



Mail Merge

Mass mailings in minutes

Finally a resource for those that need it the most;
those doing the most with the least; those
contributing their talents to educate our children - the
school secretary.

Think of a mail merge as a blank form letter looking for specific information:

To the Parent/Guardian of: {student} _____
{street address}
Mailing Street Address
{city} {state} {zip}
Mailing City, Mailing State, Mailing Zip

Dear M/M {salutation} _____,

{student} _____ has {# owed} books overdue to the Library and
owes \$ { \$ owed } in fines. Please have {student} _____ return the
books and pay the fine before {due date} _____.

Sincerely,
Mrs. Crabapple

This letter has to be sent to the parents of ten students in your school. Each letter needs to be student specific. Using a mail merge you can quickly generate those letters using two files, the template (blank letter) file, and the data file (usually a spreadsheet).

Here is a sample of the finished product:

To the Parent/Guardian of: Mary
10 Main Street, Apt. 3A
Bay City, MI, 48706

Dear M/Mrs. Jones,

Mary has 5 books overdue to the Library and owes \$7.50 in fines.
Please have Mary return the books and pay the fine before June 2nd.

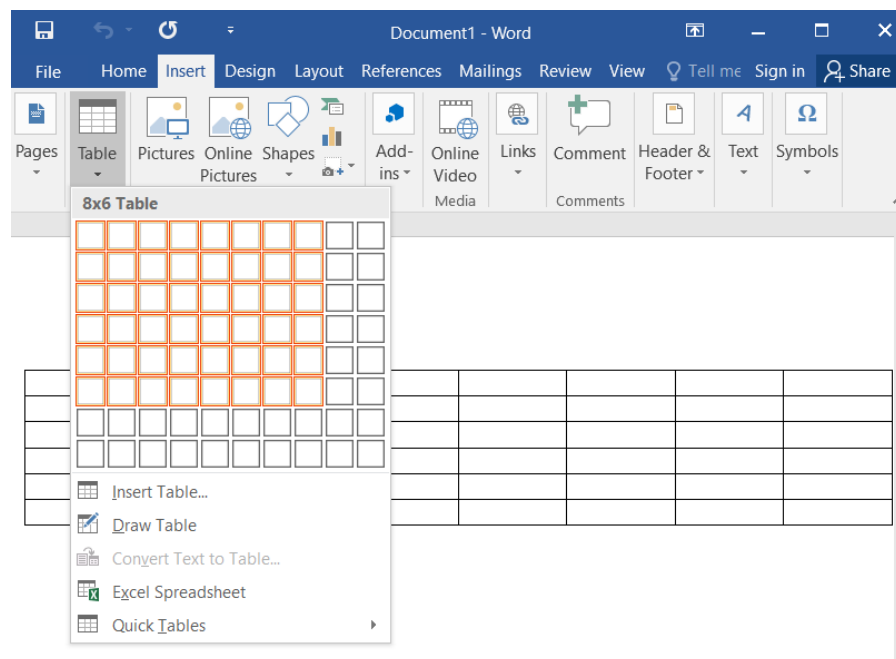
Sincerely,
Mrs. Crabapple

Let's get started with the basic form letter above.

To perform a mail merge two (2) separate files will come together to create the finished product (letters, labels, certificates, etc.). One of the files will be a spreadsheet. A spreadsheet can be created and saved using tables in Word, or Excel (this is handy if an Excel file exists for other purposes; you do not have to use all the information on the file, just select certain columns). If you are exporting data, usually the export file is opened with Excel (from say a student information system for example).

For the purposes of the form letters we are creating, let's create a table in Word. To create the table in Word, open a new, Blank Document. From the Insert tab, select Table, drag across the number of columns (the columns titles will be your field names) you will need – do not worry if you need to add rows, simply hit tab at the end of a row and a new row will appear!

Create a data file in Word:



Each column name will be a field name:

student	Street address	City	State	Zip	Salutation	# owed	\$ owed	Due date
Mary	10 Main Street, Apt. 3A	Bay City	MI	48706	Mr. & Mrs. Jones	5	7.50	June 2 nd
John	4 North Avenue	Bay City	MI	48706	Mr. & Mrs. Smith	3	4.00	June 2 nd
James	101 Third Avenue	Bay City	MI	48706	Mr. & Mrs. Black	4	5.25	June 2 nd
Jane	3 Main Street	Bay City	MI	48706	Mr. & Mrs. White	4	6.00	June 2 nd
Katie	46 Parkman Place	Bay City	MI	48706	Mr. & Mrs. Murphy	3	5.50	June 2 nd
Tom	272 Hollywood	Bay City	MI	48706	Mr. & Mrs. Kelly	1	0.75	June 2 nd

