

# MICROSOFT WORD

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Mail Merge

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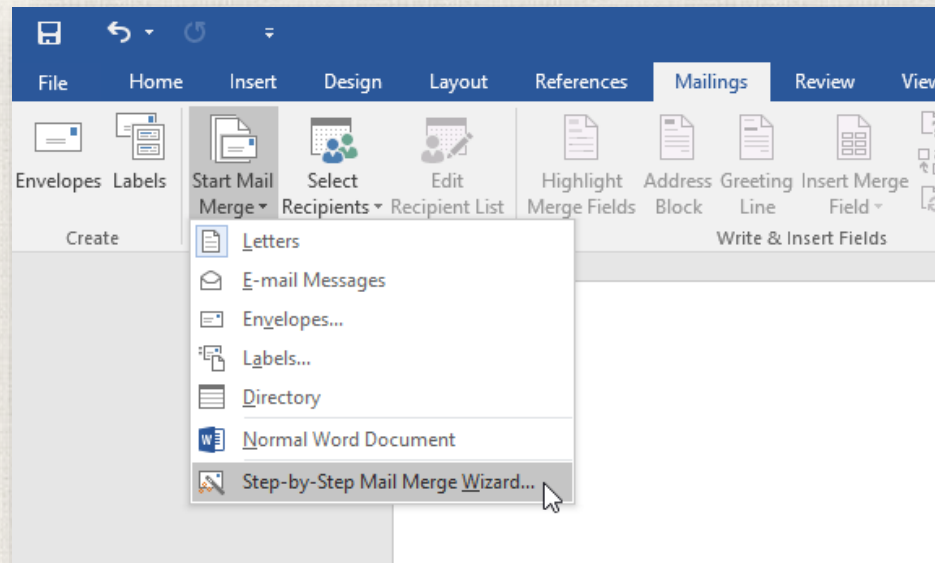
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# Introduction

- Mail Merge is a useful tool that allows you to produce multiple letters, labels, envelopes, name tags, and more using information stored in a list, database, or spreadsheet. When 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**.

# Using Mail Merge

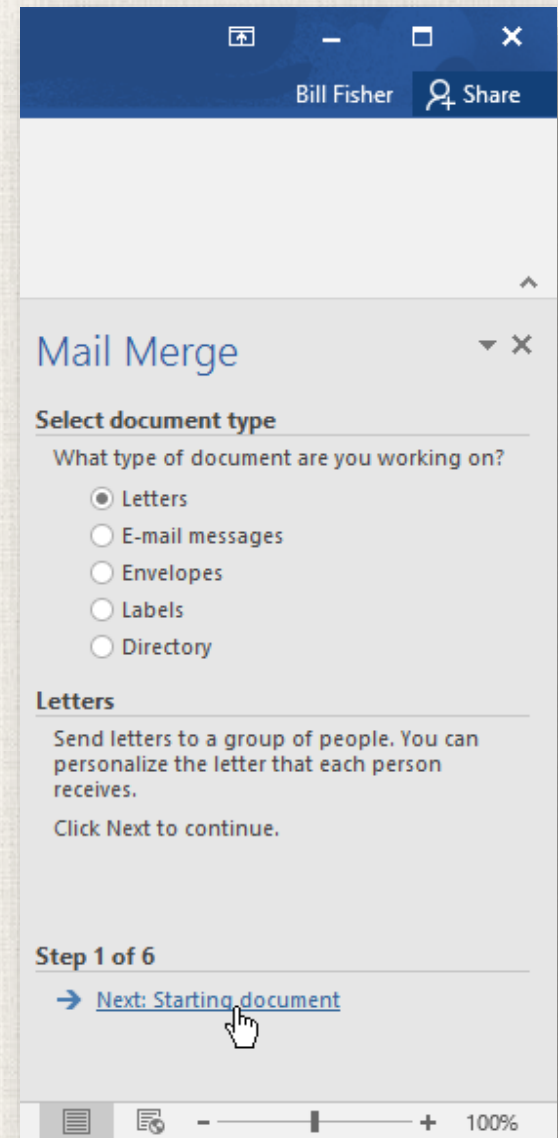
1. Open an **existing** Word document, or create a **new** one.
2. From the **Mailings** tab, click the **Start Mail Merge** command and select **Step-by-Step Mail Merge Wizard** from the drop-down menu.



- ➔ The Mail Merge pane will appear and guide you through the **six main steps** to complete a merge. The following example demonstrates how to create a form letter and merge the letter with a **recipient list**.

