

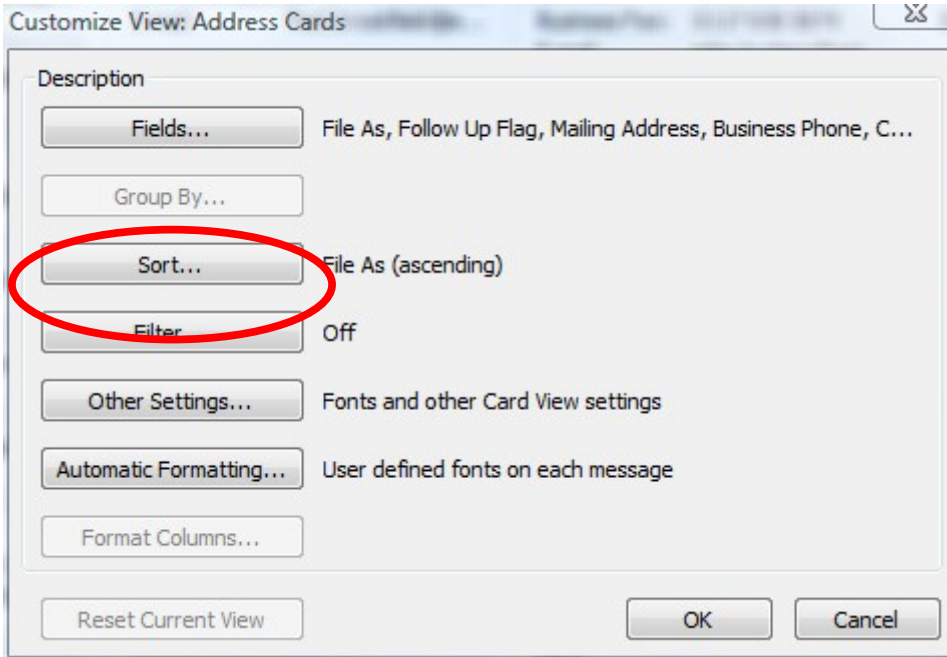
Using Outlook to create mail merged letters in Word



Select records in Outlook

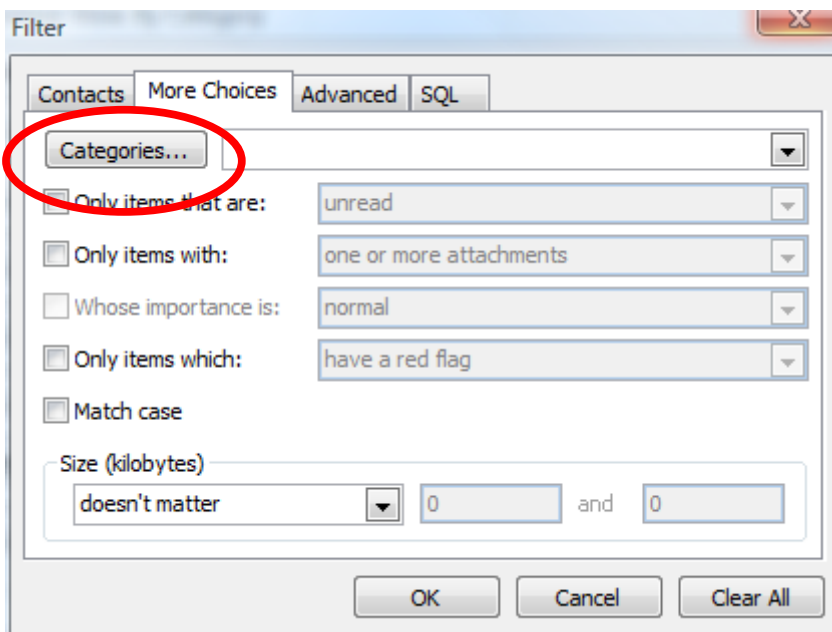
Open the correct contacts folder in Outlook.

