



## How to Use Mail Merge to Create Multiple Chapter Letters

This guide will help you quickly create letters in which only certain contents change, such as who they're addressed to, by using a word processor's mail merge function. The guide will use the Microsoft Word 365 application that is available to all AFA Field officers for free through their AFA account. Older versions of Word will look and function in very similar ways. Word for the Mac will probably also be very similar. Other word processors have similar functions but they will accomplish these tasks in somewhat different ways.

Before you start, you'll want to be sure you have the information you know will change in each letter. If it will be coming from your chapter roster, make sure you have a current copy. You can find the instructions on how to do this in the [Rosters – Membership video](#).

You may start with a letter you've already created, or create one from scratch. We'll start with the Starfighter Chapter's letter that welcomes new members.

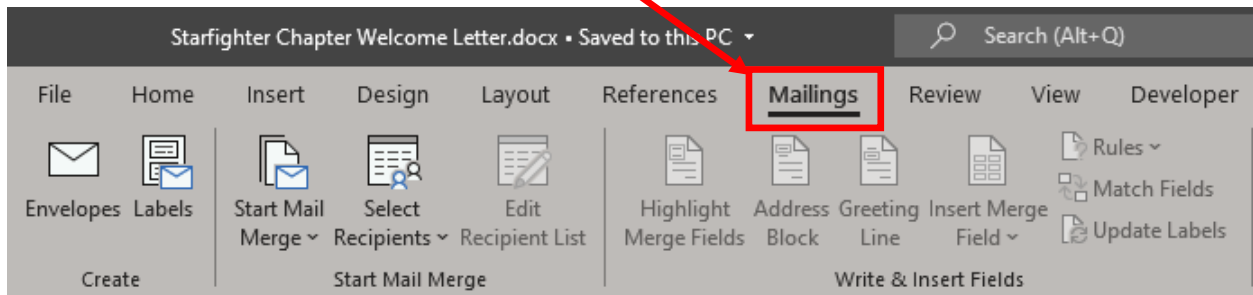
Identify what information will change from letter to letter. For this letter, that will be the **address block** and the **salutation**.

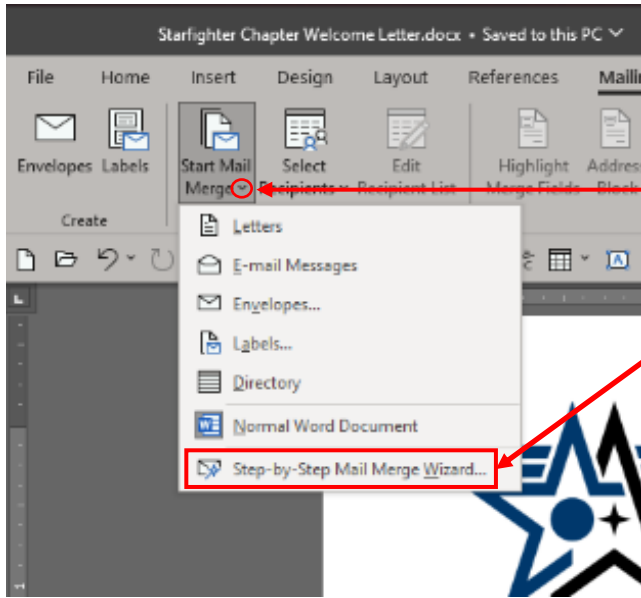
Mr. Ronnie Ramjet  
10000 Thrust Place, Apt. 9G  
Thunder Valley, AZ 87109

Dear Ronnie:

Welcome to the Starfighter Chapter and the Air Force Association! We're honored that you've decided to become a part of these great organizations.

