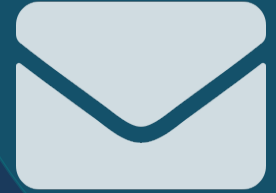


Mail Merge

in MS Word 2021

Creating Personalised Documents at Scale





What is Mail Merge?

Mail Merge creates multiple personalized documents from one template by automatically combining a Master Document with a Data Source.



Master Document

- Template with placeholders
- Contains merge fields like:
«First_Name» «Last_Name»
- Same layout for all recipients



Data Source

- Table / spreadsheet with records
- Contains the personal details:
Names, Addresses, Dates, etc.
- One row per recipient



Uses of Mail Merge



Letters

Personalized letters to many recipients



Invitations

Event invitations with individual names



Certificates

Awards with different names and details



Labels

Address labels for envelopes



Emails

Mass emails with personal touches



Envelopes

Addressed envelopes in bulk



Mail Merge Process — 6 Steps

1

Create Main Document

Open Word. Type your letter/certificate template. Leave spaces for personalised info.

3

Select Recipients

Mailings → Select Recipients → Type new list, use existing file, or Outlook contacts.

5

Preview Results

Click Preview Results to see actual data.
Use arrows to browse through recipients.

2

Start Mail Merge

Mailings Tab → Start Mail Merge → Select document type (Letters, Envelopes, etc.)

4

Insert Merge Fields

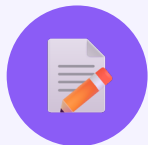
Place cursor → Insert Merge Field → Choose field (e.g. «First_Name»). Repeat for all.

6

Finish & Merge

Finish & Merge → Edit Individual Documents (best for exams!) or Print Documents.

STEP 3 | Select Recipients (Data Source)



Type a New List

Create a brand new address list from scratch in Word



Use an Existing List

Open a saved .accdb or Excel (.xlsx) data file



Outlook Contacts

Pull directly from your Outlook address book

Creating a New Address List — Common Fields

- | | | | |
|--|--------------------------|---|-----------------------------|
| ☐ Title | — Mr. / Mrs. / Ms. / Dr. | ☐ City | — Town or city |
| ☐ First Name | — Recipient's first name | ☐ Postal Code | — Zip / postal code |
| ☐ Last Name | — Recipient's last name | ☐ Custom Fields | — Date, Time, Event Name... |
| ☐ Address Line 1 | — Street address | | |

STEP 4 | Insert Merge Fields into Your Document

How to Insert:

- 1 Place your cursor where the personalized info should appear
- 2 Go to Mailings Tab → click Insert Merge Field
- 3 Select the field from the dropdown list
- 4 The field appears as «Field_Name» in your document
- 5 Repeat for every personalized item needed

Quick Options (Mailings Tab):

Address Block — inserts full address automatically
Greeting Line — inserts "Dear [Name]" automatically

Sample Merge Document

«Date»

«Title» «First_Name» «Last_Name»

«Address_Line_1»

«City»

Dear «First_Name»,

You are invited to our Annual Day
on «Event_Date» at «Venue».

STEPS 5 & 6 | Preview Results & Finish the Merge

5

Preview Results

- Mailings Tab → Preview Results
- See real data replace merge fields
- Use ◀ ▶ arrows to browse recipients
- Check for spacing / formatting errors
- Verify punctuation around fields

6

Finish & Merge

Edit Individual Documents ★

Creates ONE new document with all merged letters — Best for exam!

Print Documents

Prints directly without saving a merged file

Send Email Messages

Email each recipient directly from Outlook



EXAMPLE EXERCISE

Mail Merge Exercise

School Annual Day Invitation Letter



Task:

Create a mail merge letter inviting 3 parents/guardians to the school's Annual Day. Use the data source on the next slide and merge fields to personalize each letter.

- 1 Create the letter template in Word
- 2 Go to Mailings → Start Mail Merge → Letters
- 3 Select Recipients → Type a New List → enter the 3 records
- 4 Insert Merge Fields in the correct positions
- 5 Preview → check all 3 letters look correct
- 6 Finish & Merge → Edit Individual Documents → Save



Exercise — Letter Template & Data Source

Master Document Template

«Date»

«Title» «First_Name» «Last_Name»

«Address_Line_1», «City»

Dear «First_Name»,

We are delighted to invite you to
our Annual Day celebration.

Date: «Event_Date»

Time: «Event_Time»

Venue: «Venue»

Kindly confirm your attendance.
Yours sincerely,
The Principal

Data Source Table

Field	Record 1	Record 2	Record 3
Title	Mr.	Mrs.	Ms.
First Name	Kasun	Nimal	Anjali
Last Name	Perera	Silva	Fernando
Address	45 Main St	12 Lake Rd	78 Hill Ave
City	Colombo	Kandy	Galle
Event Date	Dec 15, 2026	Dec 15, 2026	Dec 15, 2026
Event Time	9:00 AM	9:00 AM	9:00 AM
Venue	School Hall	School Hall	School Hall
Date	June 26, 2026	June 26, 2026	June 26, 2026

Field colour key:



Date



Address



Greeting



Event details



Important Tips



Always **SAVE** the data source separately before starting the merge.



Use meaningful field names with underscores — no spaces (e.g. `First_Name`).



Always **PREVIEW** before finalizing — check spacing, punctuation, and missing data.



Remember: Master Document + Data Source = Merged Documents.



Know the difference: Edit Individual Documents vs Print Documents.



You can **FILTER** recipients to select only certain records from your data source.



Remember the Mail Merge Formula



**Master
Document**



**Data
Source**



**Merged
Documents**

Quick Recap

- 6 Steps: Create Document → Start Merge → Select Recipients → Insert Fields → Preview → Finish & Merge
- Data source can be a new list, an existing file (.xlsx / .accdb), or Outlook contacts
- Choose Edit Individual Documents for the best exam results — saves all merged letters in one file
- Always preview and save — field names must use underscores, not spaces (e.g. First_Name)