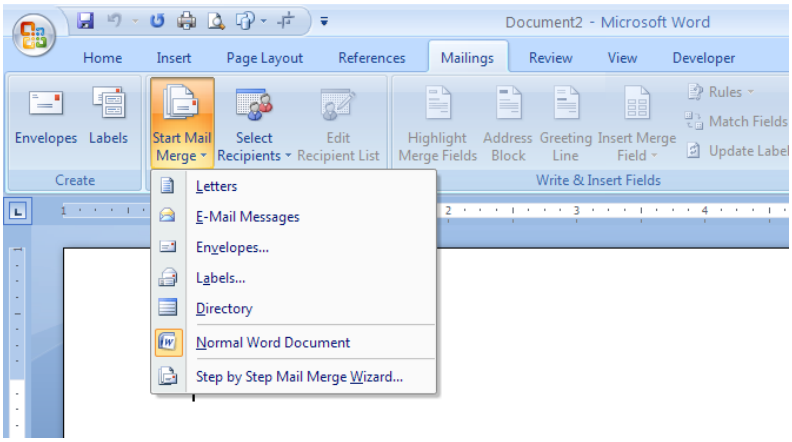
Using Mail Merge to Create Labels, Certificates, and Form Letters in Microsoft Word

This document provides instructions for using the mail merge feature in Microsoft Word. Mail merge allows you to quickly create personalized documents.

The Mail Merge Process

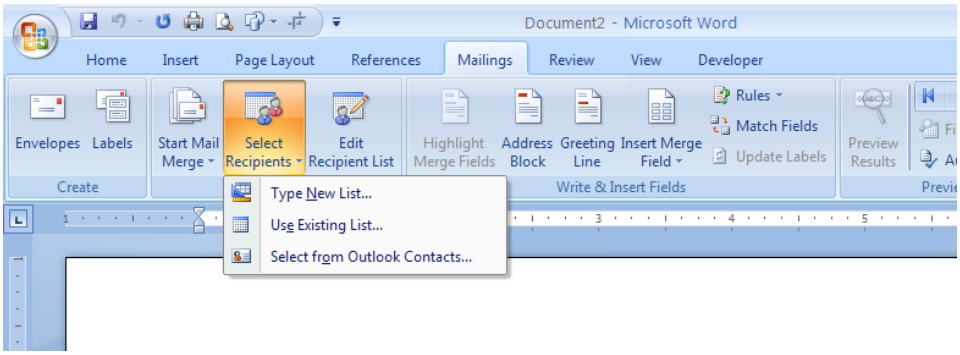
The mail merge process entails the following steps:

1. Set up the main document. The main document contains the text and graphics that are the same for each version of the merged document. For example, the return address or salutation in a form letter.
    a. Click **Start Mail Merge** on the **Mailings** tab.
    b. Select the type of document that you want to create. (The **Step by Step Mail Merge Wizard** walks you through the process via a wizard as it did in Word 2003.)

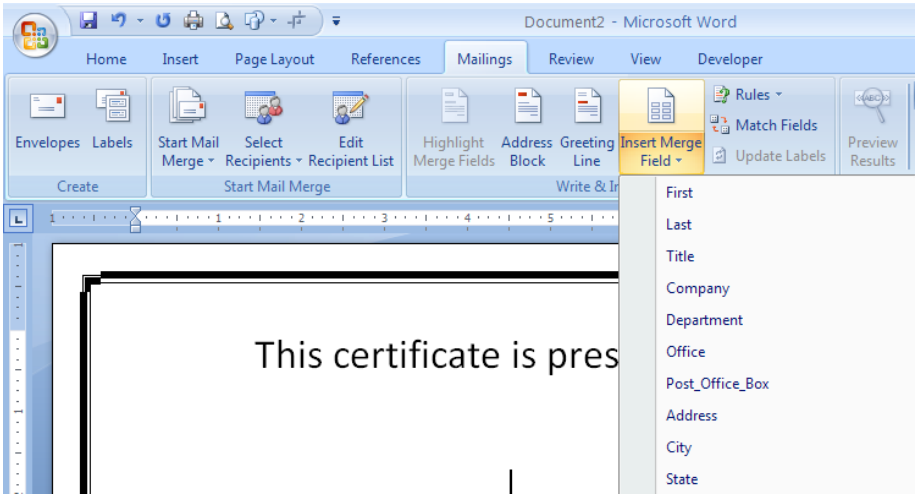


2. Connect the document to a data source. A data source is a file that contains the information to be merged into a document. For example, the names and addresses of the recipients of a letter.
    a. Click **Select Recipients** on the **Mailings** tab.
    b. Select the appropriate data source.
    c. If the data source has not been created yet, then select **Type a new list** and use the form that opens to create your list. You can then save your list as an Access database. However, it is generally easier to complete a mail merge if the data

source has already been created.

