Mail Merge Concepts

Putting Your Data to Use!
Mail Merge in Word

- Starting Your Merge.
  - Using the “Task Pane”.
  - If the “Task Pane” does not appear go to:
    - View >> Task Pane
  - Press the ctrl + F1 key
Mail Merge - Word

- Choose Mail Merge.
  - Step 1 of 6

- Choose the type of Merge.
  - Letters
  - E-mail messages
  - Envelopes
  - Labels
  - Directory
Mail Merge - Word

• Start Your Document.
  – Step 2 of 6

• Document Choices
  – Current Document
  – Document Template
  – Existing Document
Mail Merge - Word

• Data Sources
  – Step 3 of 6
  • Data Choices
    – Existing List
    – Outlook Contacts
    – New List
Mail Merge - Word

• Data Sources Continued
  – Locate or Create
  • Browse to File
  • Point to Outlook Contacts
  • Create New List

Use an existing list
Use names and addresses from a file or a database.
  • Browse...
  • Edit recipient...

Select from Outlook contacts
Select names and addresses from an Outlook contacts folder.
  • Choose Contacts Folder
  • Edit recipient list...

Type a new list
Type the names and addresses of recipients.
  • Create...
Mail Merge - Word

- Data Source Example

- Select
- Validate
- Search
- Edit
- Refresh
Mail Merge - Word

- Choose Your Format.
  - Step 4 of 6

- Create Your
  - Letter
  - E-mail
  - Envelopes
  - Labels
  - Directory
Mail Merge – Word

• Review Your Document
  – Step 5 of 6

• Preview/Edit Your
  – Letter
  – E-mail
  – Envelopes
  – Labels
  – Directory
Mail Merge - Word

- Complete Your Merge
  - Step 6 of 6

- Ready for Production:
  - Print
  - E-mail
  - Personalize
Mail Merge - Outlook

• Starting the Merge
  – Open Outlook
  • Go To >>
  • Tools >>
  • Mail Merge
Mail Merge - Outlook

- Getting Started
  - Select
    - Contacts
    - Document
    - Save for later use
    - Merge Options
Mail Merge - Outlook

• Moving On

  – When you click on “OK” Word will initialize and open.

  – If the Mail Merge “Task Pane” is not open. Open the pane (View >> Task Pane or ctrl+F1).

  – You will be at step 3 of the Mail Merge process.
Mail Merge - Outlook

• Finalizing the merge.

  – You will have to return the merge to step 1 to choose the type of merge you want to perform.

  – Then advance back to step 3

  – Follow the process to complete the merge.