Outlook will mail-merge to all the contacts that you can see, so if you wish to select some names, then use view-arrange by-current view-customise current view to get to this window:

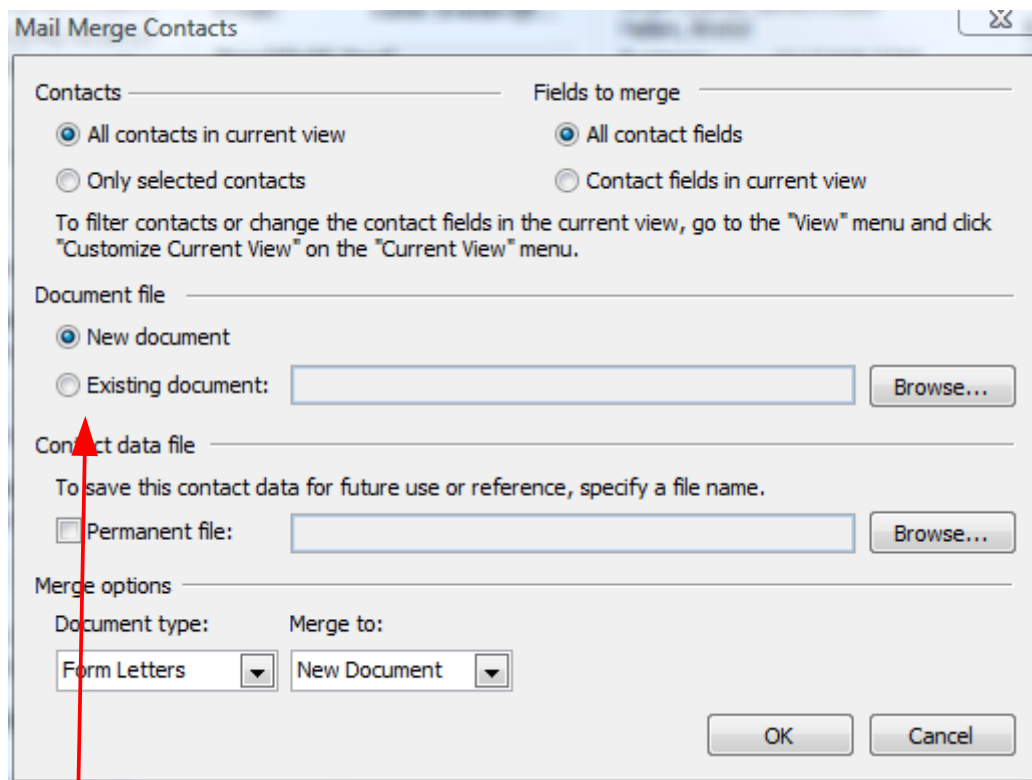


The filter button lets you choose by a wide range of criteria.

The most useful one to you may well be categories on the more choices tab:



Select tools-mail merge from the menu and this window will open:



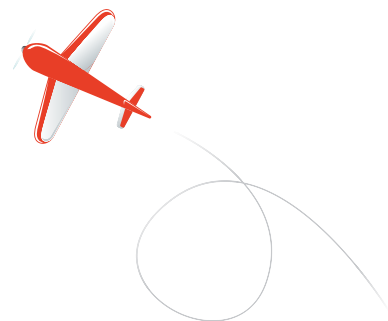
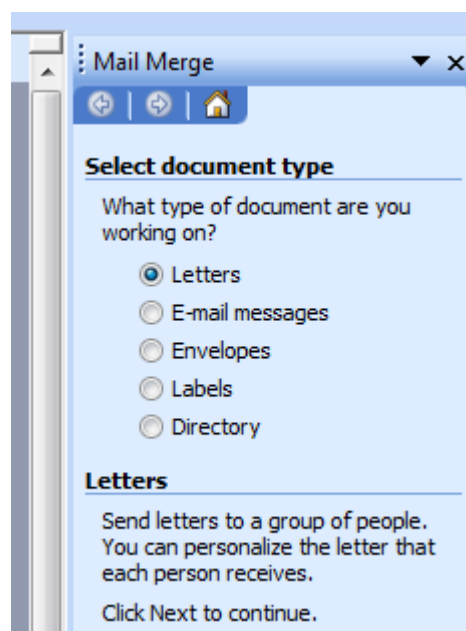
Select a new or existing document to merge the contact details into. Then press OK.

Creating the letter in Word

We will assume that you are using a new document. After a few moments, Word will open up with a blank page.

On the menu bar, select tools-letters and mailings-mail merge.