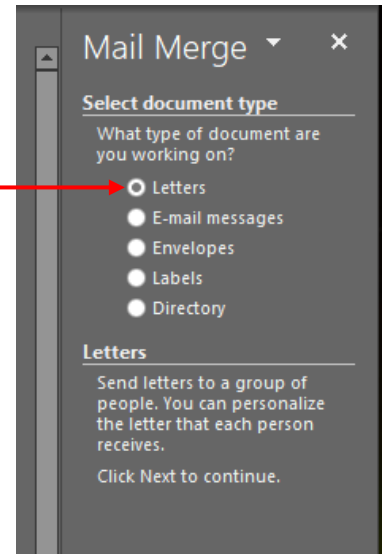
Once the letter is written, click **Mailings** on the Word menu line. This reveals the Mailings command ribbon.



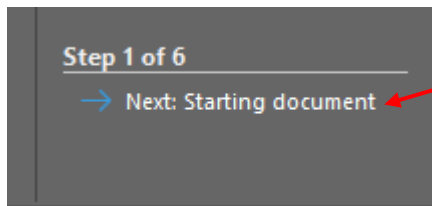


Click on the **down-arrow** next to “Start Mail Merge” to get this drop-down menu.

Then click on **“Step-by-Step Mail Merge Wizard...”**

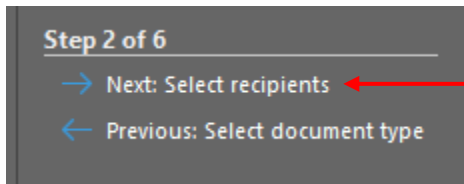
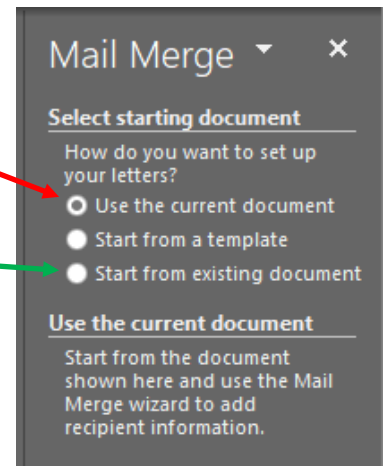


That will open the Mail Merge sidebar on the right side of the screen. **“Letters”** should already be selected, as shown here.

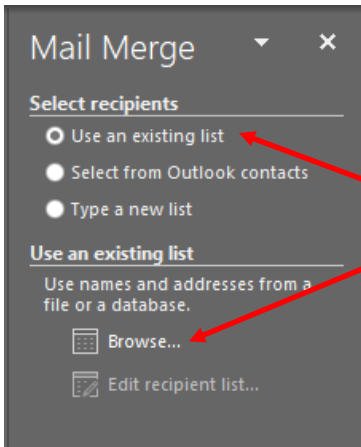


Click on the blue arrow or **“Next: Starting document”** at the bottom of the sidebar.

Since you have the document already open, select **“Use the current document”** in the sidebar. If you want to use a different document that isn't open, click **“Start from existing document”** instead.



Click on the blue arrow or **“Next: Select recipients”** at the bottom of the sidebar. Notice that from this step on, you will have the option to go back to a previous step if needed.

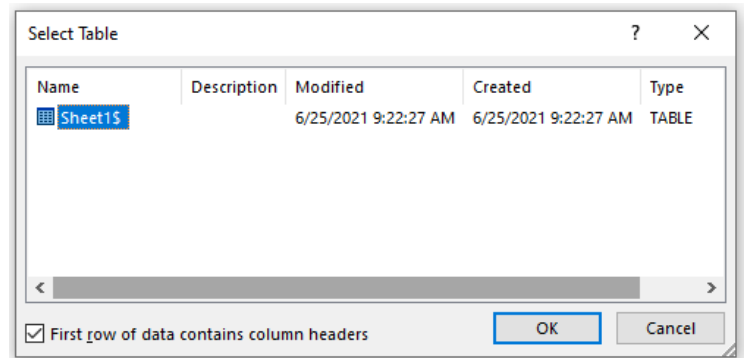


Presuming that you've downloaded or otherwise created the data source (usually an Excel spreadsheet) you're going to work from, the "Use an existing list" option is appropriate. But which one? Click on "Browse..." to find the file.

