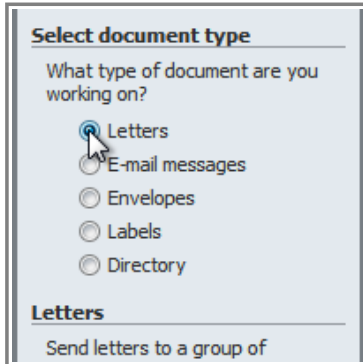




Introduction



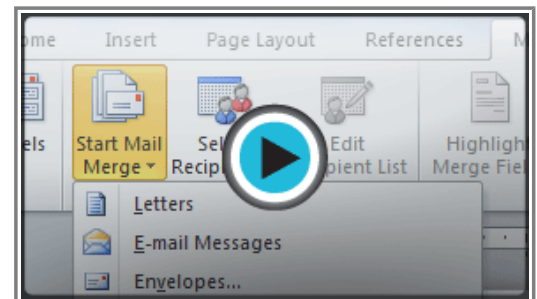
Mail merge is a useful tool that will allow you to easily produce multiple letters, labels, envelopes, name tags and more using information stored in a list, database, or spreadsheet. In this lesson, you will learn how to use the **mail merge wizard** to create a **data source** and a form **letter**, and explore other wizard features.

Mail Merge

When you are 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**. If you'd like to work along with the lesson, you can download the examples below.

- [Letter](#) (Word document)
- [Recipient list](#) (Excel workbook)

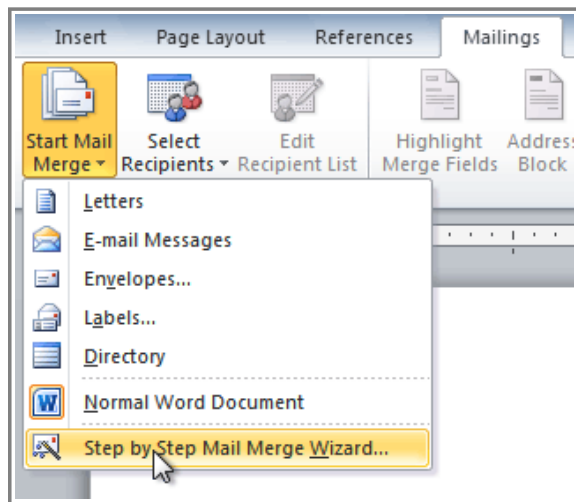
▶▶▶ Watch the video to learn about using Mail Merge.



Watch the video (3:30). [Need help?](#)

To Use Mail Merge:

1. Open an **existing** Word document, or create a **new** one.
2. Click the **Mailings** tab.
3. Click the **Start Mail Merge** command.
4. Select **Step by Step Mail Merge Wizard**.

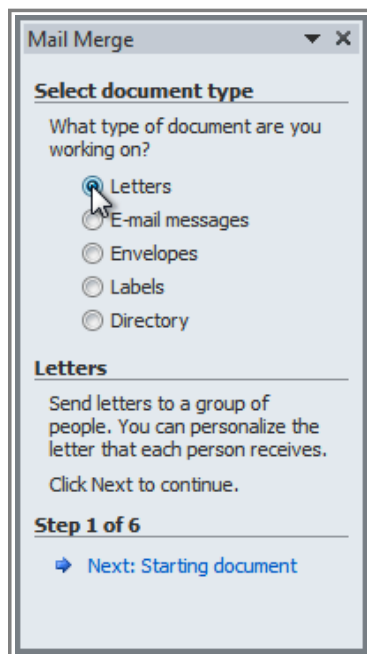


Selecting Step by Step Mail Merge Wizard

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

Step 1:

1. Choose the type of document you wish to create. In this example, select **Letters**.

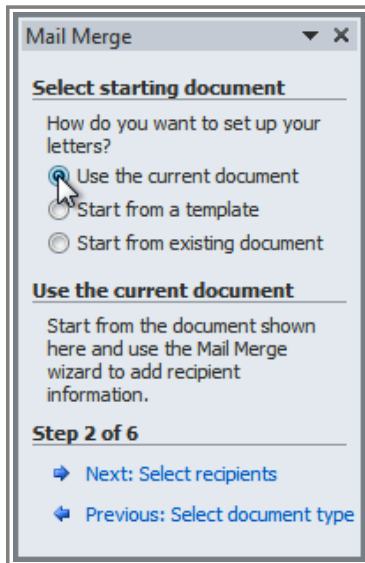


Selecting a document type

2. Click **Next: Starting document** to move to Step 2.

Step 2:

1. Select **Use the current document**.



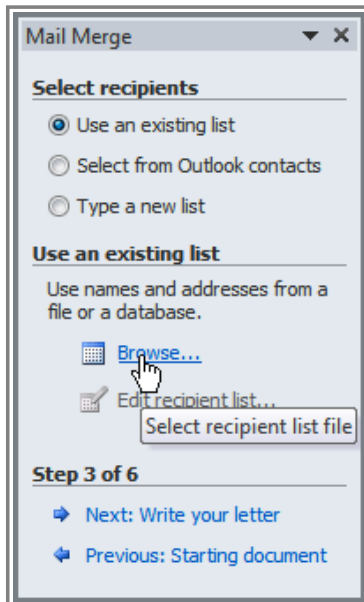
Selecting a starting document

2. Click **Next: Select recipients** to move to Step 3.

Step 3:

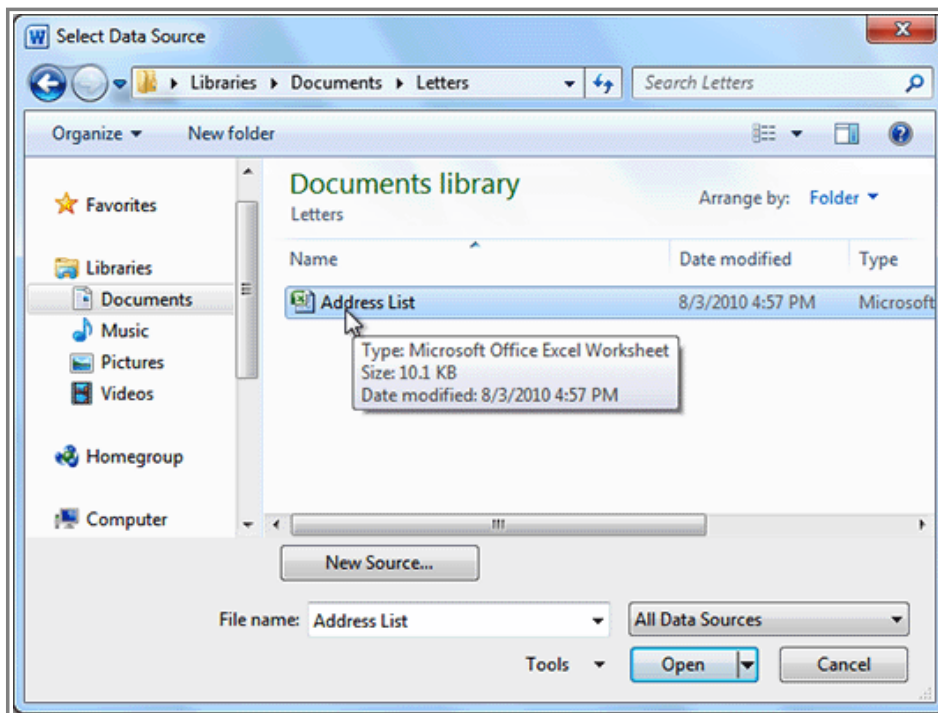
Now you'll need an address list so that Word can automatically place each address into the document. The list can be in an existing file, such as an **Excel workbook**, or you can **type a new address list** from within the Mail Merge Wizard.