# Step 1

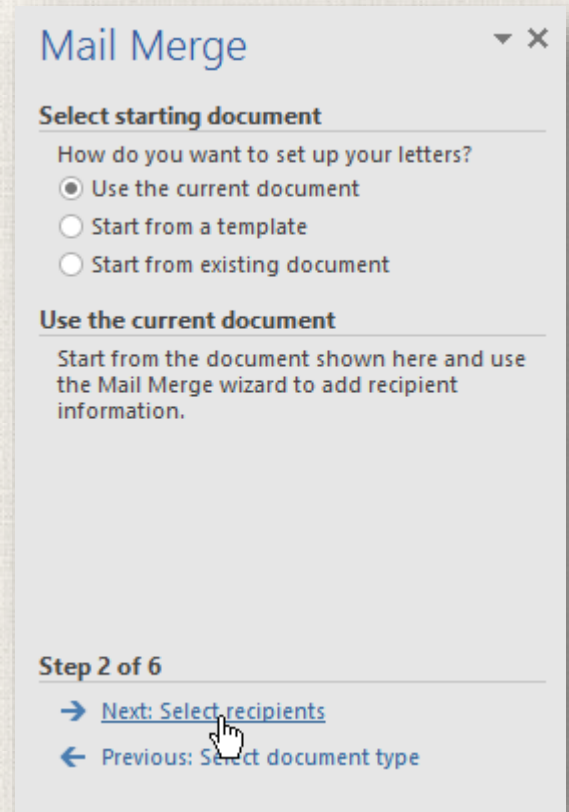
- From the Mail Merge task pane on the right side of the Word window, choose the **type** of document you want to create.
- In our example, we'll select **Letters**. Then click **Next: Starting document** to move to Step 2.



6

## Step 2

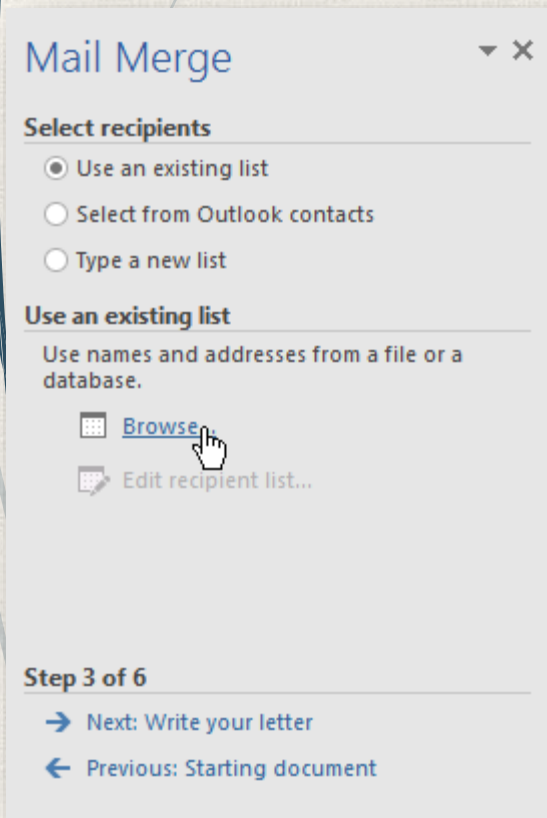
- ➔ Select **Use the current document**, then click **Next: Select recipients** to move to Step 3.



# Step 3

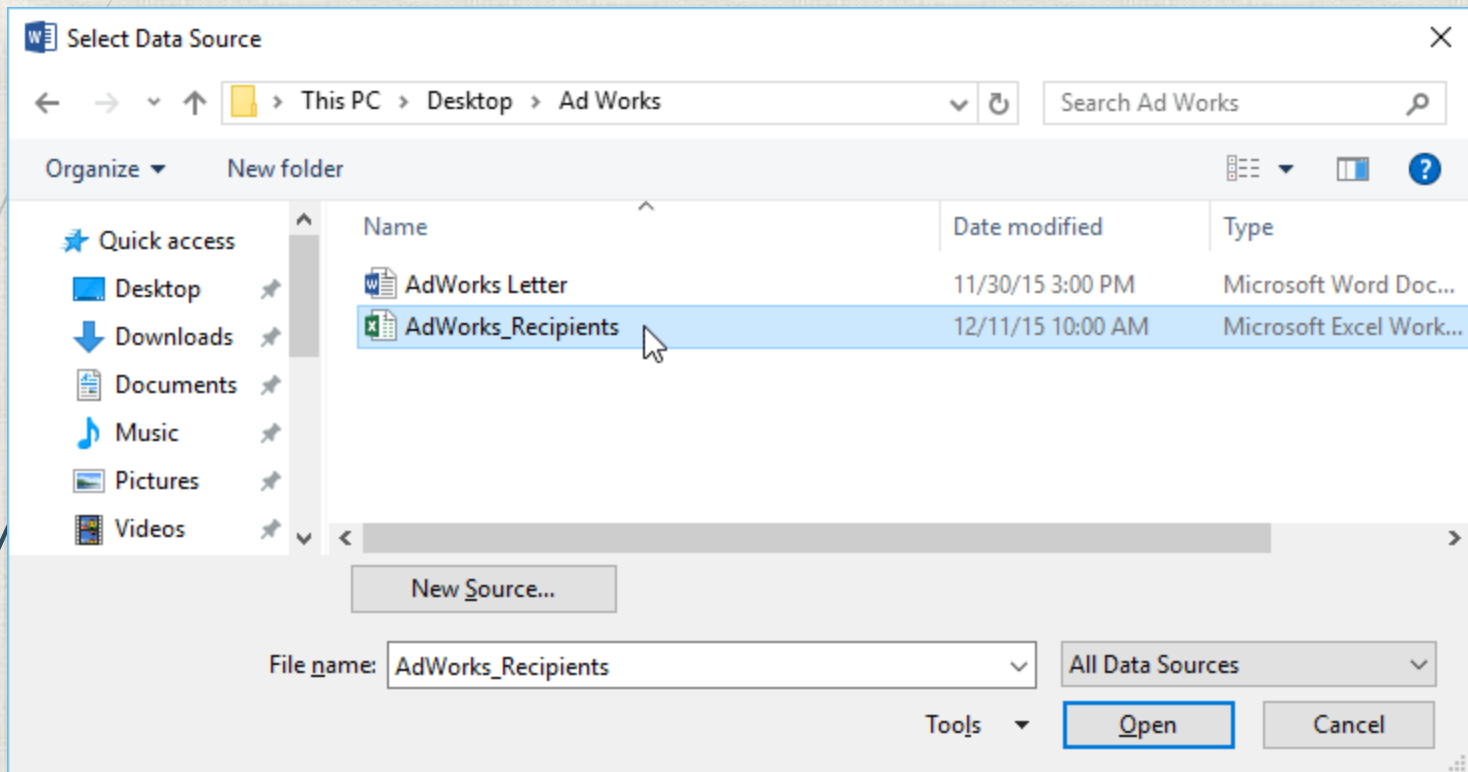
Now you'll need an address list so Word can automatically place each address into the document. The list can be in an existing file, such as an **Excel workbook**, or you can **type a new address list** from within the Mail Merge Wizard.

