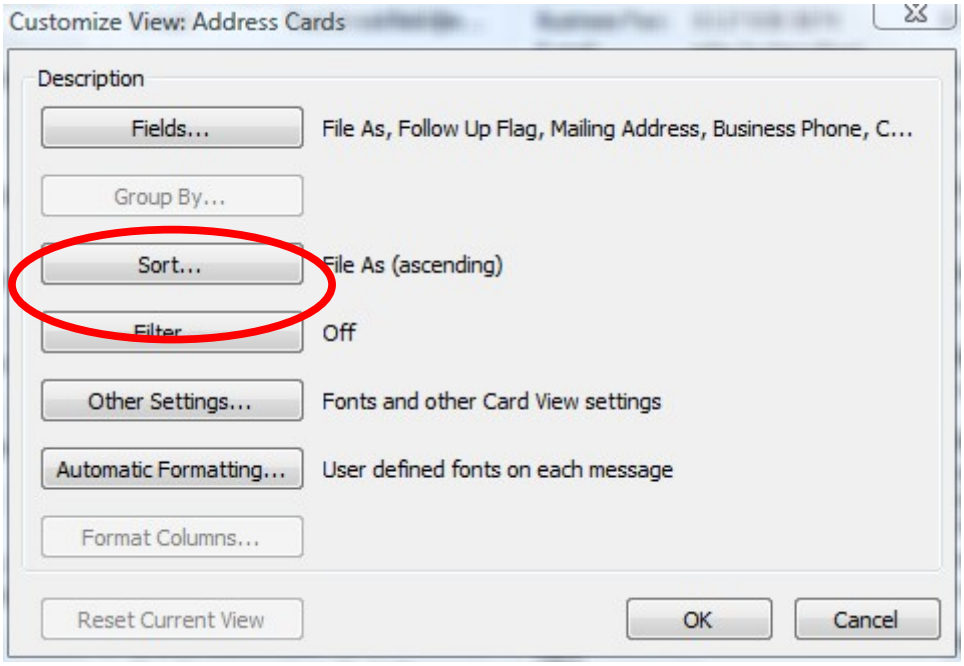
Using Outlook to create mail merged letters in Word

Select records in Outlook

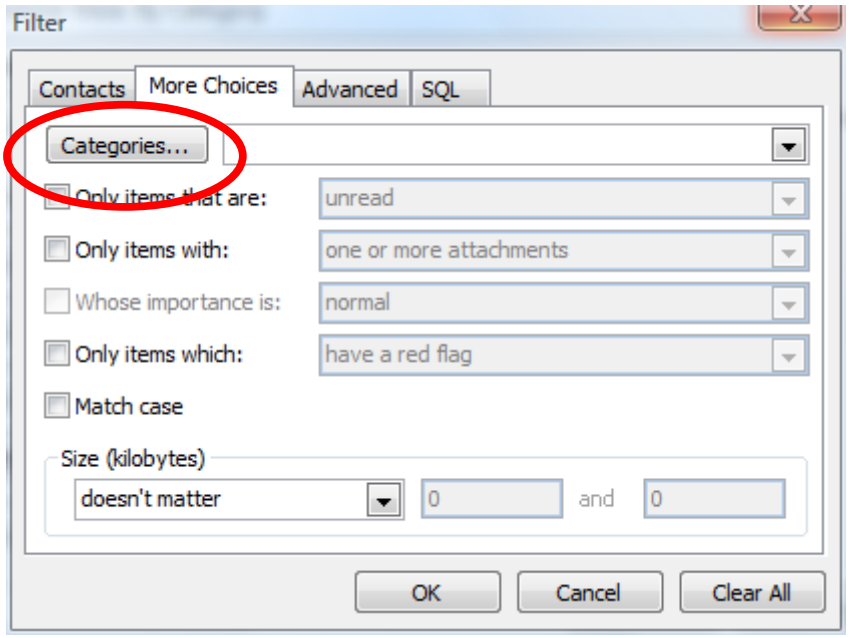
Open the correct contacts folder in Outlook.