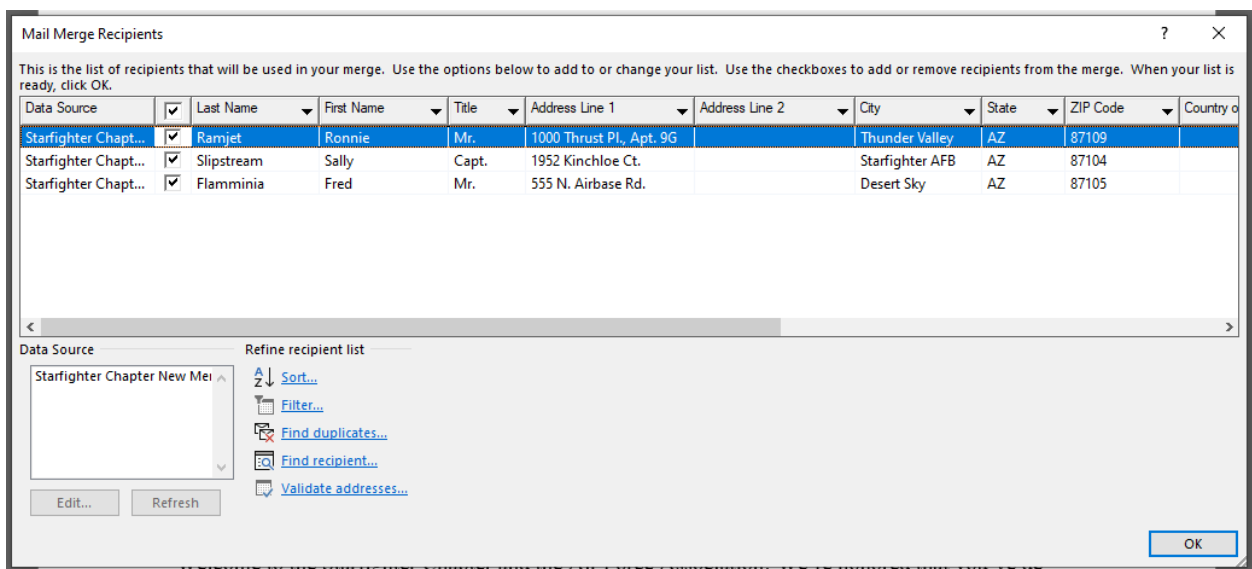
We'll use the Starfighter Chapter New Members.xlsx file.

	Merged Starfighter Chapter letters.docx	6/25/2021 10:13 AM	Microsoft Word D...	40 KB
	Starfighter Chapter New Members.xlsx	6/25/2021 9:22 AM	Microsoft Excel W...	10 KB
	Starfighter Chapter Welcome Letter mail-...	6/23/2021 10:05 AM	Microsoft Word D...	38 KB

Selecting the file will generate this pop-up window. If the workbook you selected has more than one sheet in it, you'll see all of the sheets listed here. Select the one you want.



That will generate another pop-up window like this.



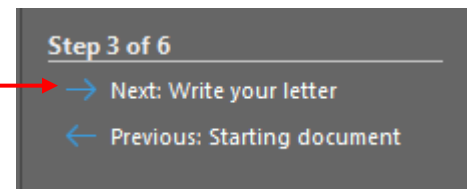
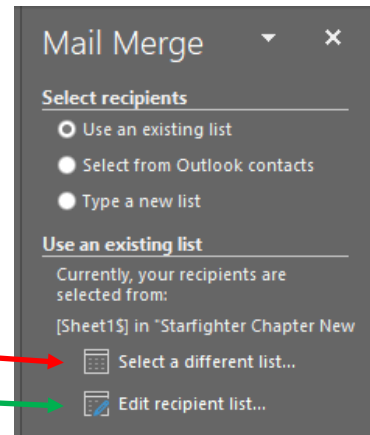
If you see any names you do *not* want to send this letter to, you can clear the check-boxes next to their names. On the other hand, if you're working from the entire chapter roster, you might want to make a separate file or sheet that contains just the people you want to send the letter to first. That will save you a lot of work at this step.