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



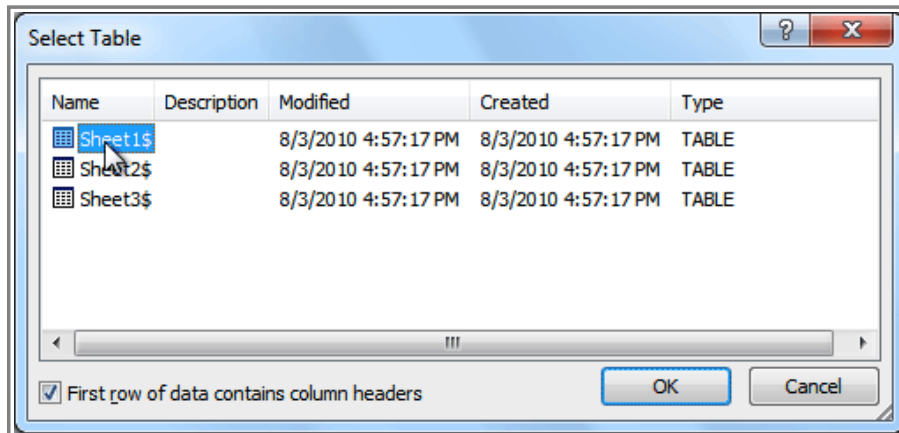
Browsing for a data source

1. Locate your file in the dialog box (you may have to navigate to a different folder) and click **Open**.



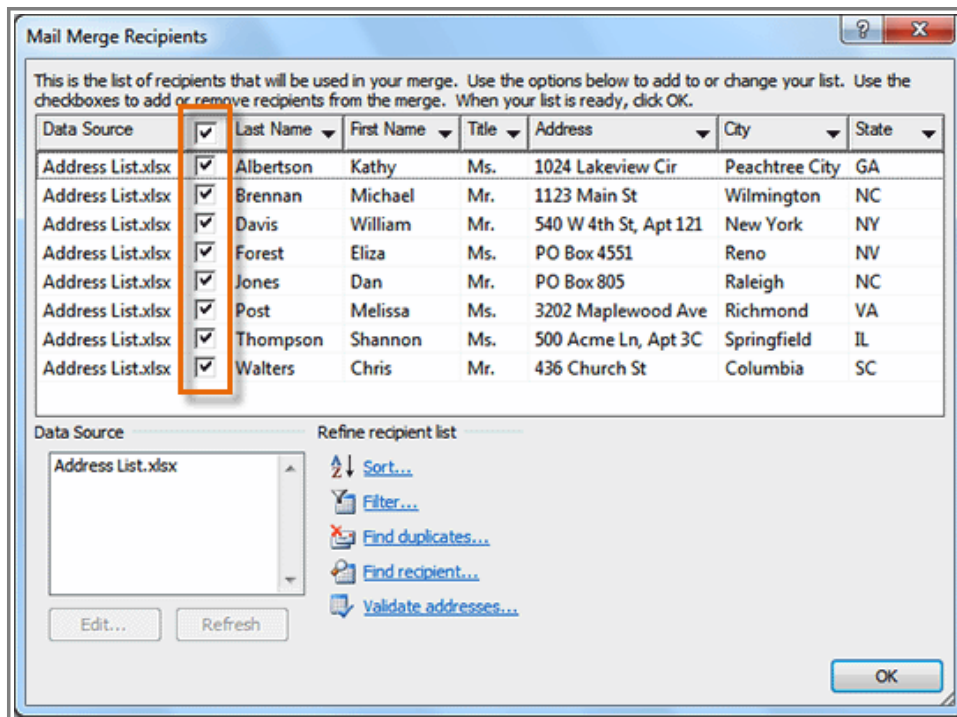
Choosing a file

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



Selecting a table

1. In the **Mail Merge Recipients** dialog box, you can **check** or **uncheck** each recipient to control which ones are used in the mail merge. When you're done, click **OK** to close the dialog box.



