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Mail merge is a Microsoft Word feature that helps you streamline creating personalized letters, labels, envelopes, emails, and a directory. Since mail merge is not among the most commonly used MS Word features, some users might not know how to do a mail merge in Word to create letters, labels, and envelopes. If you're trying to save time spent on manually personalizing each letter, label, or other documents, mail merge can come in handy. Even if you've never tried to create a mail merge letter, the process is pretty straightforward, and we walk you through each step below. How to Create Mail Merge Letters Microsoft Word has a wizard that walks you through creating mail merge letters. The wizard will ask for the letter you'd like to use and the recipients of the letter along the way, so make sure you have a list of recipients ready to insert. If you don't, no biggie, you can always add a list of recipients manually. Open a Word document and type out your message. Leave out the personalized elements (for instance, title, name, city, etc.). For now, you could just leave a blank space for where you want to insert these elements, like so: When your template is ready, select Mailings > Start Mail Merge > Step-by-Step Mail Merge Wizard from the top ribbon. A new pane will appear along the right border of your MS Word window. This is the wizard that will walk you through the process. As a first step, you'll need to select the type of document you're working on. Select Letters and choose Next: Starting document. You'll need to choose the document you want to use for mail merge in the next.If you've already typed in some content for your letter, select Use the current document.If you want to use a ready-to-use template, select Start from a template. When you've chosen a starting document, click on Select recipients. The next step is to select recipients. Assuming you have an Excel sheet populated with the recipient data, you can import the data by selecting the Use an existing file option and selecting Browse from the subsequent section. Navigate to the sheet containing the list of recipients using the explorer. Select the sheet and select Open. When you select the sheet, you'll see the Select Table window. Select the relevant table(s). Be sure to check the box beside the text First row of data contains column headers if that's true for your data, and select OK. Next, you'll see the list of recipients that Word will use in your merge. If everything looks good, select OK. When you've added the Excel sheet, select Next: Write your letter. You're now ready to add placeholders in your letter. Bring your cursor to where you want to add the placeholder and select More items from the mail merge pane. The Insert Merge Field dialog box will open from where you can select the relevant placeholder and select Insert to add it to your letter. When you've inserted all merge fields, select Next: Preview your letters. This will show you a preview of all letters generated with mail merge. You can use arrow buttons in the mail merge pane to switch the preview of letters. Select Next: Complete the merge. In the subsequent step, select either Print (if you want to print all letters) or Edit individual letters > All (if you're going to merge the letters into a single document). How to Create Mail Merge Labels It's always a good idea to compile your mailing list tidily in an Excel sheet so you don't feel dizzy when you need someone's mailing details. However, if you want to print the labels, your Excel sheet compilation won't cut it. Instead, you'll need to create mail merge labels on MS Word. If you already have an Excel sheet with mailing details, you can skip over to the next step. If not, organize your mailing list on an Excel sheet. Add some headers (First Name, Last Name, Address, etc.) and get your list sorted.Switch over to MS Word. Use the wizard for creating labels. Open a blank document and select Mailings > Select Mail Merge > Step-by-Step Mail Merge Wizard. Select Labels and then Next: Starting document. On the next screen, select Change document layout. Next, select Label options to set your product number and label brand. Once you select OK, you'll see the labels outlined on your document. If you don't, go to Table Design > Borders and select View Gridlines. Go back to the Mailings tab in MS Word and select Select Recipients > Use an Existing List. Navigate to the Excel file containing the mail list. Select the file and select Open. You'll see the Select Table window. If you have multiple sheets in your workbook, you'll see more than one item here. Select the one that contains your mailing list. Check the box besides the text First row of data contains column headers, and select OK. MS Word imports the mailing list. Select Address Block. Look at the preview on the right. If it doesn't look like how you want it, select Match Fields. Make sure that all details correspond to an appropriate header from your worksheet and select OK. Look at the preview again. If it looks good, select OK. You'll now see in the label. Go to Mailings > Update Labels to add to all labels. The labels are now ready to be merged. Go to Mailings > Finish & Merge > Edit Individual Documents. You'll see a small window pop up. Select All and then OK. You'll now see all your labels merged. How to Create Mail Merge Envelopes Creating mail merge envelopes is mostly the same as that for labels, but with a few tweaks. Again, click on Mailings > Start Mail Merge > Step-by-Step Mail Merge Wizard, but this time, select Envelopes and then select Next: Starting document. You'll be asked to select a starting document. Select Envelope options to select envelope size and position of the delivery/return address (refer to next step), and select Next: Select recipients. When you select Envelope options, you'll see a small window pop up. Select your preferred envelope size and select the font and the placement for delivery and return address. The next step in the wizard is to select recipients. Select Use an existing list (assuming you already have an Excel sheet containing the recipient data), and select Browse to look for the file. Select the relevant file and click on Next: Arrange your envelope. On your next screen, select Address block, look at the preview to ensure it looks like you want it to, and select OK. You'll now see appear on the envelope. Select Next: Preview your envelopes. You'll see the same preview you saw in the previous step but on your document. You can use the arrow buttons in the wizard pane to switch between envelopes. Your envelopes are now ready to be merged. Select Next: Complete the merge. On the following screen, you'll see an option to Edit individual envelopes. Select it, select All to merge all records, and select OK. You'll now see all envelopes merged into a single document. Bulk Printing and Emails Made Easy Using mail merge can save