Once you click OK at the bottom of the pop-up, the sidebar will change. If you discovered you've opened the wrong list, you can **select a different one.**

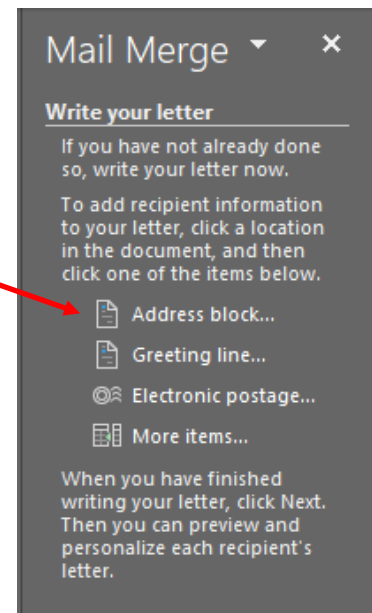
Or, if the list is the right one, you can **edit it.**

Clicking that option will bring back the pop-up window above.

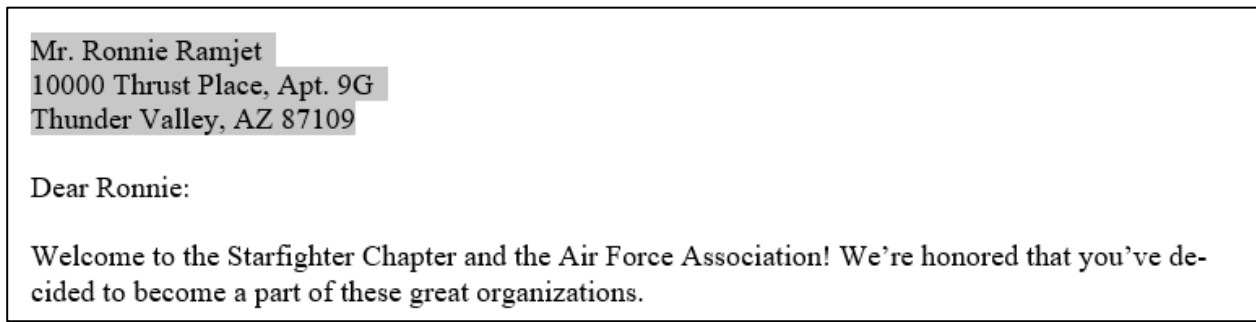
Once you're satisfied with your list of recipients, you're ready to start building the mail merge into the letter. Click on the blue arrow or **"Next: Write your letter"** to go on to that step.



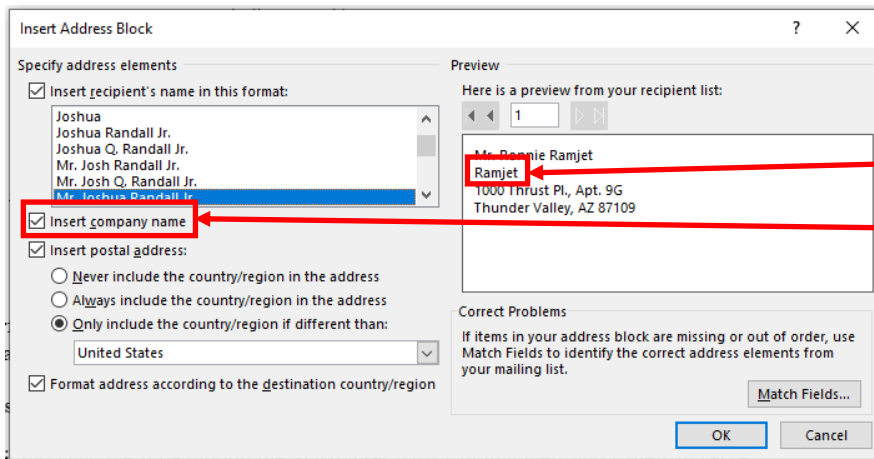
Now it's time to put those recipients into the letter. There are a couple ways to do this, although the sidebar seems to show only one for the **address block.**



