

Steps for Mail Merge in MS Word

By Terry Chapman, last updated November 16, 2012

Mail merges can save WorkExpo users a lot of time and energy.

Sending out mass mailings can seem like a daunting task--manually entering information onto address labels and letters can take hours. Microsoft Word users can simplify the process by using the mail merge function, which allows data from WorkExpo to be automatically entered onto a label or letter.

Creating a mail merge can take a few tries to get comfortable with but the process is actually fairly painless.

Instructions

1 Open Microsoft Word on your computer and create a new document. Fill in the information that will remain the same on each of the merged documents. For example, if you are sending out letters to employers, you would fill out the return address, body of the letter and signature.

2 Go to the "Mailings" tab and choose "Select Recipients" from the "Start Mail Merge" group. Choose your recipients from a contacts list from WorkExpo's data file – typically *c:\program files\workexpo\data.mdb*

NOTE: There are two tables specially created for the WorkExpo Mail Merge, use either of these. '*Students for Mail Merge*' or '*Arrangements for Mail Merge*'.

3 Put the WorkExpo merge fields into the document. Click your mouse where you want to begin inserting information and then go to "Insert Merge Field" in the "Mailings Tab." The headers that you used in your data source will appear in a list, and you can select them by clicking on them. Once the first merge field is in place, go back to the list and select the next one, and so on. For example, to create a salutation in a mail merge you might select "Title" and then "First Name" and then "Last Name" to create a merge that appears as "Mr. John Smith." Merge fields will appear as your headers, such as <<Title>>.

4 Click on the "Preview Result" icon in the "Mailings" tab to see what your end results will look like. Word will show you the first merge, and you can scroll other merged documents by using the arrows next to "Preview Result."

5 Select "Finish & Merge" from the "Finish" group and choose "Print."