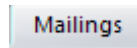


Microsoft Word - Starting the Mail Merge Wizard

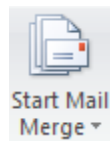


Starting the Mail Merge Wizard.

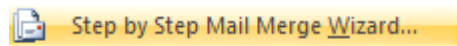
1. Select the **Mailings** tab.



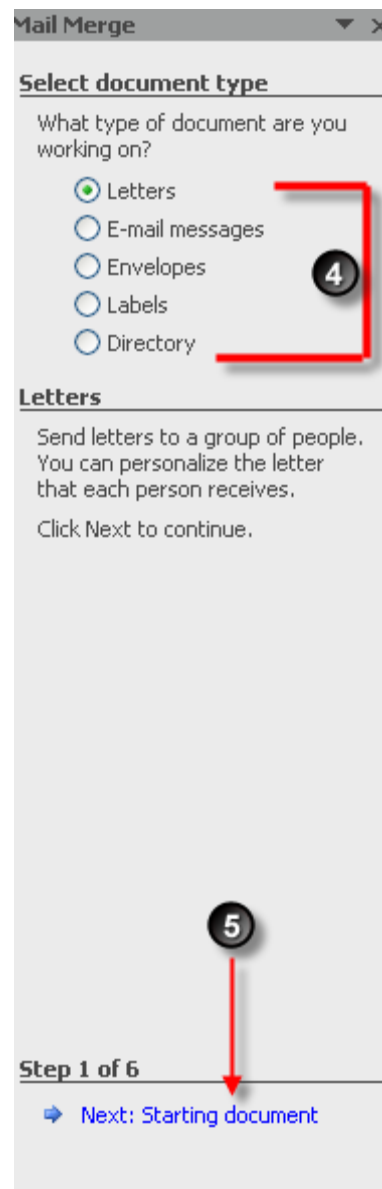
2. Click the **Start Mail Merge** button



3. Select **Step by step Mail Merge Wizard**.

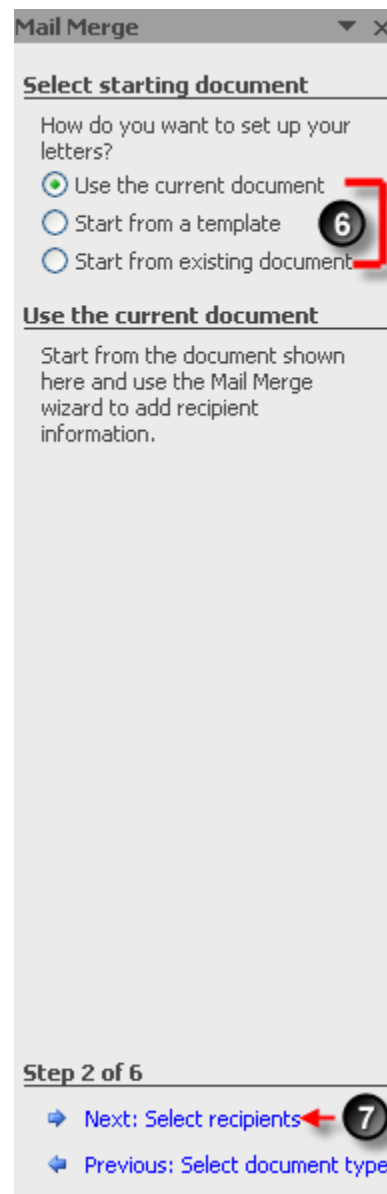


4. **Select** the type of document that you are working on.



5. Click **Next: Starting the document**.

6. From the **Select starting document** select the required option, in this case **Use current document**.



7. Click Next: **Select recipients**.

Selecting the Source for Recipients.

