

# Step by step Mail Merge in MS Word

## What is mail merge?

- To produce and send similar type mails to different people or organizations is a very common and periodic task in word processing.
- Mail merging means to plug data from an address table into form letters, e-mail messages, envelopes, address labels, or a directory (a list or catalog, for example) which may be send to different recipients very conveniently

## What are the advantages of using mail merge?

- Only one document needs to be composed for communicating to an extensive list of interested people, clients or customers.
- Each document can be personalized i.e. it appears to be have been written specifically to each recipient. It contains details only relevant to the receiver.
- Many document formats can be developed to use with one database.
- Errors in transcribing details from one document to another are eliminated.
- This advantage, of course, depends upon the accuracy of data entry into individual records in the first place!

# Types of documents in mail merge

Mainly three types of documents are required in mail merge:

- **Main Document:** the personalized document such as, a standard letter, or envelope, or mailing label that stay the same for each version of the merged document, is known as the main document. For example, the body of a form letter and return address can be the main document.
- **Data Source:** Data source is a file that contains the names and addresses or any other information that vary with each version of a mail-merge document. For example, a list of names and addresses for a form letter you want to send to a list of clients or other people.
- **Merge Document:** When you merge the main document with data source, a third document called merge document will be produced. For example, insert the merge field «City» in a letter document to have Word insert a city name, such as “Kolkata” that is stored in the City data field.

# Steps in mail merge:

- To start a mail merge, click on **Mailings -> Start mail merge -> Step by step Mail Merge Wizard**
- **Step 1: Select a Document Type**
  - The first step is to select what Word calls a “**document type**” in the Mail Merge task pane, what kind of mail-merge you want to undertake: form letters, e-mail messages, envelopes for mass-mailings, labels for mass-mailings, or a directory (a list or catalog).
  - Choose an option button and click **Next: Starting document** at the bottom of the task pane to go to step 2.
  - Look at the following slide...

File

Home

Insert

Draw

Design

Layout

References

Mailings

Review

View

Help




Tell me



2

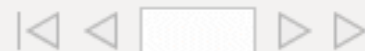
Create

Start Mail Merge ▾

 Letters E-mail Messages Envelopes... Labels... Directory Normal Word Document Step-by-Step Mail Merge Wizard...

3

1

Preview  
Results

Find Recipient

 Check for Errors

Preview Results

Finish &  
Merge ▾

Finish

## Mail Merge ▾



## Select document type

What type of document are you working on?

- ☒ Letters
- ☐ E-mail messages
- ☐ Envelopes
- ☐ Labels
- ☐ Directory

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## Letters

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

Click Next to continue.