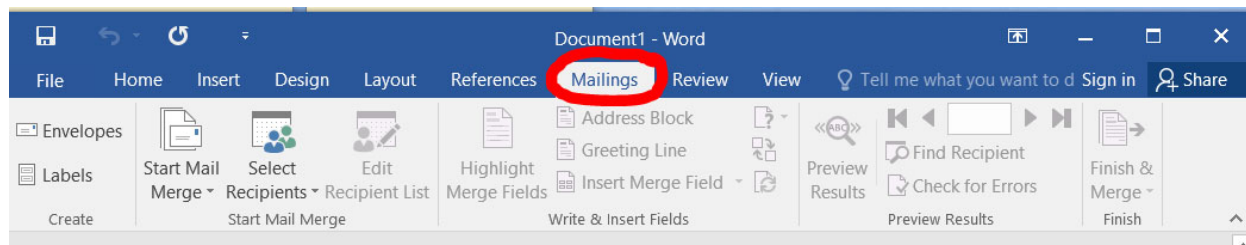
Liam	930 Penny Lane	Bay City	MI	48706	Mr. & Mrs. O'Rourke	6	4.75	June 2 nd
Kevin	76 Inwood Road	Bay City	MI	48706	Mr. & Mrs. Clark	3	4.25	June 2 nd
Alex	747 Jeopardy Way	Bay City	MI	48706	Mr. & Mrs. Trebek	4	6.25	June 2 nd
Jennifer	585 Tremont Avenue	Bay City	MI	48706	Mr. & Mrs. Lopez	2	1.50	June 2 nd

Save the file; include data file in the name to make it easier to find. So, for example this file can be saved as “overdue books data file.doc”.

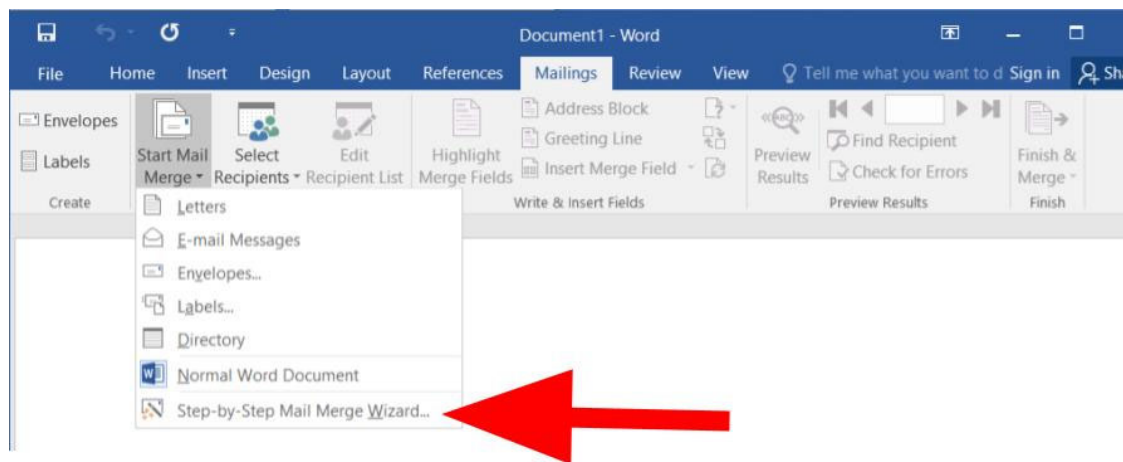
Now that the data file is ready to go, let's start on the template document.