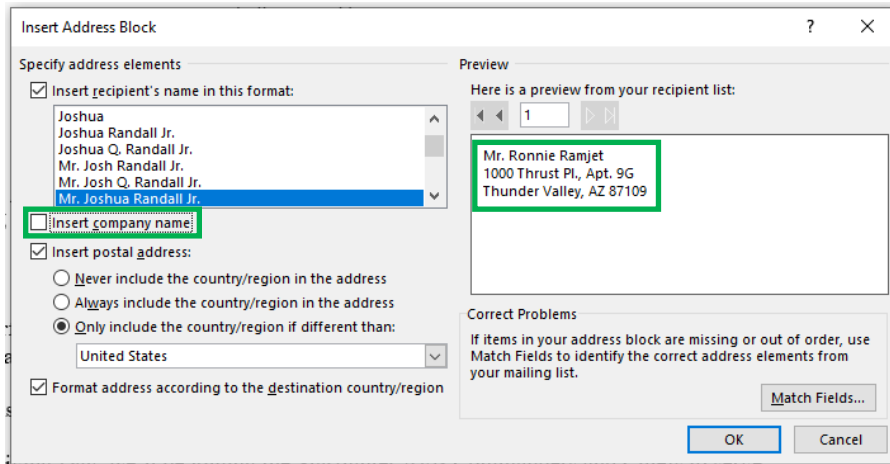
The first thing to do is select all the address block text that's currently in the letter.



Now, when you click on "Address block...", this window will pop up.

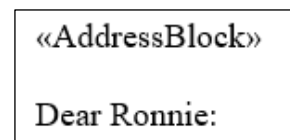


This is the default option. Notice, though, that the software interpreted Ronnie's last name as his company name, and you don't want that, so uncheck that box.



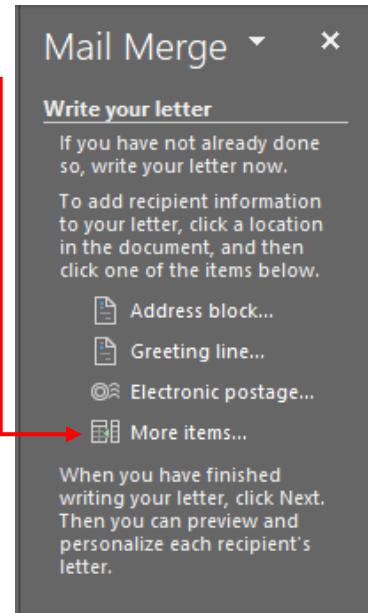
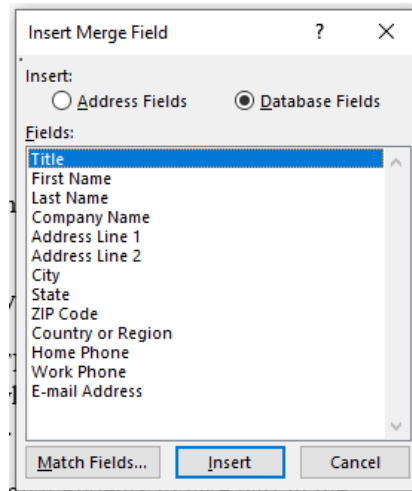
That's much better.

Now, when you click OK, the «AddressBlock» field gets inserted, but the original text hasn't been deleted, so you need to get rid of it. That's simple enough: just delete it.



Your other option is to place each field from the database individually. To do that, click on **“More items...”** in the sidebar.

That will generate this little pop-up.



Now, as you select each item you want from the list, clicking the **“Insert”** button after each one, Word will place them in the first line of the address block on the letter, like this.