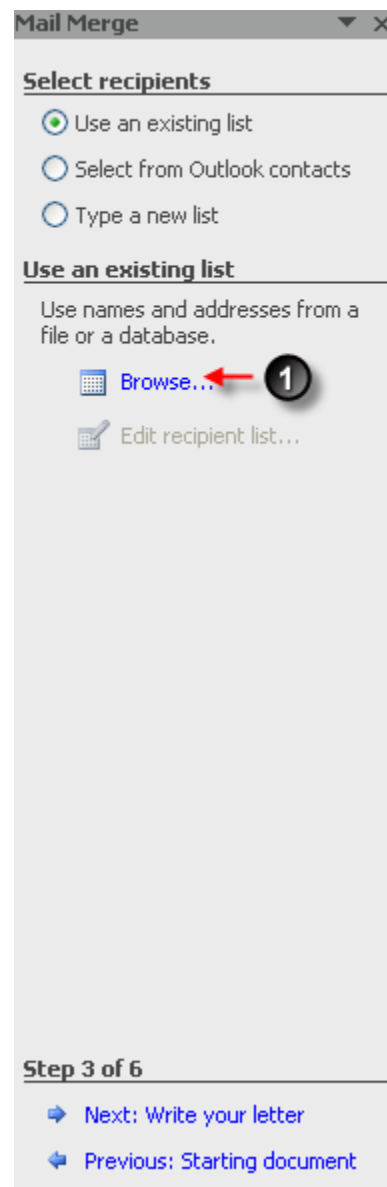
The recipient addresses can be help in various different data sources such as:

- Existing Lists (data document)
- Outlook contacts.
- Type a new list

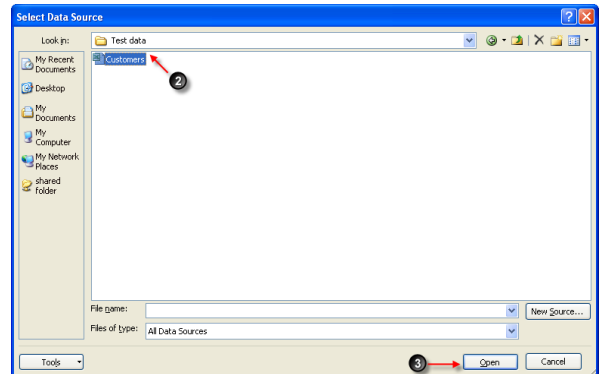
- Browse (List help in an external data source such as Excel , Access etc).

Using an External data Source such as Excel or Access.

1. From the **Use an existing list** → Select **Browse**.

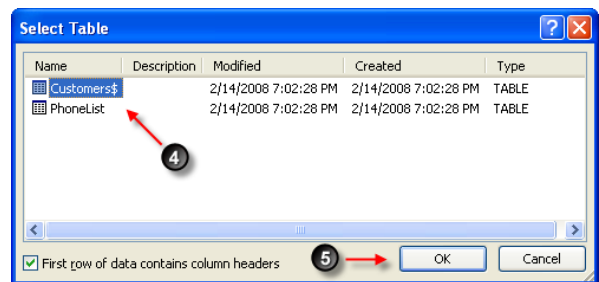


2. **Select the Folder → File** that contain the merge data.



3. **Click on Open** button.

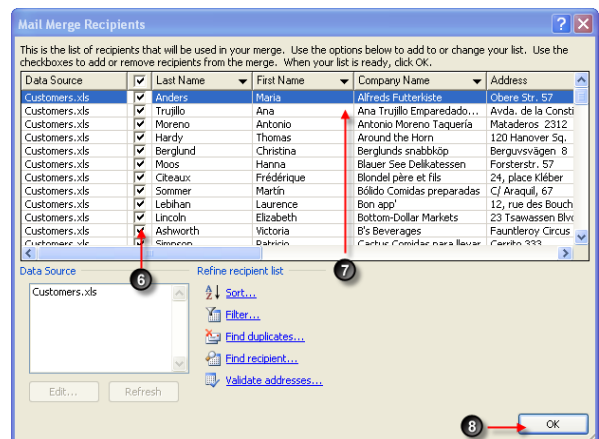
4. In this example the file we have selected has more than one recipient list to choose from.



