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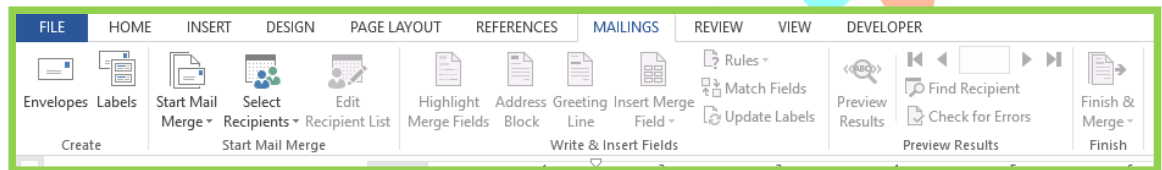
Mail Merge Usage in MS Word

Microsoft Word

Module 38 - Mail Merge Usage in MS Word

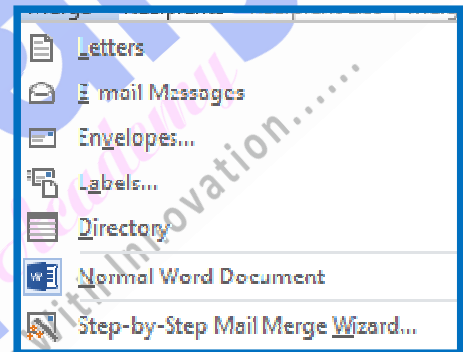
Mail Merge

Mail Merge in Microsoft Word is a powerful feature that lets you create a batch of documents that are personalized for each recipient. These documents could be letters, labels, envelopes, emails, or even certificates.

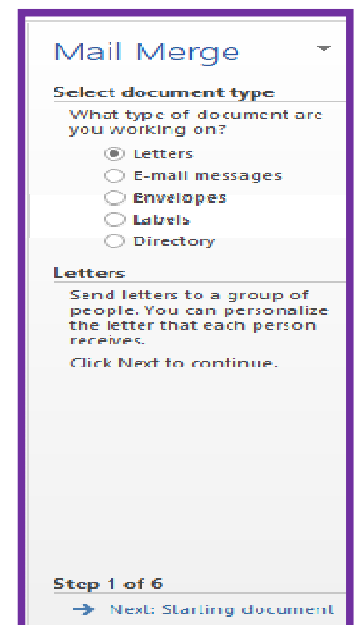


Mail Merge document type in Microsoft Word:

- **Letters** - Used to create personalized letters for multiple recipients, like invitation or announcement letters.
- **Directory** - Generates a single document that lists all records, useful for directories, catalogs, or rosters.
- **Labels** - Creates mailing or product labels with recipient info from the data source.
- **Email Messages** - Sends personalized email messages to each recipient via Outlook using the merged fields.
- **Normal Document** - A regular Word document without mail merge functionality; used when not merging data.
- **Envelope** - Used to print personalized envelopes with each recipient's name and address from the data source.



The Step-by-Step Mail Merge Wizard in MS Word is a guided tool that walks you through the entire mail merge process in six easy steps. Here's a quick overview of each step:



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Step 1

Select Document Type is the first step in the Mail Merge Wizard in Microsoft Word. It lets you choose what kind of document you want to create and personalize using your data.

Available Document Types:

- **Letters** - Create personalized letters for each recipient.
- **Email Messages** - Send customized emails through Outlook.
- **Envelopes** - Print envelopes with each recipient's name and address.
- **Labels** - Make address or product labels using recipient data.
- **Directory** - Compile multiple records into a single list, like a contact directory or catalog.

