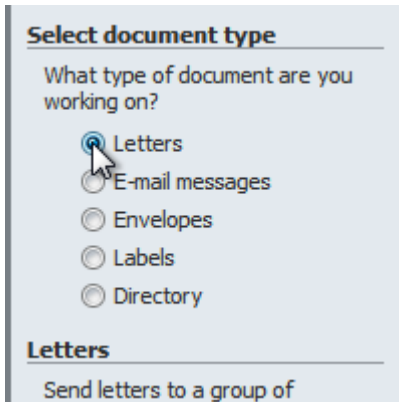


# Using Mail Merge

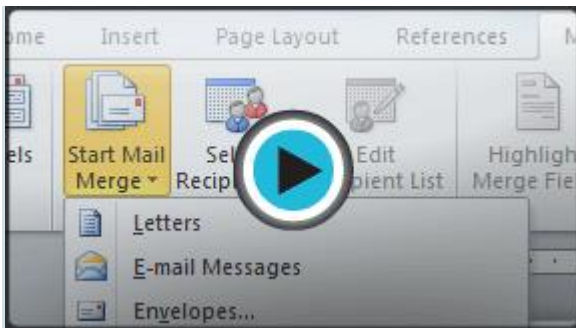
## Introduction



Mail Merge is a useful tool that will allow you to easily produce multiple letters, labels, envelopes, nametags, and more using information stored in a list, database, or spreadsheet. In this lesson, you will learn how to use the **Mail Merge Wizard** to create a **data source** and a form **letter**, and you'll explore other wizard features.

## Mail Merge

### Video: Using Mail Merge in Word 2010

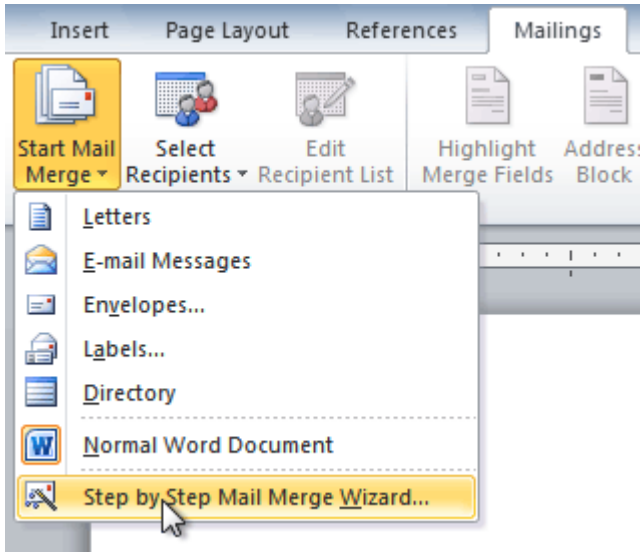


When you are performing a **Mail Merge**, you will need a **Word document** (you can start with an existing one or create a new one) and a **recipient list**, which is typically an **Excel workbook**. If you'd like to work along with the lesson, you can download the examples below.

- [Letter](#) (Word document)
- [Recipient list](#) (Excel workbook)

## To use Mail Merge:

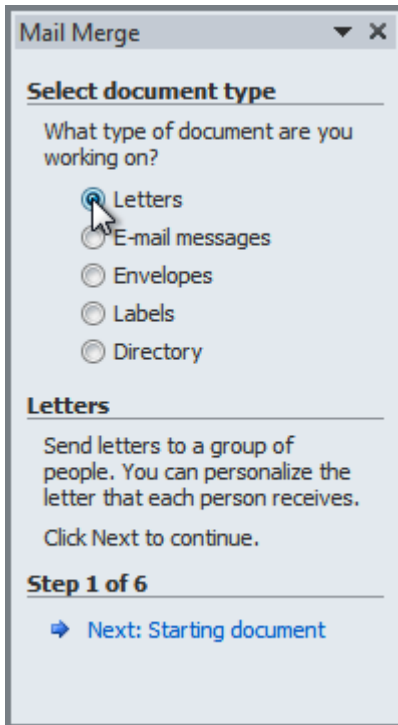
1. Open an **existing** Word document, or create a **new** one.
2. Click the **Mailings** tab.
3. Click the **Start Mail Merge** command.
4. Select **Step by Step Mail Merge Wizard**.



