# Mail Merge Documentation

I.   Start the mail merge:

1. In Word, choose **File** > **New** > **Blank document**.
2. On the **Mailings** tab, in the **Start Mail merge** group, choose **Start Mail Merge**, and then choose the kind of merge you want to run.
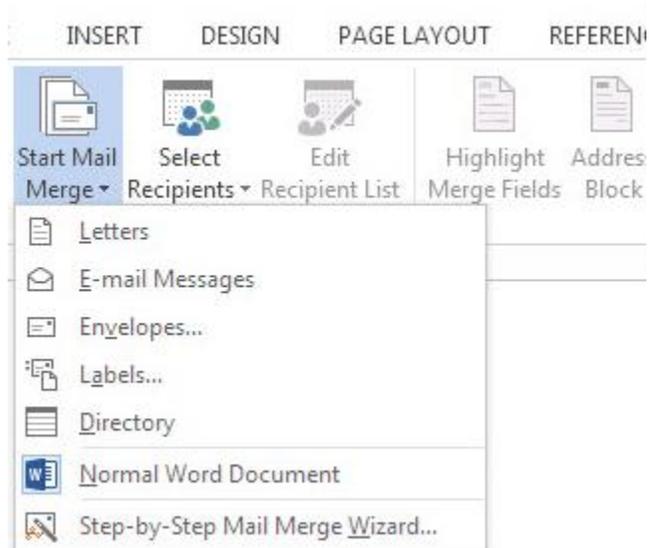
3. Choose **Select Recipients** > **Use an Existing List**.
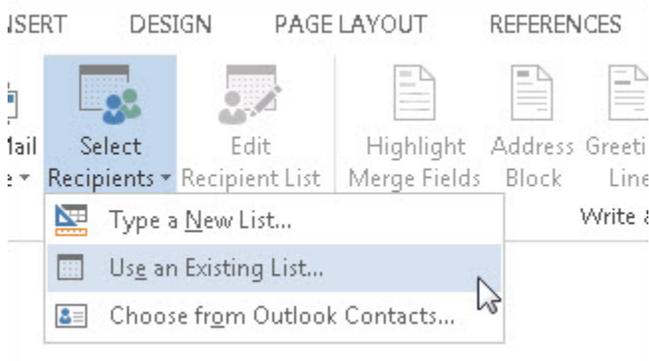
4. Browse to your Excel spreadsheet, and then choose **Open**.
5. If Word prompts you, choose **Sheet1$** > **OK**.

   Note: Now the Excel spreadsheet is connected to the mail merge document you're creating in Word.

Edit your mailing list

You can limit who receives your mail.

1. Choose **Edit Recipient List**.
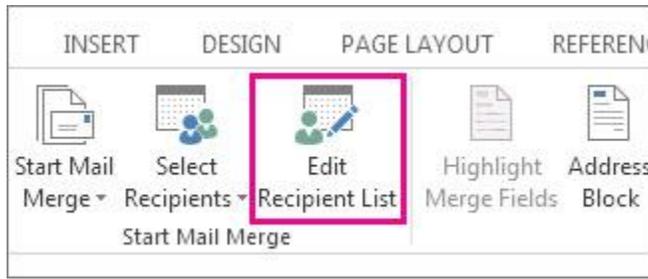
2. In the **Mail Merge Recipients** dialog box, clear the check box next to the name of any person who you don't want to receive your mailing.
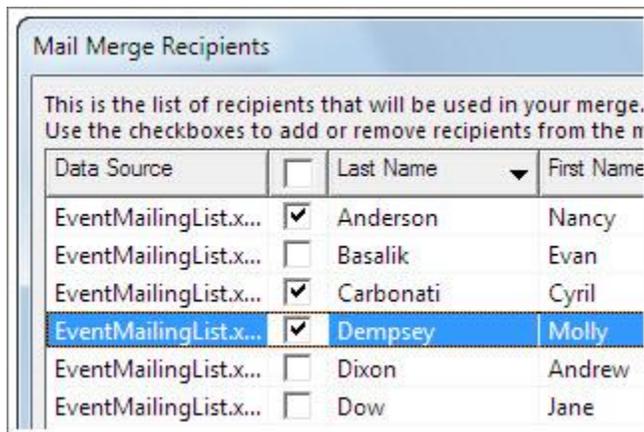
Note: You also can sort or filter the list to make it easier to find names and addresses. For more information about sorting and filtering items.

II.   Insert a merge Field:

You can insert one or more mail merge fields that pull the information from your spreadsheet into your document.

