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Microsoft Word Mail Merge Tutorial

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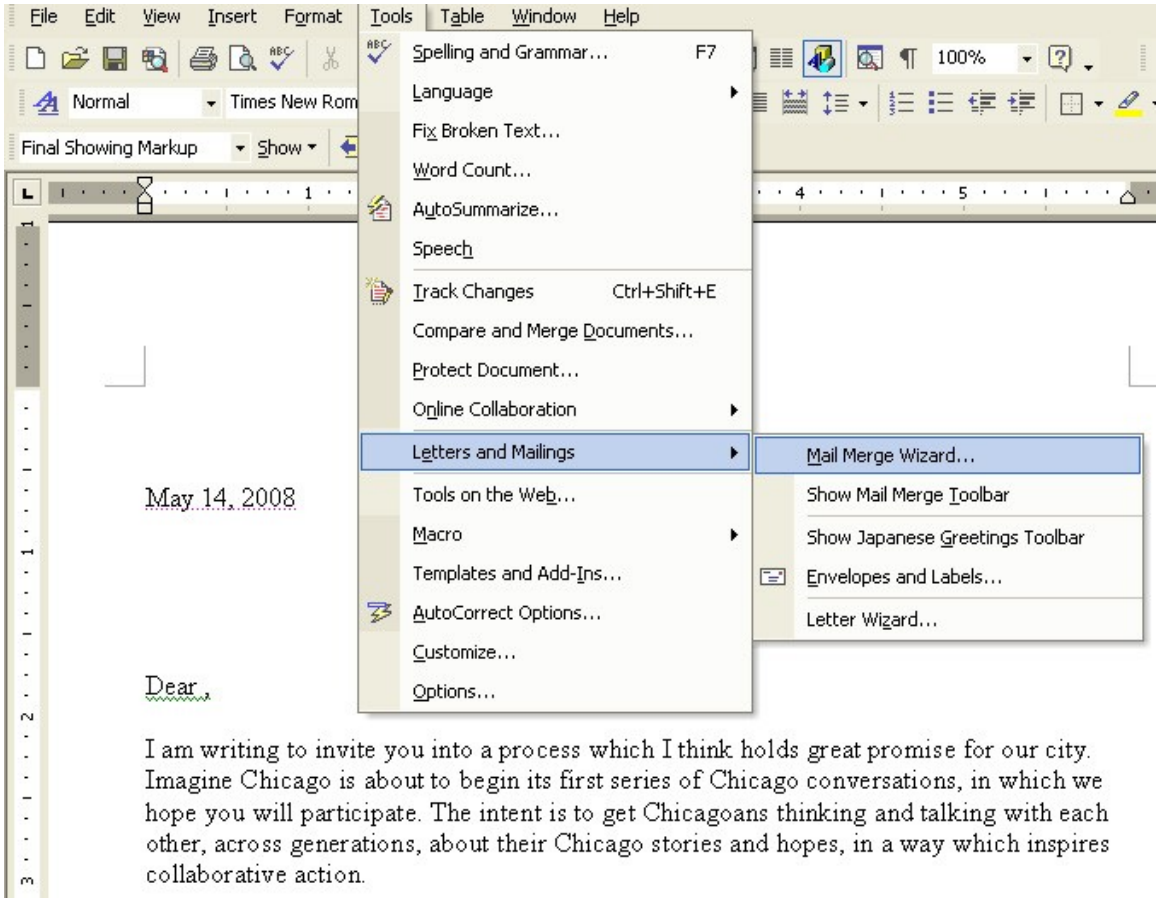
MS Word's Mail Merge function lets you easily customize a single letter to several recipients. To do this, first open or type out your form letter.



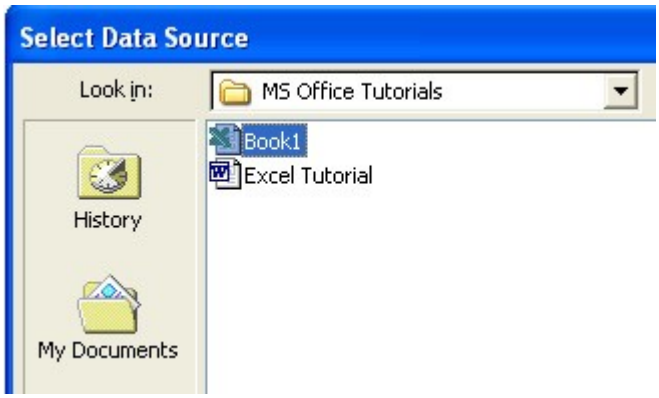
When you're ready to mail merge, click on Tools, then Letters and Mailings, then select the Mail Merge Wizard.

The Mail Merge wizard will appear on the right side of the document window.

