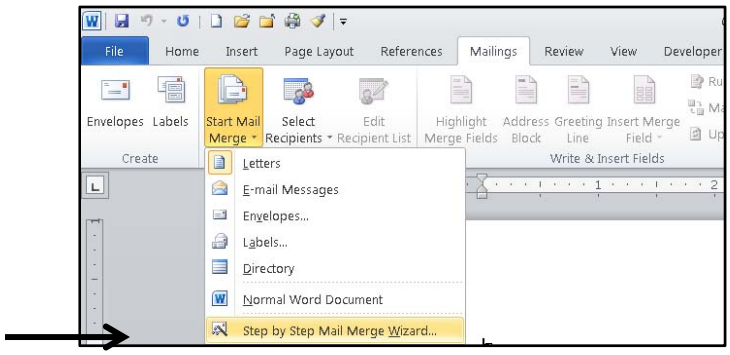
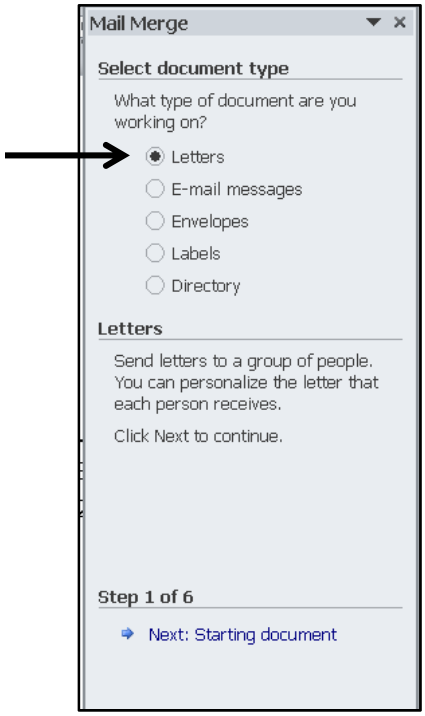
Mail Merge

Create a letter, omitting the address, greeting, and addressee's name.

Go to the Mailings tab. Letter is the default choice. Then choose Step by Step Mail Merge Wizard.



Step 1-Select document type.



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

E-mail messages-Send e-mail messages to a group of people.

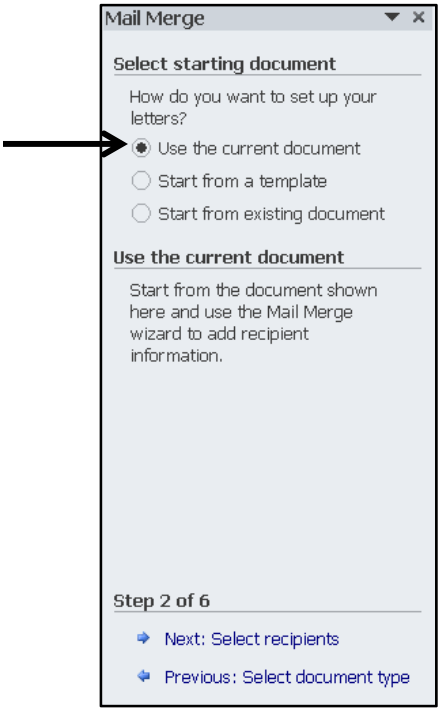
Envelopes-Print addressed envelopes for a group mailing.

Labels-Print address labels for a group mailing.

Directory-Create a single document containing a catalog or printed list of addresses.

This training will demonstrate creating a mail merge letter.

Step 2-Select starting document.



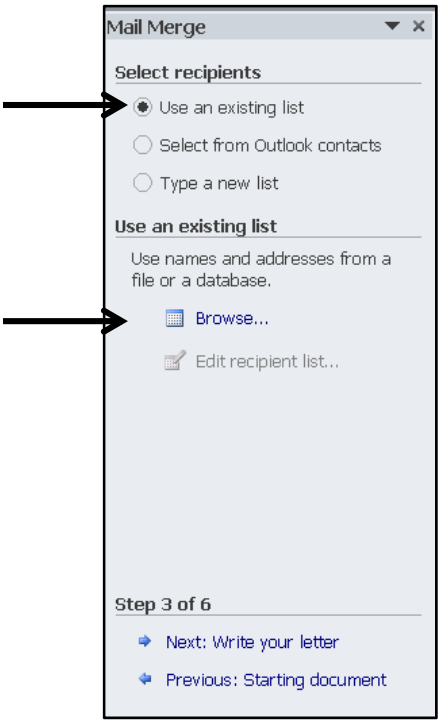
Use the current document

Start from a template

Start from existing document.