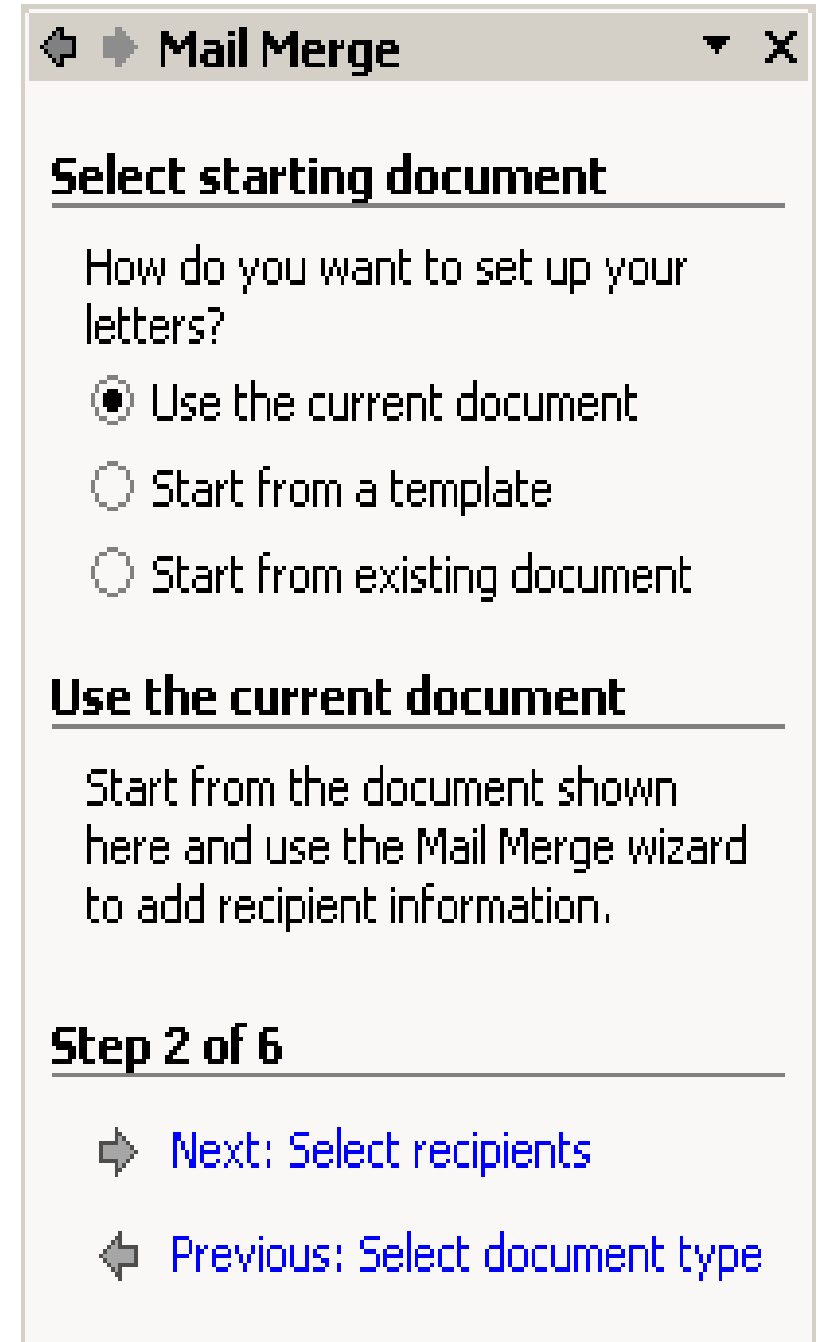
## Step 1 of 6

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[→ Next: Starting document](#)

Step 2: Select a Starting Document - “starting document” is the document in which the merging takes place. In other words, the address or other data you retrieve will land in the document you choose or create now.

One can create a new start document or use an existing one. In the case of labels and envelopes, you tell Word what size labels or envelopes you intend to print on. In the case of form letters, e-mail messages, and directories, the user supply the text either by making use of a document he has written already or writing a new document.



The screenshot shows the 'Mail Merge' window with the title bar 'Mail Merge' and standard window controls. The main content area is titled 'Select starting document' and asks 'How do you want to set up your letters?'. There are three radio button options: 'Use the current document' (which is selected), 'Start from a template', and 'Start from existing document'. Below this, there is a section titled 'Use the current document' with the text 'Start from the document shown here and use the Mail Merge wizard to add recipient information.' At the bottom, a section titled 'Step 2 of 6' contains two navigation links: 'Next: Select recipients' with a right-pointing arrow and 'Previous: Select document type' with a left-pointing arrow.

**Mail Merge**

**Select starting document**

How do you want to set up your letters?

- ☒ Use the current document
- ☐ Start from a template
- ☐ Start from existing document

**Use the current document**

Start from the document shown here and use the Mail Merge wizard to add recipient information.