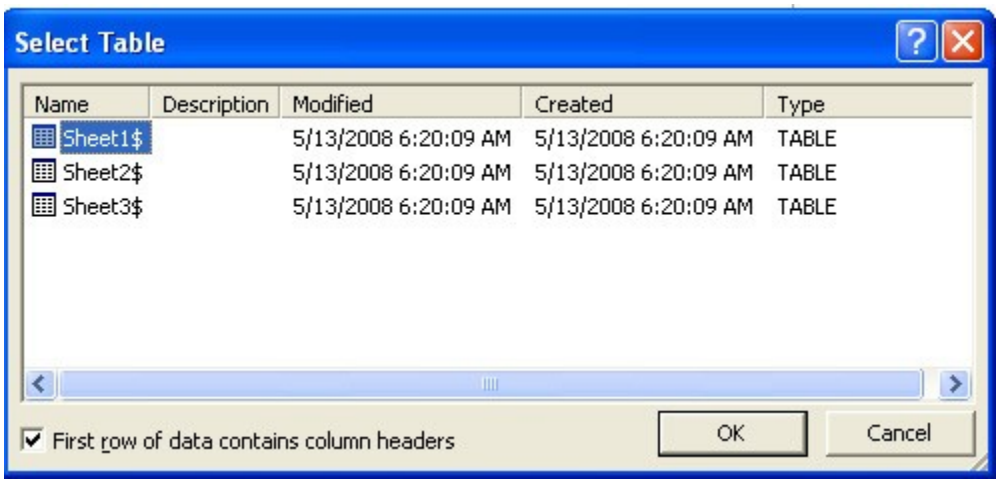
If you are working with a form letter, select Letters from the list, then click on next.

It will then ask you which document you would like to use for the mail merge. Since you already have your document opened, select Use the current document.

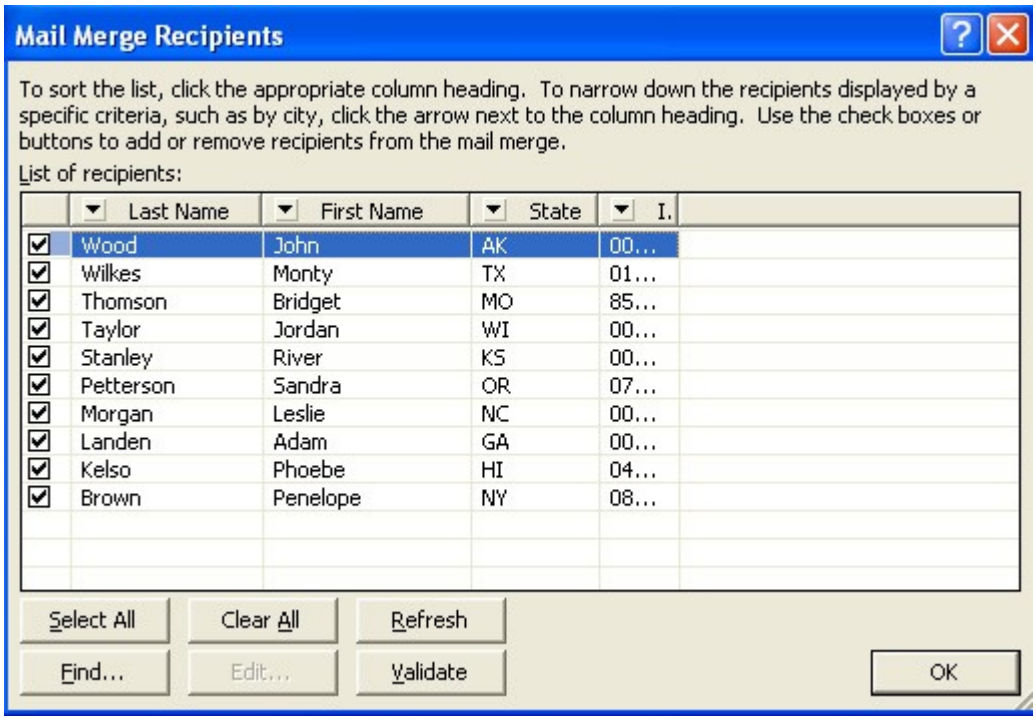
It will then ask you for the recipients of your letter. You can use an existing list from a previous mail merge session or from an Excel file, pick recipients from your Outlook contacts or type a new list. In this example, we will use an Excel spreadsheet. Click on Browse to select the Excel file to use as a data source.



If you have more than one sheet inside your file, the wizard will prompt you to select the sheet you wish to use for this mail merge.