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:



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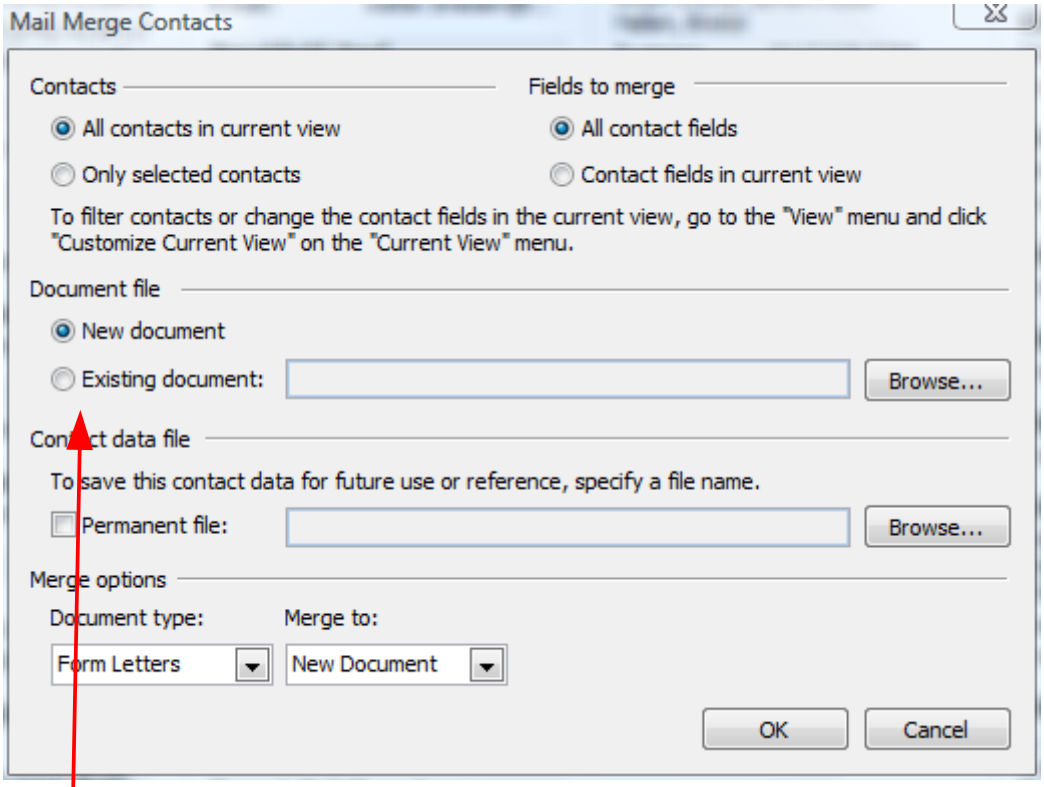
Select tools-mail merge from the menu and this window will open:



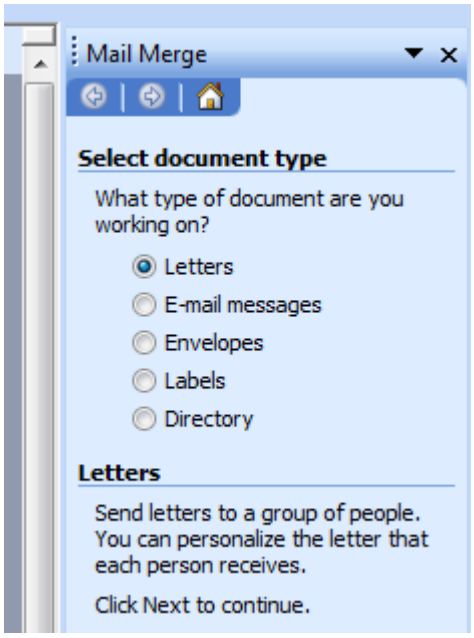
Select a new or existing document to merge the contact details into. Then press OK.

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:

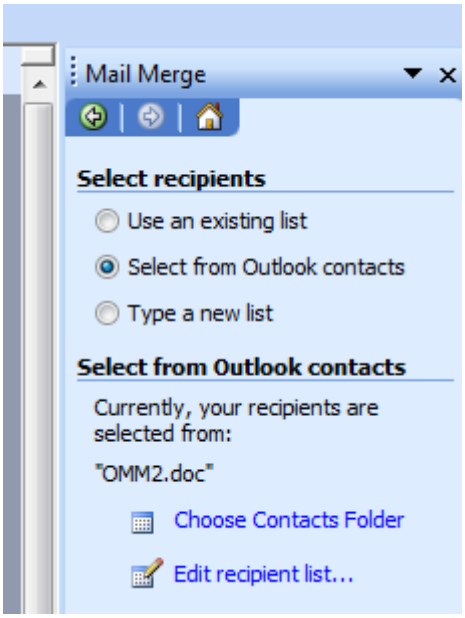


This may open at stage 1 or 3. If it opens at stage 3 you wish to use a different template, use the 'previous' link at the bottom right.