«Title»«First\_Name»«Last\_Name»«Address\_Line\_1»«City»«State»«ZIP\_Code»Mr. Ronnie Ramjet  
 10000 Thrust Place, Apt. 9G  
 Thunder Valley, AZ 87109

Dear Ronnie:

OK, that’s not quite what you’ll want, so delete all of the old information, add spaces between the fields that will be on the same line, and put the other items on their lines. NOTE: When you click in-between the double arrowheads that mark each field, the whole field name will be highlighted, like this.

«Title» «First\_Name» «Last\_Name»  
 «Address\_Line\_1»«City»«State»«ZIP\_Code»

Dear Ronnie:

Don’t worry, it’s not really selected, and you’re not going to accidentally delete that field when you press the space bar or Enter key. When you’re done, the address block should look something like this.

«Title» «First\_Name» «Last\_Name»  
 «Address\_Line\_1»  
 «City», «State» «ZIP\_Code»

Dear Ronnie:

**Mail Merge** ✕

**Write your letter**

If you have not already done so, write your letter now.

To add recipient information to your letter, click a location in the document, and then click one of the items below.

- Address block...
- Greeting line...
- Electronic postage...
- More items...

When you have finished writing your letter, click Next. Then you can preview and personalize each recipient's letter.

Now it's time to take care of the greeting line. When you click the "Greeting line..." item in the sidebar, you'll get this pop-up window.

Insert Greeting Line ? ✕

Greeting line format:  
Dear Mr. Randall ,

Greeting line for invalid recipient names:  
Dear Sir or Madam,

Preview

Here is a preview from your recipient list:  
1  
Dear Mr. Ramjet,

Correct Problems  
If items in your greeting line are missing or out of order, use Match Fields to identify the correct address elements from your mailing list.  
Match Fields...

OK Cancel

There are lots of things you can change here: the salutation itself, how the recipient is named, and even what kind of punctuation follows the name. Since this will be a personalized letter, select the recipient's first name.

Insert Greeting Line ? ✕

Greeting line format:  
Dear Mr. Randall ,

Greeting line for invalid recipient names:  
Dear Sir or Madam,

Preview

Here is a preview from your recipient list:  
1  
Dear Mr. Ramjet,

Correct Problems  
If items in your greeting line are missing or out of order, use Match Fields to identify the correct address elements from your mailing list.  
Match Fields...

OK Cancel

Just as before, the greeting line will be inserted in front of the salutation currently on the letter, so you'll have to delete that.

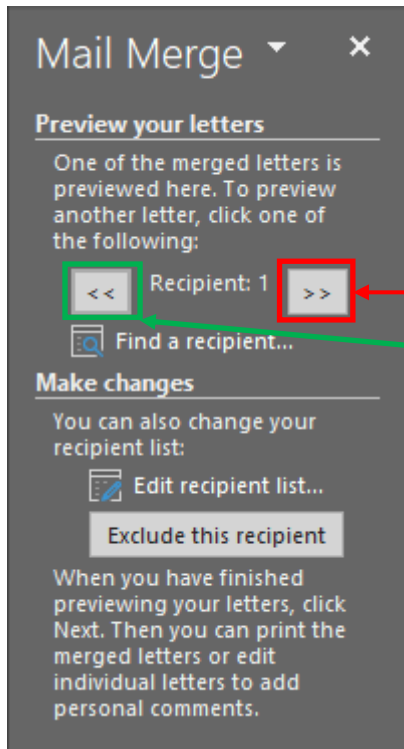
«Title» «First\_Name» «Last\_Name»  
«Address\_Line\_1»  
«City», «State» «ZIP\_Code»  
«GreetingLine» Dear Ronnie:

If there are any other changes you want or need to make, use the "More items..." option in the sidebar again. Once that's all done, click on "Next: Preview your letters" at the bottom of the sidebar to do just that.

