

# Mail Merge Instructions

- 1.) Open Word, go to **Tools, Letters and Mailings, Mail Merge Wizard**
- 2.) Select **Letters** in the **Task Pane** on the right
- 3.) Click **Next: Starting document**
- 4.) Click **Next: Select recipients**
- 5.) You can select a list that you already have set up or create a new list.

**Note: The recipient list is where you build all of your merge fields, including those for the body of the letter.**

6.) To create a new list, select **“Type a new list”**. Click on **Create**. Enter appropriate data in form and click **“New Entry”** to move to next recipient record. To add additional fields not already on form, click **Customize**, then click **Add**.

7.) Click **Next: Write your letter**

8.) Insert date, Address block, Greeting line

9.) Type your letter, inserting merge fields wherever they are needed by clicking on the **“More items”** option.

10.) Click **Next: Preview your letters**, to make sure your merge fields are working correctly

**Note: If commas or spaces or other corrections are needed before printing letters, toggle between “Write your letter” and “Preview your letter” until all corrections are made.**

11.) After all corrections are made, click **Next: Complete the merge**

12.) At this point you can **“Edit individual letters”** if specialized changes are required and print from that point, or print directly from the merge without making changes from the **“Print”** option

**It is important to remember that at any time in the process of setting up a merge, you can toggle back and forth through the steps and edit both your merge data information and the letter itself until you choose the “Print” option.**

**\*\* You can also access other options by selecting – View, toolbars, mail merge.**