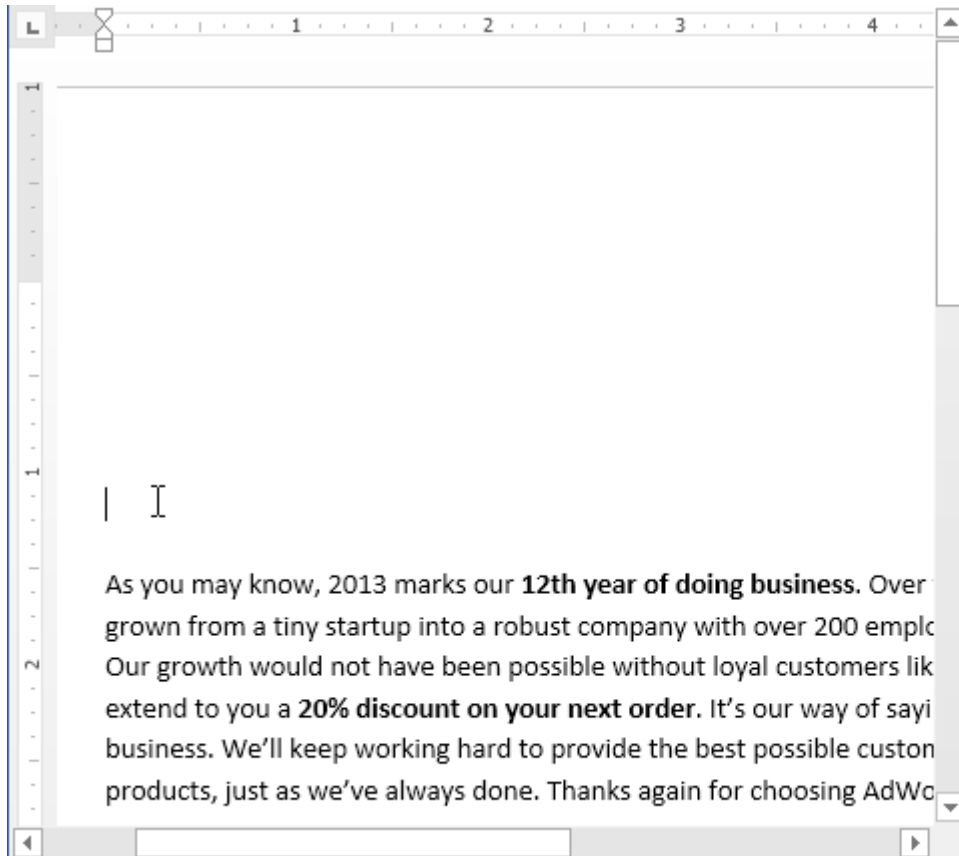
If you don't have an existing address list, you can click the **Type a new list** button and click **Create**. You can then type your address list.

## 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.



## Mail Merge


### Write your letter

If you have not already done so, write your letter now.

To add recipient information to your letter, click a location in the document, and then click one of the items below.

 [Address block...](#)

 [Greeting line...](#)

 [Electronic postage...](#)

 [More items...](#)

When you have finished writing your letter, click Next. Then you can preview and personalize each recipient's letter.

### Step 4 of 6

[Next: Preview your letters](#)

[Previous: Select recipients](#)

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







## Mail Merge

### Write your letter

If you have not already done so, write your letter now.

To add recipient information to your letter, click a location in the document, and then click one of the items below.

-  [Address block...](#)
-  [Greeting line...](#)
-  [Electronic postage...](#)
-  [More items...](#)