you a ton of time you'd otherwise spend customizing your letters, labels, or envelopes. That's not all you can do with MS Word, though. You can also create greeting cards, booklets, and index cards. Mail merge has been around for a while, but if you're looking to make your processes efficient, Microsoft Office 2019 introduced some neat features you may want to look at. Even the simplest mail merge task can benefit from conditional statements. You might use them to clean up an address by suppressing unwanted spaces or adding commas at the right spot. Or, you might store state abbreviations and want to use the entire state name in the address. Perhaps you want to use gender-specific pronouns such as he/she, his/her, and so on. All of the above and more can be tackled by combining Word fields with a mail merge. In this article, we'll quickly work through a simple mail merge and then add an IF field to handle membership types–family, friends, and individual–in the body of the letter. Instructions for setting up the mail merge are minimum because that's not the focus of this article. If you need basic information about the mail merge, read How to use Word mail-merge. We'll use the same demonstration files (with minor updates). I'm using Office 365 Excel and Word (desktop), but you can work with earlier versions. You can also work with your own data or download the demonstration files. Mail merge isn't supported by Word's online version. SEE: System update policy template download (Tech Pro Research) The pieces Any merge requires a Word document and information. Our information is in an Excel workbook. Figure A shows both pieces. We're going to merge new membership details from the Excel sheet into the letter (a Word document). The membership type field contains the conditional data. Specifically, we'll convert F, Fr, and I into family, friends, and individual, respectively. The setup The [ ] characters in the Word document (Figure A) denote spots where the mail merge will insert values from the Excel workbook. Identifying the type of merge is the first step: Click the Mailings tab, in the Start Mail Merge group, click the Start Mail Merge, and choose Letters. Then, identify the recipients: Click Select Recipients, choose Use an Existing List, identify the data source (the Excel workbook file), click Open, identify the appropriate sheet, and click OK. Now that Word knows what type of merge you're running and where the details are coming from, it's time to map Word placeholders to Excel fields. To do so, click Match Fields in the Write & Insert Field groups. Word will match a few of the items for you: City, State, and Zip. Continue to match details as follows: First Name: 1st First Name Last Name: 1st Last Name Address 1: Street Address Use Figure B as a guideline for completing the mapping process. Now you're ready to insert the mapped fields into the actual document. I'll walk you through the first one: Select [first name] in the first line of the address element. Click Insert merge Field in the Write & Insert Fields group and choose M_1st_First_Name from the resulting list. Continue replacing the text placeholders with the appropriate merge fields until you're done (Figure C). You can add spaces and commas as you would with regular text. There are no pre-defined fields for the membership number and membership type, but don't worry about that. The pre-defined map is a shortcut that you'll want to take advantage of when possible, but it won't always have every field you need. You can get around the lack of a pre-defined mapping field by inserting an unmapped merge field–so don't forget to insert both of those fields before you continue. At this point, all of the merge fields are in place, and you could run the merge. However, the membership details in the Excel workbook–F, Fr, and I–might not mean anything to the new members. So, let's replace that merge field with an IF field that can turn that meaningless data into something the members understand. The IF field If you run the merge as is, the membership type merge field will return F, Fr, and I, which you'll probably want to avoid. This next bit might feel like unchartered waters if you're not familiar with Word fields. In a nutshell, they're pre-programmed codes similar to the merge fields you inserted earlier. In this case, we're using the following nested IF fields: { IF {MERGEFIELD Membership_Type } = "F" "Family" { IF {MERGEFIELD Membership_Type } = "Fr" "Friends" { IF {MERGEFIELD Membership_Type } = "I" "Individual" } } } Inserting these fields is a bit awkward–at first. You can use the interface on the Insert tab: In the Text group, choose Field from the Quick Parts dropdown. Or, you can press Ctrl+F9 to insert the { } characters and type the rest yourself. Either way, replace the merge field with the IF fields above, as shown in Figure D. Then, run the merge as you normally would by clicking Finish & Merge in the Finish group. If you prefer, click Preview results in the Preview results group to review the merge before you commit it to finished documents. Figure E shows one of four new member letters, ready to save and/or print. Remember: You can not type the { } characters yourself. The IF field only looks complex, but its purpose is simple: If the current record's membership type value is F, print Family. If the current record's membership type value is Fr, print Family. If the current record's membership type value is I, print Individual. In this case, there should never be an empty membership type value, but if that happens, you'll want to accommodate that by adding an additional IF. Notice that the three IF fields are nested, one within another–that syntax is important. There are other ways we could modify this letter using conditional fields instead of the merge fields. For example, if the membership type value is Fr, you might want to add an additional sentence reminding the new member that the Friends membership includes an additional two guests with each visit. Word's fields are a powerful feature. If you're not familiar with them, considering reading 10 things you need to know about using Word fields. Send me your question about Office I answer readers' questions when I can, but there's no guarantee. Don't send files unless requested; initial requests for help that arrive with attached files will be deleted unread. You can send screenshots of your data to help clarify your question. When contacting me, be as specific as possible. For example, "Please troubleshoot my workbook and fix what's wrong" probably won't get a response, but "Can you tell me why this formula isn't returning the expected results?" might. Please mention the app and version that you're using. I'm not reimbursed by TechRepublic for my time or expertise when helping readers, nor do I ask for a fee from readers I help. You can contact me at susansalesharkins@gmail.com.

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