1. Select **Use an existing list**, then click **Browse** to select the file.



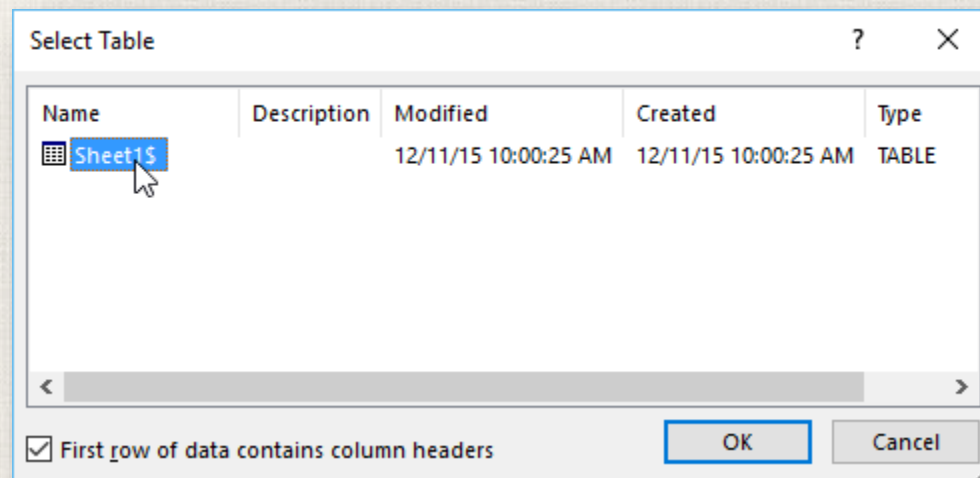
# Step 3

2. Locate your file, then click **Open**.



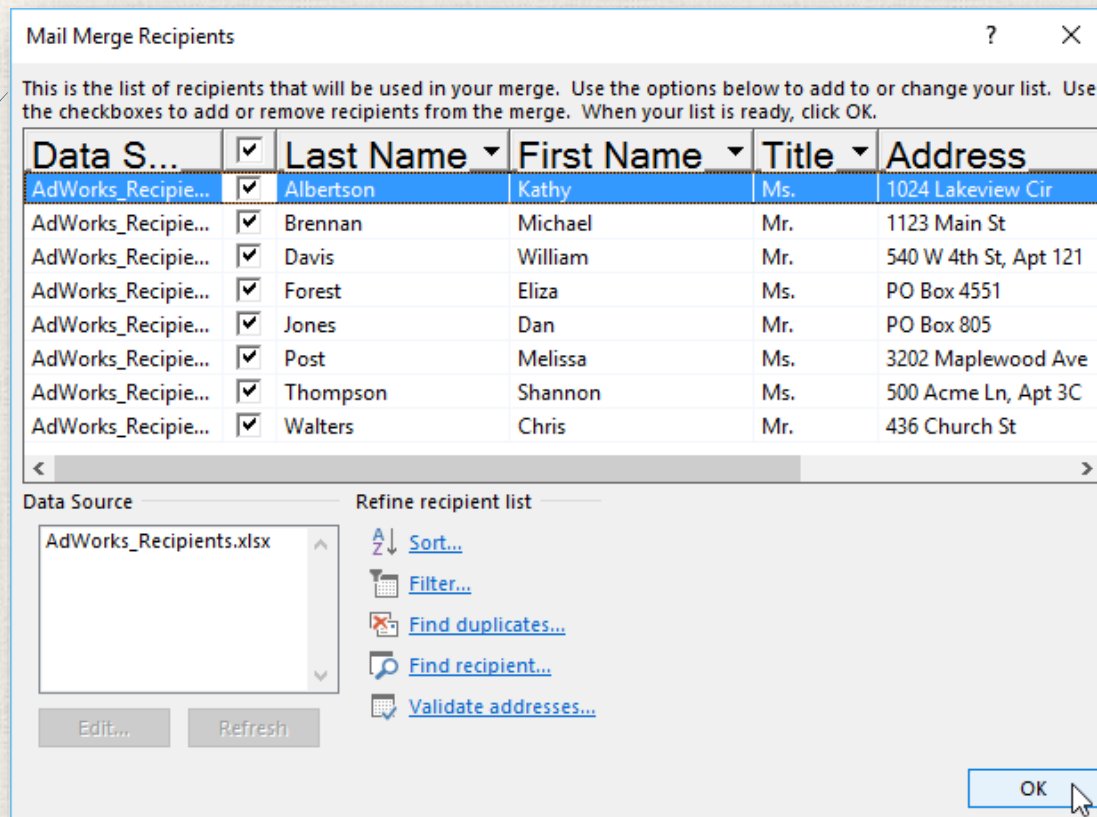
# Step 3

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



# Step 3

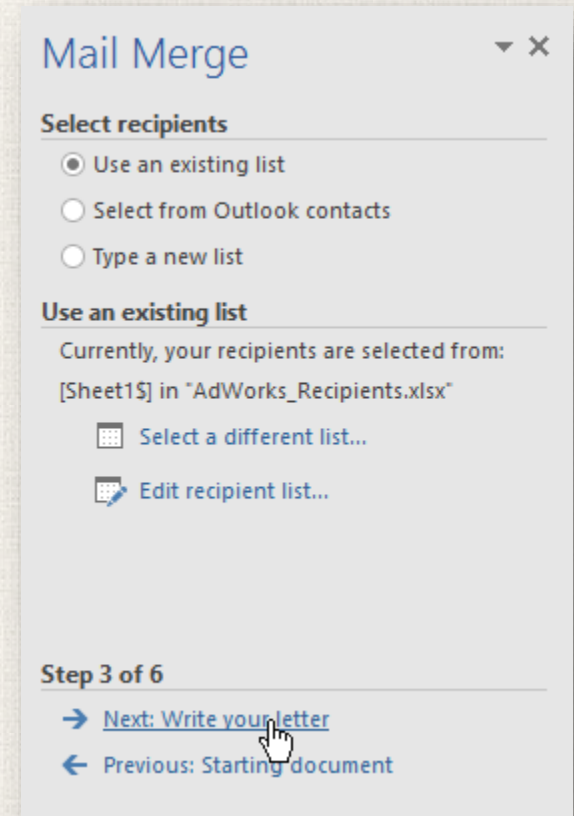
4. In the **Mail Merge Recipients** dialog box, you can **check** or **uncheck** each box to control which recipients are included in the merge. By default, all recipients should be selected. When you're done, click **OK**.



# Step 3

5. 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**, 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.

# Inserting recipient data

1. Place the insertion point in the document where you want the information to appear.

| I

As you may know, this year marks our **16th year of doing business**. AdWorks has grown from a tiny startup into a robust company with Southeast. Our growth would not have been possible without loyal would like to extend to you a **20% discount on your next order**. It's continued business. We'll keep working hard to provide the best po innovative products, just as we've always done. Thanks again for ch

Sincerely,

## Mail Merge

### Write your letter

If you have not already done so, write your letter now.

To add recipient information to your letter, click a location in the document, and then click one of the items below.

- Address block...
- Greeting line...
- Electronic postage...
- More items...

When you have finished writing your letter, click Next. Then you can preview and personalize each recipient's letter.