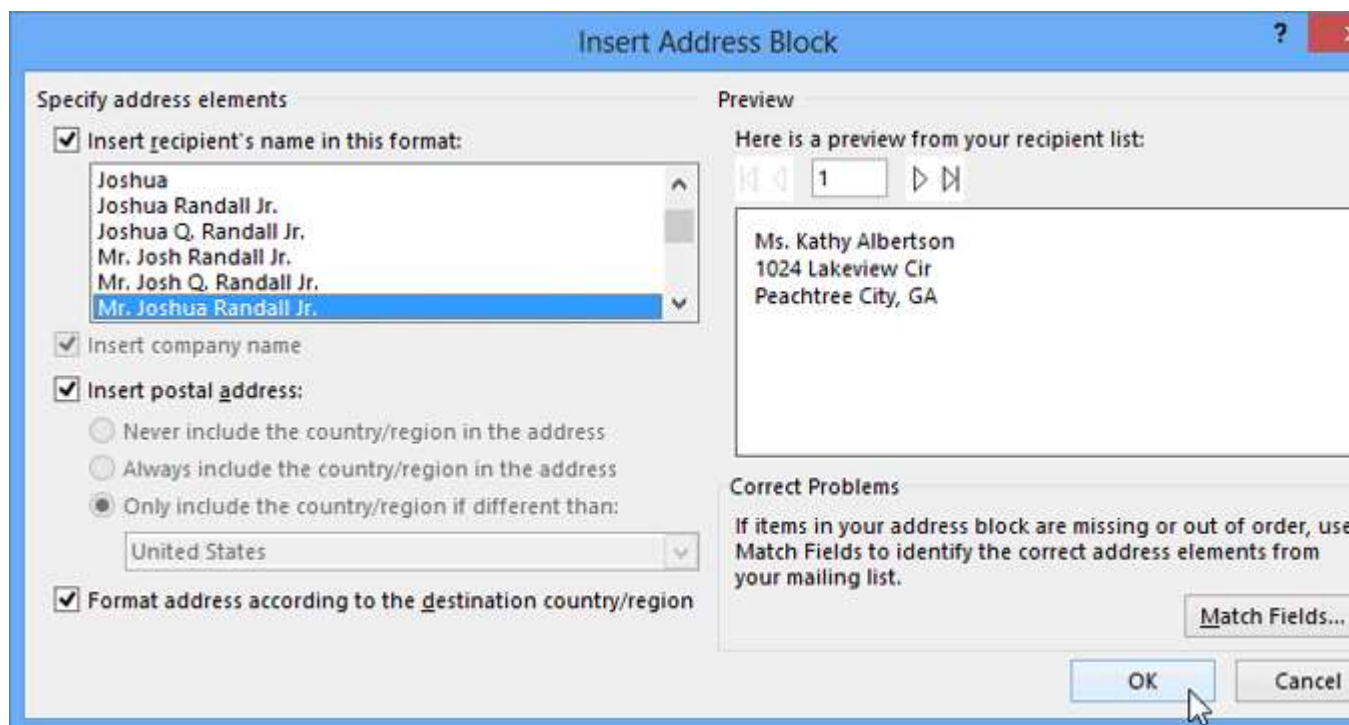
When you have finished writing your letter, click Next. Then you can preview and personalize each recipient's letter.

### Step 4 of 6

→ [Next: Preview your letters](#)

← [Previous: Select recipients](#)

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



The "Insert Address Block" dialog box is shown with the "Specify address elements" tab selected. The "Preview" tab shows a preview of the address block for the selected recipient, Ms. Kathy Albertson.

**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:
    - United States
- ☒ Format address according to the destination country/region

**Preview**

Here is a preview from your recipient list:

