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(Originally found here: <http://office.microsoft.com/en-us/word-help/use-mail-merge-to-create-and-print-letters-and-other-documents-HA101857701.aspx>)

Use mail merge to create and print letters and other documents

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You use mail merge when you want to create a set of documents, such as a form letter that is sent to many customers. Each document has the same kind of information, yet some of the content is unique. For example, in letters to your customers, you can personalize each letter to address each customer by name. The unique information in each letter comes from entries in a data source.

The mail merge process entails the following overall steps:

1. **Set up the main document.** The main document contains the text and graphics that are the same for each version of the merged document — for example, the return address in a form letter.
2. **Connect the document to a data source.** A data source is a file that contains the information to be merged into a document. For example, the names and addresses of the recipients of a letter.
3. **Refine the list of recipients or items.** Microsoft Word generates a copy of the main document for each recipient or item in your data file. If you want to generate copies for only certain items in your data file, you can choose which items (or records) to include.
4. **Add placeholders, called mail merge fields, to the document.** When you perform the mail merge, the mail merge fields are filled with information from your data file.
5. **Preview and complete the merge.** You can preview each copy of the document before you print the whole set.

You use commands on the **Mailings** tab to perform a mail merge.

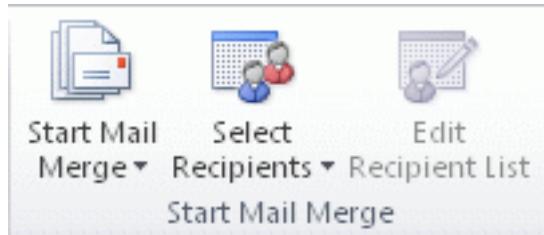
IMPORTANT If you plan to use custom contact fields with the Contacts list in Microsoft Outlook or if you plan to use a Public Folders Contacts folder, you must **begin the mail merge process in Outlook**.

Set up the main document

1. Start Word.

A blank document opens by default. Leave it open. If you close it, the commands in the next step are not available.

2. On the **Mailings** tab, in the **Start Mail Merge** group, click **Start Mail Merge**.



3. Click **Letters**.

You can also use mail merge to create:

- **A catalog or directory** The same kind of information, such as name and description, is shown for each item, but the name and description in each item is unique. Click **Directory** to create this type of document.
- **A set of envelopes** The return address is the same on all the envelopes, but the destination address is unique on each one. For more information, see [Create and print envelopes for a mass mailing](#).
- **A set of mailing labels** Each label shows a person's name and address, but the name and address on each label is unique. For more information, see [Create and print labels for a mass mailing](#).
- **A set of e-mail messages** The basic content is the same in all the messages, but each message goes to the individual recipient and each message contains information that is specific to that recipient, such as the recipient's name or some other piece of information. For more information, see [Use mail merge to send personalized e-mail messages to your e-mail address list](#).

Resume a mail merge

If you need to stop working on a mail merge, you can save the main document and resume the merge later. Microsoft Office Word retains the data source and field information.

1. When you're ready to resume the merge, open the document.

Word displays a message that asks you to confirm whether you want to open the document, which will run a SQL command.

2. Because this document is connected to a data source and you want to retrieve the data, click **Yes**. If you were opening a document that you did not realize was connected to a data source, you could click **No** to prevent potentially malicious access to data.

The text of the document, along with any fields that you inserted, appears.

3. Click the **Mailings** tab, and resume your work.

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Connect the document to a data source

To merge information into your main document, you must connect the document to a data source, or a data file. If you don't already have a data file, you can create one during the mail merge process.

IMPORTANT If you use an existing list, make sure that it contains the information that you want to use, including all the columns and the rows. You can make some changes during the merge, but you can't open your data source separately during the merge. The merge process is easier if your data source is ready before you connect to it.

Choose a data file

1. On the **Mailings** tab, in the **Start Mail Merge** group, click **Select Recipients**.



2. Do one of the following:

- **Use Outlook Contacts** If you want to use your Contacts list in Microsoft Outlook, click **Select from Outlook Contacts**.