This training will use the current document.

Step 3-Select recipients.



Use an existing list.

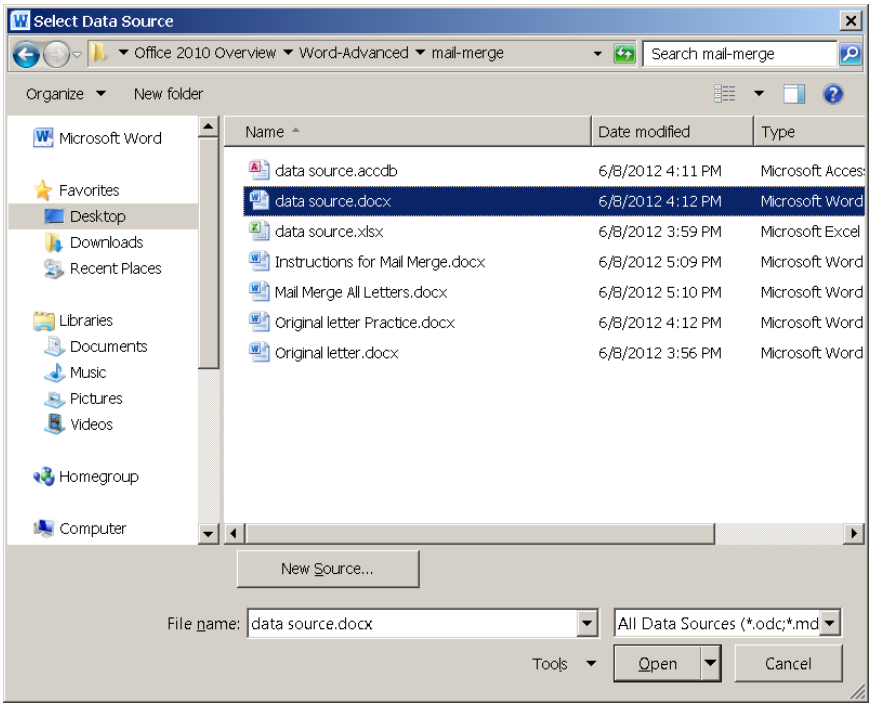
- A table in Word.
- An Excel file.
- An Access file.

Select from Outlook Contacts.

Type a new list.

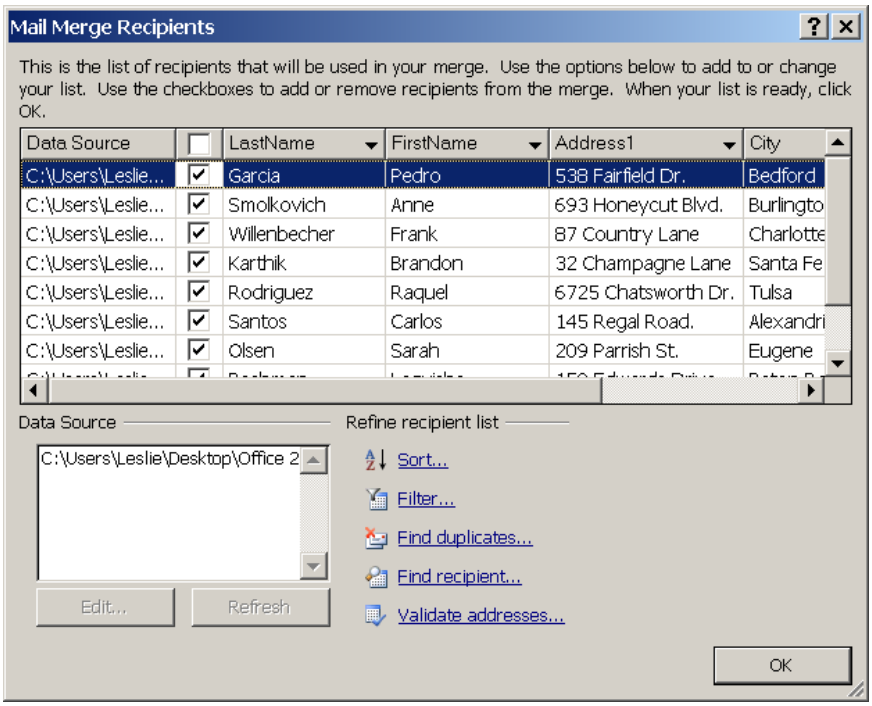
This training will browse to find the data source.docx, but you could use the Excel or Access documents also.