The Mail Merge task pane appears and will guide you through the **six main steps** to complete a merge. The following is an example of how to create a form letter and merge the letter with a **recipient list**.

## Step 1:

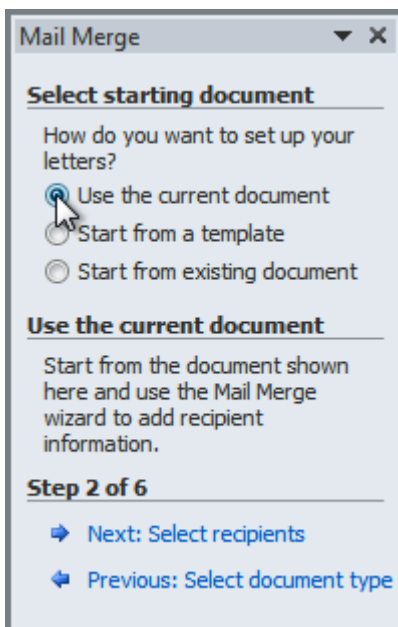
1. Choose the type of document you want to create. In this example, select **Letters**.



2. Click **Next: Starting document** to move to Step 2.

## Step 2:

1. Select **Use the current document**.

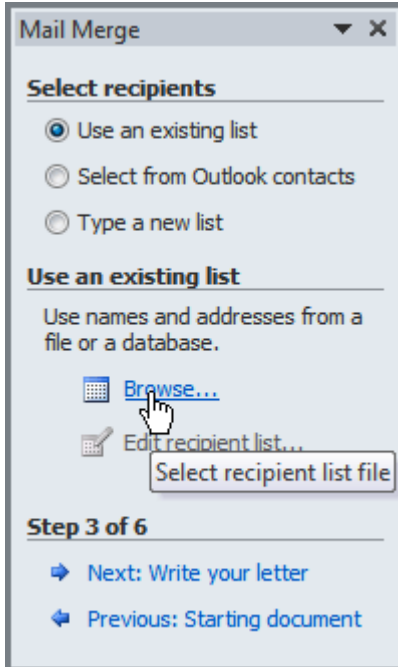


2. Click **Next: Select recipients** to move to Step 3.

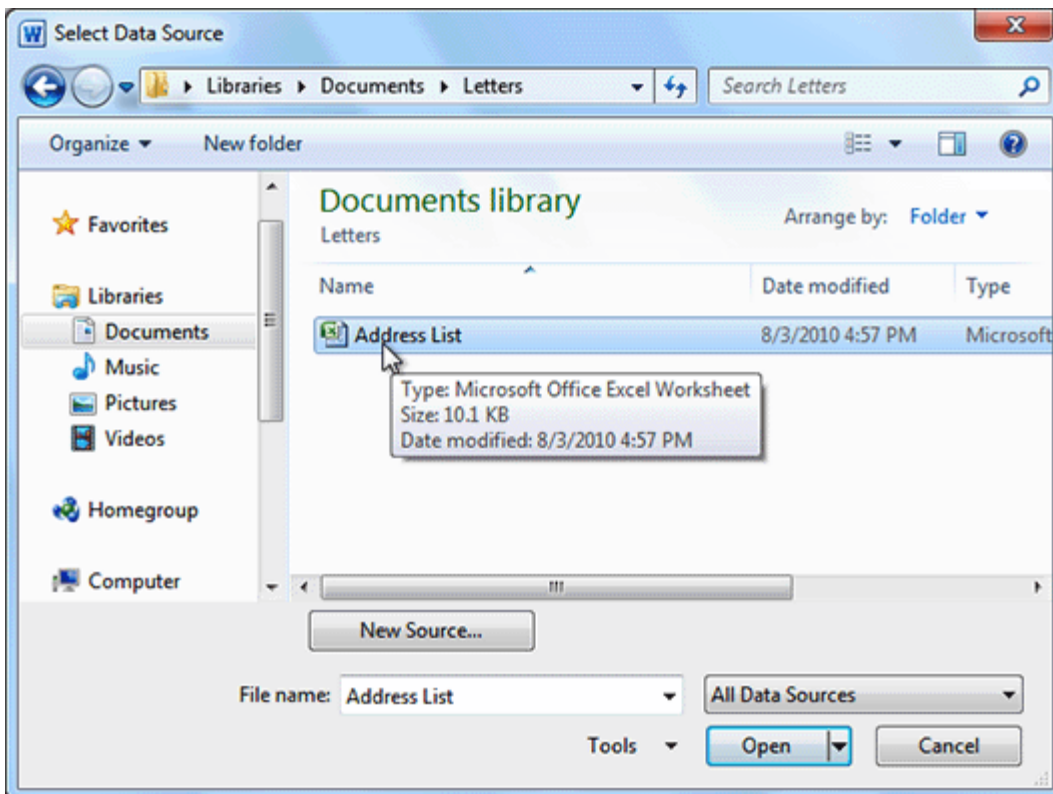
## Step 3:

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.

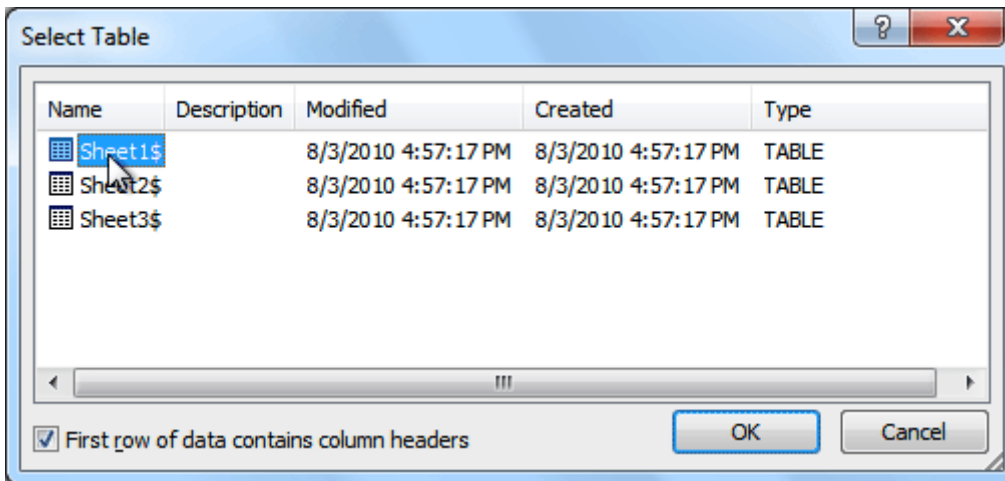
1. From the **Mail Merge** task pane, select **Use an existing list**, then click **Browse**.



