

## How to Use Mail Merge

You can use the data in a Microsoft Excel spreadsheet to generate personalized letters using Microsoft Word Mail Merge facility. The following steps show you how.

1. Create your form letter or document in Word, saving and naming it.
2. Once the document is created in Word, choose Tools/Mail Merge/Step 1/Main Document/Create. Using the down arrow, choose Form letters.
3. Choose to do this in the Active Window (your document is already open and on the desktop and thus active).
4. Still in the Mail Merge Helper window, choose Step 2/Data Source/Get Data
5. Now using the down arrow, choose Open Data Source...
6. Browse until you find the excel database file you created previously (remember to display "all files" so that you can find the excel workbook).
7. Select the excel file. A window appears allowing you to choose the Entire Spreadsheet. Click on OK
8. Choose the Edit Main Document option since Word has found no merge fields in the Main Document, thus you must insert them.
9. At this point you are returned to the Main Document which you have created. You will note there is now a button called Insert Merge Field with a drop down arrow beside it. By clicking on this down arrow, you will be able to select from the different merge fields such as Organization Name, User Name etc.
10. Position your cursor anywhere in the document where you would like to insert the data. For example, position your cursor after To: and then click on Insert Merge Field to select **Organization Name**. Proceed to the next spot in the document where you wish to insert the appropriate data.

The above outlines how the document wrac\_memo\_merge.doc was created. When you are ready to create all of the form letters, you proceed as follows:

11. Open the document wrac\_memo\_merge.doc in Word and choose **Tools/Mail Merge** and then **Step 3/Merge the data** with the document.
12. Click on the **Merge** button, accepting the default of Records to be merged **All**.
13. The document and data proceed to merge. You may now save the merged document for future use or just print it.