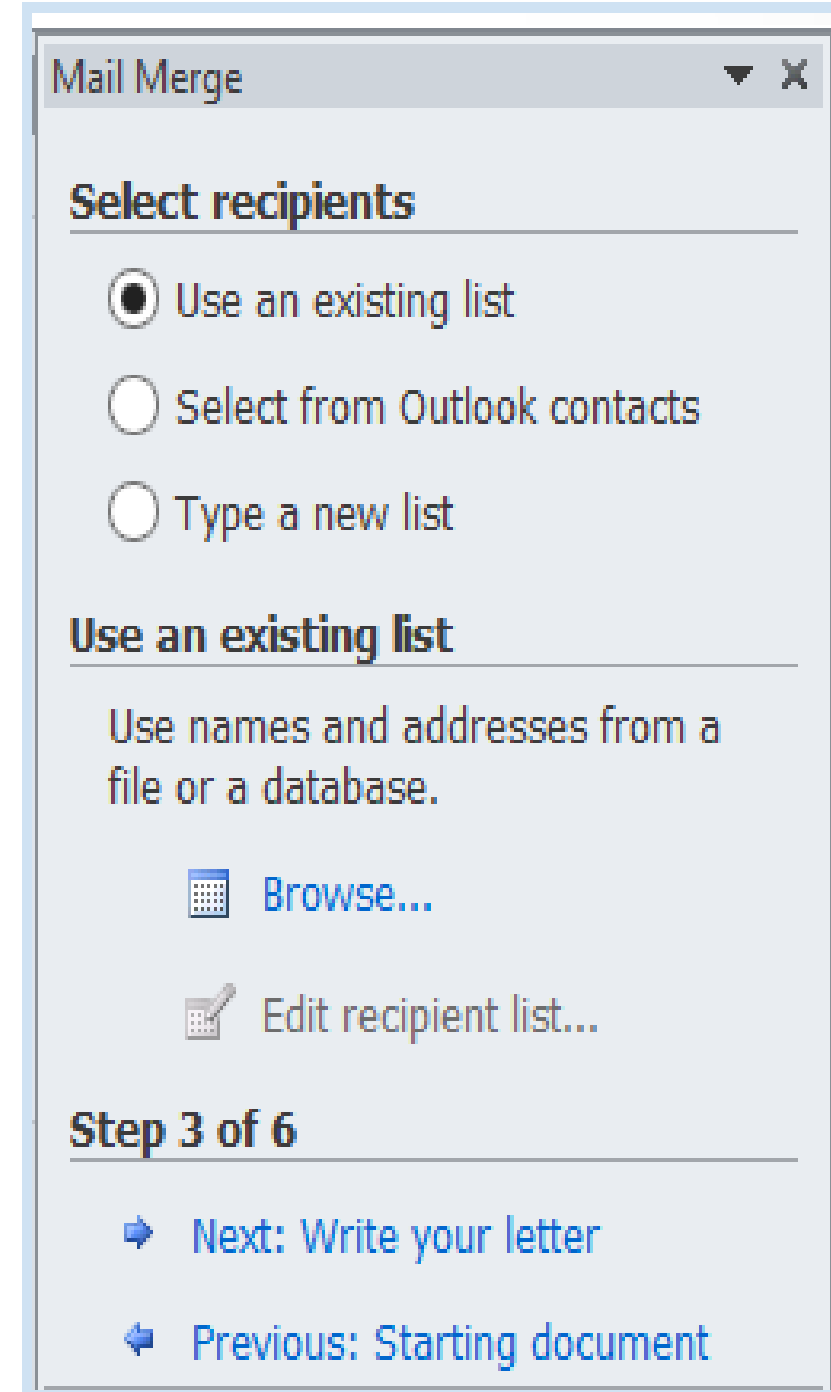
**Step 2 of 6**

➡ [Next: Select recipients](#)

⬅ [Previous: Select document type](#)

## Step 3: Select Recipients

- In step 3, the user will inform Word where to get the data that that will be merged into the starting document created, or supplied in step 2.
- The data may be retrieved from a table in a Word document, or may be imported from an Access database table or query, or the Excel Worksheet where the addresses are stored.
- A new list for the data can also be created using Mail merge wizard.



The screenshot shows the 'Mail Merge' dialog box with the 'Select recipients' section active. It contains three radio button options: 'Use an existing list' (selected), 'Select from Outlook contacts', and 'Type a new list'. Below these is the 'Use an existing list' section, which includes the instruction 'Use names and addresses from a file or a database.' and two buttons: 'Browse...' and 'Edit recipient list...'. At the bottom, it indicates 'Step 3 of 6' and provides navigation links: 'Next: Write your letter' and 'Previous: Starting document'.

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

- Browse and Select the table from the list

Click on  
Next: Write  
your letter

Mail Merge Recipients

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"/>	LastName ▼	FirstName ▼	Title ▼	StreetAddress ^
SampleMailingLis...	<input checked="" type="checkbox"/>	Wilber	Alex	Marketing Assistant	9256 Towne Cente
SampleMailingLis...	<input checked="" type="checkbox"/>	Deyoung	Allan	IT Admin	N19 W24133 River
SampleMailingLis...	<input checked="" type="checkbox"/>	Pisani	Bianca	Salesperson	One Microsoft Wa
SampleMailingLis...	<input checked="" type="checkbox"/>	White	Cameron	Salesperson	One Microsoft Wa
SampleMailingLis...	<input checked="" type="checkbox"/>	Cline	Christie	Buyer	9257 Towne Cente
SampleMailingLis...	<input checked="" type="checkbox"/>	Berger	Debra	Administrative Assistant	205 108th Ave. NE,
SampleMailingLis...	<input checked="" type="checkbox"/>	Dennis	Delia	Engineer	One Microsoft Wa
SampleMailingLis...	<input checked="" type="checkbox"/>	Siciliani	Diego	HR Manager	3535 Gradview Par