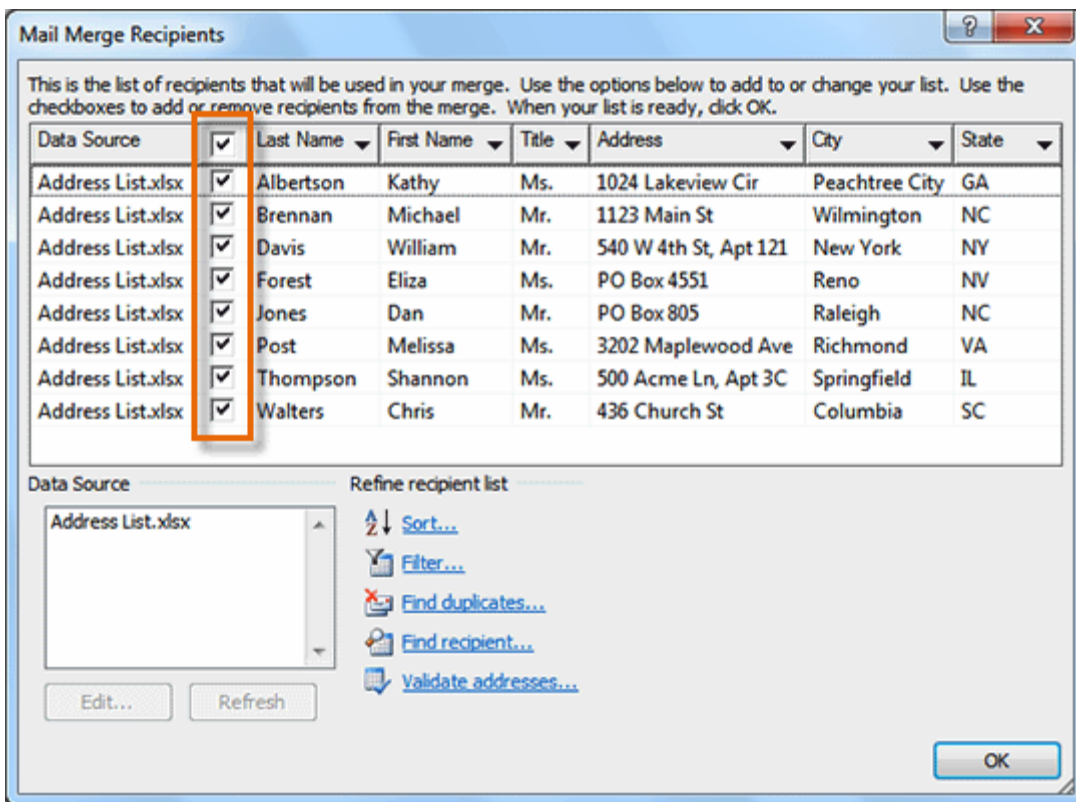
2. Locate your file in the dialog box (you may have to navigate to a different folder), then click **Open**.



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



4. In the **Mail Merge Recipients** dialog box, you can **check** or **uncheck** each recipient to control which ones are used in the merge. When you're done, click **OK** to close the dialog box.



5. From the **Mail Merge** task pane, 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**. You can then type your address list.

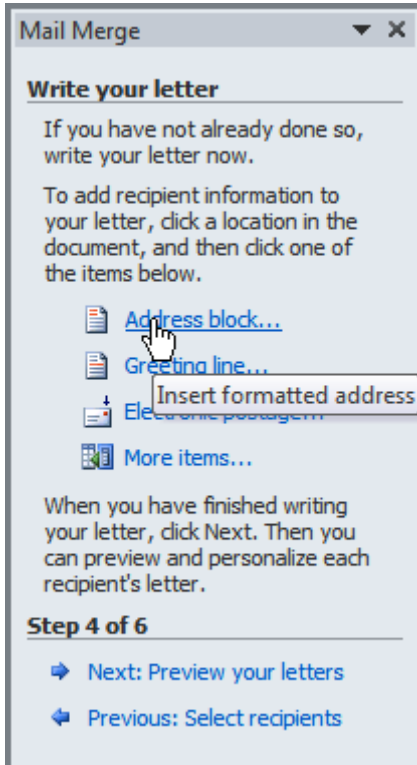
## Step 4:

Now you're ready to write your letter. When it's printed, each copy of the letter will basically be the same, except the **recipient data**—like the **name** and **address**—will be different on each one. You'll need to