Select the required recipient list.

5. **Click Ok.**

6. By removing / inserting a the tick from the check box it is possible to add or remove delegate details from the merge.



7. **Select the drop-down arrow** for more advanced options such as **Sorting** and **filtering** recipients.

8. **Click Ok** to move to the next stage of the merge wizard.

Mail Merge Wizard Continued – Creating a form Letter.

The only difference between a normal letter and a Form Letter is that a Form Letter contains merge fields.

It is possible to use merge fields in any part of the document, for example the Address block and Greeting line.

Each merge field corresponds to a piece of information in the data source and appears in the main document with the greater than and less than characters around it.

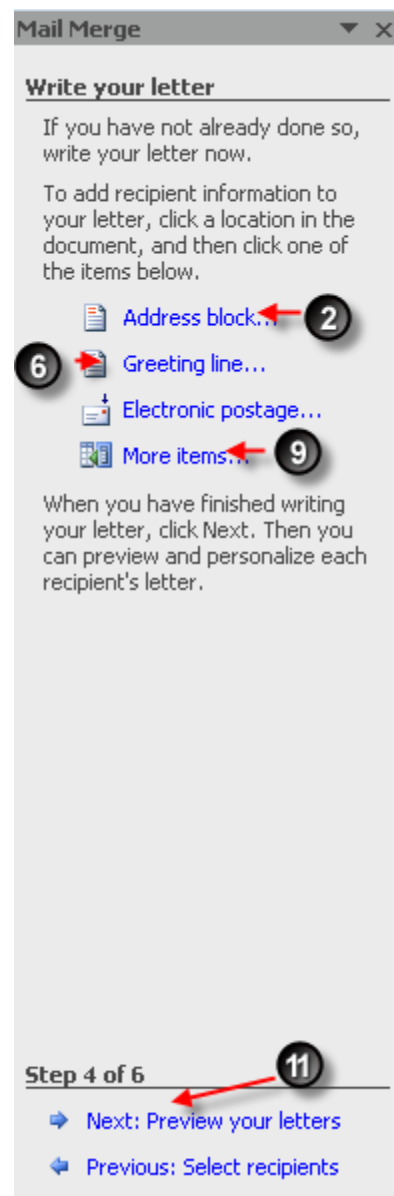
For example, the <<Address Block>> merge field corresponds to the name and address information in the data source. Word incorporates insert commands for each of these in the merge wizard.

Creating a Form Letter.

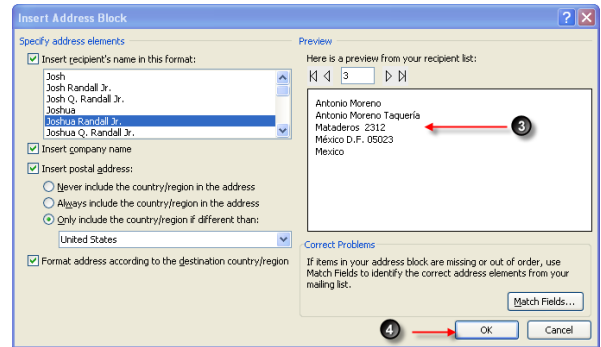
1. So far in the wizard we have selected the document that we wish to create using merge data from an external data source ("Excel").

In this section we will create the Form Letter.

2. Click **Address Block** on the task pane.
3. **Select** the **address block** options required. (see *below diagram*)
4. Click **Ok** to insert the block into the document. (see *below diagram*)
5. **Position** the insertion point to where you require the **Greeting** to appear.
6. Click **Greeting Line**.



Stages 3 and 4 Preview.