Use check boxes to include or exclude recipients

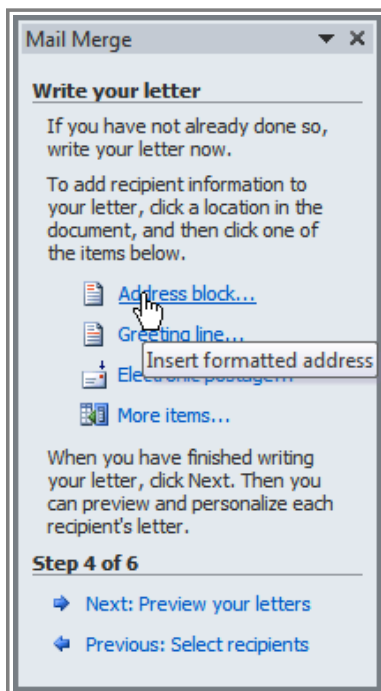
1. From the **Mail Merge** task pane, click **Next: Write your letter** to move to Step 4. If you don't have an existing address list, you can click the **Type a new list** button and click **Create**. You can then type your address list.

Step 4:

Now you're ready to write your letter. When it's printed, each copy of the letter will basically be the same, except the **recipient data** (such as the **name** and **address**) will be different on each one. You'll need to add **placeholders** for the recipient data, so that mail merge knows exactly where to add the data. If you're using mail merge with an existing letter, make sure that the file is open now.

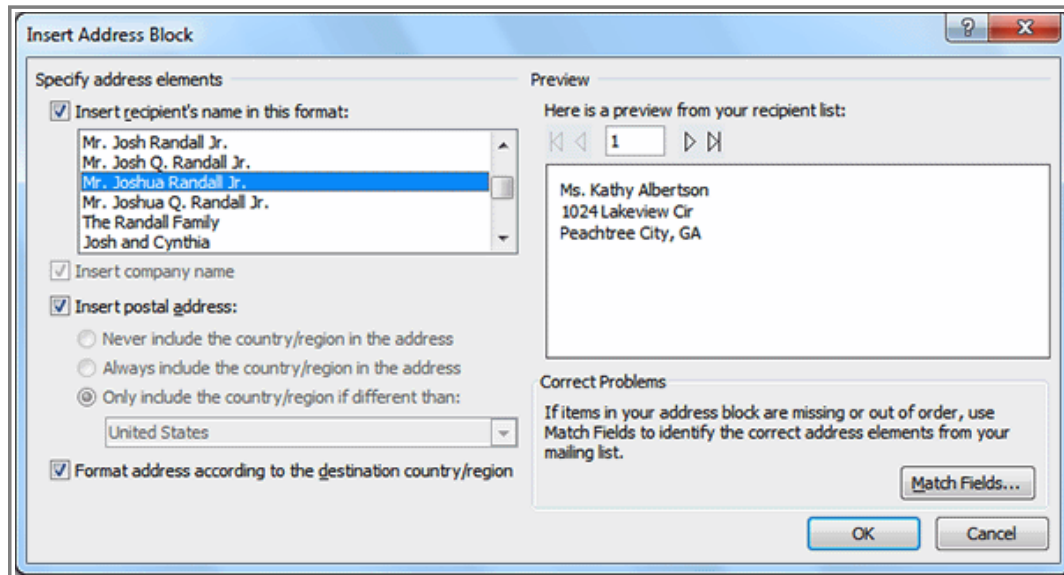
To Insert Recipient Data:

1. Place the insertion point in the document where you wish the information to appear.
2. Select **Address block**, **Greeting line**, **Electronic postage**, or **More items** from the task pane.



Inserting an address block

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




Adjusting the address block formatting

4. A placeholder appears in your document. For example: «**AddressBlock**».
5. Repeat these steps each time you need to enter information from your data record.
6. From the **Mail Merge** task pane, 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 wish 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.