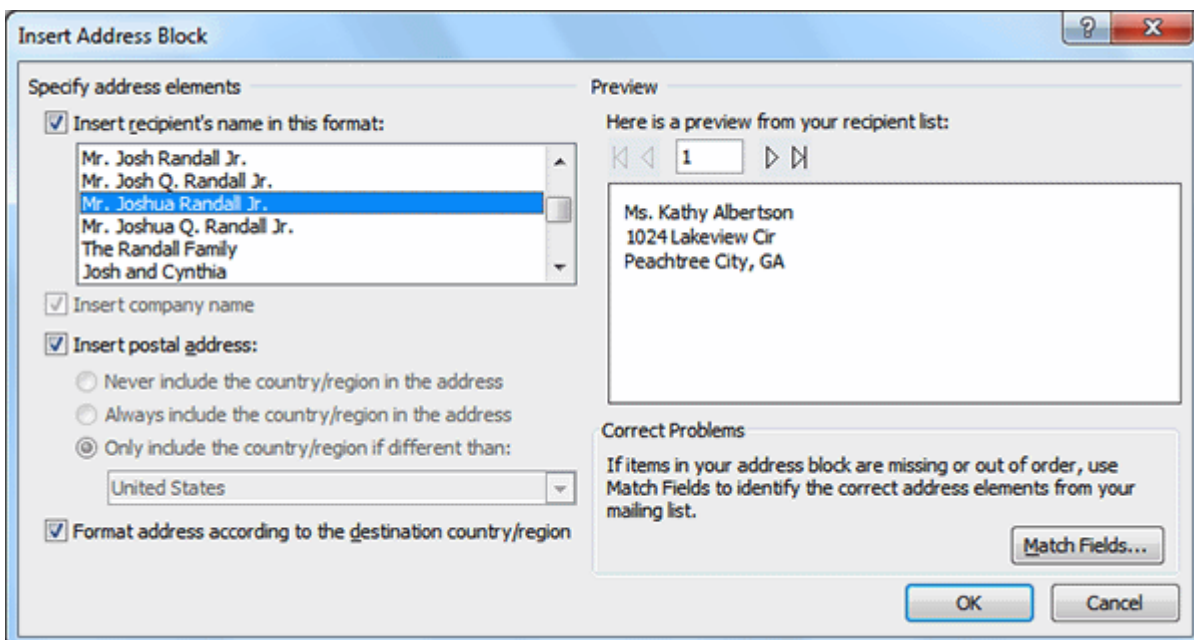
add **placeholders** for the recipient data so Mail Merge knows exactly where to add the data. If you're using Mail Merge with an existing letter, make sure the file is open.

## To insert recipient data:

1. Place the insertion point in the document where you want the information to appear.
2. Select **Address block**, **Greeting line**, **Electronic postage**, or **More items** from the task pane.



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



4. A placeholder appears in your document (for example: «AddressBlock»).
5. Repeat these steps each time you need to enter information from your data record.
6. From the **Mail Merge** task pane, 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**. Sometimes, however, you may want to place **recipient data** within the body of the letter to further **personalize it**.

## Step 5:

1. Preview the letters to make sure information from the recipient list appears correctly in the letter. You can use the left and right scroll arrows to view each document.

The image shows a screenshot of the Microsoft Word Mail Merge task pane. The task pane is titled "Mail Merge" and has a close button (X) in the top right corner. It is currently on the "Preview your letters" step. The text in the task pane reads: "One of the merged letters is previewed here. To preview another letter, click one of the following:" followed by a box containing left and right arrow buttons and the text "Recipient: 1". Below this is a "Find a recipient..." search box. The next section is "Make changes", which includes the text "You can also change your recipient list:" and buttons for "Edit recipient list..." and "Exclude this recipient". At the bottom, it says "When you have finished previewing your letters, click Next. Then you can print the merged letters or edit individual letters to add personal comments." and "Step 5 of 6" with "Next: Complete the merge" and "Previous: Write your letter" buttons.

Two callout boxes are present:
 

- A blue rounded rectangle at the top left says "Use arrows to preview each letter" with an orange arrow pointing to the right arrow button in the task pane.
- A blue rounded rectangle at the bottom left says "The preview allows you to see how recipient data will look in each letter." with an orange arrow pointing to a preview of a letter.