IMPORTANT For more information about using the Contacts list, see [Tips for working with Microsoft Outlook Contacts list](#).

- **Use an existing data source file** If you have a Microsoft Excel worksheet, a Microsoft Access database, or another type of data file, click **Use Existing List**, and then locate the file in the **Select Data Source** dialog box.

For Excel, you can select data from any worksheet or named range within a workbook. For Access, you can select data from any table or [query](#) that is defined in the database.

IMPORTANT For tips on formatting the data in your Excel worksheet for mail merge, see [Tips for formatting data in Excel](#).

For another type of data file, select the file in the **Select Data Source** dialog box. If the file is not listed, select the appropriate file type or select **All Files** in the **Files of type** box. In a mail merge, you can use the following types of data files:

- Files from single-tier, file-based database programs for which you have installed an [OLE DB](#) provider or[ODBC](#) driver (a number of which are included with Microsoft Office 2010).
- An HTML file that has a single table. The first row of the table must contain column names, and the other rows must contain data.
- A Microsoft Word document. The document should contain a single table. The first row of the table must contain headings, and the other rows must contain the records that you want to merge.
- Any text file that has [data fields](#) separated (or delimited) by tab characters, or commas and [data records](#)separated by paragraph marks.
- **Create a new data file in Word** If you don't have a data file yet, click **Type New List**, and then use the form that opens to create your list. The list is saved as a database (.mdb) file that you can reuse. For more information, see [Type a new list](#).

NOTE If you installed Microsoft Office 2010 (instead of installing Word 2010 by itself), you can also use Microsoft Query to construct a [query](#) and retrieve the data you want from an [external data source](#).

If you are ready to continue, [go to the next step](#).

If you need more information, read on.

Tips for working with Microsoft Office Outlook Contacts list

Connecting to your Outlook Contacts folder is usually a straightforward process, but sometimes you may encounter a problem. Here are solutions to common problems that you may encounter:

- I can't find my Outlook Contacts folder to connect to it.
- I get error messages about mail clients and tables.
- I can't connect to an Outlook Contacts folder in Public Folders.

I can't find my Outlook Contacts folder

You may need to turn on the **Show this folder as an e-mail Address Book** property in Outlook, or you may need to change your Outlook user profile.

Turn on the Show this folder as an e-mail Address Book property

1. In Microsoft Outlook, click **Contacts**.
2. Right-click the **Contacts** folder that contains the information that you want to use for a mail merge, and then click **Properties** on the shortcut menu.
3. On the **Outlook Address Book** tab, make sure that the **Show this folder as an e-mail Address Book** check box is selected, and then click **OK**.

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Change your Outlook user profile

An Outlook user profile is a group of e-mail accounts and address books. Usually, you need only one profile — but if you share your computer with other people or use different address books for different purposes, you can set up more than one profile. If, when you start your mail merge, you're using a profile that doesn't include the Contacts folder that you want to use, that folder won't be available.

To switch to a different user profile, restart Outlook. When you're prompted for a profile, choose the profile that includes the Contacts folder that you want to use in the mail merge.

If you aren't prompted for a profile and you know that you have more than one, you may want to set up Outlook so that it prompts you. To do this:

1. Exit Outlook.
2. In Control Panel, click **User Accounts**, and then click **Mail**.
3. Click **Show Profiles**.

4. To be prompted to select a profile each time you start Outlook, click **Prompt for a profile to be used**, and then click **OK**.

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I get error messages about mail clients and tables

If you try to connect to your Contacts folder during a mail merge in Word, and Outlook is not set up as your default e-mail program in Windows Internet Explorer, you will get an error message that says:

"Either there is no default mail client or the current mail client cannot fulfill the messaging request. Please run Microsoft Office Outlook, and set it as the default mail client."

To avoid getting this message during a mail merge, do the following:

1. Click the File tab.
2. Click **Options**.
3. Under **Start up Options**, select the **Make Outlook the default program for E-mail, Contacts, and Calendar**, and then click **OK**.

Start Word again, open your mail merge document, and connect to your Outlook Contacts folder.