Create a Starting Document – Template for Mail Merge

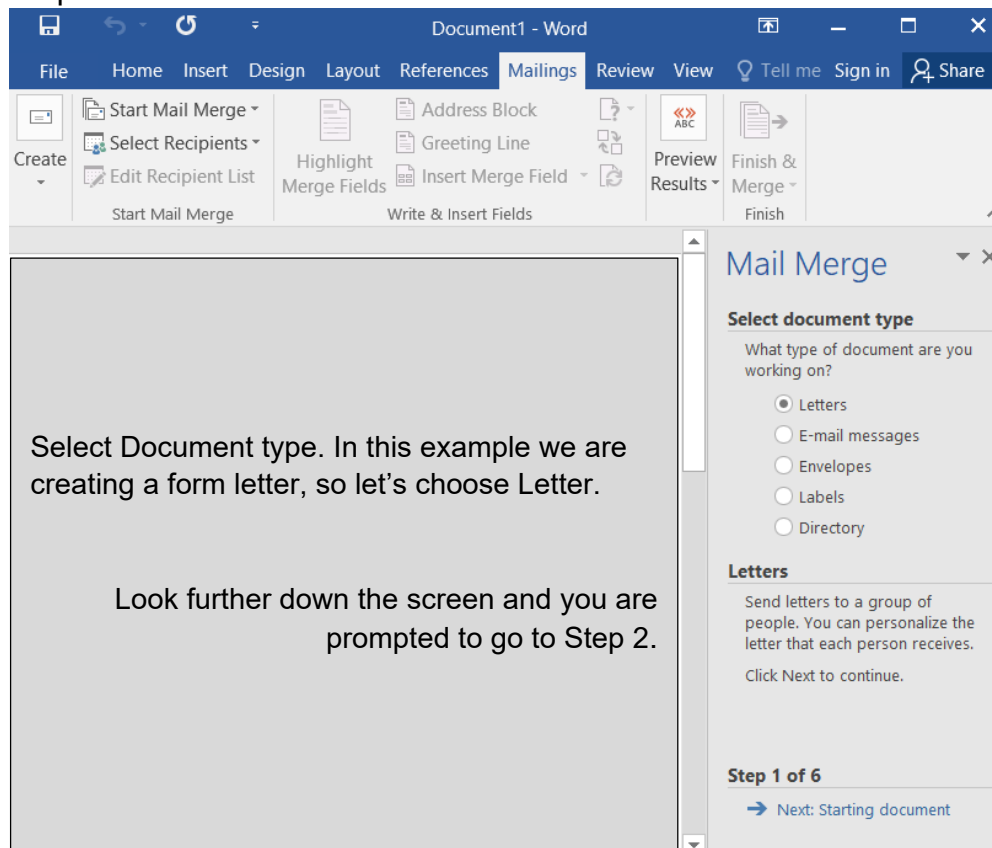
Open a Blank Document in Word > Select the Mailings Tab



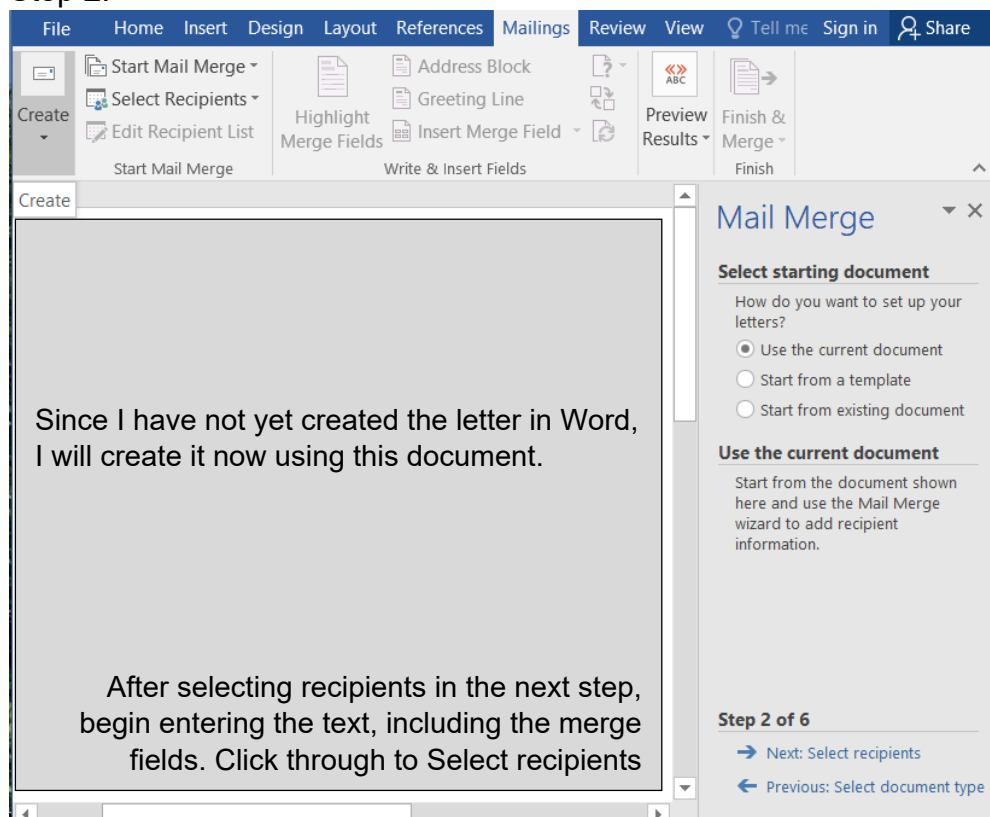
I always open the wizard to walk me through all the steps; even though I am quite comfortable with mail merges, if the guidance is there, why not use it!