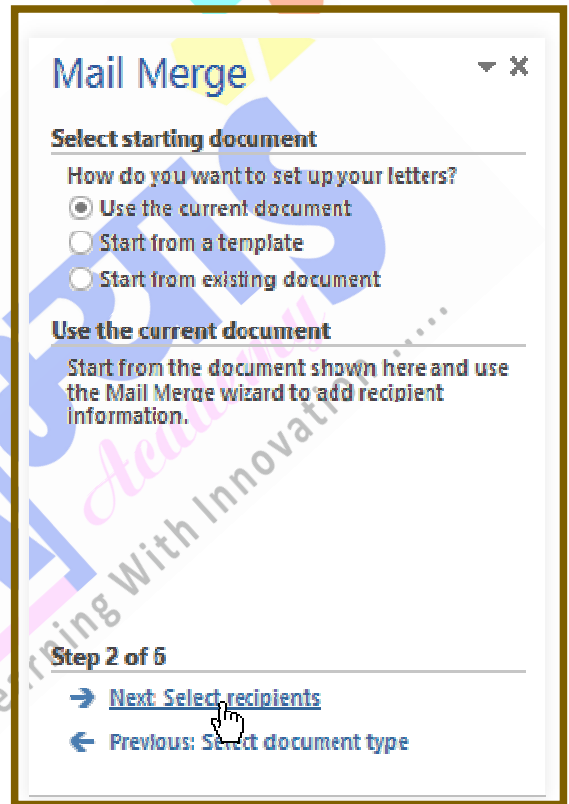
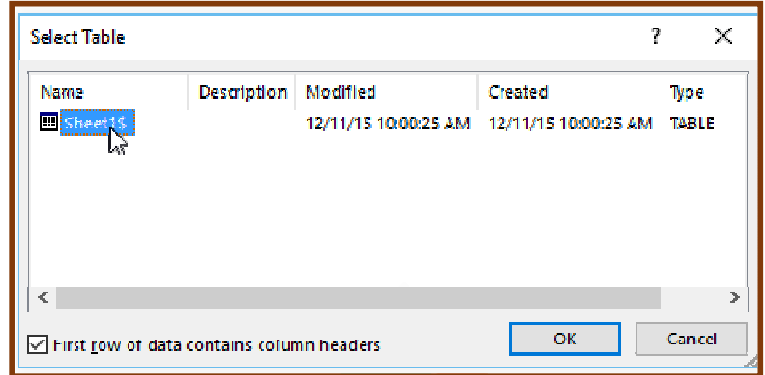
Step 2:

• Select **Use the current document**, then click **Next: Select recipients** to move to Step 3.

Step 3:

Select Recipients

This is where you choose the data source that contains the information you want to merge (like names, addresses, emails, etc.). You have three main options:



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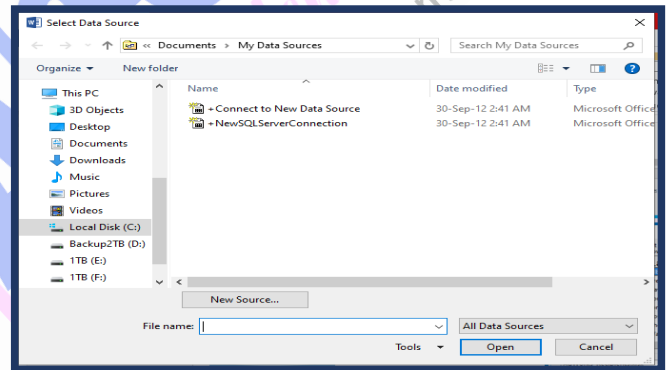
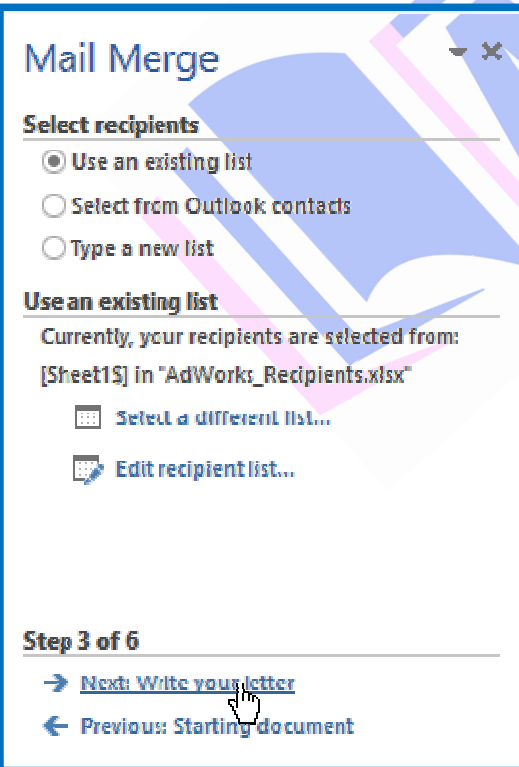
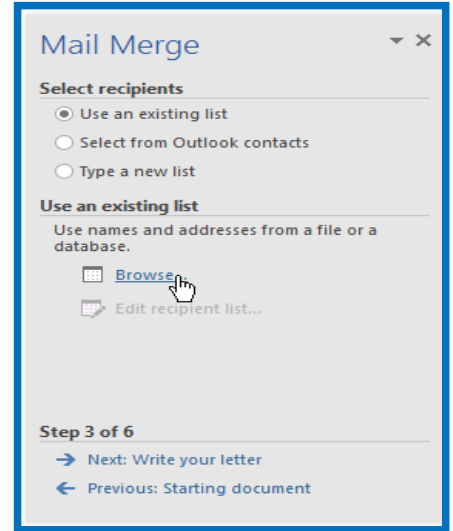
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- **Use an existing list** - Choose an Excel file, Access database, or another data source that already has your list of recipients.
- **Select from Outlook contacts** - Use your Outlook address book if your contacts are stored there.
- **Type a new list** - Manually create a new list right inside Word by entering each recipient's info.
- Select Use an existing list, then click Browse to select the file.
- Locate your file, then click Open.
- If the address list is in an Excel workbook, select the worksheet that contains the list, then click OK.
- 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.

Click Next: Write your letter to move to Step 4.



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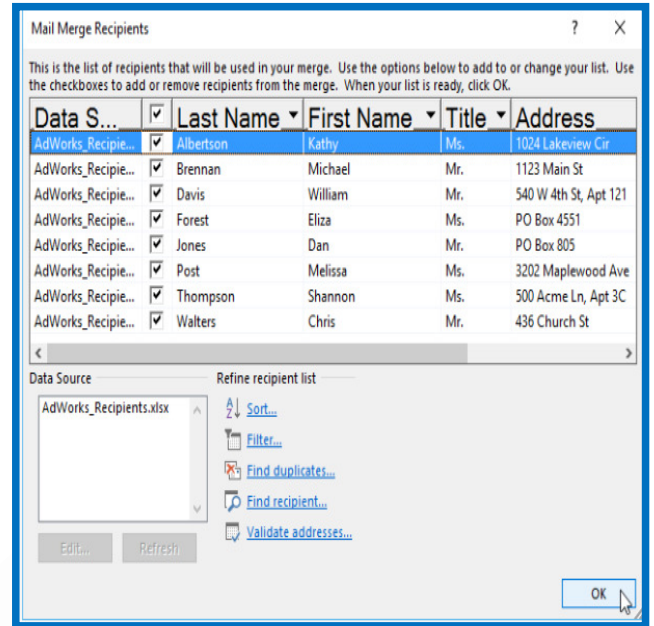
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If you don't have an existing address list, you can click the Type a new list button and click Create, then type your address list manually.