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I can't connect to an Outlook Contacts folder in Public Folders

If you start a mail merge in Word and try to connect to an Outlook Contacts folder in **Public Folders**, you get an error message that says:

"The operation cannot be completed because of dialog or database engine failures. Please try again later."

If you try again later, you get the same error message.

To use a Public Folders Contacts folder as the data file for your mail merge, you have to start the mail merge from within Outlook.

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Tips for formatting data in Excel

If your data file is an Excel worksheet that includes percentages, currency values, or postal codes, you can preserve the numeric formatting of the data by using Dynamic Data Exchange to connect to the Excel worksheet from Word. For example, you can make sure a five-digit postal code of 07865 from your data file is not displayed as the number 7865 (without the leading zero).

Before you connect to the worksheet, do the following in Word:

1. Click the File tab.
2. Click Options.
3. Click **Advanced**.
4. Scroll to the **General** section, and select the **Confirm file format conversion on open** check box.
5. Click **OK**.
6. With the mail merge main document open, in the **Start Mail Merge** group on the **Mailings** tab, click **Select Recipients**, and then click **Use Existing List**.
7. Locate the Excel worksheet in the **Select Data Source** dialog box, and double-click it.
8. In the **Confirm Data Source** dialog box, click **MS Excel Worksheets via DDE (*.xls)**, and then click **OK**. If you don't see **MS Excel Worksheets via DDE (*.xls)**, select the **Show all** check box.
9. In the **Microsoft Excel** dialog box, for **Named or cell range**, select the cell range or worksheet that contains the information that you want to merge, and then click **OK**.

NOTE To prevent being prompted every time you open a data file, you can clear the **Confirm conversion at Open** check box after you connect to the worksheet.

Type a new list

1. In the **New Address List** dialog box, type the information for the first address, or record, that you want to include in your mail merge.

If you want to add or remove columns, click **Customize Columns**, and then make the changes that you want.

2. After you type all the information for your first record, click **New Entry**, and then type the information for the next record. Continue until you have typed information for all the records that you want to include.
3. When your new list is complete, click **OK**.
4. In the **Save Address** List dialog box, type a name for your new list, and then click **Save**.

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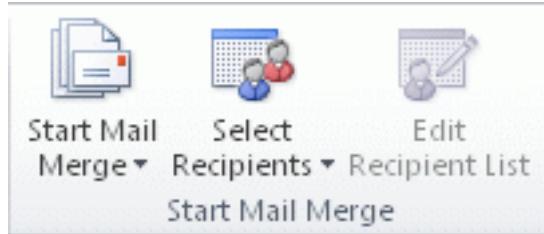
Refine the list of recipients or items

When you connect to a certain data file, you might not want to merge information from all the records (or rows) in that data file into your main document.

If you plan to use your entire list, you can [skip ahead to the next step](#).

To narrow the list of recipients or use a subset of the items in your data file, do the following:

1. On the **Mailings** tab, in the **Start Mail Merge** group, click **Edit Recipient List**.



2. In the **Mail Merge Recipients** dialog box, do any of the following:

- **Select individual records** This method is most useful if your list is short. Select the check boxes next to the recipients you want to include, and clear the check boxes next to the recipients you want to exclude.

If you know that you want to include only a few records in your merge, you can clear the check box in the header row and then select only those records that you want. Similarly, if you want to include most of the list, select the check box in the header row, and then clear the check boxes for the records that you don't want to include.

- **Sort records** Click the column heading of the item that you want to sort by. The list sorts in ascending alphabetical order (from A to Z). Click the column heading again to sort the list in descending alphabetical order (Z to A).

If you want more complex sorting, click **Sort** under **Refine recipient list** and choose your sorting preferences on the **Sort Records** tab in the **Filter and Sort** dialog box. For example, you can use this type of sorting if you want recipient addresses to be alphabetized by last name within each postal code and the postal codes listed in numerical order.

- **Filter records** This is useful if the list contains records that you know you don't want to see or include in the merge. After you filter the list, you can select or clear the check boxes to include or exclude records.

