

Mail merges are useful when you want to create form letters or other documents sent to or drawing information from multiple customers. The content may be the same, but it makes each document unique and personalized.

This guide will cover the basics of the Mail Merge process. For more detailed information, see <http://office.microsoft.com/en-us/word-help/use-mail-merge-to-create-and-print-letters-and-other-documents-HA101857701.aspx>

THE MAIL MERGE PROCESS

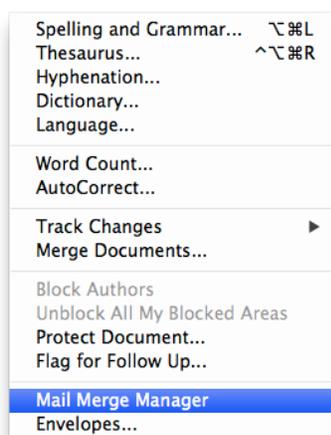
A mail merge consists of five main steps:

1. **Setting up the main document.** This will be the “template” for the merged documents, such as a form letter.
2. **Connect the main document to a data source.** The data source is the file that contains all of your information you wish to merge, like names and addresses. This is usually a database or spreadsheet.
3. **Refine the list of recipients or items.** If you want to create copies of only certain items, or send to certain recipients, you can choose which items to include or exclude.
4. **Add placeholders (mail merge fields) to the document.** Once you perform the mail merge, the mail merge fields are populated with information from your data source.
5. **Preview and complete the merge.**

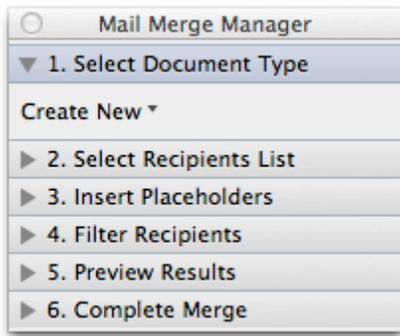
A word of note: If you plan to use custom contact fields with the Contacts list in Microsoft Outlook, you must begin the mail merge process in Outlook.

SETTING UP THE MAIN DOCUMENT

1. Start Word.
2. On the **Tools** drop-down menu, click **Mail Merge Manager**.



3. In the Mail Merge Manager, choose **Form Letters**.



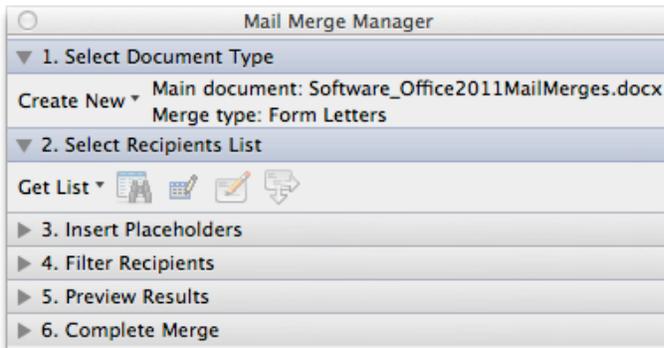
- a. You can also choose **Labels**, **Envelopes** or **Catalog**.

CONNECT THE MAIN DOCUMENT TO A DATA SOURCE

In order to create a mail merge, you must have a data source for the data you want to merge. If you don't already have a data file, you can create one during the mail merge process. If you are using an existing list, make sure it contains the data you wish to use. You can make changes during the merge, but you can't open the data source separately. Make sure your data source is prepared before starting the merge.

CHOOSE A DATA FILE

1. In the **Select Recipients List** section of the **Mail Merge Manager**, click **Get List**.



2. Choose one of the following:
 - a. **Office Address Book** if you want to use your Microsoft Outlook Contacts list.
 - b. **Open Data Source** if you want to use an existing Excel worksheet or Access database, etc. **Select Data Source** to locate and select the file.
 - c. **New Data Source** to create a new data file in Word. The list will be saved as a database file.

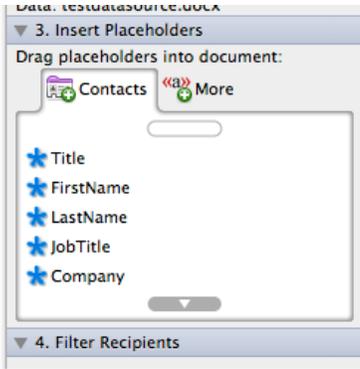
ADD MAIL MERGE FIELDS

Now, you'll type the text of the document, and add mail merge fields that you'll insert from the data source during the merge. Mail merge fields correspond with the column headings of your data source. For example, a mail merge field <<First Name>> would correspond with a First Name column in your data file.