Browse to find the data source files below



When you select the source, you will see your database.

You have several choices for refining your recipient list.



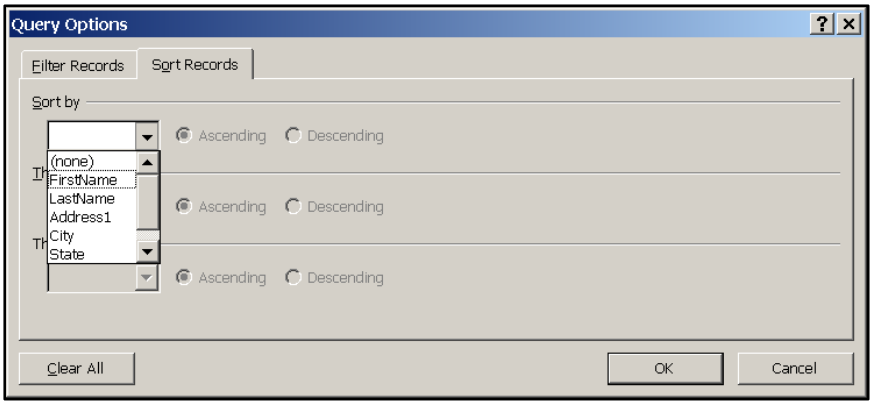
Sort-By any field, alpha or numeric

Filter-Find everyone with a Texas address or in a specific zip code.

Find duplicates-In case you have errors in your database

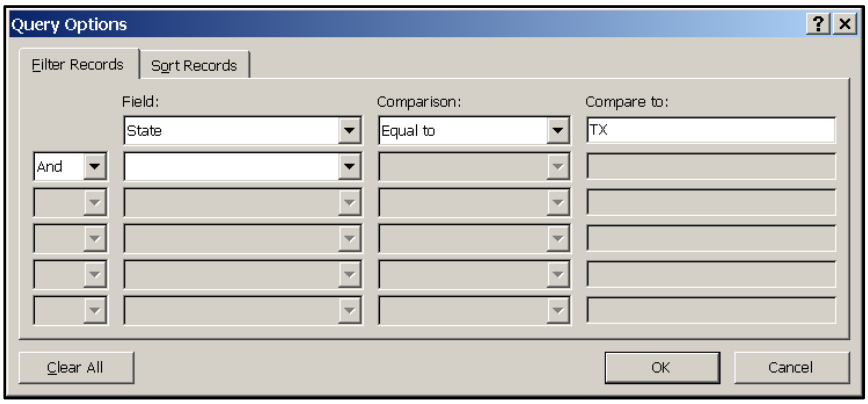
Find recipient-If you want to be sure a certain recipient is in the list.

Validate addresses-Requires software downloaded from Microsoft.



You can sort by any field.

Ascending, descending.

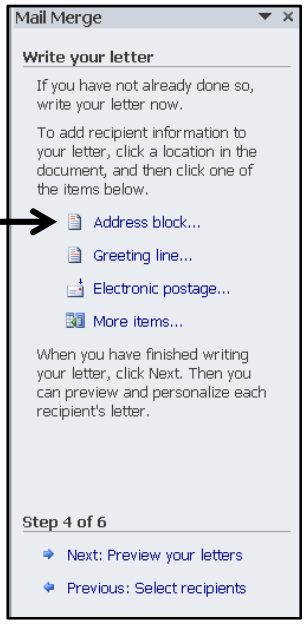


You can filter on each field. For example, filter everyone from TX.

You can edit your list and remove the filter.

In this training, we will not filter or sort.

Step 4-Write your letter.