To filter records, do the following:

1. Under **Refine recipient list**, click **Filter**.
2. On the **Filter Records** tab in the **Filter and Sort** dialog box, choose the criteria that you want to use for the filter.

For example, to generate letters only for addresses that list Australia as the country/region, you click **Country or Region** in the **Field** list, click **Equal to** in the **Comparison** list, and then type or select **Australia** in the **Compare to** list.

3. To refine the filter further, click **And** or **Or** and choose more criteria.

For example, to generate letters only for businesses in Munich, you filter on records whose **City** field contains **Munich** and whose **Company Name** field is not blank. If you use **Or** instead of **And** in this filter, your mail merge includes all Munich addresses as well as all addresses that include a company name, regardless of city.

- **Add recipients** To add recipients to the list, do the following:
 1. Under **Data source**, click the name of your data file.
 2. Click **Edit**.
 3. In the **Edit Data Source** dialog box, click **New Entry**, and then type the information for that recipient.

TIP Depending on the type of data source that you use, some processes might not be available. If possible, make sure that your data file is complete before you connect it to your main document.

NOTE If you have installed address validation software, you can click **Validate addresses** in the **Mail Merge Recipients** dialog box to validate your recipients' addresses.

Add placeholders, called mail merge fields, to the document

After you connect your main document to a data file, you are ready to type the text of the document and add placeholders that indicate where the unique information will appear in each copy of the document.

If you are familiar with how mail merge fields work, you can skip ahead to [mapping and merging](#).

If you want to learn more about how mail merge fields work, read on.

About mail merge fields

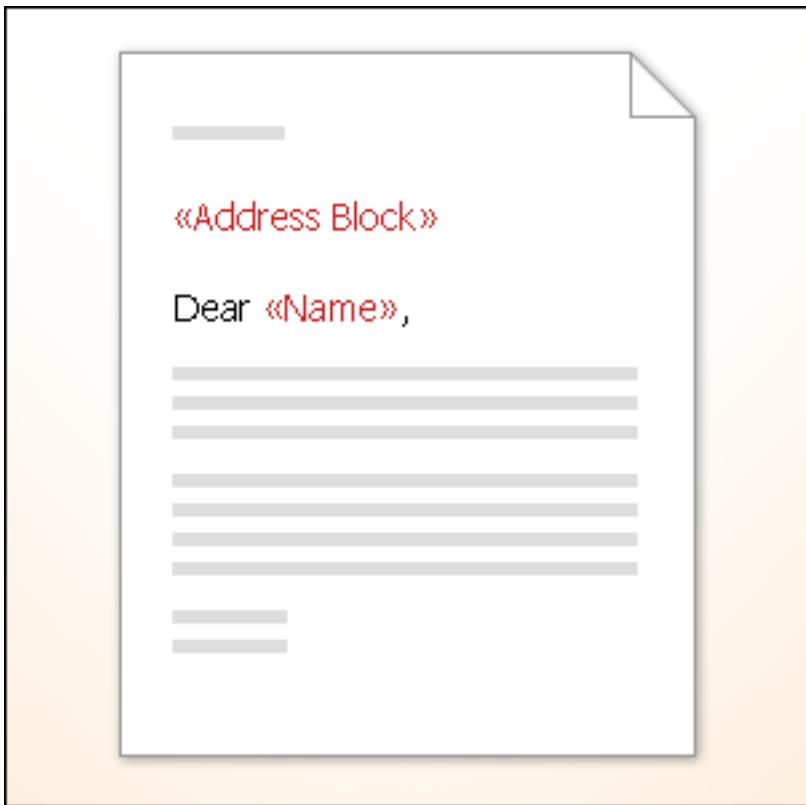
The placeholders, such as address and greeting, are called mail merge fields. Fields in Word correspond to the column headings in the data file that you select.

	A	B	C
1	Name	Last Name	Street Address
2	Nancy	Anderson	123 Main St.
3	Ann	Beebe	567 Country Rd.
4			
5			
6			
7			
8			
9			

1 Columns in a data file represent categories of information. Fields that you add to the main document are placeholders for these categories.