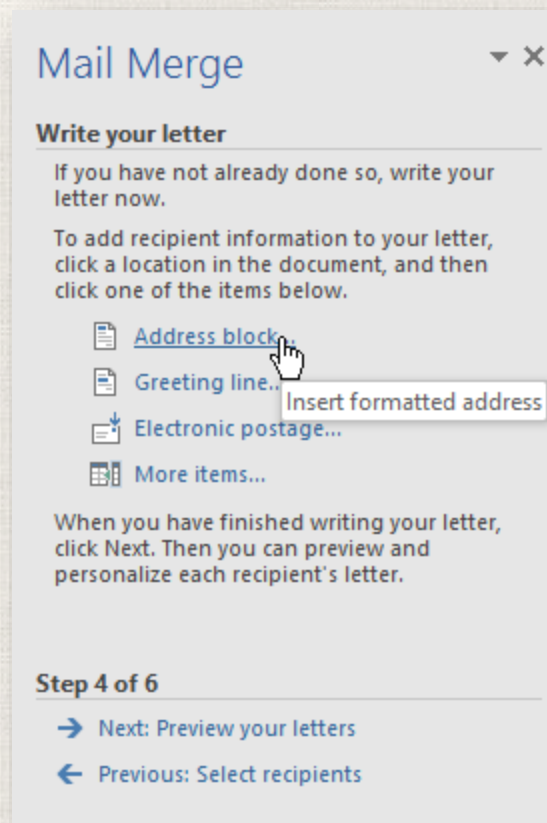
### Step 4 of 6

- Next: Preview your letters
- Previous: Select recipients

Page 1 of 1 106 words

# Inserting recipient data

2. Choose one of the **placeholder** options. In our example, we'll select **Address block**.



# Inserting recipient data

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

**Insert Address Block** ? X

**Specify address elements**

- Insert recipient's name in this format:
  - Joshua
  - Joshua Randall Jr.
  - Joshua Q. Randall Jr.
  - Mr. Josh Randall Jr.
  - Mr. Josh Q. Randall Jr.
  - Mr. Joshua Randall Jr.**
- Insert company name
- Insert postal address:
  - Never include the country/region in the address
  - Always include the country/region in the address
  - Only include the country/region if different than:
    - United States
- Format address according to the destination country/region

**Preview**

Here is a preview from your recipient list:

1

Ms. Kathy Albertson  
1024 Lakeview Cir  
Peachtree City, GA

**Correct Problems**

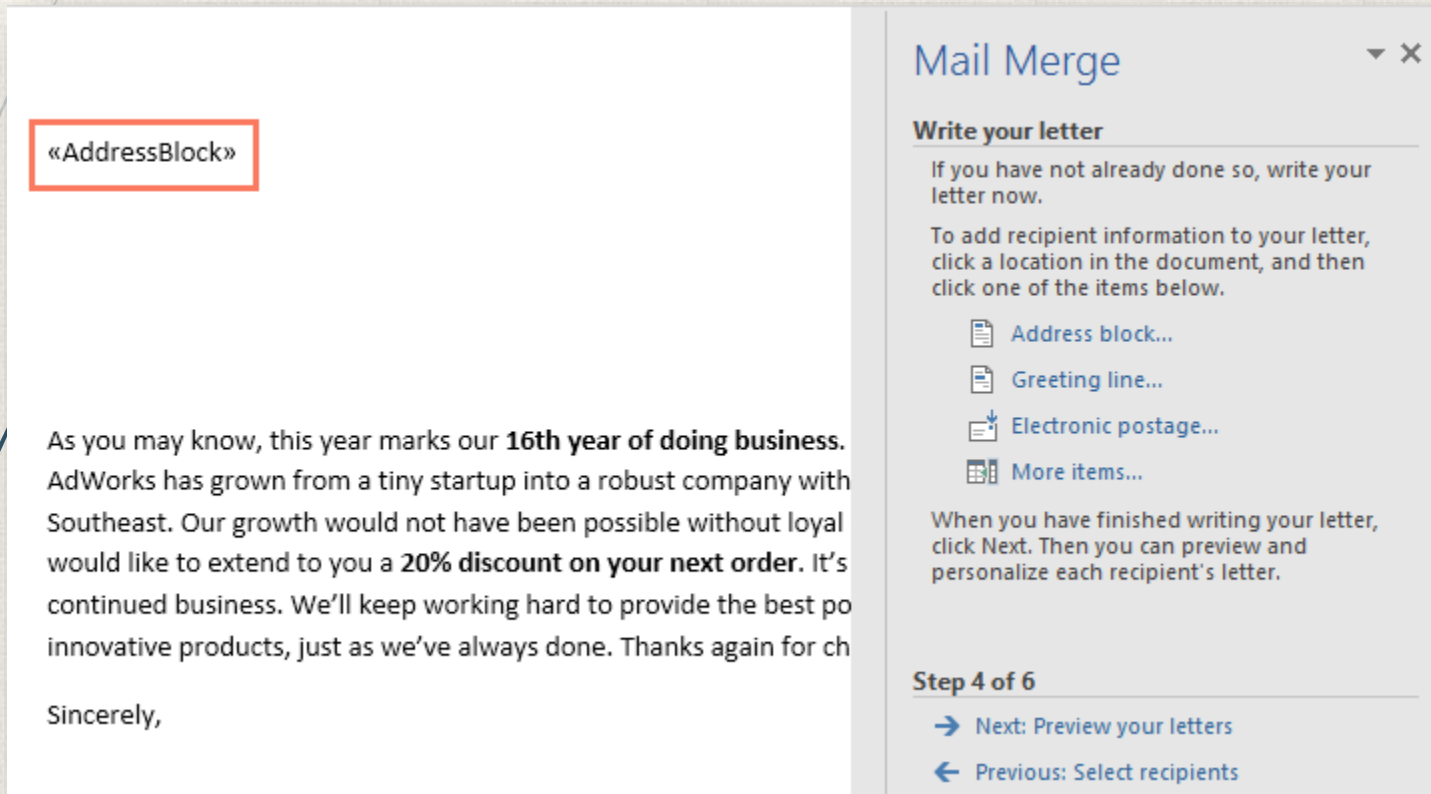
If items in your address block are missing or out of order, use Match Fields to identify the correct address elements from your mailing list.

