

CREATING A FORM LETTER IN MICROSOFT WORD USING MAIL MERGE

1. Launch Word and open a new blank document.
2. Go to the Tools Menu and select "MailMerge".
3. Under the heading, "Main Document", click on the "Create" button.
4. Four choices: Form Letters, Mailing Labels, Envelopes, and Catalogs. Select "Form Letters".
5. Since you have a blank document on your screen, you will select "active window".
6. Under the heading, "Data Source", click on the button that says "Get Data".
7. Four choices again: Create Data Source, Open Data Source, Use Address Book, and Header.
8. Choose "Create Data Source" to make a new database of Addresses in Word.
9. To this list of fields you can add or remove fields. To remove highlight them & click on the "Remove field name" button. To add: where it says "Field Name", type Zipcode, & click on the button "Add field name".
10. Click on OK and you will see the Save As dialog box. Name this database file & save it.
11. To begin entering information click on "Edit Data Source".
12. Fill in the information & click on the "Add New" button. (Note: do NOT click on the OK button as this will tell Word that you are finished creating your database and it will close this box. Continue adding people, clicking "Add New" after each one, until you have all of the people in your database. When you are done, click on "OK".
13. Back at the blank document, there's a new toolbar at the top of your screen, which includes a button that says "Insert Merge Field". This is your Mail Merge toolbar.
14. At the beginning of your blank document click on the button that says "Insert Merge Field". From this dropdown list, click on Title. This inserts the title field into your document (It looks like <<Title>>). Insert a space.
15. Click "Insert Merge Field" button and FirstName field, space then LastName. You should now have a line in your document which looks like this: <<Title>> <<FirstName>> <<LastName>>. DON'T FORGET THE SPACES!
16. Press Enter to move to the next line & insert Address1. Press Enter and insert City. Then a comma (,) space, State, space, then Zipcode field.
17. Now, hit your Enter key a couple times to drop down a few lines and type the word, Dear. Now go back to your Insert Merge Field button and insert the Title field, hit the spacebar, insert the LastName field and type a comma.
18. Now, hit Enter a couple times to drop down a few lines and type the body of your letter. (If you want any personalized info within the body of your letter, you can insert these merge fields within the body of your letter anywhere you want.
19. Once you finish the letter, type your sign off line and signature.
20. Now, go back up to your Mail Merge toolbar and click on the button that says "Merge".
21. Leave the settings as they are and click on the button that says "Merge".
22. Your mail merge is now complete and all you need to do is print it.
23. When you are finished printing it, you can close all of these files and save the ones you want. You probably will not want to save the individual letters with the personalized info in them, but you SHOULD save the letter with the merge fields in it, in case you want to send this same letter to another group of people in the future, and you MUST save your database of addresses if you ever want to use this database with a different form letter or envelopes or mailing labels.

CONGRATULATIONS!! You have just successfully completed your first mail merge.