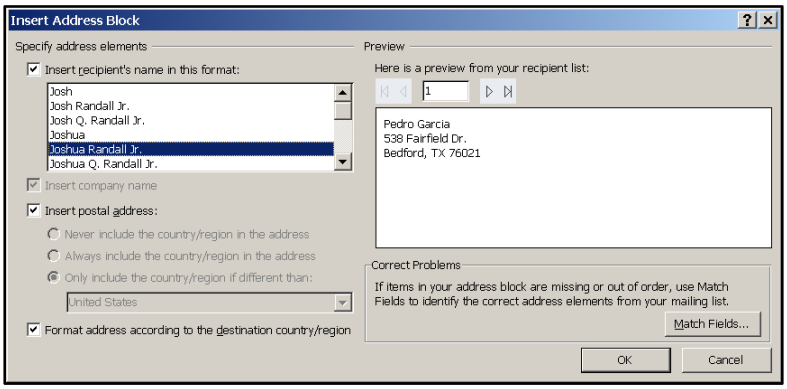
Address block

Greeting line

Electronic postage-You must first download software from Microsoft.

More items-allows you to customize by selecting any field you would like.

This training will include an address block and a greeting line.

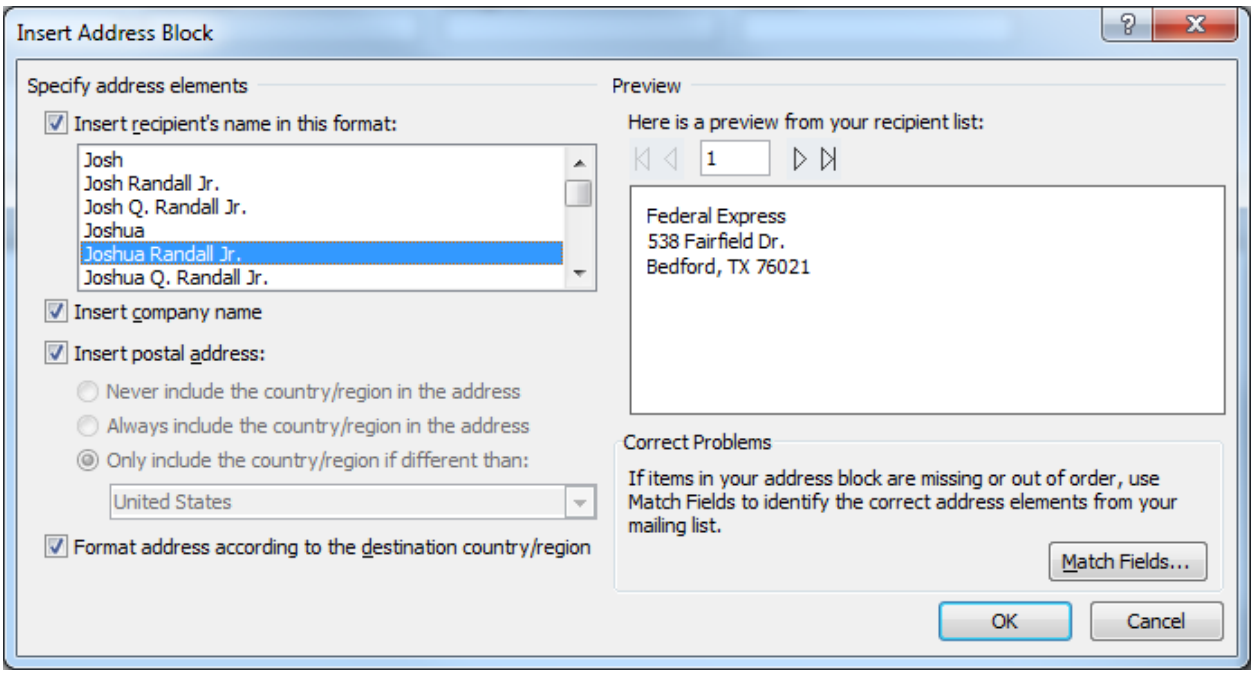


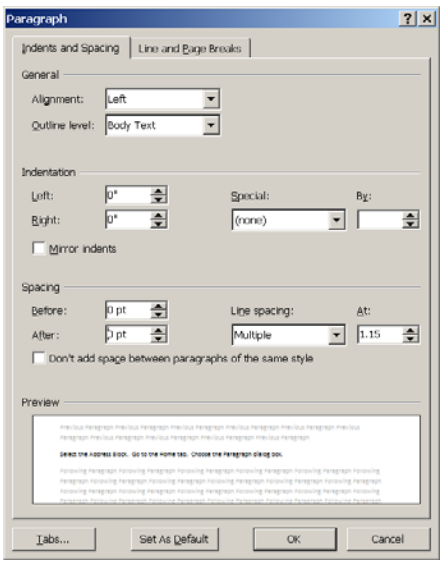
<<AddressBlock>>

When you insert the address block, Word arranges first, last, address1, city, state, and zip, just as you would expect.