7. Select the format you require for the greeting line.

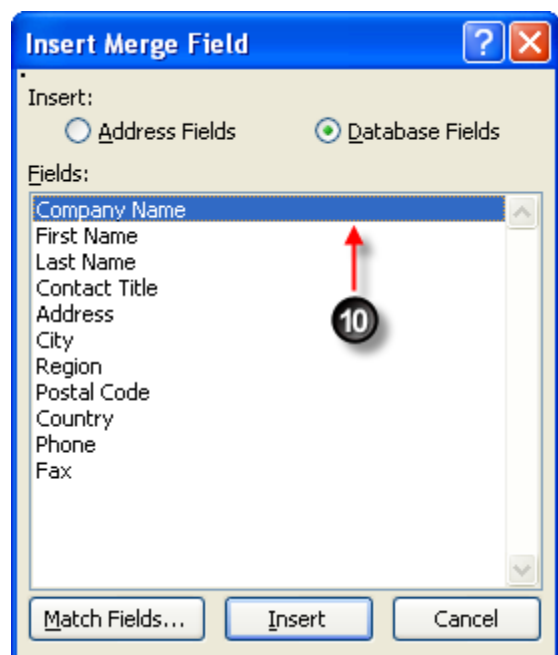


8. Click **Ok** to apply the style to the merge field.

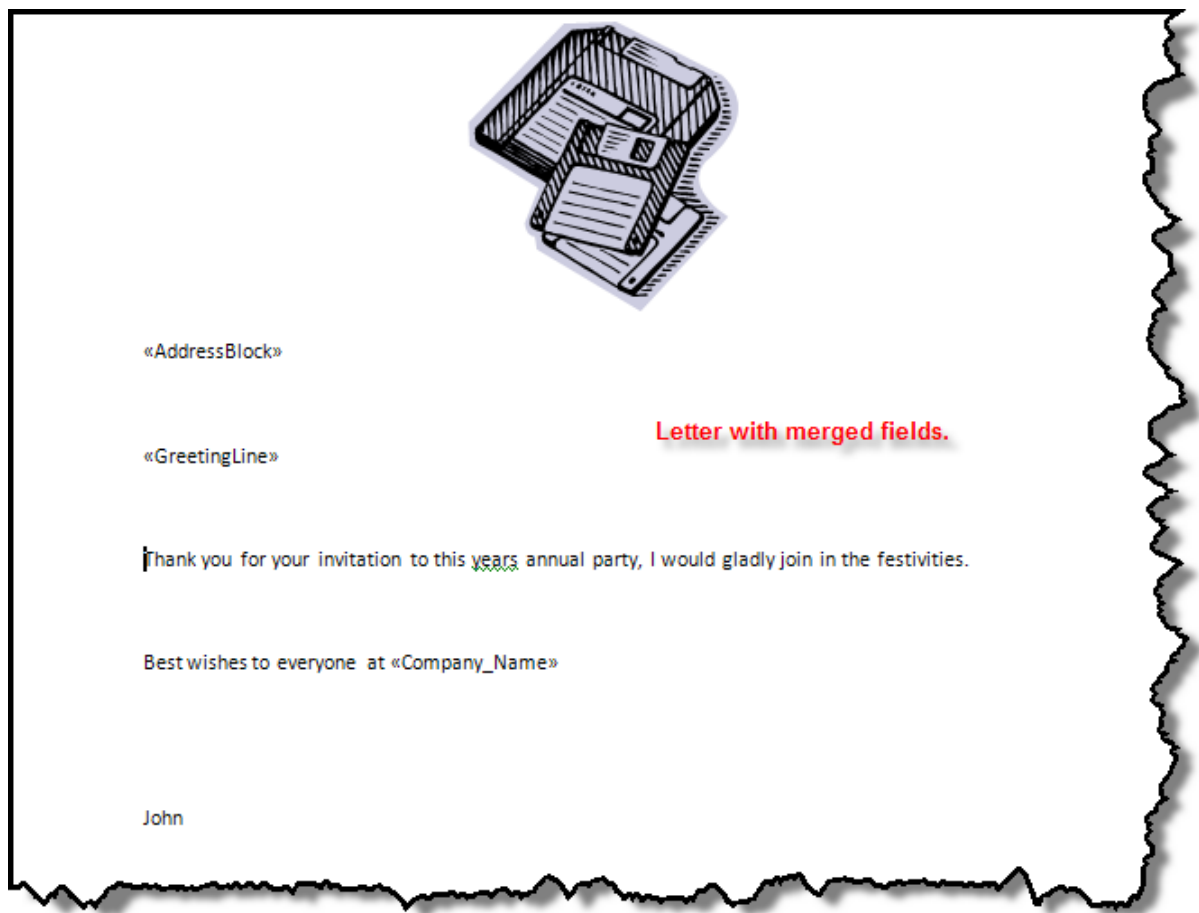
9. If you require to add additional merge fields in the body of the form letter, position the insertion point where you wish the information to be displayed click **More Items** on the task pane.