1

Ms. Kathy Albertson  
1024 Lakeview Cir  
Peachtree City, GA

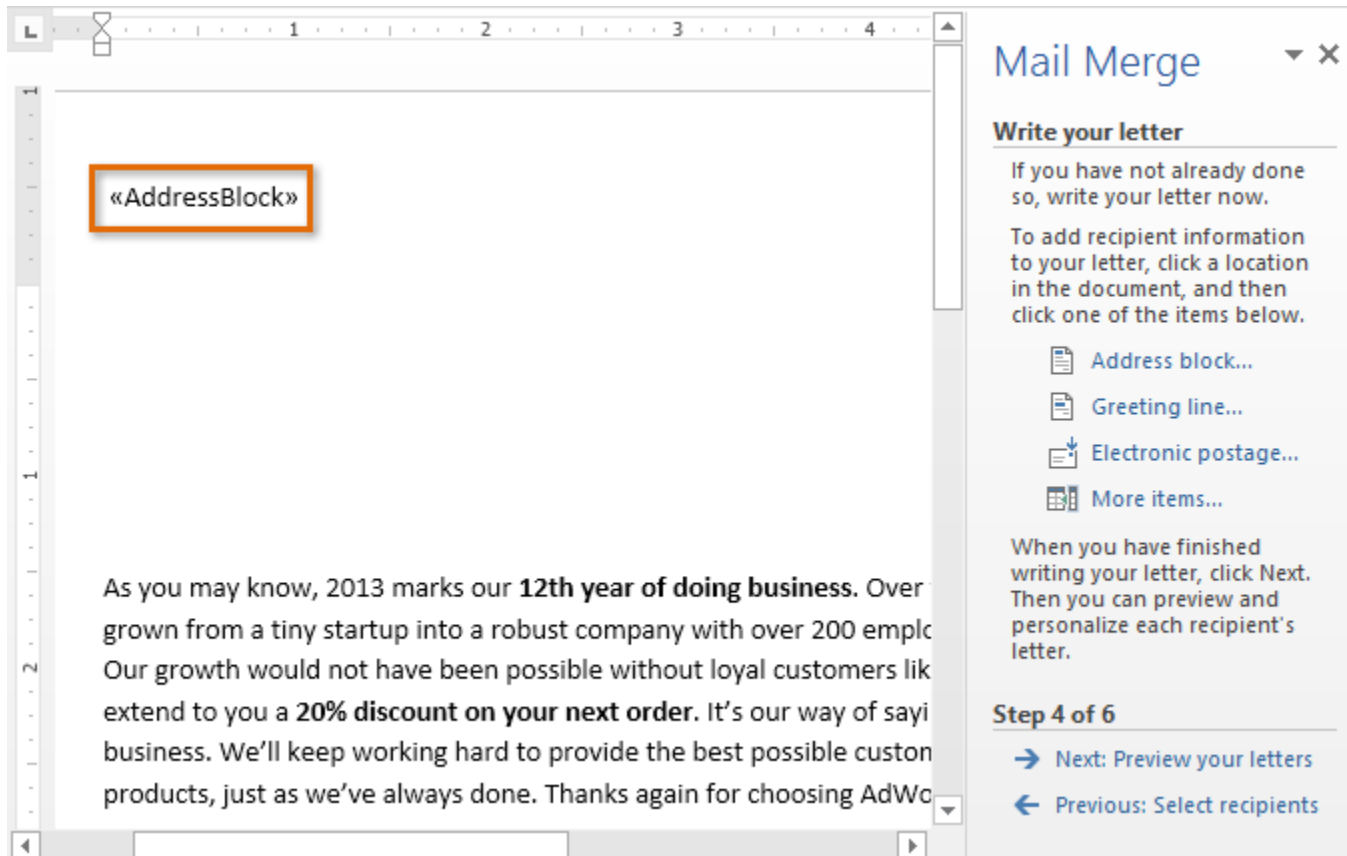
**Correct Problems**

If items in your address block are missing or out of order, use Match Fields to identify the correct address elements from your mailing list.

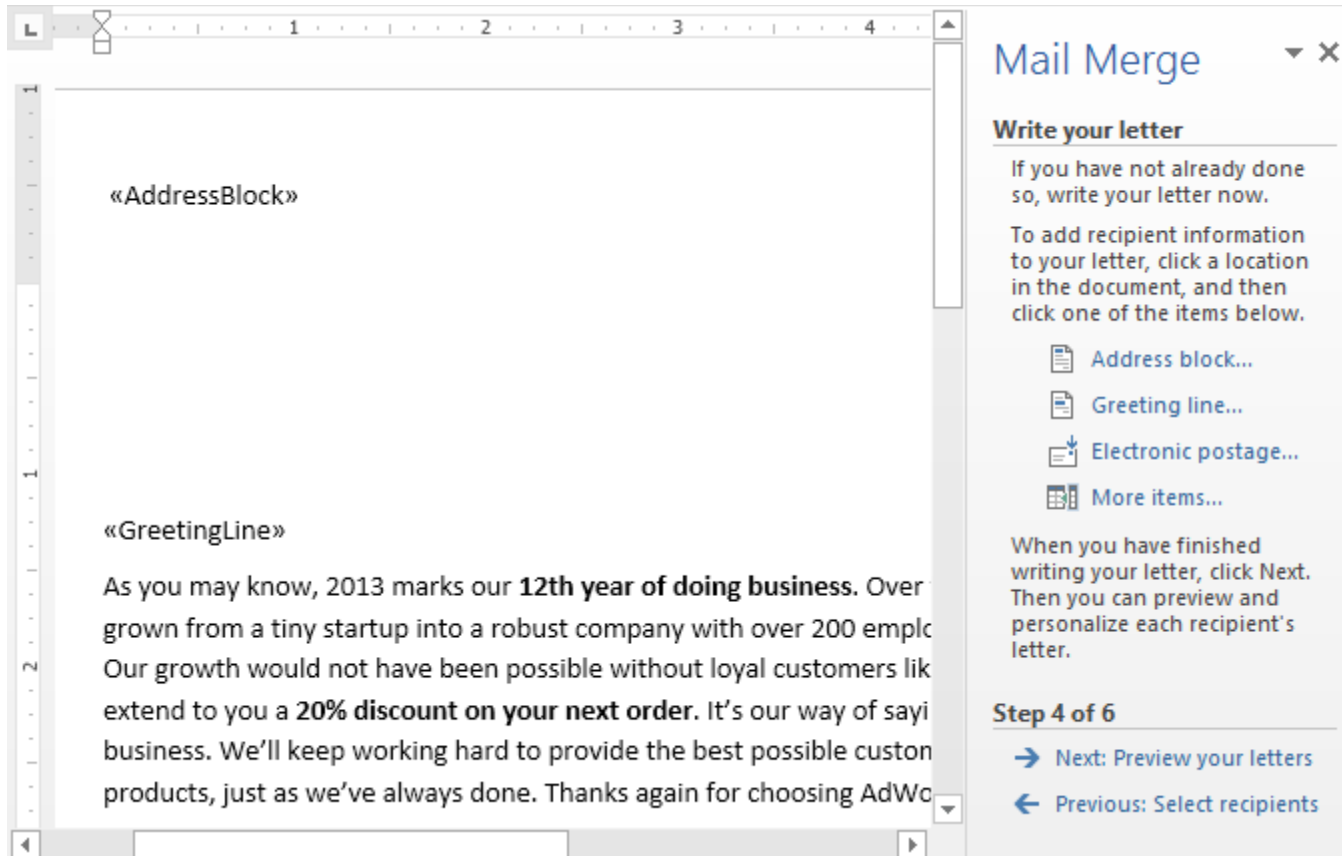
[Match Fields...](#)

