

Mail Merge is used to create a document that contains standard text but requires personalized information for multiple recipients.

Using Mail Merge - Creating a Form Letter

Step 1) Get your data together.

In this example we will take a list of names and addresses and create a customized letter for each person. The simplest way to get the data formatted is to use an excel file. Therefore, you can sort, view, and manipulate the data.

Microsoft Excel - mail-merge-example.xls

File Edit View Insert Format Tools Data Window Help Classification

New... Open... Close Save Save As... Save as Web Page... Save Workspace... Web Page Preview Page Setup... Print Area Print Preview

Enter per line all the information that you want to customize per letter.

Set a header line that will help to construct the mail merge

First Name	Last Name	Address	ZIP	City	State
John	Doe	255 Park Av.	10022	New York	NY
Art	Merks	732 5th Av.	10021	New York	NY
Elizabeth	Jones	14 Main Street	7349	Houston	TX
	Logins	54 South Street	32054	Orlando	FL

In order to let MSWord know which data you want to use for the mail merge, define the "Print Area" as the table containing the data

Step 2) Create the Word document.

Save excel file containing the data for each person, with the data area selected. Go into a new Word document and start the mail merge process.

Document1 - Microsoft Word

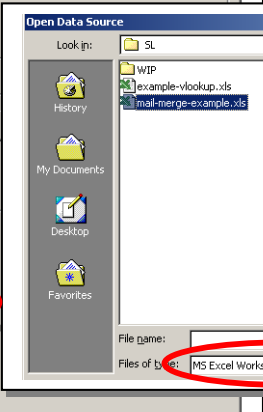
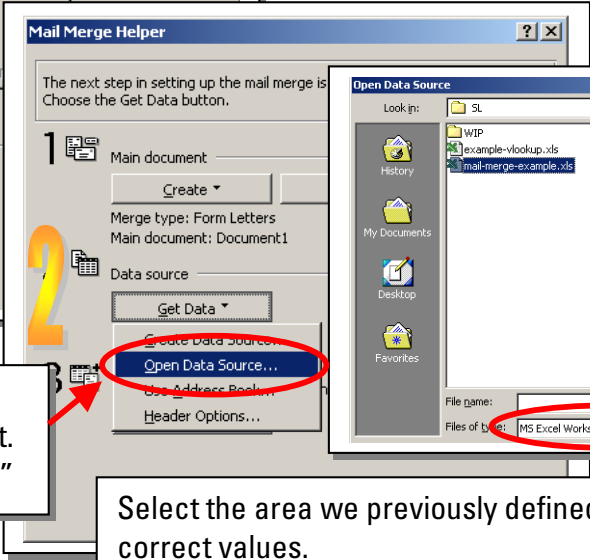
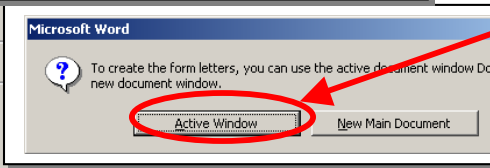
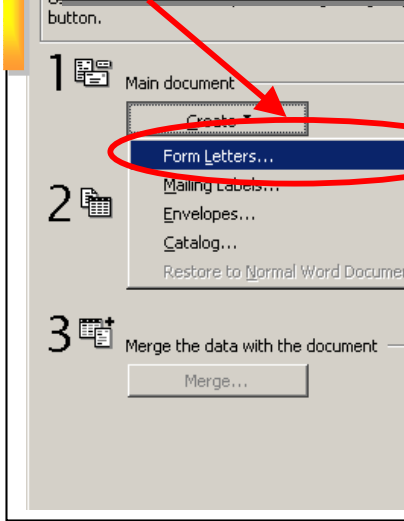
File Edit View Insert Format Tools Table Window Help Classification

Spelling and Grammar... F7 Language Word Count... AutoSummarize... AutoCorrect... Track Changes Merge Documents... Protect Document... Online Collaboration Mail Merge...

