



Microsoft Word 2010: Using Mail Merge

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Introduction

This handout provides instructions on how to use the Mail Merge feature in Microsoft Word 2010. Users will learn how to create letters, e-mails, faxes, forms, envelopes, mailing labels, directories and other documents once and use them many times. With Mail Merge tools, users can customize letters or mailing labels using the data saved in a mailing list database or from a Microsoft Outlook Contacts list and send them out to multiple recipients, all from one convenient place.

Using the Mail Merge Wizard

The *Mail Merge* wizard provides all the basic steps to create, open and modify both the main document and the data source. Some of the terms used in the Mail Merge wizard are described in Table 1. The Mail Merge pane provides instructions for each step in the process. In addition, it is possible to go back to any previous step to review or modify the selected options.

Table 1 – Terms Used in the Mail Merge Wizard

Term	Description
Main document	Contains the information common to all merged documents. It can be a letter, e-mail, envelope, label or directory into which the data will be merged. It can include text, images, borders, colors, shades, tables and more.
Source file	The file from which the merge data is taken. It contains the variable information that will be inserted into the merge fields in the main document.
Merge fields	Identifiers inserted in the text that indicate to Word the position and type of data to be inserted at that point in the document.
Address block	Includes name and address information.
Greeting line	Adds the opening salutation, along with the name of the recipient.

To use the Mail Merge wizard:

1. On the **Mailings** tab of the **Ribbon**, in the **Start Mail Merge** group, click the **Start Mail Merge** button, and then click **Step by Step Mail Merge Wizard** (see Figure 1). The **Mail Merge** pane opens.

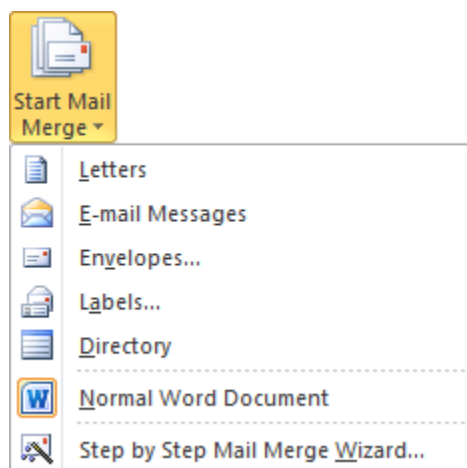


Figure 1 – Start Mail Merge Menu

2. In the **Select document type** section, select the **E-mail messages** option.

NOTE: The option you select depends on the type of document you wish to work with.

3. Click the **Next: Starting document** link to advance to step 2 of the **Mail Merge** wizard.
4. In the **Select starting document** section, select the **Use the current document** option.
5. Click the **Next: Select recipients** link to advance to step 3 of the **Mail Merge** wizard.

NOTE: Word 2010 provides three options for selecting the recipients (see Figure 2). Two of the methods (i.e., **Type a new list** and **Use an existing list**) are covered in the following sections of this handout.

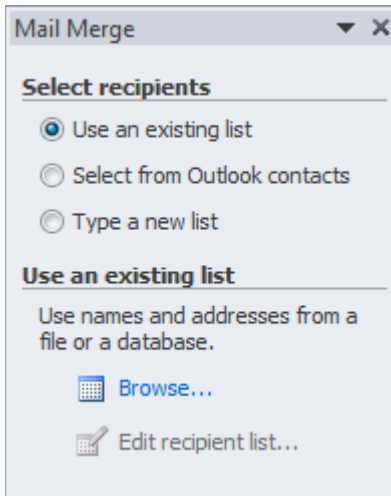


Figure 2 – Select Recipients Options in the Mail Merge Pane

Typing a New List

The *Type a new list* option allows users to create a new list of mail merge recipients.

To type a new list:

1. In the **Mail Merge** pane, in the **Select recipients** section, select the **Type a new list** option.
2. In the **Type a new list** section, click the **Create** link. The **New Address List** dialog box opens.
3. Enter the information for the first person or company.

NOTE: Clicking the **Customize Columns** button allows you to add, delete, rename and reorder fields.

4. After completing the first record, click the **New Entry** button to add the next record.
5. When the new list is complete, click the **OK** button. The **Save Address List** dialog box opens.
6. Select a location to save the file, enter a name in the **File name** box, and then click the **Save** button. The **Mail Merge Recipients** dialog box opens, displaying the list of recipients that will be used in the merge (see Figure 3).

NOTE: You can sort or filter the recipient list as well as select or deselect recipients. You can also edit the list by selecting the list in the **Data Source** box, and then clicking the **Edit** button. The **Edit Data Source** dialog box that opens looks and functions exactly the same as the **New Address List** dialog box.