To insert an address block for an envelope, a label, an email message, or a letter

1. On the **Mailings** tab, in the **Write & Insert Fields** group, choose **Address Block**.

2. In the **Insert Address Block** dialog box, choose a format for the recipient's name as it will appear on the envelope.
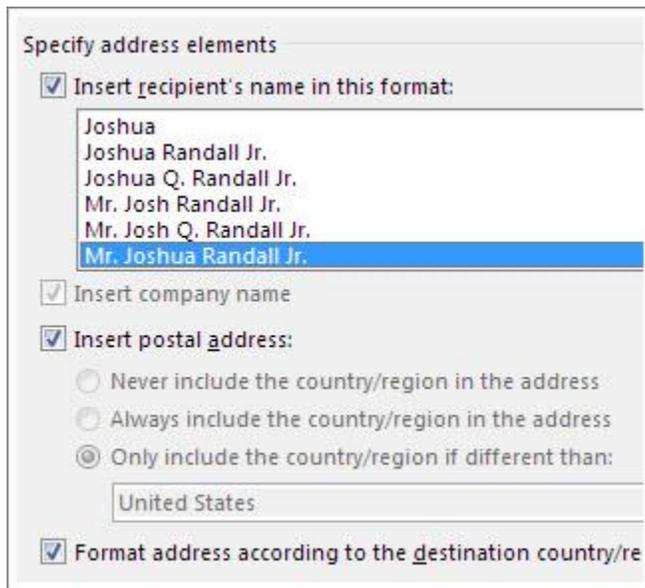
3. Choose **OK**.
4. Choose **File** > **Save**.

To insert a greeting line in an email message or a letter

1. On the **Mailings** tab, in the **Write & Insert Fields** group, choose **Greeting Line**.
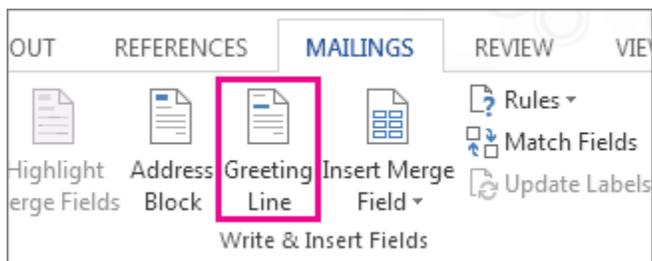

2. In the **Insert Greeting Line** dialog box, do the following:

- Under **Greeting line** format, change the salutation if necessary by choosing the greeting (**Dear** is the default), the format for the recipient name, and the ending punctuation (a comma is the default).
- Under **Greeting line for invalid recipient names**, choose an option in the salutation list.

3. Choose **OK**.
4. Choose **File** > **Save**.

III. <u>Preview and finish the mail merge:</u>

After you insert the merge fields you want, preview the results to confirm that the content is okay. And then you're ready to complete the merge process.

1. On the **Mailings** tab, choose **Preview Results**.
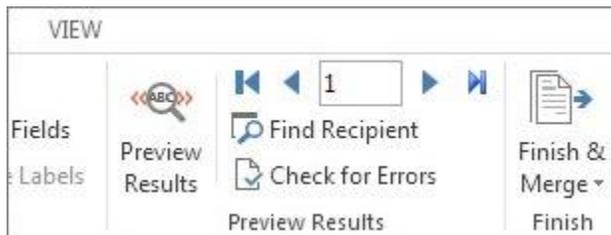
2. Choose the **Next** ▶ or **Previous** ◀ record button to move through records in your data source and view how the records will appear in the document.
3. In the **Finish** group, choose **Finish & Merge**, and choose **Print Documents** or **Send E-mail Messages**.
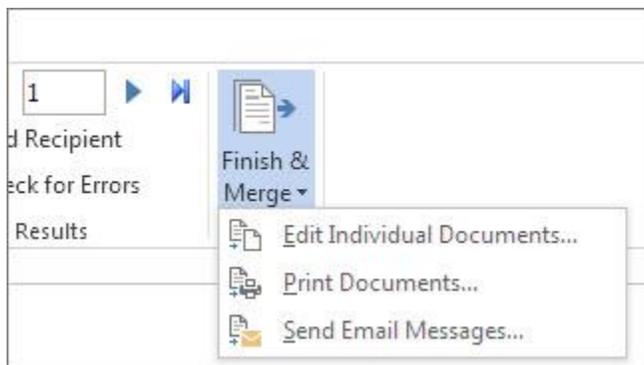
The Excel part of mail merge:

Make sure that you have the following order in the excel sheet (first name, last name and email).