

# Mail Merge Made Easy

By Lorrie Jackson

## WHY A TECHTORIAL?

### What will I learn today?

You'll learn how to personalize your bulk letters using the Mail Merge Wizard in Microsoft Word.

### What hardware and/or software does the techtorial apply to?

The terminology in this techtorial refers to Microsoft Office XP, but Mail Merge is available in most recent versions of Microsoft Office.

### Which National Educational Technology Standards for Teachers does the techtorial address?

The techtorial will help teachers accomplish standard IIIc in particular.

The International Society for Technology in Education (ISTE) has developed a set of National Educational Technology Standards for Teachers. Standards or Performance Indicators are included for each techtorial to help teachers and administrators improve technology proficiency. For a complete description of the standards indicated, go to [NETS for Teachers](#), click Standards in the menu bar on the left, and then click the arrow to the right of Standards and Performance Indicators for Teachers.

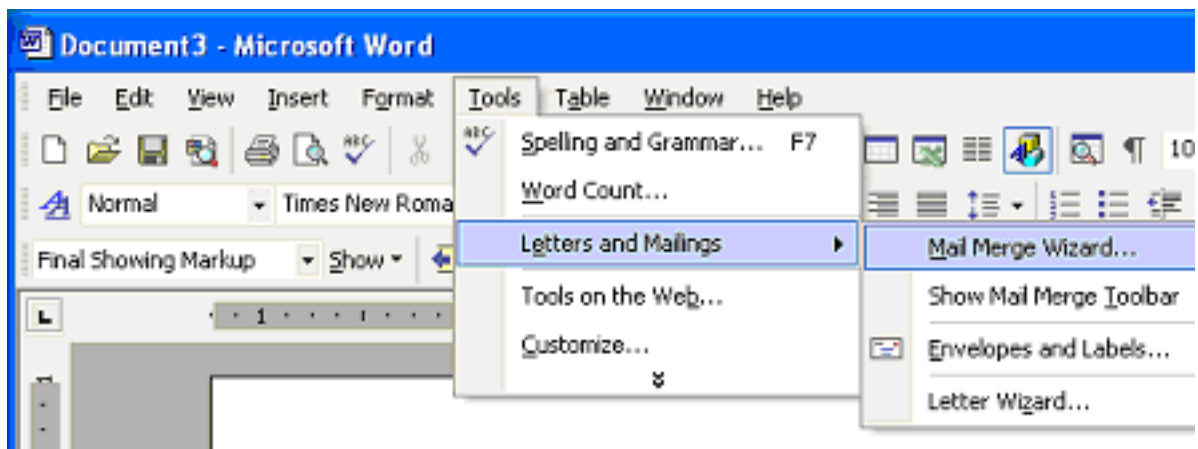
## WHAT IS MAIL MERGE?

Mail Merge is a feature in Microsoft Word that allows you to personalize form letters or other documents. With mail merge, you can type a single letter and individualize it for each recipient -- including parent and student names, addresses, and other specific data, for example -- without retyping the letter.

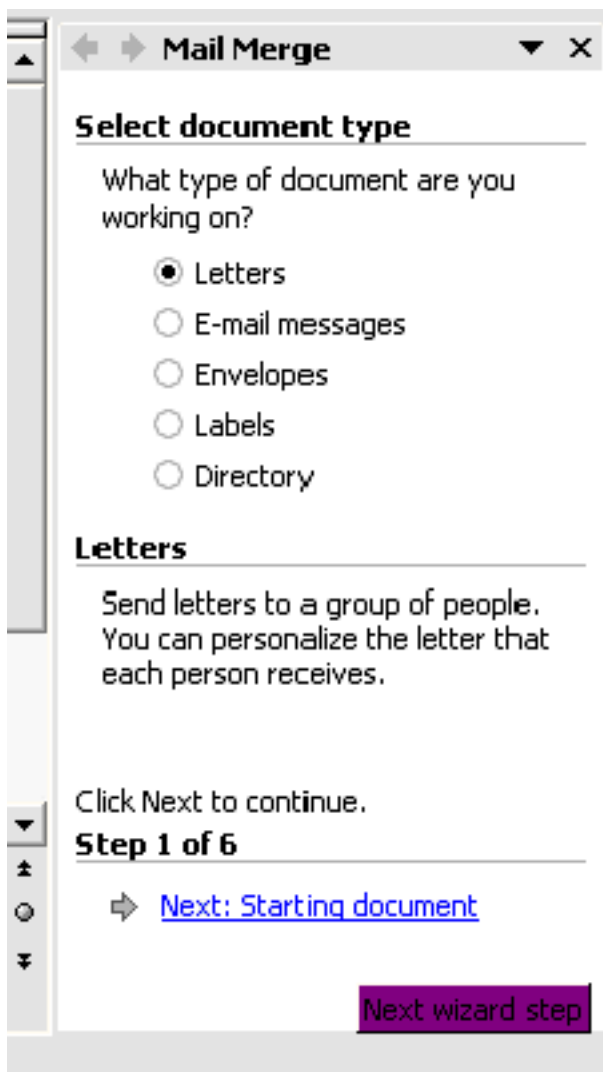
Microsoft Office XP's Mail Merge Wizard can help you quickly and easily create a personalized holiday form letter for your students, their parents, or your friends!

