

Microsoft Word 2013: Mail Merge

Mail merge is a tool which allows you to create form letters, mailing labels and envelopes by linking a main document to a data source. It is the process of combining a list of data with a template.

The mail merge process involves the following:

- **The Main Document** contains the text and graphics that are the same for each version of the merged document
- **Data Source** a file that contains the information to be merged into a document. For example, the names and addresses of the recipients of a letter.

Mail Merge – Form Letters

- 1) Open Microsoft Word and create a new blank document
- 2) Type the letter with all needed text and formatting, leaving room for the data from the data source (example: name, address, etc)
- 3) Click the **Mailings** tab
- 4) Click Start Mail Merge
- 5) Click Step by Step Mail Merge Wizard



The Mail Merge task pane appears on the right of your screen. Note there are 6 steps:

Step 1

- 1) Click Letters for the document type
- 2) Click Next: Starting document

Step 2

- 1) Click Use the current document under Select starting document
- 2) Click Next: Select recipients

The recipients can come from either an existing Excel file, an Access table or you can create a new list in Word.

If Using an Existing List:

- 1) Click Use an existing list under Select recipients
- 2) Click Browse
- 3) Select the file
- 4) Click Open
- 5) Select the worksheet tab name that contains the data
- 6) Click OK

Mail Merge Recipients opens showing the file data

7) Click **OK**

Mail Merge Recipients							
This is the list of recipients that will be used in your merge. Use the options below to add to or change your list. Use the checkboxes to add or remove recipients from the merge. When your list is ready, click OK.							
Data Source	$\overline{\mathbf{v}}$	Last Name 🛛 👻	First Name	▼ Address Line 1	▼ Add	ress Line 2	
friends.mdb	~	Jones	Kim	10 Park Ave			
friends.mdb	~	Oberg	Judi	5 Main Street			
friends.mdb	~	Smith	Peter	11 Apple Lane			
friends.mdb	~	Volpe	Julie	7 Mill Street			
		Define vesti	ingele Firele			>	
Data Source		Kerine recip	ient list				
friends.mdb		A 2↓ Sort	<u>.</u>				
		Filter.					
		X-1 Find o	luplicates				
			apricación (1)				
		Find r	ecipient				
		Valida	te addresses				
						ОК	

8) Click Next: Write your letter

If Creating a New List:

- 1) Click Type a new list under Select recipients
- 2) Click Create
- 3) Click **Customize Columns** to modify the list of fields

New	Address List							?	×
Type recipient information in the table. To add more entries, click New Entry.									
	Title 👻	First Name 🗖	 Last 	Name 🛛 👻	Compar	ny Name 👻	Address	sLine 1 🧃	•
	1								
			0						_
<)	J		_				>
Ne	ew Entry	Eina							
Del	lete Entry 🤇 Cust	omize Columns)			ОК		Cancel	

- 4) Delete any unnecessary field names and/or add new ones
- 5) Click OK



6) Begin typing records, hitting **TAB** to advance to the next field and to continue adding new records

New Address List							
Type recipient information in the table. To add more entries, click New Entry.							
Title		👻 Last Name	👻 Company Name 👻	Address Line 1 👻			
D Mr.				1 Normal Avenue			
<u> </u>				>			
New Entry	Eind						
Delete Entry	Customize Columns.		ОК	Cancel			

- 7) Click OK
- 8) Click Save

The recipients list will be saved as a separate file as a Microsoft Access file type. It is saved in the **My Data Sources** folder. It is recommended to save the file in this folder.