Step 4 of 6

→ Next: Preview your letters

← Previous: Select recipients

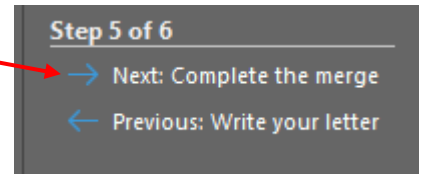


At first, it might not look like anything changed, but take a look at the sidebar. It turns out our friend Ronnie Ramjet is recipient #1. If you click on the **double arrowheads** in the box to the right of the recipient number, you'll advance to the next one, in this case, Capt. Sally Slipstream.

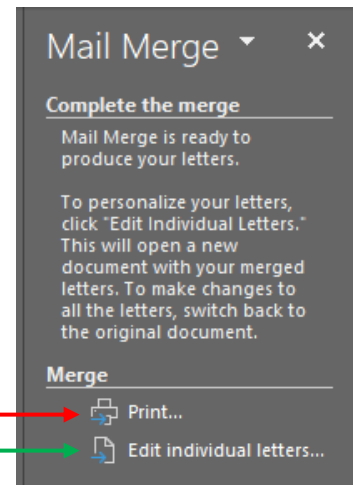
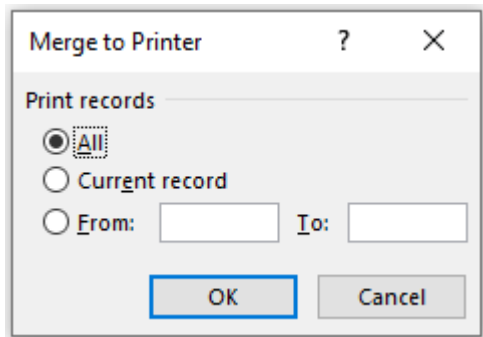
Capt. Sally Slipstream  
1952 Kinchloe Ct.  
Starfighter AFB, AZ 87104  
  
Dear Sally,

The **double arrowheads** to the left of the recipient number move you back toward the beginning of the list. This is a great tool for double-checking to make sure all of the names and addresses are correct before you go on to the next step. Use the "Edit recipient list..." option to make any corrections you need.

You're almost done. Click on **"Next: Complete the merge"** to do just that.

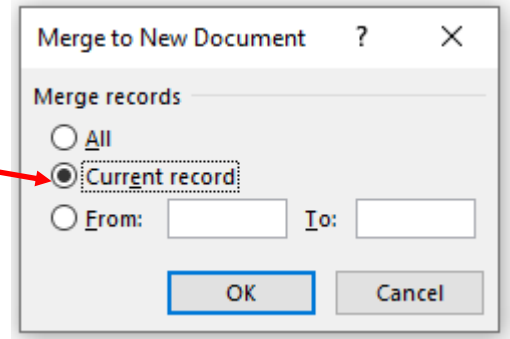


The sidebar now gives you the option to print the letters or make any last changes you want. You can open a pop-up window by clicking either the **"Print..."** or **"Edit individual letters..."** options. The windows look the same, except for the title.





At this point, you may be thinking, “I don’t want hard-copies of these letters, I’m going to attach them to e-mails. What am I going to do?” Unfortunately, this is one place where this “wizard” isn’t so magical. Your best bet is to select the “Edit individual letters...” option, click the radio button next to “Current record,” and click OK. That will open a new Word document containing just that letter. You can save it as a separate file. So long as you don’t have too many of these letters to save this way, this won’t be too much of a hassle.



And that’s it: a quicker and easier way to generate a lot of personalized letters in next to no time.

If you want to use a program other than Word, or you have an older version, there are plenty of tutorials on the web. Just do a search for “mail merge [your application and version]” and you’ll come up with lots of options.

Finally, the Field Council Training Subcommittee would appreciate it if you’d take a minute to click or tap on the big red Survey button at the right or on [this link](#) to take our survey. We always appreciate your feedback on our videos and guides; they help us make our training better for you. Thanks!