Match Fields...

OK Cancel

# Inserting recipient data

4. A placeholder will appear in your document (for example, «AddressBlock»).



The image shows a mail merge interface. On the left, a document preview displays a placeholder «AddressBlock» in a red box. Below it, the text of a letter is visible, starting with "As you may know, this year marks our 16th year of doing business." and ending with "Sincerely,". On the right, a "Mail Merge" panel is open, showing instructions to "Write your letter" and a list of options: "Address block...", "Greeting line...", "Electronic postage...", and "More items...". The panel also indicates "Step 4 of 6" and provides navigation buttons for "Next: Preview your letters" and "Previous: Select recipients".

«AddressBlock»

As you may know, this year marks our **16th year of doing business**. AdWorks has grown from a tiny startup into a robust company with Southeast. Our growth would not have been possible without loyal would like to extend to you a **20% discount on your next order**. It's continued business. We'll keep working hard to provide the best po innovative products, just as we've always done. Thanks again for ch

Sincerely,

## Mail Merge

### Write your letter

If you have not already done so, write your letter now.

To add recipient information to your letter, click a location in the document, and then click one of the items below.

- Address block...
- Greeting line...
- Electronic postage...
- More items...

When you have finished writing your letter, click Next. Then you can preview and personalize each recipient's letter.

### Step 4 of 6

→ Next: Preview your letters

← Previous: Select recipients

# Inserting recipient data

5. Add any other placeholders you want. In our example, we'll add a **Greeting line** placeholder just above the body of the letter.

The screenshot shows a mail merge interface. On the left is a document with two placeholders: «AddressBlock» and «GreetingLine». Below the «GreetingLine» placeholder is a paragraph of text: "As you may know, this year marks our **16th year of doing business**. AdWorks has grown from a tiny startup into a robust company with Southeast. Our growth would not have been possible without loyal would like to extend to you a **20% discount on your next order**. It's continued business. We'll keep working hard to provide the best po innovative products, just as we've always done. Thanks again for ch". Below the text is the word "Sincerely,". On the right is a "Mail Merge" panel. It has a title bar with a dropdown arrow and a close button. Below the title is the section "Write your letter" with instructions: "If you have not already done so, write your letter now." and "To add recipient information to your letter, click a location in the document, and then click one of the items below." There is a list of options: "Address block...", "Greeting line...", "Electronic postage...", and "More items...". A mouse cursor is hovering over "Greeting line...", and a tooltip box says "Insert formatted salutation". Below the list is another instruction: "When you have finished writing your letter, click Next. Then you can preview and personalize each recipient's letter." At the bottom of the panel is the section "Step 4 of 6" with two buttons: "Next: Preview your letters" and "Previous: Select recipients".

«AddressBlock»

«GreetingLine»

As you may know, this year marks our **16th year of doing business**. AdWorks has grown from a tiny startup into a robust company with Southeast. Our growth would not have been possible without loyal would like to extend to you a **20% discount on your next order**. It's continued business. We'll keep working hard to provide the best po innovative products, just as we've always done. Thanks again for ch

Sincerely,

## Mail Merge

**Write your letter**

If you have not already done so, write your letter now.

To add recipient information to your letter, click a location in the document, and then click one of the items below.

- Address block...
- Greeting line...**
- Electronic postage...
- More items...

Insert formatted salutation

When you have finished writing your letter, click Next. Then you can preview and personalize each recipient's letter.