A wizard will open on the right-hand side:

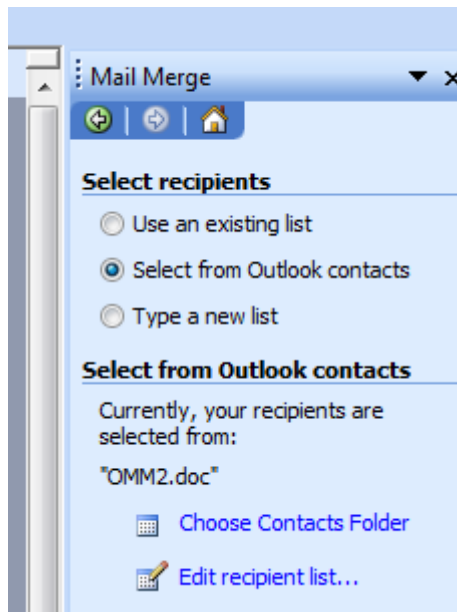


This may open at stage 1 or 3. If it opens at stage 3 you wish to use a different template, use the 'previous' link at the bottom right.

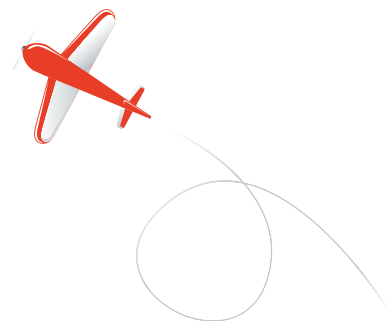
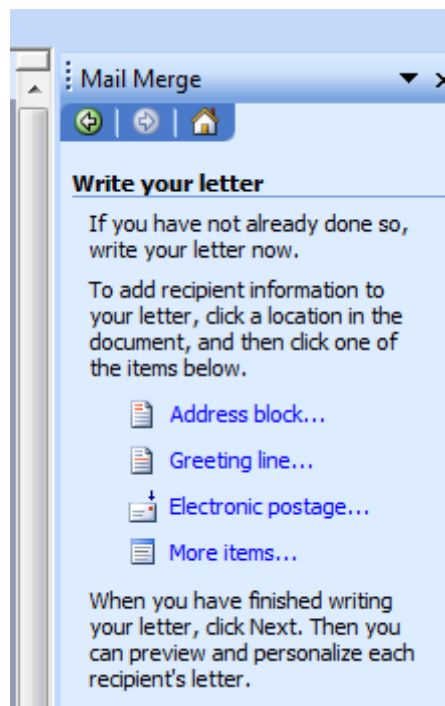
Stage 1 is to select the type of document you require, e.g. letter. Press 'next -starting document' at the bottom right.

Stage 2 lets you choose a blank document, a template or an existing document. Press 'next -select recipients'

Stage 3 is where you choose 'select from outlook contacts'. Press 'next – write your letter'



In the case of a blank letter, you will need to insert the contact details:



You will need at least an address block and a greeting line. Firstly select an address block:

Insert Address Block

Specify address elements

Insert recipient's name in this format:

Joshua
Joshua Randall Jr.
Joshua Q. Randall Jr.
Mr. Josh Randall Jr.
Mr. Josh Q. Randall Jr.
Mr. Joshua Randall Jr.

Insert company name

Insert postal address:

Never include the country/region in the address

Always include the country/region in the address

Only include the country/region if different than:

United Kingdom

Format address according to the destination country/region

Preview

Mr. Joshua Randall Jr.
Blue Sky Airlines,
1 Airport Way
Kitty Hawk
NC
27700
United States of America

Match Fields... OK Cancel

Match fields as the two screen shots below:


Match Fields

Mail Merge has special features for easily working with addresses. Use the drop-down list to select the proper database field for each address field component.

Address Component	Database Field
Last Name	Last_Name
First Name	First_Name
Courtesy Title	Title
Company	Company
Address 1	(not matched)
City	(not matched)
State	(not matched)
Postal Code	(not matched)
Spouse First Name	Spouse
Middle Name	Middle_Name
Suffix	Suffix

Use the drop-down lists to choose the field from your database that corresponds to the address information Mail Merge expects (listed on the left.)

OK Cancel



Match Fields

Mail Merge has special features for easily working with addresses. Use the drop-down list to select the proper database field for each address field component.

Optional information	
Middle Name	Middle_Name
Suffix	Suffix
Nickname	Nickname
Phonetic Guide for Last Name	(not matched)
Phonetic Guide for First Name	(not matched)
Job Title	Job_Title
Department	Department
Address 2	Business_Address
Address 3	(not matched)
Country or Region	(not matched)
Business Phone	Business_Phone
Business Fax	Business_Fax

Use the drop-down lists to choose the field from your database that corresponds to the address information Mail Merge expects (listed on the left.)

OK Cancel

Choose the name format required and choose from the address options. Word will sort out blank lines. Place the address block where you require it.

Do the same for the greetings block.

Stage 5 previews you letter. You can go back to stage 4 as often as required.

Stage 6 produces your letters.