2 Rows in a data file represent records of information. Word generates a copy of the main document for each record when you perform a mail merge.

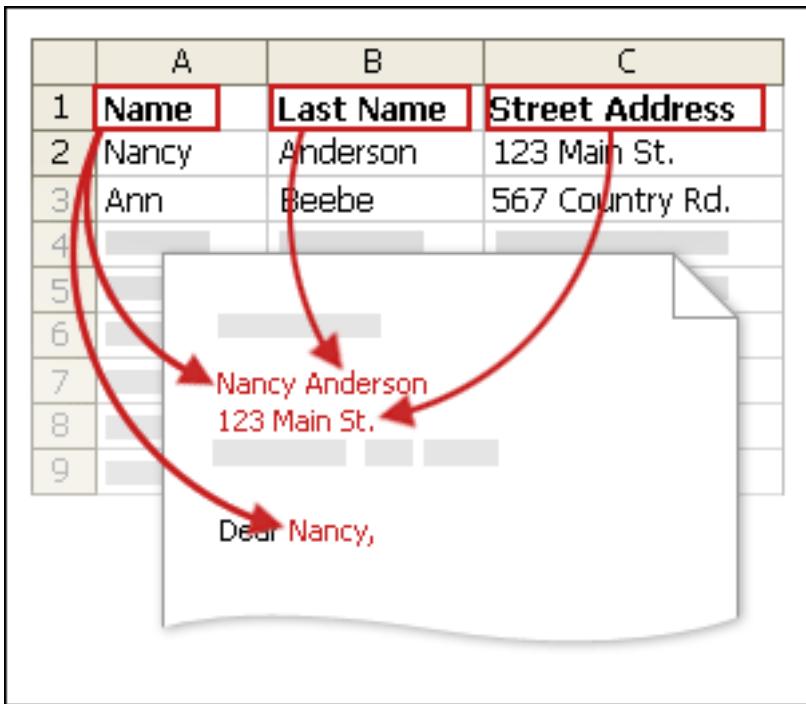
By putting a field in your main document, you indicate that you want a certain category of information, such as name or address, to appear in that location.



NOTE When you insert a mail merge field into the main document, the field name is always surrounded by chevrons (« »). These chevrons do not show up in the merged documents. They just help you distinguish the fields in the main document from the regular text.

What happens when you merge

When you merge, information from the first row in the data file replaces the fields in your main document to create the first merged document. Information from the second row in the data file replaces the fields to create the second merged document, and so on.



Working with fields: Examples

You can add any column heading from your data file to the main document as a field. This gives you flexibility when you design form letters and other merged documents.

For example, suppose you are creating a letter to notify local businesses that they have been selected for inclusion in your annual city guide. If your data file contains a Company column with the name of each business that you want to contact, you can insert the «Company» field instead of typing the name of each individual company.

You can combine fields and separate them by punctuation marks. For example, to create an address, you can set up the fields in your main document like this:

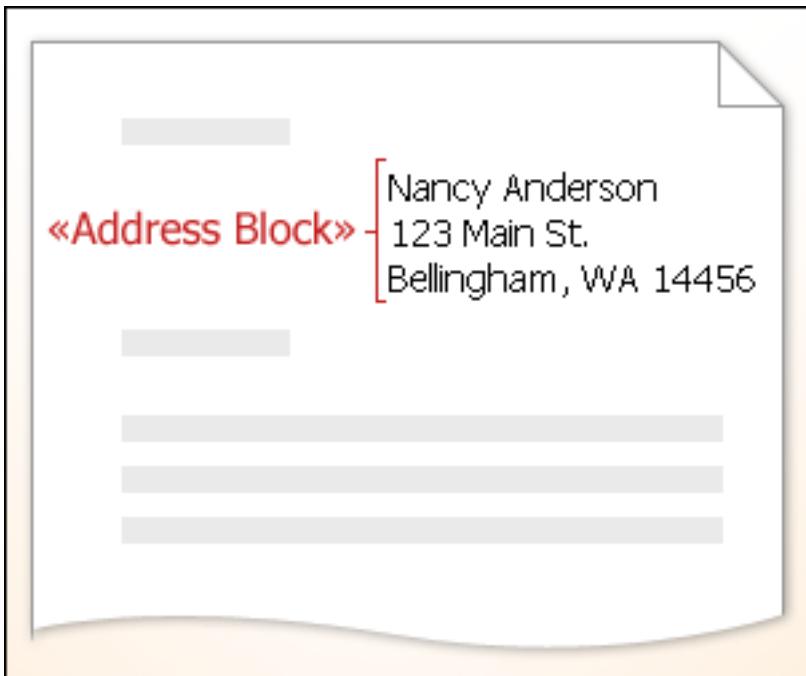
«First Name» «Last Name»