You can add any column heading from your data file into your main document as a mail merge field. These can be used just like normal text, including formatting and punctuation.

Word also has composite fields that can group a number of fields together, such as Address Blocks. The Address Block field combines several fields into one block that can be inserted into your document without having to insert and format each field individually.

To add fields to your merge, you can drag placeholders into your document from the **Insert Placeholders** section of the **Mail Merge Manager**.

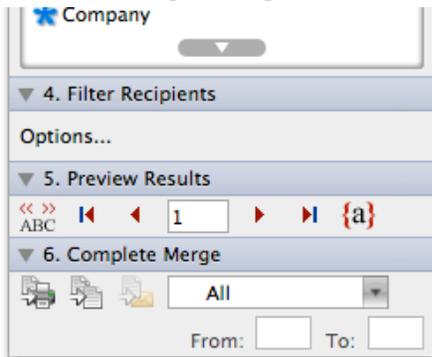


You can also insert fields by clicking **Insert** and choosing **Fields**.

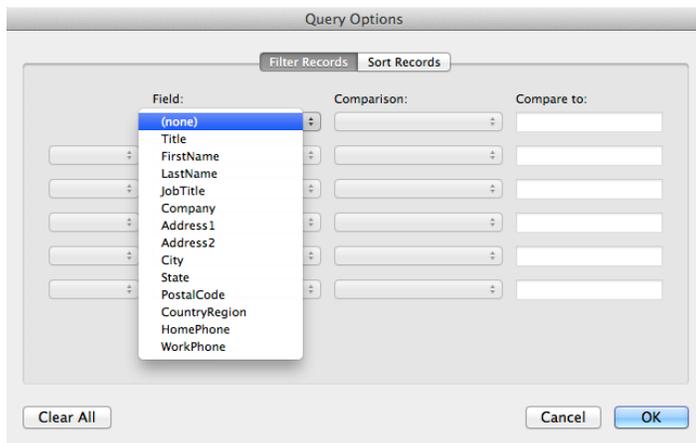
REFINE THE LIST OF RECIPIENTS OR ITEMS

If you plan to use the entire list, you can skip this section. If you want to select or narrow the list of recipients, do the following:

1. In the **Mail Merge Manager**, in the **Filter Recipients** section, click **Options...**

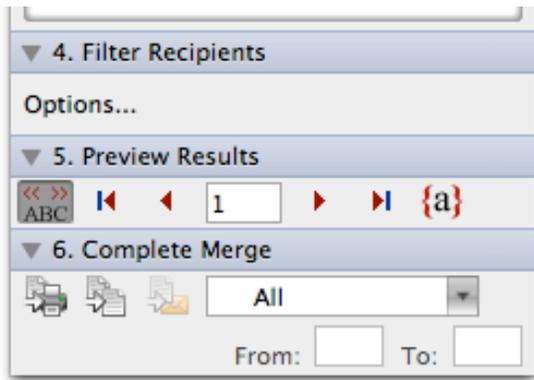


- a. Use the Query Options window to filter or sort your records.



PREVIEW AND COMPLETE THE MAIL MERGE

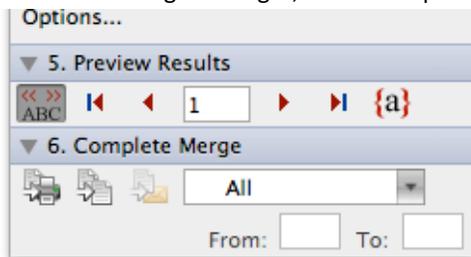
You can preview the merge to make sure it's working properly before you perform it. In the **Preview Results** section of the **Mail Merge Manager**, click **View Merged Data**.



Use **Next Record** and **Previous Record** to page through the merged documents. Once completed, you can print the merged document completely or individually, edit individual copies, and save the document.

PRINT THE MERGED DOCUMENTS

1. In the Mail Merge Manager, in the Complete Merge section choose one of the following:



- a. Choose Merge to Printer to just print the mail merge.
- b. Choose Merge to New Document to create a new document from the Mail Merge.
- c. Choose Generate E-mail Messages to create an email mail merge.

CHANGE INDIVIDUAL COPIES OF THE DOCUMENT

1. On the **Mailings** tab, in the **Finish** group, click **Finish & Merge**, and then click **Edit Individual Documents**.
2. Choose whether you want to edit the whole set, the currently visible copy, or a subset by record number.

SAVE THE MAIN DOCUMENT

It's a good idea to save the main document if you plan to use it again later. When you save it, the next time you open the main document, you are prompted to choose whether you want the information from the data file to be merged again into the main document.