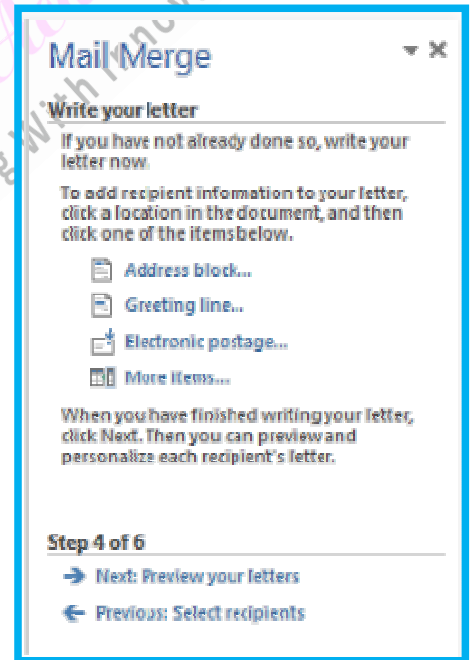


Step 4:

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.

You can add merge fields from the wizard, or from the following list:

- **Write & Insert Fields group on the ribbon:**
- **Address Block:** This is a combination of fields to insert the names and addresses of recipients.
- **Greeting Line:** This is a combination of fields to insert the recipient's name in the greeting line.
- **Insert Merge Field:** When you click this button, a list of additional merge fields you can insert appears.



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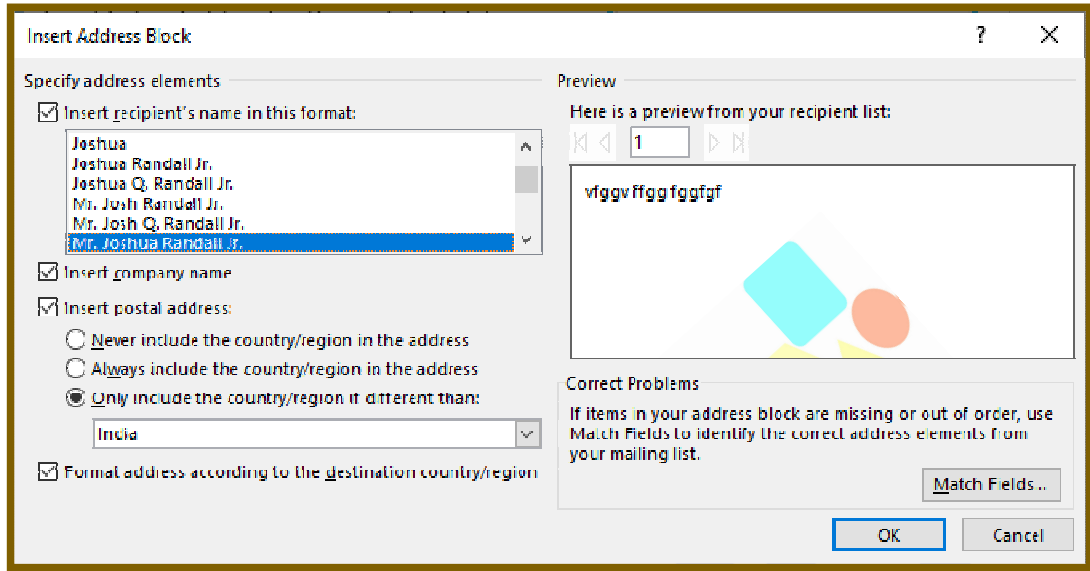
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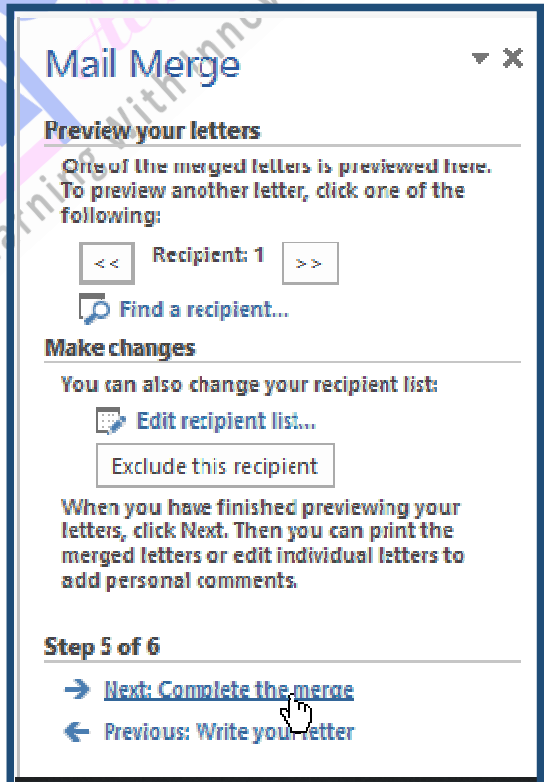
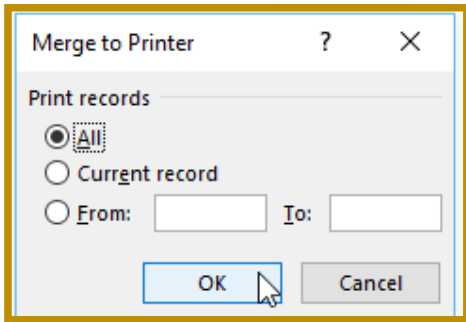
Step 5:

- 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 version of the document.

- If everything looks correct, click Next: Complete the merge to move to Step 6.

Step 6:

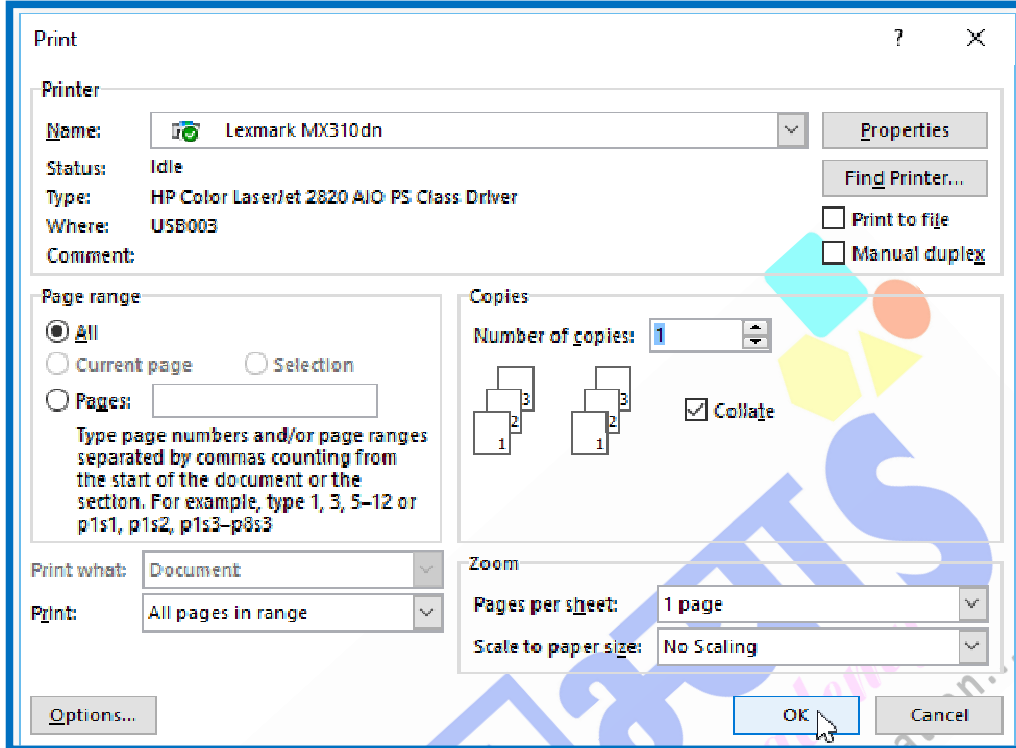
- Click Print to print the letters.
- A dialog box will appear. Decide if you want to print All of the letters, the current document (record), or only a select group, then click OK. In our example, we'll print all of the letters.



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The Print dialog box will appear. Adjust the print settings if needed, then click OK. The letters will be printed.



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