10. **Select** the merge field(s) you want to place, click **Insert** → **Close**.

11. When completed, click **Next**: Preview your letters on the task pane.



Preview of letter with merge fields.

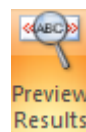


Previewing the Mail Merge.

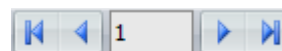
At this stage the mail merge is almost complete, it is a good idea now to review the merged letters before printing them.

You may wish to change the body text formatting or even add additional merge fields.

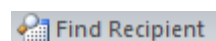
1. **Select** from the **Mailings** tab on the ribbon → **Preview Results**.



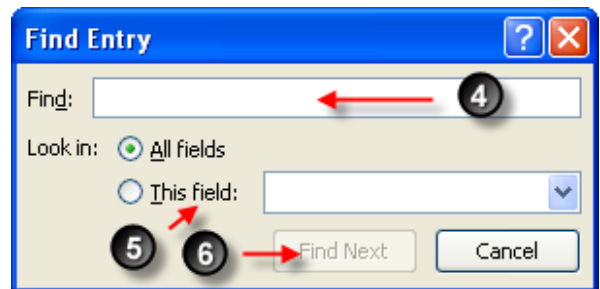
2. **Scroll** through the merge letters one at a time, making changes if required.



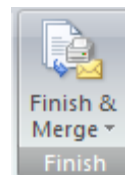
3. To **Find** a given a **recipient**.



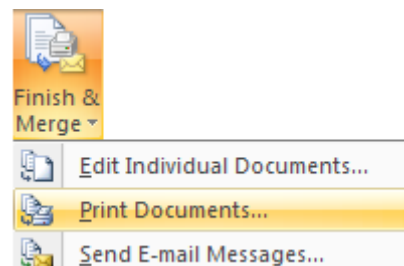
4. Enter the search criteria.
5. Select all fields or specify exact field to be search.
6. Click Find Next to proceed to the next matching record.



7. **Click Finish & Merge** to complete the mail merge.



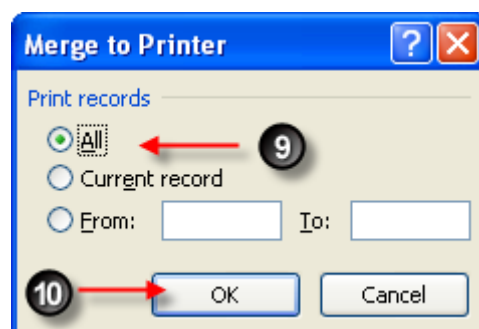
8. **Select** the required **Finish & Merge** option.



9. In step 8 we selected to print the merge, therefore in this step we must;

Specify the records you wish to merge and print.

10. Click **Ok**.



11. **Select** the desired printer.

12. Click **Ok**.

Merge completed.

