

Mail Merge from an Excel Spreadsheet

From the “Mailings” Tab, then click “Start Mail Merge”

- Select the type of merge:
 - Letters: Merges each record into a separate document
 - Email Messages: Merges each record into a separate email message
 - Envelopes: Merges addresses to print on envelopes
 - Labels: Merges address, names, etc to print on labels
 - Directory: Merges all records in an order you specify into one catalog
- Click “Select Recipients”, then “Use Existing List”
- Navigate to the Excel Workbook containing the data you wish to merge and then select the sheet within that workbook that contains the data (If the first row is the header, make sure the “First row of data contains column headers” is checked.
- Click “Edit Recipient List”
 - Click on a column header to sort the records as needed
 - Uncheck any records you wish to exclude from the merge

Begin typing letter and format as you would any Word document. When you reach a place where the merged data would appear, click “Insert Merge Field” and select the field you wish to insert.

When you have finished composing your letter, click “Finish & Merge”. From here you can choose:

- Edit individual documents: Creates a Word document with containing each letter on separate sheets.
- Print documents: Prints out each letter
- Send email messages: Sends an email to each recipient containing the body of each letter