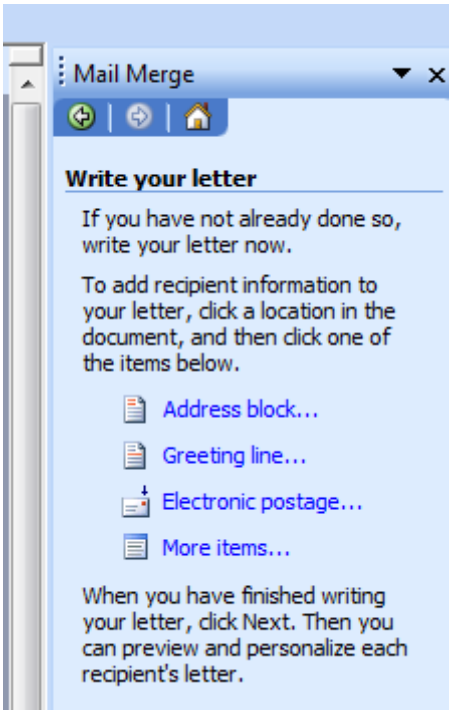
Stage 1 is to select the type of document you require, e.g. letter. Press 'next -starting document' at the bottom right.

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

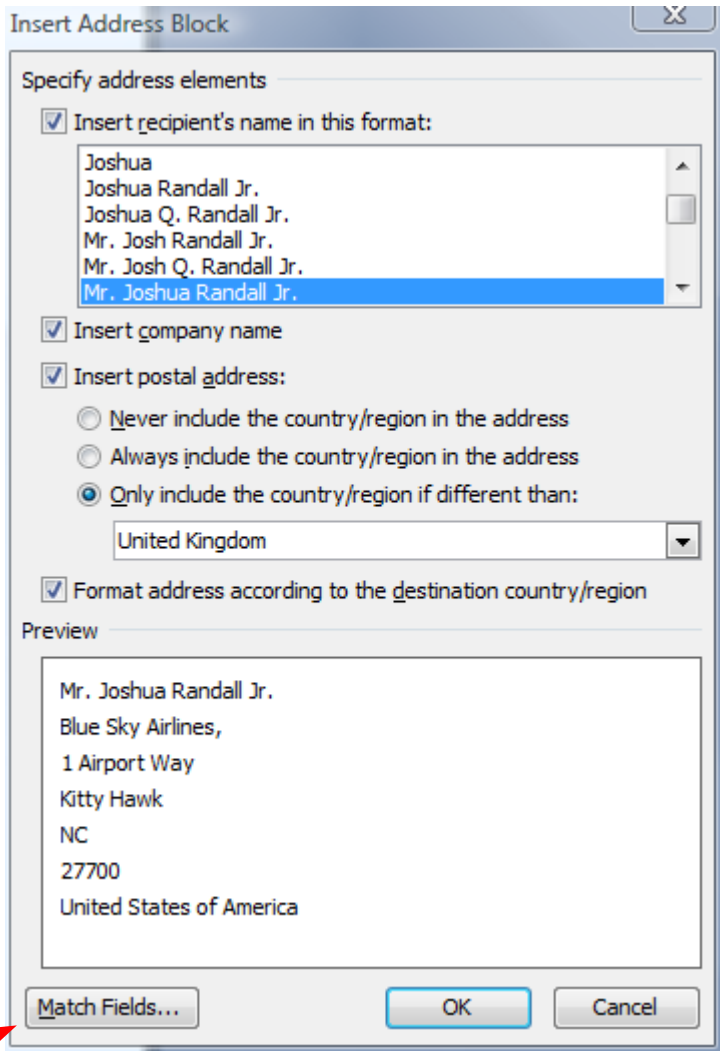
Stage 3 is where you choose 'select from outlook contacts'. Press 'next – write your letter'