To prepare to create a letter using the Mail Merge Wizard:

- Open a new document in Microsoft Word 2003 (also called Office XP).



- Click **Tools>Letters and Mailings > Mail Merge Wizard**.



- The Mail Merge pane will appear.
- Click the circle next to Letters, and then click **Next: Starting Document**.

## WRITING YOUR LETTER?

For the purposes of this tutorial, we will type a letter to students' parents, wishing them a happy holiday and offering a preview of upcoming activities.

- Click **Use the Current Document**.
- Type your letter using a standard letter format. Do *not* include a salutation ("Dear Mrs. Smith,") or recipient address. Leave blank the areas in the letter that require such individualized data as names or addresses.

December 8, 2003

The semester is almost over, and I'd like to wish you and your child a very happy and healthy holiday break. Don't forget that we will begin researching for science fair when we return in January. You may want to begin discussing with some ideas that are of interest and perhaps visit our local science museum. Thank you for your continued support of Adams Elementary and don't hesitate to contact me if you have any questions or concerns.

Sincerely,

Mrs. Joan Smith  
4<sup>th</sup> Grade Teacher  
Adams Elementary  
123 Main St.  
Anywhere, AN 12345

## PERSONALIZING YOUR LETTER

To create a different version of the letter for each parent, you first need to create a database containing the individual information:

- Click **Next: Select Recipients** in the Mail Merge pane.

 Mail Merge

### Select recipients

- Use an existing list
- Select from Outlook contacts
- Type a new list

### Type a new list

Type the names and addresses of recipients.

 Create...

- In the area beneath Select Recipients, click the circle next to Type a New List, and

then click **Create**.

- A new window, called New Address List, will open.

**New Address List**

Enter Address information

Title

First Name

Last Name

Company Name

Address Line 1

Address Line 2

City

State

New Entry Delete Entry End Entry ... Filter and Sort... Customize...

View Entries

View Entry Number First Previous 1 Next Last

Total entries in list 1

Cancel

- **Enter Address information** (complete the above form) for one student's parent(s).
- Click **Customize**. In the Customize Address List window, click **Add**, type *Child's Name*, then click **OK**.

**New Address List**

Enter Address information

Title Mr.

Child's name John Michael

First Name Albert

Last Name Smith

Company Name

Address Line 1 144 Pine Ave.

Address Line 2

City

State

New Entry Delete Entry End Entry ... Filter and Sort... Customize...