«Street Address»

«City», «State» «Postal code»

For things that you use frequently, like address blocks and greeting lines, Word provides composite fields that group a number of fields together. For example:

- The Address Block field is a combination of several fields, including first name, last name, street address, city, and postal code.



- The Greeting Line field can include one or more name fields, depending on your chosen salutation.

You can customize the content in each of these composite fields. For example, in the address, you may want to select a formal name format (Mr. Joshua Randall Jr.); in the greeting, you may want to use "To" instead of "Dear."

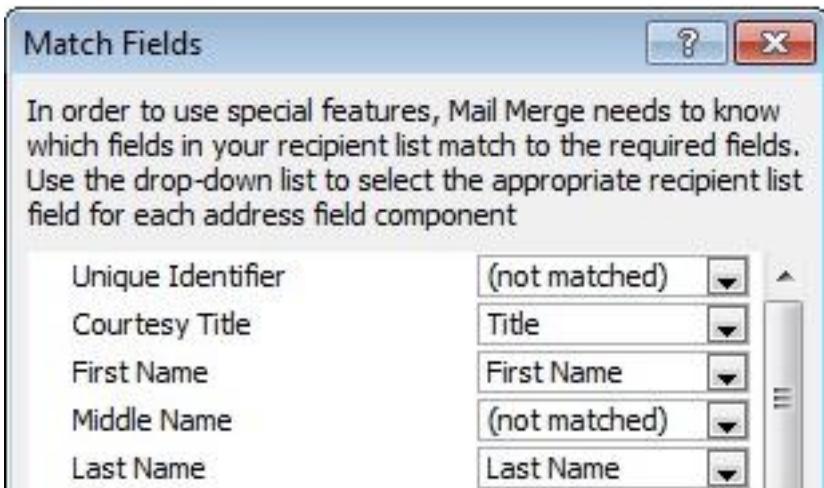
Map mail merge fields to your data file

To make sure that Word can find a column in your data file that corresponds to every address or greeting element, you may need to map the mail merge fields in Word to the columns in your data file.

To map the fields, click **Match Fields** in the **Write & Insert Fields** group of the **Mailings** tab.



The **Match Fields** dialog box opens.



The elements of an address and greeting are listed on the left. Column headings from your data file are listed on the right.

Word searches for the column that matches each element. In the illustration, Word automatically matched the data file's **Title** column to **Courtesy Title**. But Word was unable to match other elements. From this data file, for example, Word can't match **Middle Name**.

In the list on the right, you can select the column from your data file that matches the element on the left. It is okay that **Unique Identifier** isn't matched. Your mail merge document doesn't need to use every field. If you add a field that does not contain data from your data file, it will appear in the merged document as an empty placeholder — usually a blank line or a hidden field.

Type the content and add the placeholders, or fields

1. In the main document, type any content that you want to appear on every copy of the document.

To add a picture, such as a logo, click **Picture** in the **Illustrations** group on the **Insert** tab.

