

Mail Merge

In Microsoft Word, you can create a single envelope or label, or use a **Mail Merge** to create a batch of labels, envelopes, letters, or even a catalog from a table, spreadsheet or database.

Data Source

When using Mail Merge, you will need to create a data source that contains all of the information you want to enter into your mail merge document. While you can create a data source as you are creating your mail merge document, it is often created beforehand. This data source can be a table created in Microsoft Word, an Excel spreadsheet, a table or query from an Access database, or a contact list from Outlook email. This data source should contain the information you will want to enter into your Mail Merge document, such as names and addresses for address labels or envelopes, or email addresses for emails. After you enter the information you want into the data source, save the file so it can be used later.

Prefix	FirstName	LastName	Street	City	State	Zip
Ms.	Jane	Austen	123 Mansfield Park St.	Nashua	NH	03060
Mr.	Tom	Candiotti	1085 West 3rd Street	Cleveland	OH	44114
Mrs.	Subhadra Kumari	Chauhan	987 Tridhara St.	Nashua	NH	03060
Mr.	Eddie	Cicotte	324 West 35th Street	Chicago	IL	60616

Labels

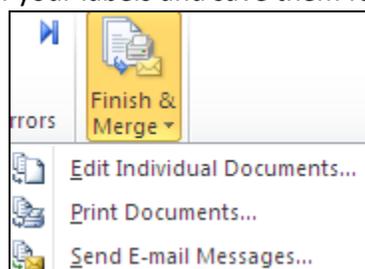
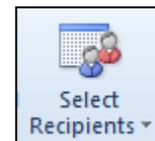
To use a mail merge to create labels, follow the steps below:

1. Open a new document.
2. Select the **Start Mail Merge** icon on the **Mailings** tab and select Labels
3. Select the type of labels you want to use and click OK.

If you do not see the gridlines on the page and would like to, click on the **View Gridlines** icon in the **Table Tools**→**Layout** tab.

4. Click the **Select Recipients** icon, and choose **Use Existing List**.
5. Use the dialog box to find your file and select it.
6. If you think you might need to make changes to your list, click the **Edit Recipient List** icon.

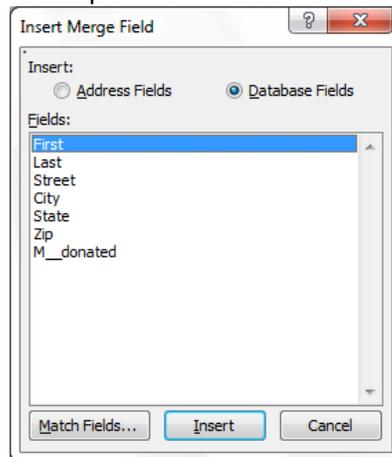
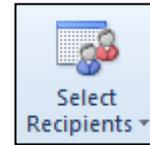
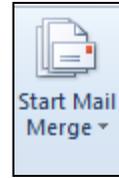
7. Insert your mail merge fields. For labels, choose **Address Block** for pre-formatted address blocks. You will not have to insert the individual fields, but you will have to be sure that the headings in your data source coincide with the preformatted options. To do so, click **Match Fields**. Check each field to be sure they match correctly, i.e., Zip and Postal Code. If they don't match, use the dropdown arrow to select the appropriate field. Click **Update All Labels** to place the address block on all of the labels.
8. Click **Preview Results** to see how your labels will appear.
9. Click **Finish & Merge** to complete the merge. You have the option to **Edit Individual Documents** or **Print Documents**. If you choose Edit, your labels will open in a new document and you will have the opportunity to proof your labels and save them for the future.



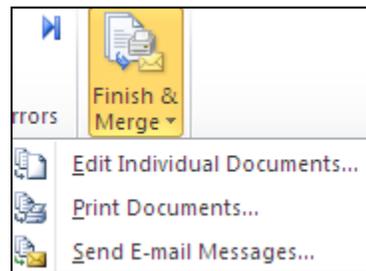
Letters

To use a mail merge to create letters, follow the steps below:

1. Open a new document.
2. Select the **Start Mail Merge** icon on the **Mailings** tab and select **Letter**.
3. Click the **Select Recipients** icon, and choose **Use Existing List**.
4. Use the dialog box to find your file and select it.
5. If you think you might need to make changes to your list, click the **Edit Recipient List** icon.
6. Type out the letter. To include an address at the top of the letter, use the **Address Block** as described above. Use the **Insert Merge Field** button to select whichever fields you wish to use in a particular spot, such as the first name in the greeting line. You can also use **Greeting Line** to insert a greeting line into your letter, which will include the salutation and punctuation. You can customize it to fit your needs.



