

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

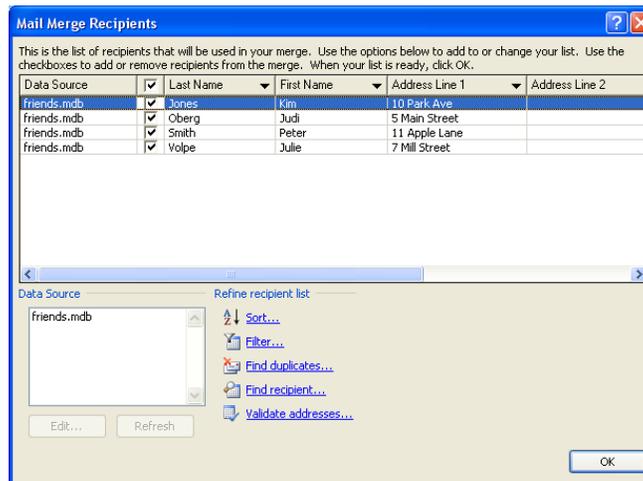
- 1) Click **Use the current document** under **Select starting document**
- 2) Click **Next: Select recipients**

Step 3

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:

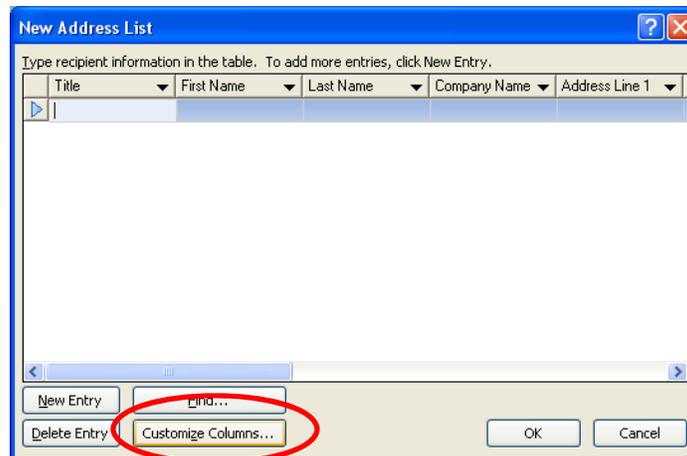
- 1) Click **Use an existing list** under **Select recipients**
- 2) Click **Browse**
- 3) Select the file
- 4) Click **Open**
- 5) Select the worksheet tab name that contains the data
- 6) Click **OK**
Mail Merge Recipients opens showing the file data
- 7) Click **OK**



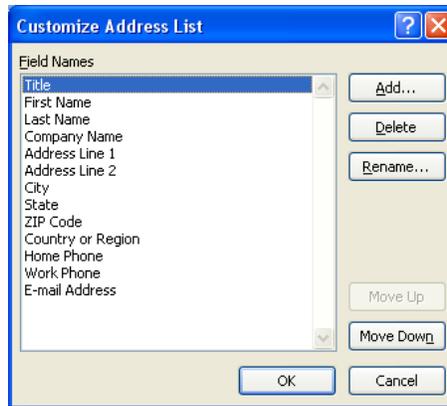
- 8) Click **Next: Write your letter**

If Creating a New List:

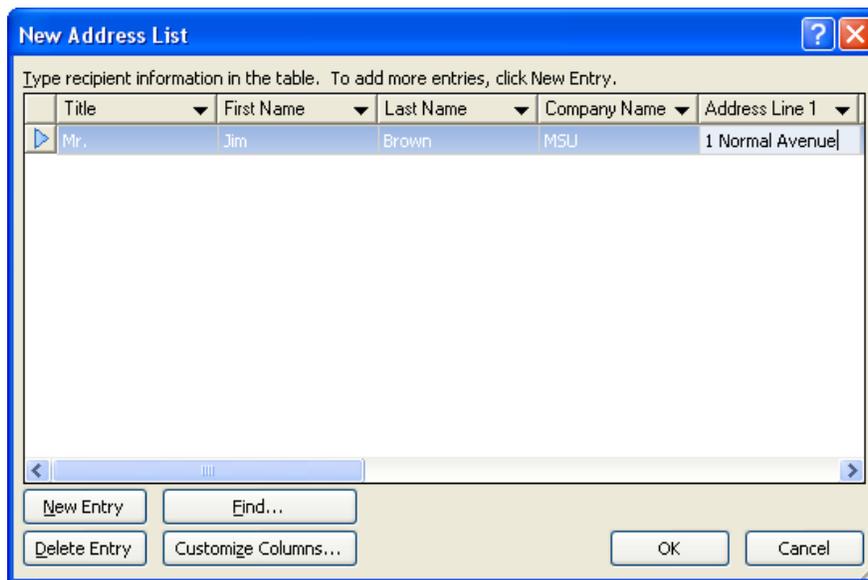
- 1) Click **Type a new list** under **Select recipients**
- 2) Click **Create**
- 3) Click **Customize Columns** to modify the list of fields