Step 1:



Step 2:



Step 3:

Select recipients simply means to choose the list that we previously created.

Click on Browse to open File Explorer and select the file – for this example “overdue books data file.doc”.

The next step will bring us back to the Starting Document

Mail Merge

Select recipients

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

Use an existing list

Use names and addresses from a file or a database.

[Browse...](#)

[Edit recipient list...](#)

Step 3 of 6

[Next: Write your letter](#)

[Previous: Starting document](#)

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Step 4:

Now that the data file is attached, as you enter text, select Insert Merge Field to insert the appropriate text:

To the Parents of «student»
«Street_address»
«City», «State»

Insert Merge Field

Insert:

- ☐ Address Fields
- ☒ Database Fields

Fields:

- student
- Street_address
- City
- State
- Zip**
- Salutation
- M_owed
- M_owed1
- Due_date

Mail Merge

Write your letter

If you have not already done so, write your letter now.

To add recipient information to your letter, click a location in the document, and then click one of the items below.

- [Address block...](#)
- [Greeting line...](#)
- [Electronic postage...](#)
- [More items...](#)

When you have finished writing your letter, click Next. Then you can preview and personalize each recipient's letter.

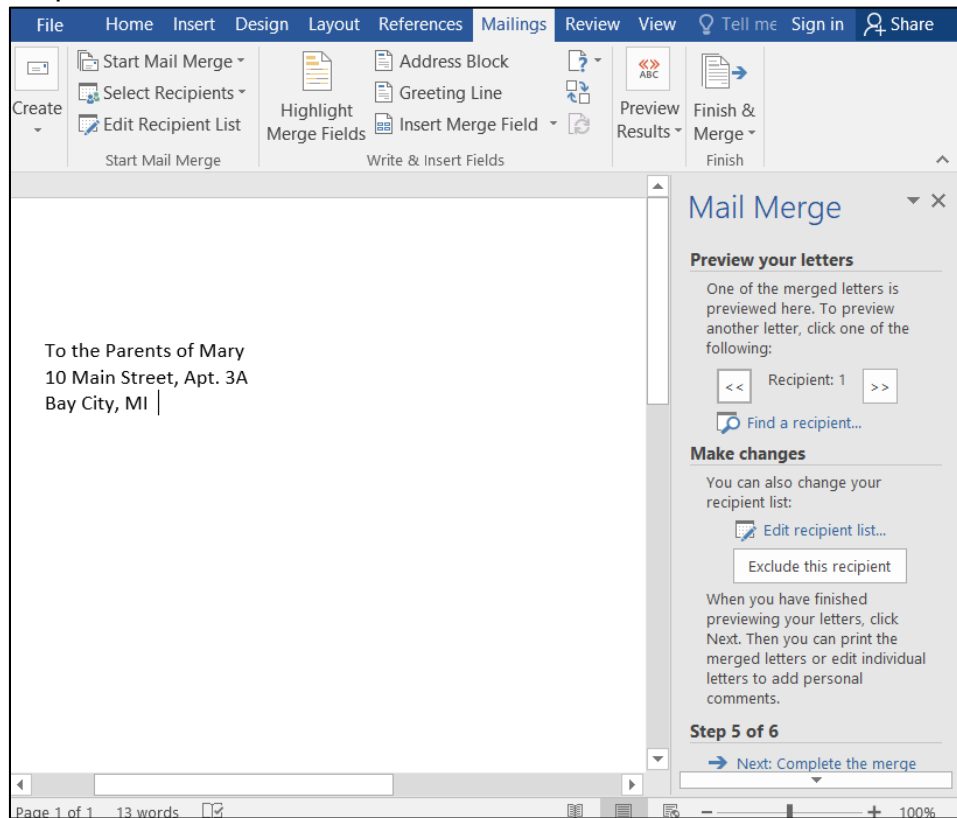
Step 4 of 6

[Next: Preview your letters](#)