9) Click Next: Write your letter

- 1) If including an address, click the location in your document where the address data will be inserted
- 2) Click address block...
- 3) Select the address elements you want included
- 4) Click OK

Insert Address Block	? 🛛
Specify address elements Insert recipient's name in this format: Josh Josh Randall Jr. Joshua Boshua Randall Jr. Joshua C, Randall	Preview Here is a preview from your recipient list: I D P N Kim Jones 10 Park Ave Denville, NJ 07834
Always include the country/region in the address Only include the country/region if different than: United States Format address according to the destination country/region	Correct Problems If items in your address block are missing or out of order, use Match Fields to identify the correct address elements from your mailing list. Match Fields
	OK Cancel

The field name will look like this: <<AddressBlock>>

The address block will insert the following fields including any necessary punctuation: First Name, Last Name, Company, Address 1, Address 2, City, State, Postal Code.

If your fields do not match the ones listed above or you are not using address fields, click **More** items...

Insert Merge Field	? 🛛
Insert: <u>A</u> ddress Fields <u>F</u> ields:	⊙ <u>D</u> atabase Fields
First Name Last Name Address Line 1 Address Line 2 City State Zip Gift	 X
Match Fields	isert Cancel

- 5) Click on the field from the list
- 6) Click Insert
- 7) Click Close
 - The field name will look like this «First_Name»

8) Repeat this step until all fields have been inserted.

Remember to put spaces and punctuation where needed.

9) Click Next: Preview your letters

Here is where you can preview the first page with the fields filled in. Click **Next: Complete the merge**

Step 6

To Complete the Merge:

- 1) Click **Print** to send directly to the printer
- 2) Click Edit individual letters to create a new file

Remember to save your document as you go. The next time you open your document and click on **Step by Step Mail Merge**, the data source file will be attached.

Mail Merge – Labels

- 1) Create a new blank document
- 2) Click the **Mailings** tab
- 3) Click Start Mail Merge
- 4) Click Step by Step Mail Merge Wizard

Step 1

- 1) Click Labels for the document type
- 2) Click Next: Starting document

Step 2

- 1) Click Label options under Change document layout
- 2) Choose the label style you are using
- 3) Click **OK**

Label Options		? 🛛
Printer information	ters	
Page printers <u>Tr</u>	ray: Default tray (Auton	natically Select) 💙
Label information		
Label <u>v</u> endors: Avery L	JS Letter 🛛 🗸	
Product n <u>u</u> mber:		Label information
5143 5144	<u> </u>	Type: Easy Peel Mailing Labels - Fill Across
5146		Width: 2.63"
5147		Page size: 8.5" X 11"
5160	✓	
Details New La	bel Delete	OK Cancel

4) Click Next: Select recipients

- 1) Click Use an existing list under Select recipients
- 2) Click Browse
- 3) Select the file
- 4) Click Open
- 5) Select the worksheet tab name that contains the data
- 6) Click OK
- 7) Click Next: Arrange your labels

Step 4

- 1) Click in the first label box and click on either **Address block** or **More items** to insert the data fields
- 2) Click Update all labels to include the fields on all labels
- 3) Click Next: Preview your labels

	U 🖳 😼 🔹			
L	n ≡N socios sa isra de const	2	a a 5 a a 🛢 🛢 a co 6 a a a 1 a a a 7 a co	🕂 🖌 🕂 🗧 🔂 Mail Merge 🔻 🗙
				Arrange your labels
				If you have not already done so, lay out your label using the first label on the sheet.
		«Next Record»	«Next Record»	To add recipient information to your label, citik a location in the first label, and then citik one of the first label, and then citik one of the first label, and then citik one of Address block
				Greeting line Electronic postage More items
	«Next Record»	«Next Record»	«Next Record»	When you have finished an anying your label, click Next. Then you can preview each region is bade and make any invividue changes.
-				You can copy the layout of the first labels to the other labels on the origin by difference by the other labels on
	«Next Record»	«Next Record»	«Next Record»	Update all labels
	«Next Record»	«Next Record»	«Next Record»	Step 4 of 6
	"Novt Pocordy	"Novt Pocord»	"Novt Pocordy	Ŧ

Step 5

Here is where you can preview the labels. Click **Next: Complete the merge**

Step 6

Click **Print** to send directly to the printer

Click Edit individual labels to create a new file