View Entries

View Entry Number First Previous 2 Next Last

Total entries in list 2

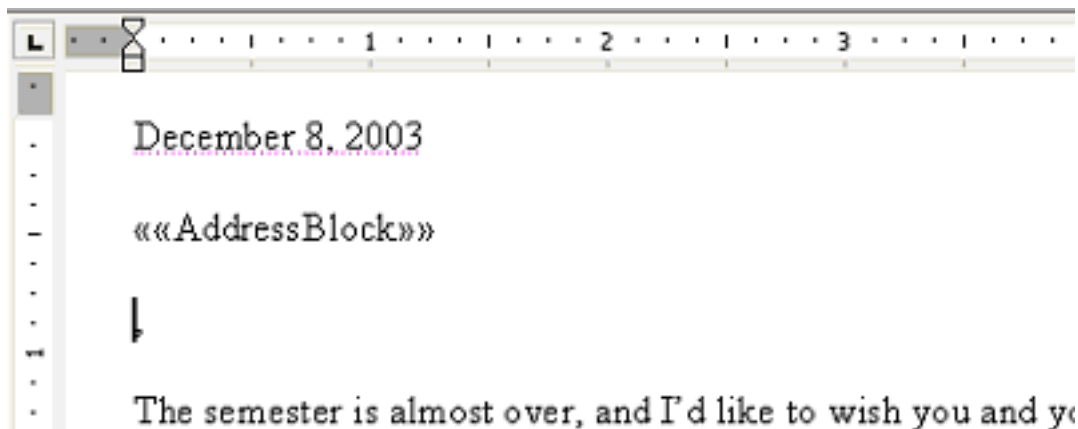
Close

- The Address information form now includes a space for the child's name.
- Type the appropriate child's name into the space labeled Child's name.
- Click **New Entry**. A new Address information form will appear.
- Complete an Address information form for another student's parent(s), and then click **New Entry**.
- Continue adding names and addresses until your list is complete.
- Click **Close**.
- You will be asked if you want to save your list. Give the list a name you'll remember and save it in a file you'll remember. (You might name it "Parent List" and save it in My Documents, for example.)
- Click Save.
- A Mail Merge Recipients window will open. This window allows you to choose who will receive your letter. Here, you'll have the opportunity to "sort" recipients. For example, if you included every parent's name, but only want to send letters to boys' parents, you would find that feature here. For now, click **Close**.

## MAIL MERGE

To create your customized letters:

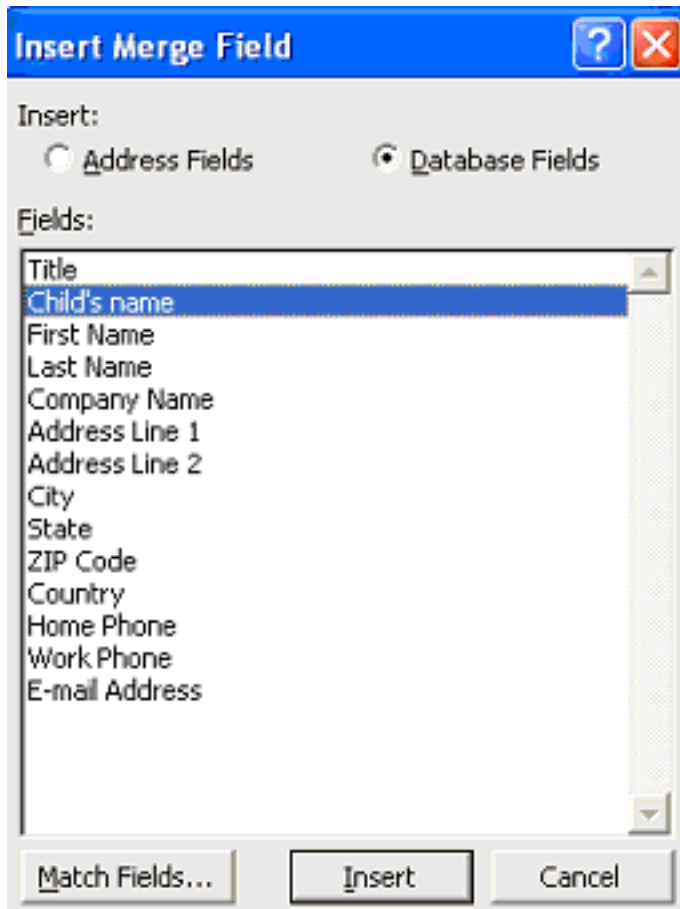
- Put your cursor two lines beneath the date in your letter and click.



- Click **Address block** in the Mail Merge pane.
- Click **OK**. An AddressBlock field will appear in your letter.
- Click the area in the letter where the salutation should be.
- Click **Greeting line**, and then click **OK**. A GreetingLine field will appear in your letter.

Your letter can be customized in other ways as well. If you've typed a sentence you want the student's name to appear in:

- Click the area in the letter where you want the name to appear.
- Click **More Items** in the Mail Merge pane, and then click OK.
- An Insert Merge Field window will appear.



- Click **Child's name** and **Insert**.
- Click **Close**.

## PREVIEWING YOUR LETTER

Did it work? The Mail Merge Wizard also allows you to see how your letter turned out.

- Click **Next: Preview Your Letter**. The preview pane will appear along with the first copy of your letter.
- Check to see that your letter is correct. (Don't forget to check the spacing in the address, salutation, and name fields.).

- Use the double arrows to move to through all your the letters, if necessary.
- If you find any errors, click **Previous: Write Your Letter** in the Mail Merge pane, and keep clicking until you get to a place where you can fix the error.
- If everything looks correct, click **Next: Complete Your Mail Merge**.

## COMPLETING YOUR MAIL MERGE

If you have a special note you want to add for some of the parents, click **Edit individual letters** in the Mail Merge pane.

Click **Print** to print all the letters.

That it's!

## TELL ME MORE!

For help using Mail Merge on older versions of Word (such as Word 98, 2000, or ME), try an [Internet 4Classrooms tutorial](#).