Introduction

There are a number of subtle differences in the manner a mail merge is conducted in the XP environment. The following steps illustrate how to complete a Mail Merge in your new XP environment.

Mail Merge Step by Step

For the purposes of this document we will create a new letter and merge it with a previously created data list of Names and Addresses in an Excel Spreadsheet.

Open Your Document

1. Open Microsoft Word by clicking on the Icon as shown below.

![Microsoft Word Icon](image)

2. Create your letter without inserting any addresses or salutations.

3. Using your mouse click on **Tools** on the Menu Bar.

4. Select **Letters & Mailing**

5. Choose **Mail Merge Wizard**

6. A new window will appear on the right hand side of the document. (View Diagram Below)
How to Use the Mail Merge Wizard

Using the Mail Merge Wizard in Microsoft Word XP is a six step process.

**Step One – Select Document Type**

7. Select **Letters**

8. Click **Next: Starting Documents**
Step Two – Selecting Starting Document

9. Select **Use Current Document**

10. Click **Next: Select Recipients**

Step Three – Selecting Recipients

11. Select **Use an Existing List** (for this exercise browse to S drive Common/Training/Client Services/Spreadsheet for Mail Merge/Example Spreadsheet and double click on filename to select.

12. Choose **Browse** and locate the relevant file.
Note: If you are using Office XP via Thin Client Access (Citrix or RDP) go to step 12 else go to step 15.

13. If you are using Office XP via Thin Client Access (Citrix or RDP) you will get the following errors, select OK for both.

![Error Message 1](image1.png)  ![Error Message 2](image2.png)

14. After the error messages the following window will pop-up. Click OK.

![Microsoft Excel](image3.png)

Note: If you are using Office XP via Thin Client Access (Citrix or RDP) ignore step 16.

15. The following Window will pop-up.
16. Once you have selected OK, the following window will display.

17. Choose Select All

18. Choose Next Write Your Letter
Step 4 - Insert your Address Data

19. Place your cursor in your letter on the screen at the point where you want to place your address

20. Click on Address Block

21. The Following Window will pop-up.
22. Click on **Match Fields**

23. The following window will pop-up.

![Match Fields window](image)

24. In the match fields screen click the drop down arrow at the appropriate line (see diagram above) and select the relevant address details such as **address**, **city**, **state**, and **postcode**.

25. Click **OK**, then **OK**

26. The following line will appear in your letter:

```
<< << Address Block >> >>
```

27. Place your cursor in your letter on the screen at the point where you want to place your greeting

28. Click on **Greeting Line**

29. The Following Window will pop-up
30. If you click on the arrows a drop down menu will appear allowing you to customise the options to display the greeting in a different format.

31. The following line should appear in your letter:

<< << Greeting Line >> >>

32. Now choose **Preview your letter**.

**Step 5 – Preview Your Letters**

33. Preview the merged pages by clicking on arrows (View Diagram below) see your letters individually in preview mode.
Step 6 – Complete the Merge

34. To finish click on **Next: Complete the Merge.**

Congratulations you have now completed the mail merge!!!