If your fields do not have the exact names that Word expects, you will have to choose Match Fields. In the example below, the data source lists the company first instead of the first name.

Choose Match Fields to correct this problem.

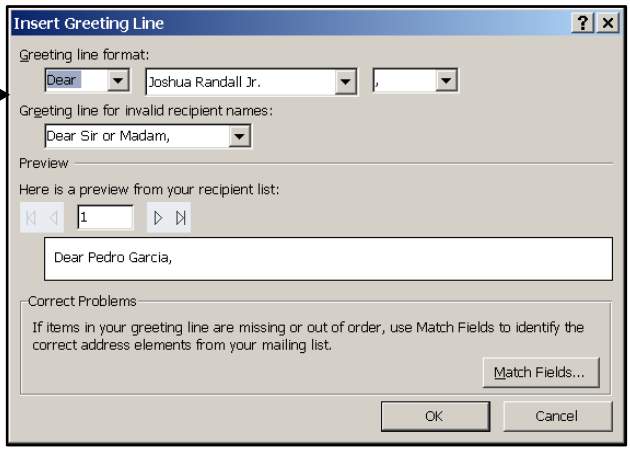




To make your address have tighter spacing, follow these steps.

Select the Address Block. Go to the Home tab. Choose the Paragraph dialog box.

Change the Spacing Before from 10 to 0.



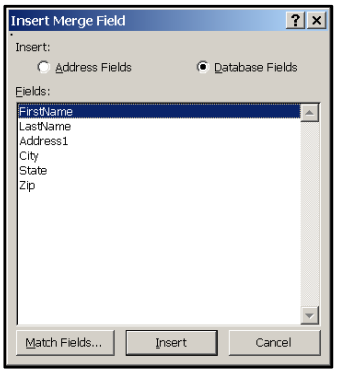
<<GreetingLine>>

You have many drop down choices when you insert the Greeting Line.

Dear, To, or None

Many forms of the person's name. First Last. First only.

Choice of comma or color.



<<First>> Or Other Fields.

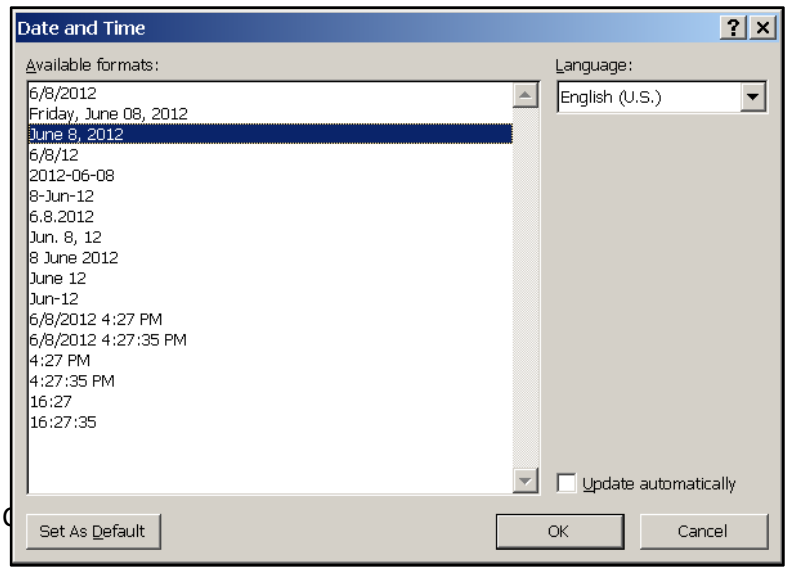
When you choose More Items, you can insert any field within the document. For example, you can address the person by name within the document. This gives the feeling that the letter is more personal.