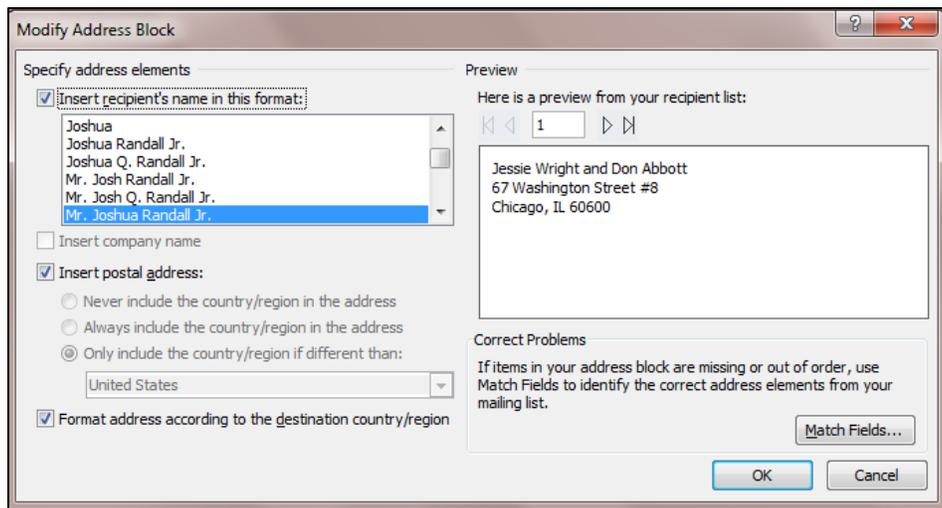
7. Click **Preview Results** to see how your letter will appear.
8. Click **Finish & Merge** to complete the merge. You have the option to **Edit Individual Documents** or **Print Documents**. If you choose Edit, your letters will open in a new document and you will have the opportunity to proof and save them for the future.



Envelopes

1. Open a new document.
2. Select the **Start Mail Merge** icon on the **Mailings** tab and select **Envelopes**.
3. Under "Envelope Options", select your envelope size. You can also adjust the font for the delivery address and sender's address, if you wish.
4. Click OK. Word will create an envelope-sized printing area.
5. Click the **Select Recipients** icon, and choose **Use Existing List**.
6. Edit your recipients if needed.
7. Click into the center of the delivery address area. From the Mailings ribbon, select "Address Block". Make any changes that you want for the format of the delivery address.





8. If your envelopes are blank and you want to include a return address, click into the return address area on your envelope and type in the return address. If your envelopes have a preprinted return address or company logo, skip this step.
9. Preview your results if you wish. Otherwise, load your envelopes to the printer and click Finish and Print.

Using Different Data Sources

Importing Data from Word or Excel

1. Click the **Select Recipients** icon, and choose **Use Existing List**.
2. Locate the Word or Excel file you want to use and double-click on it.

Importing Data from Access

1. Click the **Select Recipients** icon, and choose **Use Existing List**.
2. Locate the database you want to use and double-click on it.
3. Select the table or query that has the information you want to use and click Okay.

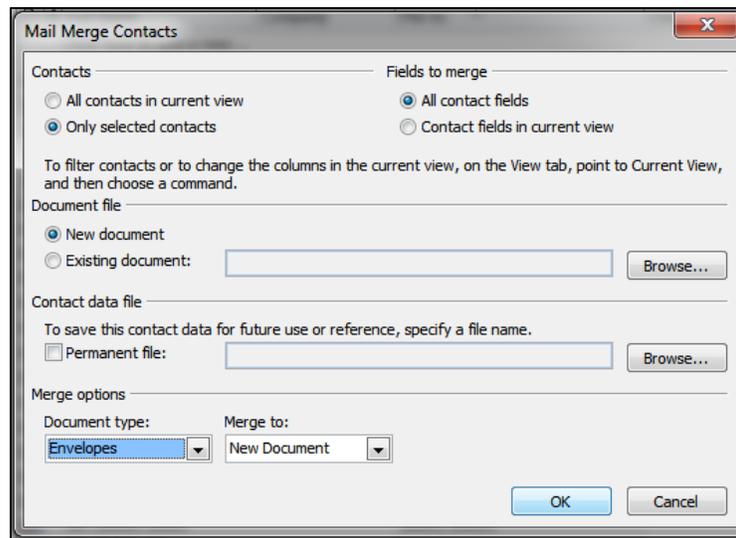
Using Data from Outlook

When using Outlook contacts as your data source, it can be useful to create a separate folder for your mail merge contacts. To do so:

1. Open Outlook.
2. Click the **Folder** tab.
3. Click **New Folder**.
4. Type a name for the new folder. Select your Contacts folder as the location to store the new folder. Click OK. This will create a new folder within your existing Contacts group. Add your mail merge contacts to the folder.

Once you have set up your data, you can start your merge.

1. From within Outlook, go to the contacts folder with your mail merge contacts. Select the contacts you wish to mail. Control-click to select additional contacts.
2. In the Outlook Home ribbon, click the Mail Merge button.
3. In the dialog box that appears, select whether you want to mail to all contacts or just the selected contacts.



4. Choose whether you are merging to a brand new document or an existing document.
5. Choose what type of document you wish to merge to—for example, envelopes. Word will open a new document of that type.
6. For some types of merge, Word will open the Mail Merge Helper dialogue box to allow you to finish setup (for example, choose envelope size and make changes to font used for the mailing address).
7. Proceed with your merge in Word.

Sending an Email Message Using Mail Merge

To send a personalized email to each person in your mail merge contacts:

1. Open Word.
2. Go to Mailings→Start Mail Merge→ Email Messages
3. Choose your data source using the Select Recipients button.
4. Type your email message, using “Insert Merge Field” to include individual fields such as **Greeting Line**, phone number, or other custom content from your data source. For example:

«GreetingLine»

It was great to talk with you on our recent visit to «City». Thank you for your valuable work at «Company». We will be sending your campaign package to the following address:

«AddressBlock»

If you need to update your address, please respond to this email.

Sincerely,
Carol Candidate

5. Proceed as usual to filter and sort your contacts list and Match Fields. You can then preview and send your messages. Note that each contact will receive a separate, personalized message, instead of there being one identical message sent to a list of addresses in the BCC line.