The previewed letter shows the following content:
 

Ms. Kathy Albertson  
 1024 Lakeview Cir  
 Peachtree City, GA

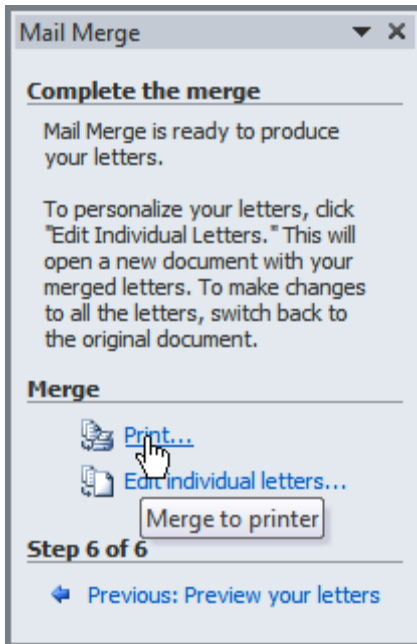
Dear Ms. Albertson,

As you may know, 2010 marks  
 grown from a tiny startup into  
 Our growth would not have b  
 ount  
 ing  
 way

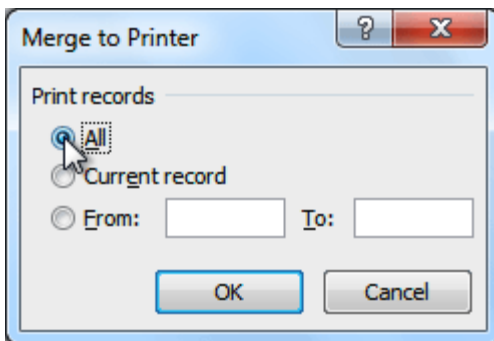
2. Click **Next: Complete the merge** to move to Step 6.

## Step 6:

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

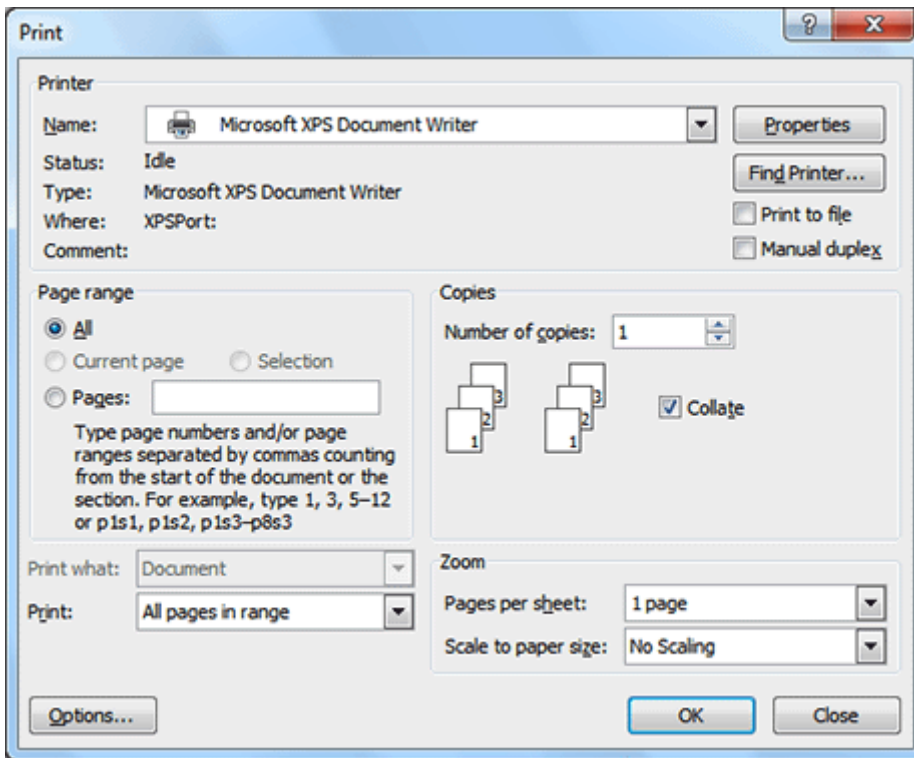


2. The **Merge to Printer** dialog box opens. Click **All**, then click **OK**.





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



## Challenge!

1. Open an **existing Word document**. If you want, you can use this [example](#).
2. Download the [recipient list](#).
3. Use the **Mail Merge Wizard** to merge the **letter** with the **recipient list**.
4. Place an **Address Block** at the top of the page and a **Greeting line** above the body of the letter.
5. **Print** the document.