Outlook: Mail Merge

Adding Outlook Contacts to Microsoft Word’s Mail Merge

*These instructions assume that you already have an Outlook Account set up.

1. Verify that Microsoft Outlook is registered as the default email client on your computer. To do so, open Microsoft Outlook, click the “File” tab on the home page, then go to “Options.” The “General” tab should be highlighted in the window that just opened- simply click the box next to “Make Outlook the default program for E-mail, Contacts, and Calendar.” Click OK.

2. In Microsoft Word, click on the “Mailings” tab above your document, then click “Start Mail Merge.” Clicking this option will offer a drop box; the “Step by Step Mail Merge Wizard” is the option we are going to use.
3. After selecting this option, a navigation pane will appear to the right of the screen. Select the type of document you wish to work on (in this case, we are going to produce a letter) and click “Next: Starting document” at the bottom.

4. Our next option is to choose whether we want to use the current document, start a letter from a template, or start the letter from an existing document. We are going with option 1- select the bubble next to “Use the current document,” then click “Next: Select recipients” at the bottom right of the screen.

5. Since we are doing this with Outlook, select the button next to “Select from Outlook Contacts. A dialog box should appear; click OK. At this point, another box will appear with all of your contacts. Select the ones you wish to mail (the name will be checked if you wish to include them) and click OK. At the bottom right of the screen, click “Next: Write your letter.”
6. In this step, we will add an address block. To add an address block to your letter, select “Address block…” on the right side of the screen. The opened box will allow you to format the look of the address block, by changing the look of the name as well as a number of other features. Play around, and when you are happy with the preview, click “OK.”
7. Now that the address block is finished, we will add a greeting line. Click “Greeting line…” on the right of the screen, and a dialog box will appear. Similar to the previous step, you will be able to design your greeting line by changing the name format, as well as the greeting itself. Experiment, and when you are happy with the preview, hit “OK.” When both the address block and greeting line are finished, the end result should hang about your letter as this:

<<AddressBlock>>
<<GreetingLine>>

You can now write the body of your letter underneath. After you are done, click “Next: Preview Your Letters.”

8. Now, you can see what your letter will look like when printed. Scroll through the recipients using the arrows on the right side of the screen. You will also have the option to edit your recipient list: to do so, click “Edit recipient list” and return to step 5. When you are done, click “Next: Complete the merge.”

9. You’re almost done! This step is simple, either click “Print” or “Edit individual letters” if you want to add some personalization. Clicking “Edit individual letters” will bring up a large document with all of your generated letters, allowing you to customize each one as you see fit. When you are finished, click “Print,” click “OK,” and you’re done!