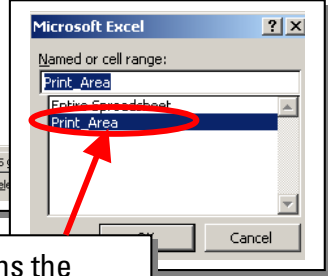
- 1) Open a new Word Document
- 2) Click on **Tools -> Mail Merge**

Create a document from a letter template. Then once the letters are generated, you can create labels from the same list (excel file)

Select Active window because we just created a new document.



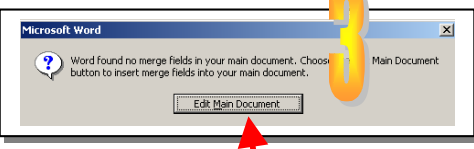
Make sure to select the correct filter in order to see your file (Excel extensions)



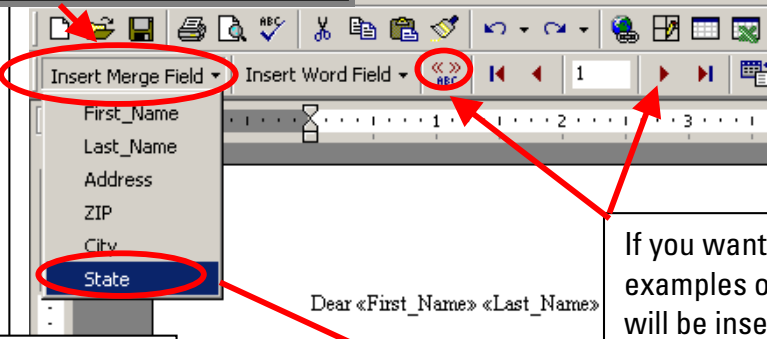
Tell MSWord which file contains your data to import. Select "Open Data Source"

Select the area we previously defined that contains the correct values.

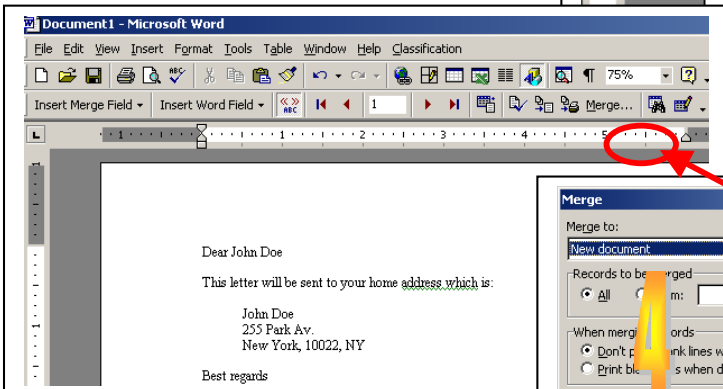
Type your Letter and insert the appropriate fields



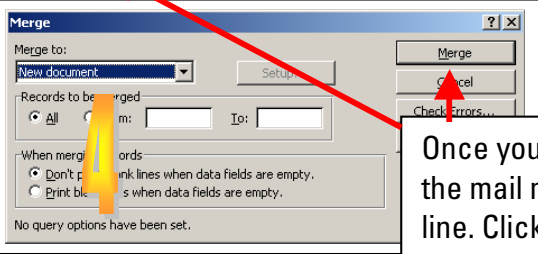
As it is a new document, Word will prompt to go into the document and add the merge fields



If you want to review examples of the value that will be inserted, you can click on the <<ABC>> icon to toggle fields values and fields name. Then you can navigate among records with the arrows.



Dear «First_Name» «Last_Name»
This letter will be sent to your home
«First_Name» «Last_Name»
«Address»
«City», «ZIP», «State»
Best regards



Once your template satisfies you, create the mail merge and one letter per Excel line. Click on Merge...