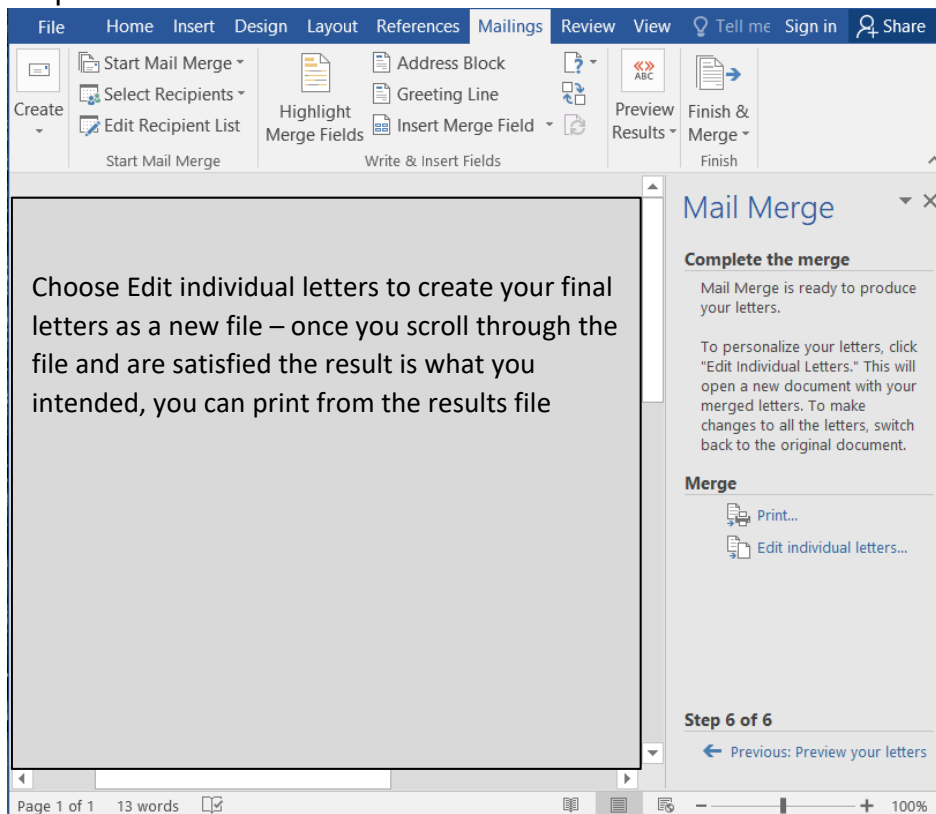
[Previous: Select recipients](#)

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Step 5



Step 6



Click here to see a video walkthrough: [Mrs. Office Lady – Mail Merge for beginners](#)

Create Labels using a mail merge

Use the Mail Merge Wizard, but instead of choosing Letters as your starting document, choose Labels. You will be able to choose a template from Avery, 3-M, all the brands to line up the margins for you!

When creating mailing labels, the one difference is you will be able to Replicate Labels so there will be one label for each contact from your data file. Once you click on Update Labels in Step 4, every label will populate with the field names (really handy if you have 30 labels per page!)

«Salutation»¶ «Street_address»¶ «City», «State» «Zip»¶ ¶	«Next-Record»«Salutation»¶ «Street_address»¶ «City», «State» «Zip»¶ ¶	«Next-Record»«Salutation»¶ «Street_address»¶ «City», «State» «Zip»¶ ¶
«Next-Record»«Salutation»¶ «Street_address»¶ «City», «State» «Zip»¶ ¶	«Next-Record»«Salutation»¶ «Street_address»¶ «City», «State» «Zip»¶ ¶	«Next-Record»«Salutation»¶ «Street_address»¶ «City», «State» «Zip»¶ ¶
«Next-Record»«Salutation»¶ «Street_address»¶ «City», «State» «Zip»¶ ¶	«Next-Record»«Salutation»¶ «Street_address»¶ «City», «State» «Zip»¶ ¶	«Next-Record»«Salutation»¶ «Street_address»¶ «City», «State» «Zip»¶ ¶

Create Awards/Certificates using a mail merge

The students in Mrs. O'Brien's class just completed the walkathon for the local food bank. You are tasked with creating a Certificate of Award for these students and want to make it extra special.

Create a certificate and where the student's name would print, insert a mail merge field with their first name – play with the fonts and colors! Microsoft Publisher also has an option for Mail Merge – allows you to create really special documents!



One data file allows you to communicate many ways!

The principal has been keeping a list of volunteers that have helped out throughout the school year. The volunteer appreciation breakfast is coming up and you need to send invites to everyone. You may have to follow up with an email as well.

Using the same data file, you can first create a form letter. Then, go back and instead of choosing letters in the Mail Merge Wizard, choose email, as long as Outlook has your email added, your emails will go! After composing your email and selecting the distribution list, this window will open:

Merge to E-mail

Message options

To: [dropdown]

Subject line: [text box]

Mail format: HTML [dropdown]

Send records

☒ All

☐ Current record

☐ From: [text box] To: [text box]

OK Cancel