7. When finished selecting recipients, click the **OK** button.

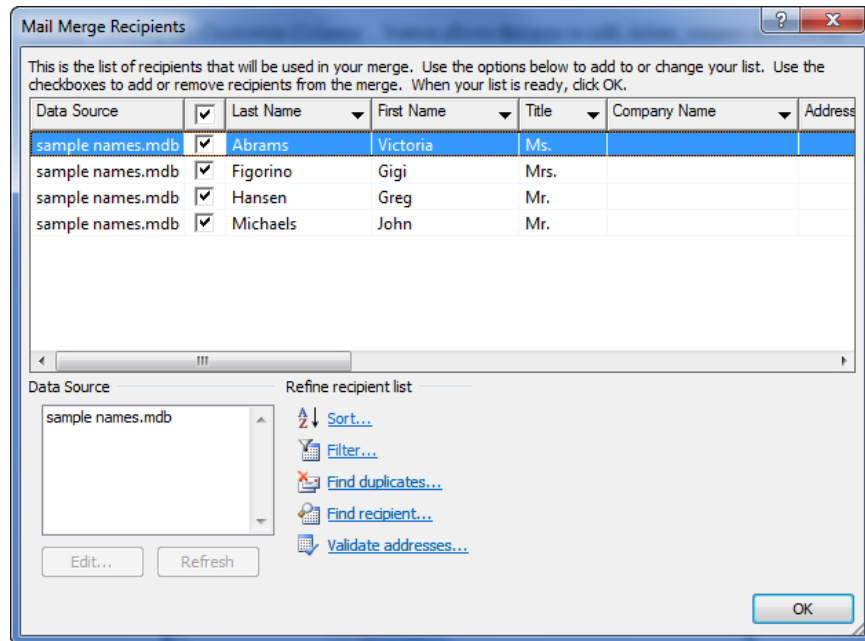


Figure 3 – Mail Merge Recipients Dialog Box

Using an Existing List

Using an existing list allows users to use an existing file (e.g., a Microsoft Excel workbook or a Microsoft Access database) as the data source that contains the information to be merged into a document.

To use an existing list:

1. In the **Mail Merge** pane, in the **Select recipients** section, select the **Use an existing list** option.
2. In the **Use an existing list** section, click the **Browse** link. The **Select Data Source** dialog box opens.
3. Locate and select the file that contains the list, and then click the **Open** button. The **Mail Merge Recipients** dialog box opens.

NOTE: If a data source (such as a database or a workbook) contains multiple tables or worksheets, the **Select Table** dialog box will open first. After selecting the correct table or worksheet, and then clicking the **OK** button, the **Mail Merge Recipients** dialog box will open.

4. Select the check boxes next to the recipients you want to include, and deselect the check boxes next to the recipients you want to exclude.
5. When finished, click the **OK** button.

Inserting Merge Fields into a Document

Once the document and the recipients have been selected, the next step is to add the placeholders in the document where the data will be inserted for individual recipients.

To insert merge fields:

1. In the **Mail Merge** pane, click the **Next: Write your e-mail message** link to advance to step 4 of the **Mail Merge** wizard.
2. In the document, click where you want to insert the first merge field.
3. In the **Mail Merge** pane, in the **Write your e-mail message** section, click the link for the merge field you want to insert (see Table 2).

NOTE: Clicking the link for an item will open its corresponding dialog box from which the desired formats and options can be selected.

Table 2 – Merge Fields That Can Be Inserted in the Document

Field	Description
Address block	Opens the <i>Insert Address Block</i> dialog box which allows you to add name and address information.
Greeting line	Opens the <i>Insert Greeting Line</i> dialog box which allows you to select the salutation to be used as well as the format for the recipient name.
Electronic postage	Enables you to work with electronic postage if that feature is installed.
More items	Opens the <i>Insert Merge Field</i> dialog box which gives you the option of adding additional fields to the main document.



4. If the common items do not meet your needs, click the **More items** link. The **Insert Merge Field** dialog box opens, displaying a list of available fields.
5. Select the field you want to insert, and then click the **Insert** button.
6. When finished, click the **Close** button.

NOTE: You can also insert merge fields by clicking the appropriate buttons in the **Write & Insert Fields** group on the **Mailings** tab of the **Ribbon**. When inserted, a merge field is enclosed in chevrons (e.g., «First_Name» «Last_Name»).

Previewing Merged Data

Before actually performing the mail merge, preview the merged document and check for formatting and spelling errors. If an error is found in the main document, correct it. Also, correct any errors in the data source if there will be another merge. The merge can also be evaluated for errors by clicking the *Auto Check for Errors* button in the *Preview Results* group on the *Mailings* tab of the *Ribbon*. Once the document is formatted to the desired specifications, the merge can be completed.

To preview merged data:

1. In the **Mail Merge** pane, click the **Next: Preview your e-mail messages** link to advance to step 5 of the **Mail Merge** wizard.
2. In the **Preview your e-mail messages** section, click the **Forward** arrow  to preview the next merged message, or click the **Back** arrow  to preview the previous merged message.
3. To locate a particular recipient, click the **Find a recipient** link in the **Preview your e-mail messages** section.
4. To remove a recipient from the current merge operation, click the **Exclude this recipient** button in the **Make changes** section.

Completing a Merge

The final step of the mail merge process is printing, sending or saving the document with the merge data intact.

To complete the merge:

1. In the **Mail Merge** pane, click the **Next: Complete the merge** link to advance to step 6 of the **Mail Merge** wizard.

2. In the **Merge** section, click the **Electronic Mail** link. The **Merge to E-mail** dialog box opens.
3. In the **Message options** section, select **Email_Address** from the **To** list.
4. Enter a subject in the **Subject line** box.
5. Select **Attachment**, **Plain Text** or **HTML** from the **Mail format** list.
6. In the **Send records** section, select the desired option.
7. Click the **OK** button to send the e-mail messages.

NOTE: Other options for completing a merge can be accessed by clicking the **Finish & Merge** button in the **Finish** group on the **Mailings** tab of the **Ribbon**.