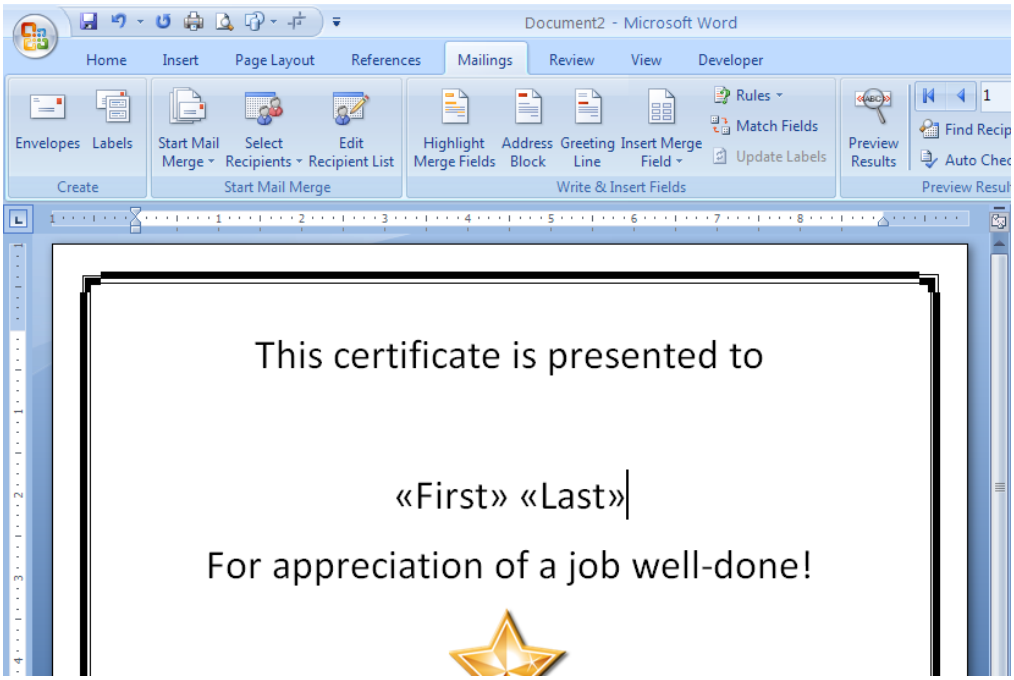


3. Refine the list of recipients or items. Microsoft Word generates a copy of the main document for each item, or record, in your data file. If your data file is a mailing list, these items are probably recipients of your mailing. If you want to generate copies for only certain items in your data file, you can choose which items (records) to include.
    a. Click **Edit Recipient List** on the **Mailings** tab.
    b. Then select individual records, sort, or filter as needed.
4. You are now ready to prepare the main document.
    a. Type the text of the document. This is the part that will stay consistent for each record. As with any document, you can apply formatting to the text, add graphics, or other elements as desired.
    b. Add placeholders, called mail merge fields, to the document. When you perform the mail merge, the mail merge fields are filled with information from your data source.
    c. To insert a placeholder, click **Insert Merge Field** and select the field from the list.

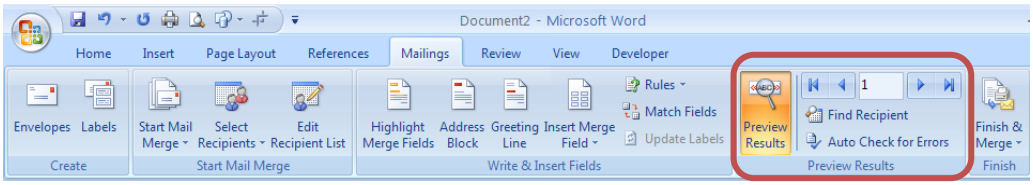


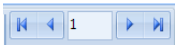
    d. When you insert a mail merge field into the document, the field name is surrounded by chevrons (« »). Be sure to include the appropriate punctuation

between fields (for example, a space between first name and last name).

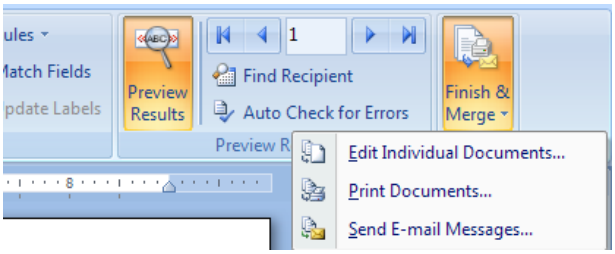


5. Preview and complete the merge. You can preview each copy of the document before you print the whole set.
    a. Click **Preview Results** in the **Mailings** tab.



        1. You can page through each merged document by using the **Next Record** and **Previous Record** buttons. 
        2. You can also preview a specific document by clicking **Find Recipient** and searching for a keyword. If a particular recipient has a long name, this is a helpful tool to ensure that you have left adequate space for the name.

    b. To print the merged documents, click **Finish & Merge** on the **Mailings** tab. Then click **Print Documents**.
    c. To edit individual documents, click **Finish & Merge** on the **Mailings** tab. Then click **Edit Individual Documents**. This creates a new document separate from your main document.



6. Save the merge components.
    a. There are three separate files involved in a mail merge: the main document, the data source, and the merged document.
        1. Saving the main document allows you to use it again in the future for similar merges or with updated data sources. You will be given the option to save the data source connection with the main document.
        2. The data source was already saved, either when it was originally created or when you created it in Step 2.
        3. The merged document can be saved for reference or for future printing.