

## How To Create A Mail Merge - Letters

A mail merge, whether it be mailing labels or a form letter, is composed of three parts. These three parts are:

1. A data file. This file is an organized set of information such as names and addresses. This file can be created in Word, it can be an Excel spreadsheet, an Access database or a table in a Word document.
2. A master Word document that indicates where the information in the data file will be merged into the document.
3. The merged document. This document is created by merging the data file with the master document. This file will have a page or a label for each record of information that exists in the data file. This is the document that is printed but not necessarily saved because it can be recreated at any time by remerging the master document and the data file.

How to create a form letter using a mail merge: (A data file must exist or a new can be created within Word). There is a data file on your class CD, in the Word Documents folder what we will use for the merge.

- Open Microsoft Word.
- Click on the Tools menu.
- Click on Letters and Mailings.
- Click on Mail Merge. The Mail Merge Task Pane opens at the right side of the screen and will lead you through the six step process of creating a Mail Merge.

### Step 1: Selecting the Document Type

- Choose Letters.
- Click Next at the bottom of the Task Pane.

### Step 2: The Starting Document

- Under Select Starting Document, we don't need to make a change since this is the first time we are doing a merge. We are making the master document. If we had made a master document previously we could change the choice to Start from existing document.
- Click Next at the bottom of the Task Pane.

### Step 3: Select Recipients

- Under Select Recipients, we will use an existing list, make no changes. If a list didn't exist, we could make a new list at this point.
- Under Use an Existing List, click on Browse.
- The data file we will be using is on your CD. Browse to D:\Word Documents. The data file is called Address List.
- When Address List is chosen, you'll see the individual records in the Address List data file. At this point you could edit the records, add new records or choose to exclude someone in the list from getting a letter..
- Click Next at the bottom of the Task Pane.

### Step 4: Write your letter

- Begin typing your letter. Where ever you want to insert a field from your Address List, click on More Items in the Task Pane and choose the field to insert.
- Click Next at the bottom of the Task Pane.

### Step 5: Preview Your Letters

- Step 5 lets you preview your labels to see how they will look when they are printed.
- Click Next at the bottom of the Task Pane.

### Step 6: Complete the Merge

- At this point you can print the letters or you can choose Edit Individual Letters. I usually choose Edit Individual Letters because this will cause a new document that is the product of the data file and the master document to be created. I can then look at the new document and see if it is OK to print before sending the job to the printer and then finding out that something wrong and wasting a bunch of paper.

### Last Step: Saving the master document.

- When you save the master document Word will remember the data file that was used with this merge. When you open the master document again, it will be ready to merge and print even if you changed the information in the data file.