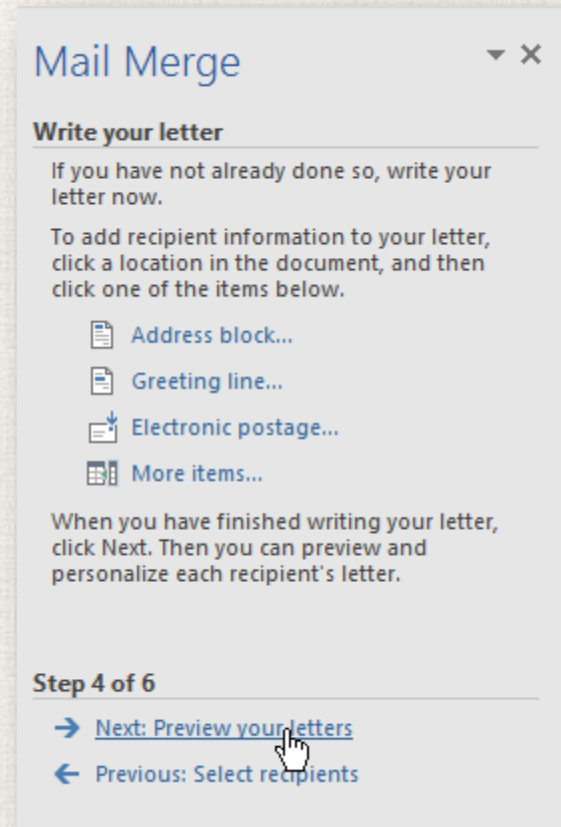
**Step 4 of 6**

- Next: Preview your letters
- Previous: Select recipients

# Inserting recipient data

6. When you're done, 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**. But you can also add more placeholders (such as recipients' names or addresses) in 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 version of the document.

The screenshot displays a 'Mail Merge' window with a preview of a letter on the left and navigation controls on the right. The letter preview shows the recipient's address and the start of the salutation. The right-hand panel includes instructions for navigating between letters and options to edit the recipient list.

**Mail Merge** [Close]

**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

Ms. Kathy Albertson  
1024 Lakeview Cir  
Peachtree City, GA

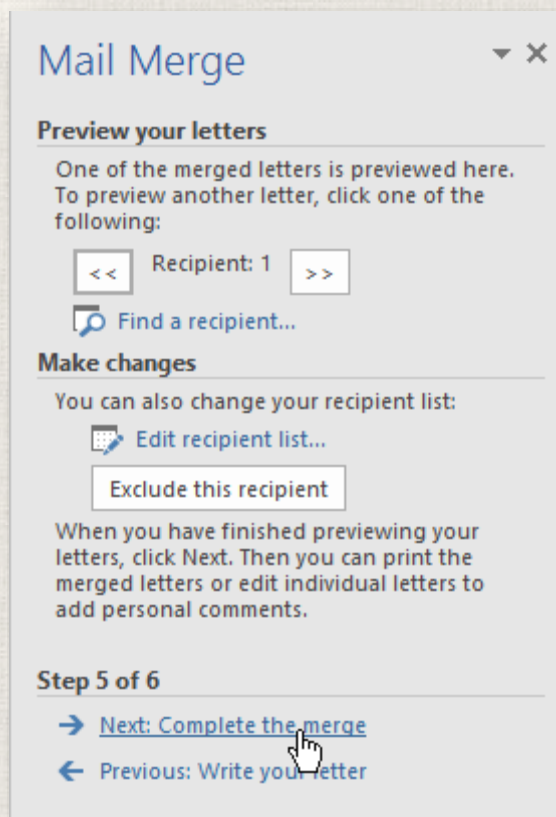
Dear Ms. Albertson,

As you may know, this year marks our **16th year of doing business**. AdWorks has grown from a tiny startup into a robust company with Southeast. Our growth would not have been possible without loyal would like to extend to you a **20% discount on your next order**. It's continued business. We'll keep working hard to provide the best po innovative products, just as we've always done. Thanks again for ch

Sincerely,

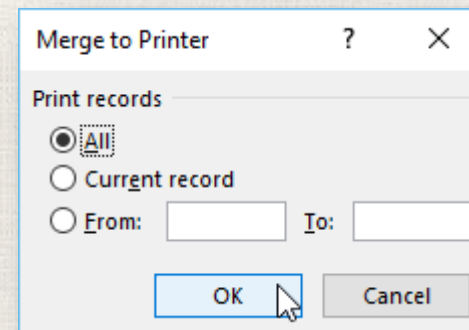
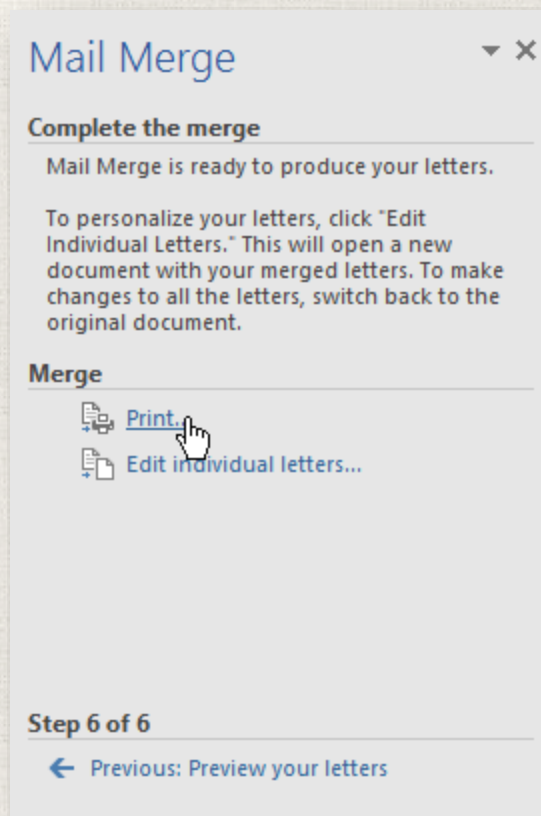
# Step 5