Inserting the Date

Insert the cursor at the location where you would like the date.

Including the date is important but not part of the actual mail merge.

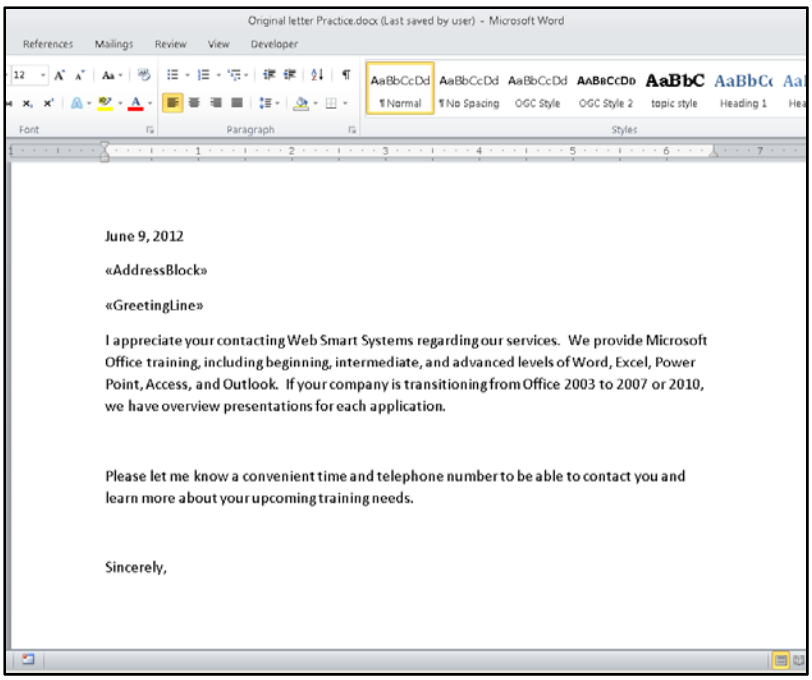
Go to the insert menu and choose Date and Time.



Select your format.

If you are wishing to date stamp your document, don't check mark the box for the date to update.

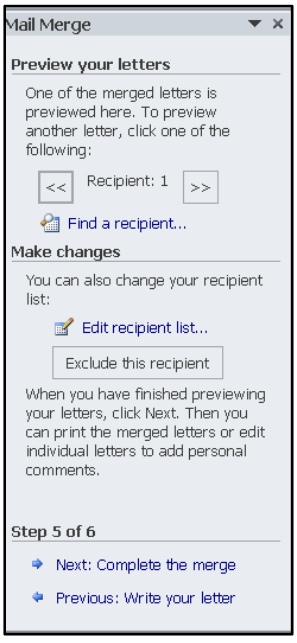
Then your letter will show the exact date you created it.



Letter showing

Date
AddressBlock
GreetingLine

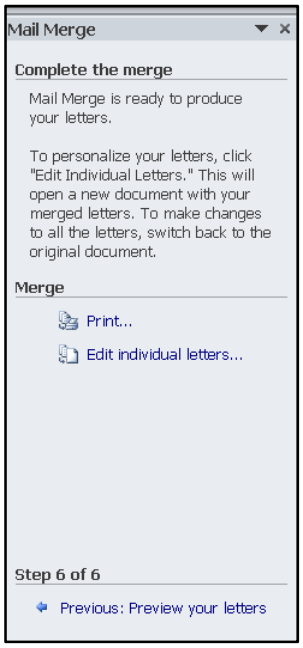
Step 5-Preview your letters.



Preview your letters.

At this point, you can edit your recipients.

Step 6-Complete the merge.



You have 2 choices: Print or Edit individual letters.

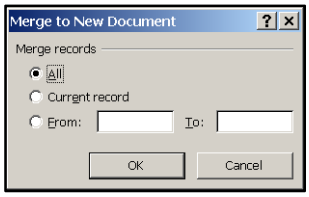
Choose Edit individual letters.

This allows you to save the entire mail merge letter as one long Word document with a page for each person.

This is the best choice.

If you choose Print and the printer is off line or out of paper or you lose electric power during the print, you will have to start all over.

Also, you can save the mail merge letter in your files as documentation.



You choose “All” to save your mail merge to a new document. Then you can print at a convenient time.