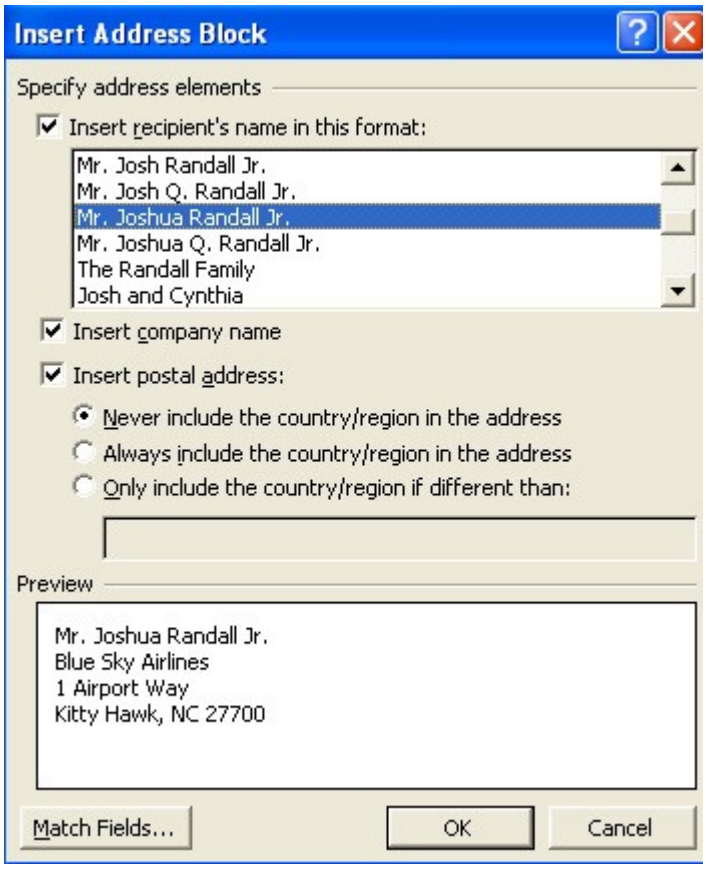
After selecting the sheet, it will ask you whether you want all of the contacts to be included in the recipient list. Uncheck the box of the contacts to be excluded from the mail merge.



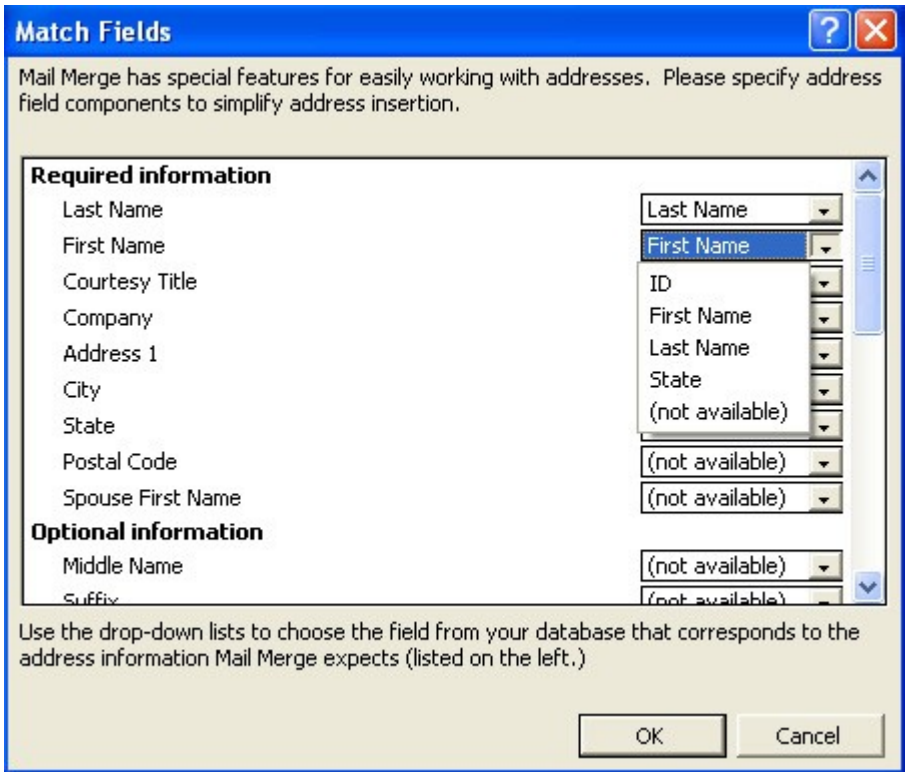
Click on OK after you finish selecting the contacts to be included.

You would still be able to edit your recipient list or even select a different data source.

Click on the next button. You will now have to add the mail merge fields into your form letter. There are several pre-made templates of commonly used mail merge fields. In our example, we will be using the Address block and the Greeting line.



When you click on the Address block link, this will appear. Select the format you want to use for the recipient's name. Tick the boxes if you want to include the company name and postal address. Click on Match Fields to select which columns corresponds to the pre-set fields.



Match the pre-set fields on the left with the column headers from your data source. All the column headers will show up in the drop down boxes. Once you have finished matching all the fields, click on OK.

May 14, 2008

«AddressBlock»

«GreetingLine»,

I am writing to invite you into a proce
Imagine Chicago is about to begin its
hope you will participate. The intent i
other, across generations, about their
collaborative action.

The fields will now be visible in your document. To position the fields, click on the field, then cut and paste it to where you want it to be placed.

To preview the merged document, click on Preview, found on the right sidebar.

May 14, 2008

John Wood
, AK

Dear John Wood,,

The data inside the fields will now appear where the mail merge fields were. You can preview all the recipient's letter by clicking on the arrows to scroll through the list.

From here on, you can either print the documents or further customize each letter. To customize the letter, click on Edit Individual Letter.

When you click the link, a dialogue box will appear, asking you which entry to customize.

You can customize all entries, the current record or only certain entries in a sequence. When you click on OK, a new document will be created with the generated form letter.