Data Source: SampleMailingList.xlsx

Refine recipient list

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

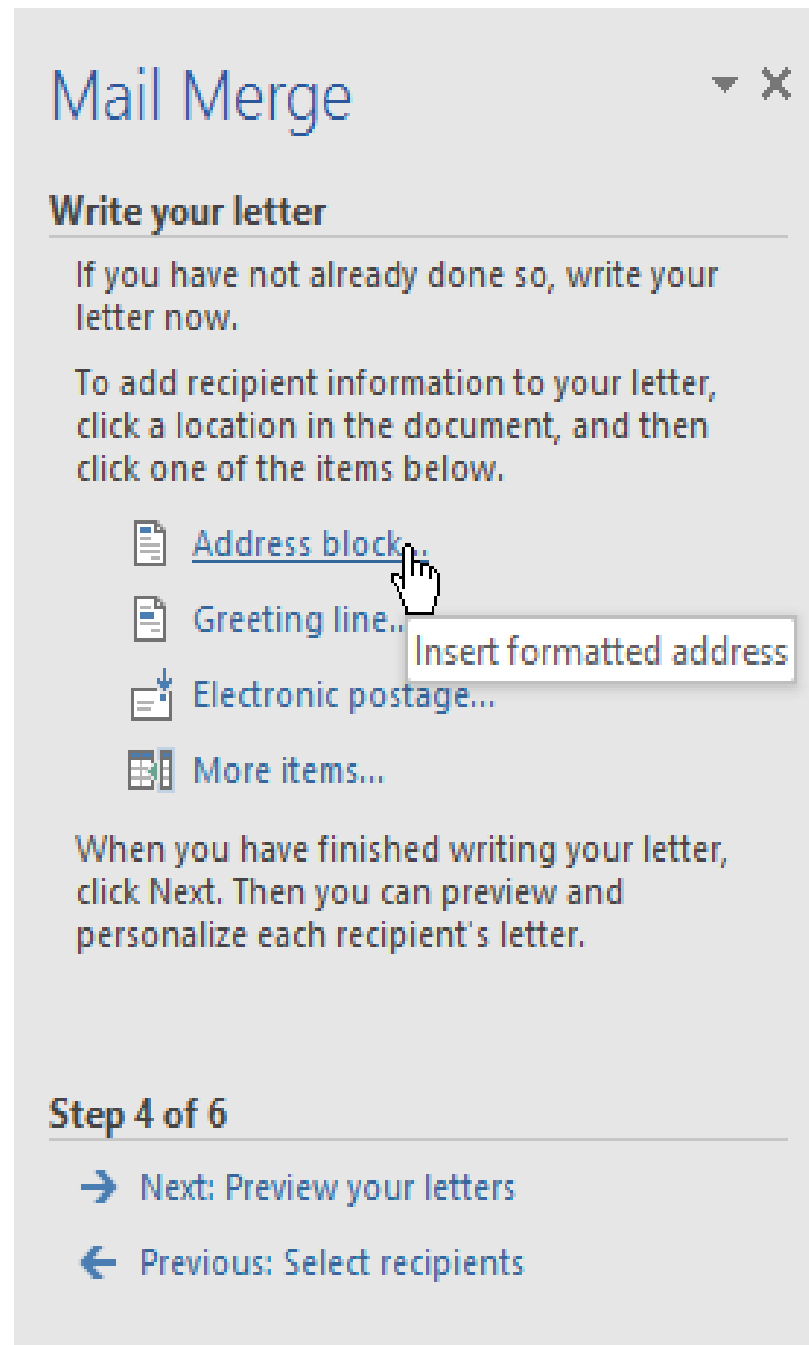
Edit... Refresh

OK



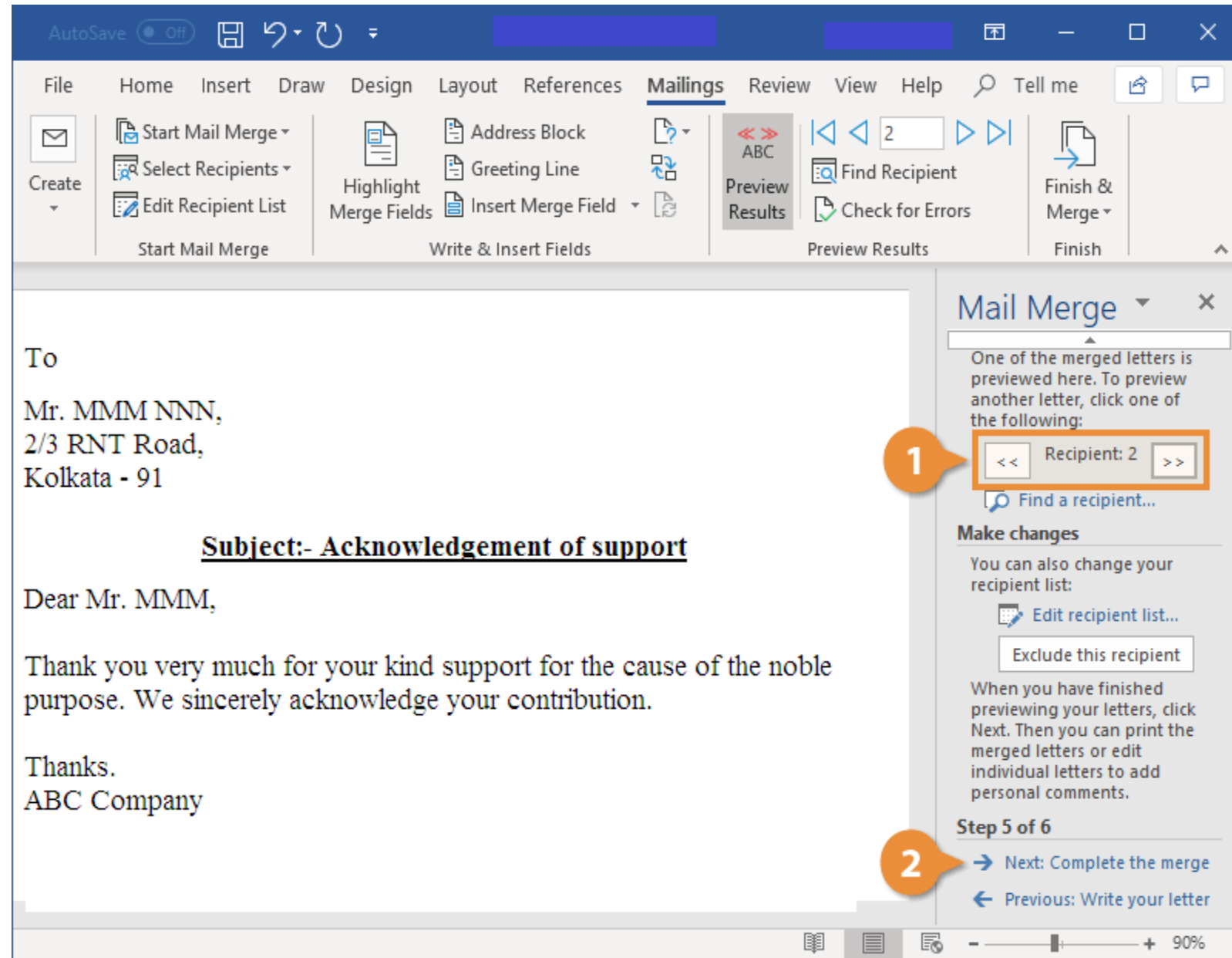
# Step 4: Write your letter

- In this step, one has to insert the merge fields, the parts of the starting document that differ from recipient to recipient (address for example).
- Inserting the merge fields enables the Word, to know where to plug information from the data source into the starting document and which data are to be taken from the data source.
- **An address block** (different recipient's addresses), his or her name, company, title, street address, city, and zip code may be inserted in this step.
- **Greeting line:** Place the cursor where the salutation goes and click the Insert Greeting Line button, or click the Greeting Line hyperlink on the Mail Merge toolbar. In the Greeting Line dialog box, fashion a salutation and click OK.
- Click Next: Preview your letter.



# Step 5 of 6: Preview your letter

- **Step 5:** Preview Your Document: Look over the form letters before you print them or create a file for them.
- Click the Record buttons to see what your document will look like after the mail merge is complete.
- Make any change if required.
- If everything is okay, click on the Next: Complete the merge



# Step 6: Complete the merge

- Save the Mail Merge in a New Document: You get a new document that you can edit or print another day.
  - Click the Merge to New Document button on the Mail Merge toolbar.
  - After editing individual mails, create a new Word file which you may edit and print.