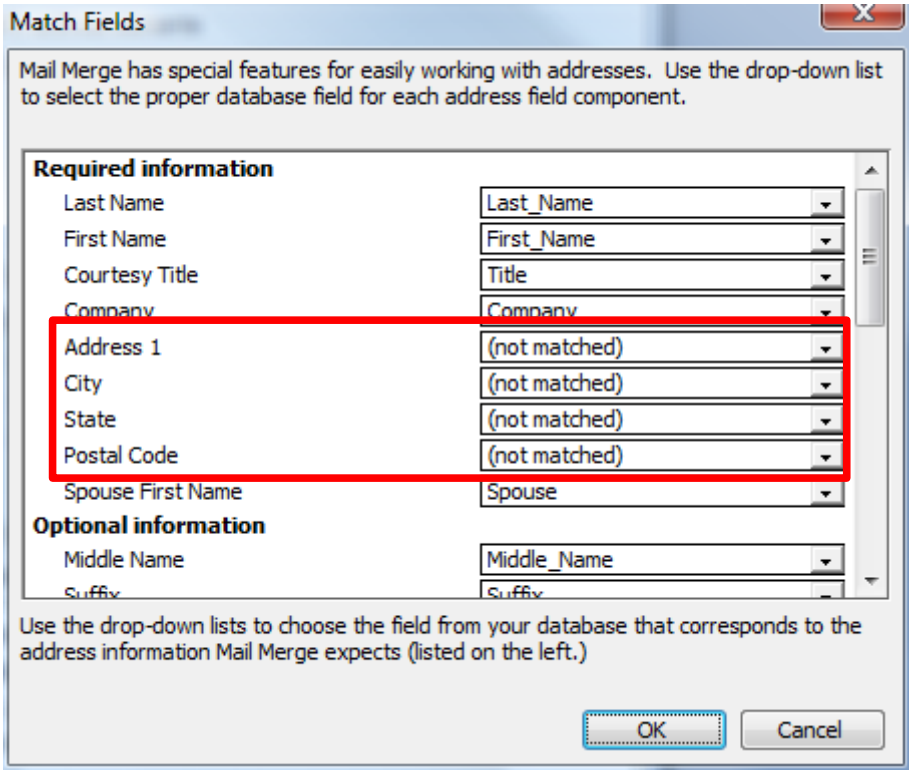
In the case of a blank letter, you will need to insert the contact details:

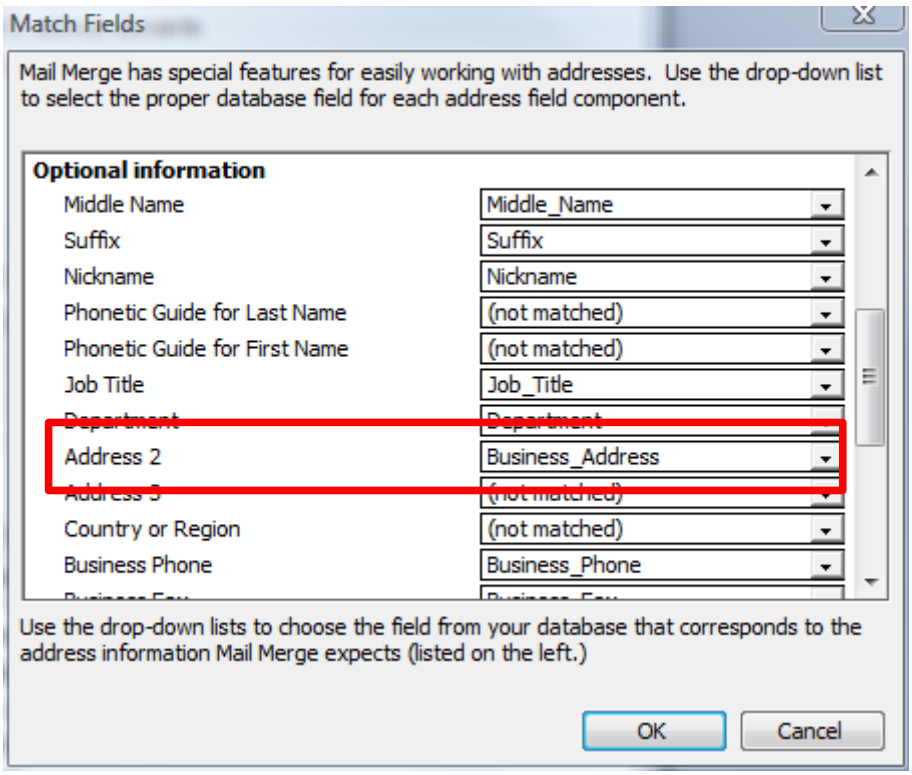


You will need at least an address block and a greeting line. Firstly select an address block:



Match fields as the two screen shots below:





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.

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