- 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



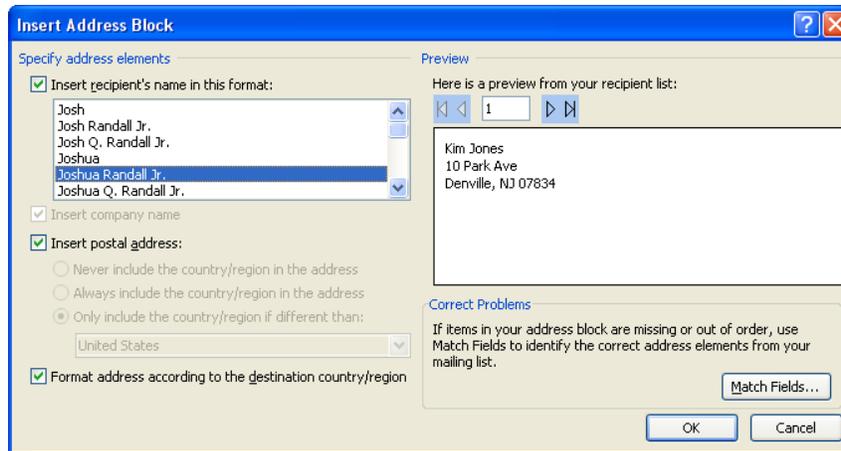
- 7) Click **OK**
- 8) Click **Save**

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**

Step 4

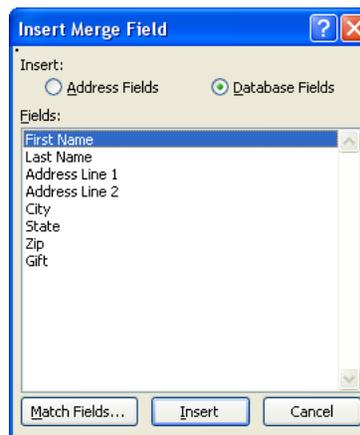
- 1) If including an address, click the location in your document where the address data will be inserted
- 2) Click **address block...**
- 3) Select the address elements you want included
- 4) Click **OK**



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...**



- 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**

Step 5

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

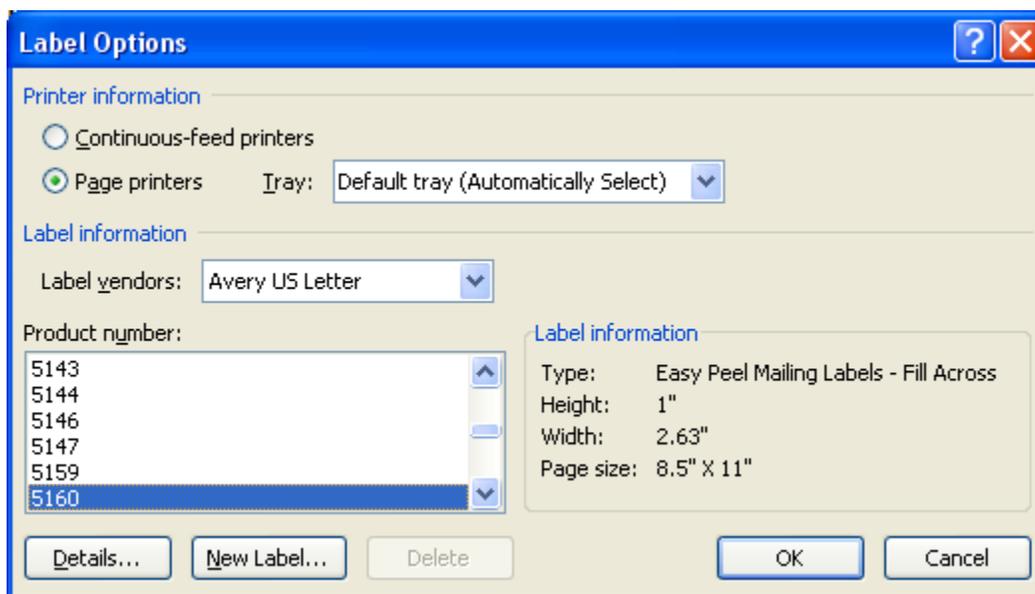
- 1) Create a new blank document
- 2) Click the **Mailings** tab
- 3) Click **Start Mail Merge**
- 4) Click **Step by Step Mail Merge Wizard**

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**



- 4) Click **Next: Select recipients**

Step 3

- 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**



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

OR

Click **Edit individual labels** to create a new file