**OK** **Cancel**

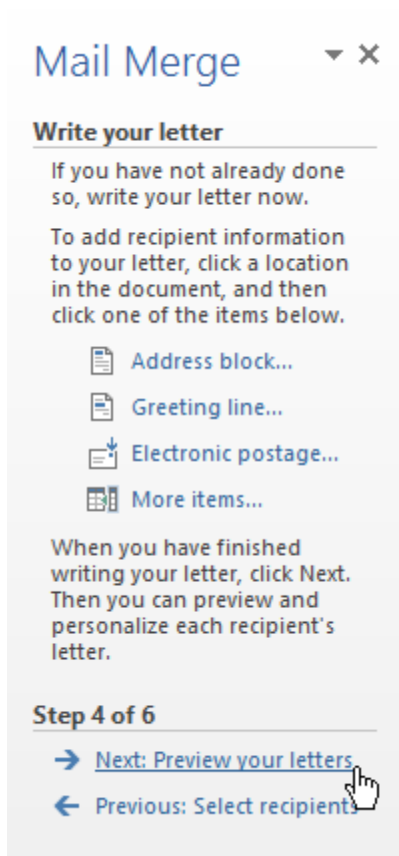
4. A placeholder will appear in your document (for example, «AddressBlock»).



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.

Ms. Kathy Albertson  
1024 Lakeview Cir  
Peachtree City, GA

Dear Ms. Albertson,

As you may know, 2013 marks our **12th year of doing business**. Over grown from a tiny startup into a robust company with over 200 emplc Our growth would not have been possible without loyal customers lik extend to you a **20% discount on your next order**. It's our way of sayi

**Use the arrows to preview each letter**

**The preview allows you to see how recipient data will appear in each letter**

## Mail Merge

### Preview your letters

One of the merged letters is previewed here. To preview another letter, click one of the following:

<< Recipient: 1 >>

[Find a recipient...](#)

### Make changes

You can also change your recipient list:

[Edit recipient list...](#)

[Exclude this recipient](#)

When you have finished previewing your letters, click Next. Then you can print the merged letters or edit individual letters to add personal comments.

### Step 5 of 6

[Next: Complete the merge](#)

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

Mail Merge

▼ ×


**Preview your letters**

One of the merged letters is previewed here. To preview another letter, click one of the following:

<<


Recipient: 1

>>

 Find a recipient...

**Make changes**

You can also change your recipient list:

 Edit recipient list...

Exclude this recipient

When you have finished previewing your letters, click Next. Then you can print the merged letters or edit individual letters to add personal comments.