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



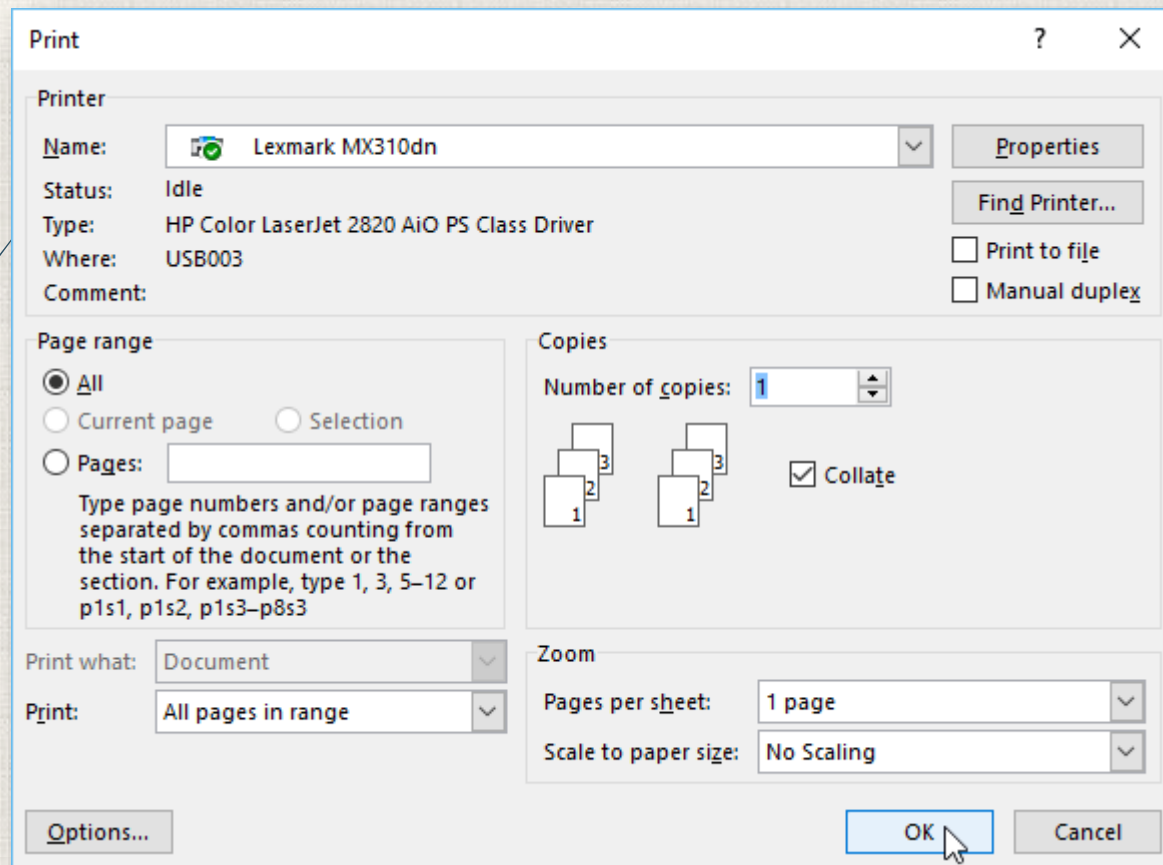
# Step 6

1. Click **Print** to print the letters.
2. 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.



# Step 6

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



# Practice

- Open our **practice document** and **practice recipient list**.
- Use the **Mail Merge Wizard** to merge the letter with the recipient list.
- Insert an **address block** at the top of the document. Choose the second format: **Joshua Randall Jr.**
- Above the body of the letter, insert a **Greeting Line**. Format the greeting line so it says **Mr. Joshua Randall,**
- Check your letters to make sure they are formatted correctly. Your third letter should look something like the following:

# Solution

William Davis  
540 W 4th St, Apt 121  
New York, NY

Mr. Davis,

As you may know, this year marks our **16th year of doing business**. Since our launch over a decade ago, AdWorks has grown from a tiny startup into a robust company with over 200 employees throughout the Southeast. Our growth would not have been possible without loyal customers like you. Therefore, we would like to extend to you a **20% discount on your next order**. It's our way of saying "thanks" for your continued business. We'll keep working hard to provide the best possible customer service along with innovative products, just as we've always done. Thanks again for choosing AdWorks!

Sincerely,

Liz Doe  
President and CEO

The image features a light beige background with a fine, woven texture. On the left side, there are several thin, dark blue lines that curve upwards and outwards, resembling stylized grass or reeds. The text 'THE END' is centered in a bold, dark blue, sans-serif font. The letters have a slight 3D effect with a shadow on the right side. Below the text is a faint, semi-transparent reflection of the same text.

**THE END**

THE END