The screenshot shows a 'Mail Merge' window with two main sections. On the left, a preview of a letter is shown with a recipient address and a salutation. On the right, a control panel allows navigating between recipients and making changes. Two callout boxes provide instructions: one points to the navigation arrows and the other points to the recipient address in the preview.

Use arrows to preview each letter

Ms. Kathy Albertson
1024 Lakeview Cir
Peachtree City, GA

Dear Ms. Albertson,

As you may know, 2010 marks
grown from a tiny startup into
Our growth would not have b
unt
ing
way

The preview allows you to see how recipient data will look 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

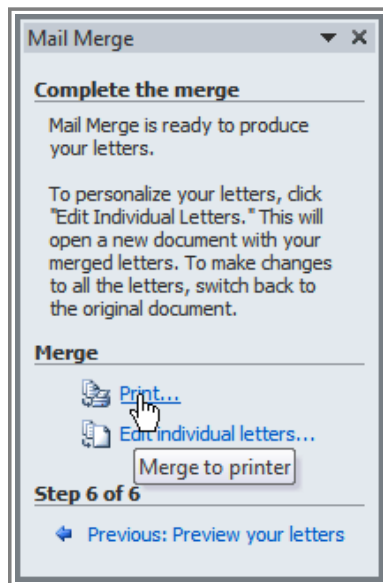
Previous: Write your letter

Previewing the letters

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

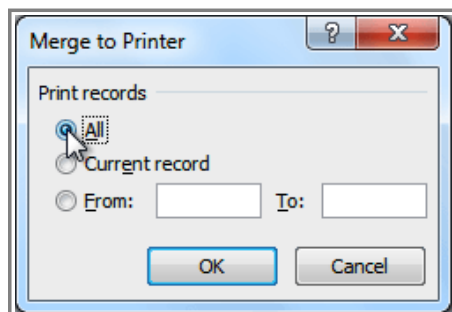
Step 6:

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



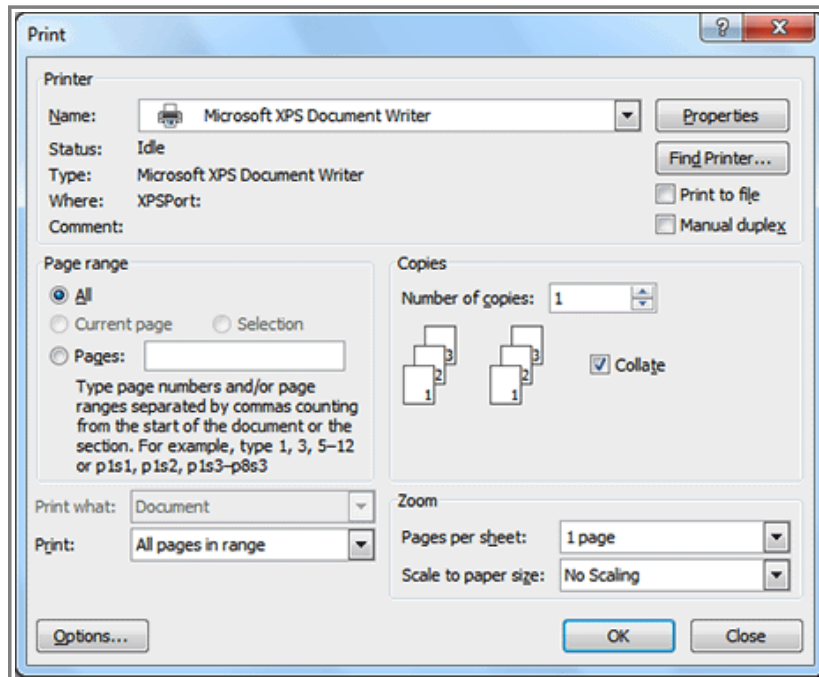
Printing the letters

2. The **Merge to Printer** dialog box opens. Click **All**, and then click **OK**.



The Merge to Printer dialog box

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



The Print dialog box

Challenge!



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