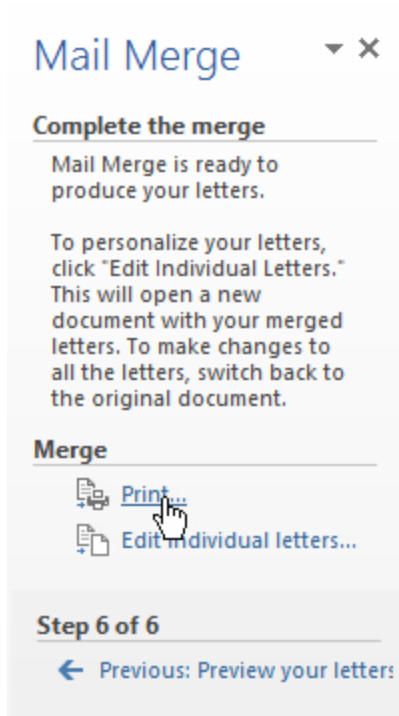
**Step 5 of 6**

→ [Next: Complete the merge](#)

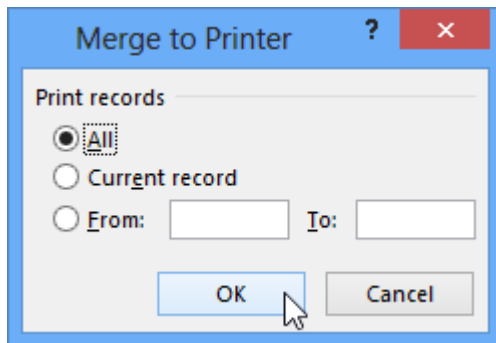
← [Previous: Write your letter](#)

## Step 6:

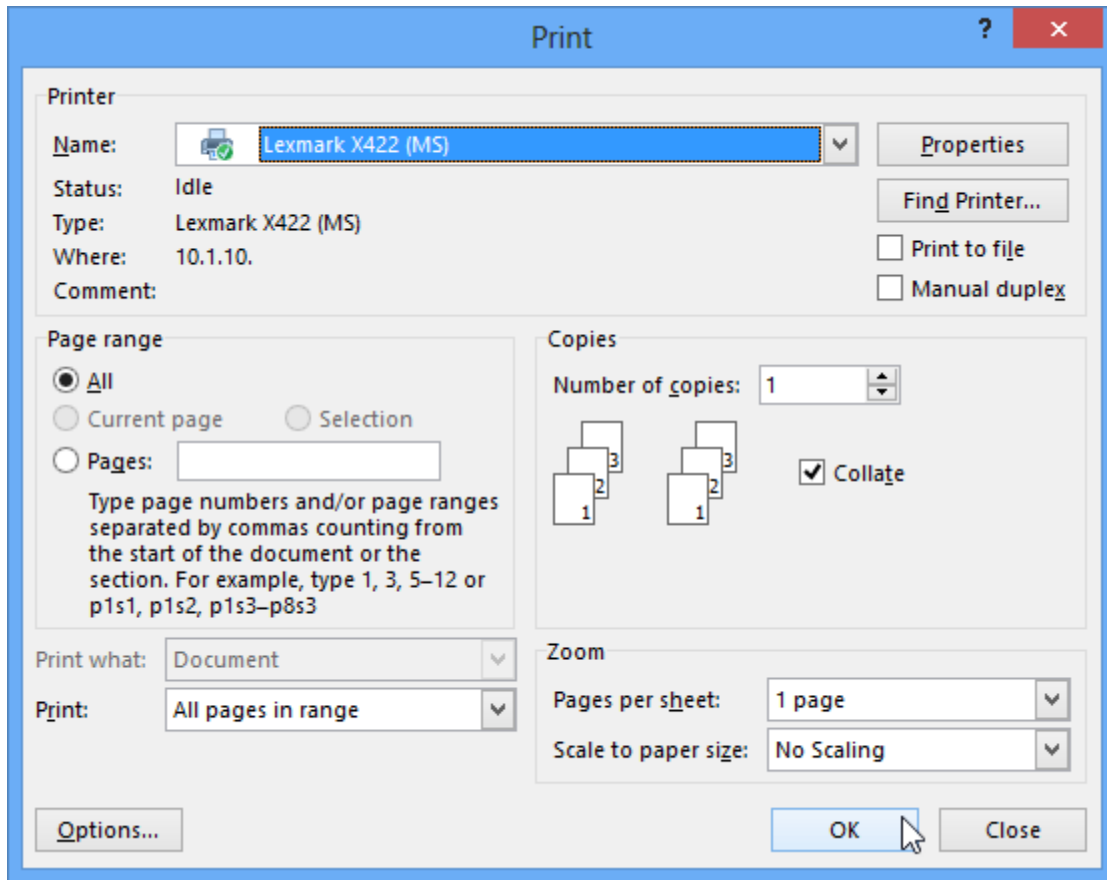
1. Click **Print...** to print the letters.



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.