2. Click where you want to insert the field.
3. Use the **Write & Insert Fields** group on the **Mailings** tab.



4. Add any of the following:

⊕ Address block with name, address, and other information

⊕ Greeting line

⊕ Individual fields

⊕ Custom fields from Outlook contacts

NOTES

- You can't type merge field characters (« «») manually or use the **Symbol** command on the **Insert** menu. You must use mail merge.
- If the merge fields appear inside braces, such as { MERGEFIELD City }, then Microsoft Word is displaying **field codes** instead of **field results**. This doesn't affect the merge, but if you want to display the results instead, right-click the field code, and then click **Toggle Field Codes** on the shortcut menu.

Format the merged data

Database and spreadsheet programs, such as Microsoft Access and Microsoft Excel, store the information that you type in cells as raw data. Formatting that you apply in Access or Excel, such as fonts and colors, isn't stored with the raw data. When you merge information from a data file into a Word document, you are merging the raw data without the applied formatting.

Add formatting

1. Select the mail merge field. Make sure that the selection includes the chevrons (« ») that surround the field.
2. On the **Home** tab, in the **Font** group, apply the formatting that you want. Or click the **Font Dialog Box** launcher for more options.

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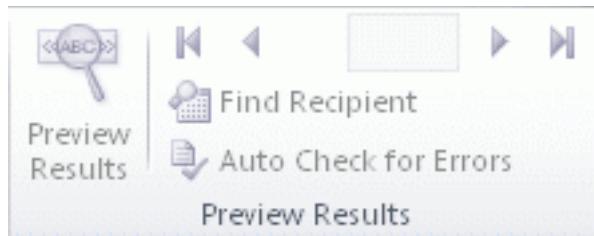
Preview, complete the merge, and print the documents

After you add fields to your main document, you are ready to preview the merge results. When you are satisfied with the preview, you can complete the merge.

Preview the merge

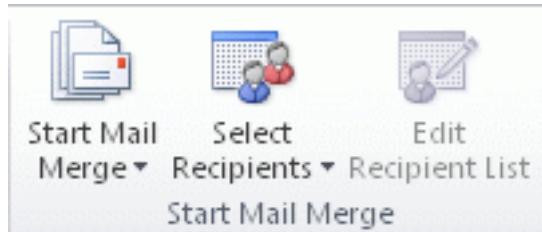
You can preview your merged documents and make changes before you actually complete the merge.

To preview, do any of the following in the **Preview Results** group of the **Mailings** tab:



- Click **Preview Results**.
- Page through each merged document by using the **Next Record** and **Previous Record** buttons in the **Preview Results** group.
- Preview a specific document by clicking **Find Recipient**.

NOTE Click **Edit Recipient List** in the **Start Mail Merge** group on the **Mailings** tab to open the **Mail Merge Recipients** dialog box, where you can filter the list or clear recipients if you see records that you don't want to include.



Complete the merge

You can print the merged documents or modify them individually. You can print or change all or just a subset of the documents.

If you want to print a subset of the documents, you can specify the set by a range of record numbers. If you want to print pages instead of specifying record numbers, follow the instructions in the [Change individual copies of the document](#) section.

Print the merged documents

1. On the **Mailings** tab, in the **Finish** group, click **Finish & Merge**, and then click **Print Documents**.



2. Choose whether to print the whole set of documents, only the copy that's currently visible, or a subset of the set, which you specify by record number.

Change individual copies of the document

1. On the **Mailings** tab, in the **Finish** group, click **Finish & Merge**, and then click **Edit Individual Documents**.



2. Choose whether you want to edit the whole set of documents, only the copy that's currently visible, or a subset of the set, which you specify by record number. Word compiles the copies that you want to edit into a single file, with a page break between each copy of the document.

After you finish editing the new file of documents, you can print the documents by clicking the **File** tab, clicking **Print**, and then clicking the **Print** button.

Save the main document

Remember that merged documents that you save are separate from the main document. It's a good idea to save the main document itself if you plan to use it for another mail merge.

When you save the main document, you also save its connection to the data file. The next time that you open the main document, you are prompted to choose whether you want the information from the data file to be merged again into the main document.

- If you click **Yes**, the document opens with information from the first record merged in.
- If you click **No**, the connection between the main document and the data file is broken. The main document becomes a standard Word document. Fields are replaced with the unique information from the first record.