

Mail Merge For Word 2013



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INTRODUCTION

The Mail Merge Wizard for Word 2013 allows you to create a list of mailing addresses and other information in a data source and then merge them into a standard document file that is referred to as the main document. Microsoft Word can combine—or merge—lists of variable information in one file (data source) with a Word document to individualize form letters and envelopes.

GETTING STARTED

- 1.) Choose the *MAILINGS* tab on the Ribbon Bar.
- 2.) Choose the icon that says *Start Mail Merge*.



- 3.) For the purpose of this manual, choose the *Step-by-Step Mail Merge Wizard*.
- 4.) Once you click, the wizard will open up a task pane on the right side of the screen.

NOTE: Notice that as you move forward along in your mail merge, the ribbon bar also changes. You can actually perform your merge from the task pane on the right-hand side of the screen OR right on the Ribbon itself.

SELECT DOCUMENT TYPE

The first step, regardless if you choose the step-by-step option or not, is to choose what kind of document you want to produce in mail merge.

- The letters option allows you to create personalized letters for mass mailings.
- The e-mail messaging options allow you to create personalized e-mails for mass e-mailings.
- The envelope option allows you to print addressed envelopes for a group mailing.
- The label option allows you to print address labels for a group mailing.
- The directory option allows you to create a single document containing a catalogue or printed list of addresses.

LETTERS

- 1.) When you are in step by step mode for letters, you will see a hyperlink at the bottom of the task pane
- 2.) Click Next: Starting document to continue onto the next step.
- 3.) Once you click on the hyperlink, you will be brought to the *select starting document* task pane.

SELECT STARTING DOCUMENT

The second step in the mail merge process is to select where you want to create your starting document. Word offers the following options:

	Sa	Mail Merge 🔹 🗙
This allows you to start from the document that is already open. Be aware that this option is not available for envelopes or labels.		Select starting document How do you want to set up your letters?
This allows you to start from a ready-to-use template that can be customized to suit your needs.		Start from a template Start from existing document Use the current document Start from the document shown
This allows you to start from a document that has already been created and saved on your computer.		here and use the Mail Merge wizard to add recipient information.

Please select, for this manual, *Use the current document* and click on *Next: Select recipients* to continue onto the next step of our sample mail merge

SELECT RECIPIENTS

The third step in the mail merge process is to select a list of recipients. You can chose from the following options:



Note: You can also select your recipients from the Ribbon Bar. Under the *Start Mail Merge* Group, select *Select Recipients*. The same options that appear on the task pane now appear available on your Ribbon Bar as well. The following image is a comparison of both ways you can select your recipients.

Mail Merge Wizard Task Pane	Ribbon Bar
Mail Merge	
Select recipients	Select Edit Highlight
Use an existing list	Recipients - Recipient List Merge Fields
 Select from Outlook contac 	Type a <u>N</u> ew List
⊖ Type a new list	- 📖 Us <u>e</u> an Existing List
Use an existing list	Choose from Outlook Contacts
Use names and addresses from a file or a database.	
III Browse	
Edit recipient list	

Select *Type a New List* in either of the above examples in your document to insert your recipients into your mail merge.

Now, click the hyperlink titled *Create...* and the following window will appear:

Select recipients	New	Address Lis	t						2	×
O Use an existing list	Тур	e recipient ir	nformat	ion in the table.	To	add more entries,	cli	ck New Entry.		
0		Title	•	First Name	•	Last Name 🗨		Company Name 👻	Address Lin	ie 1 👻
 Select from Outlook contacts 										
Type a new list										
Type a new list										
Type the names and addresses of recipients.										
Create										
	•									
	<u> </u>	lew Entry		<u>F</u> ind						
	D	elete Entry	Cust	omi <u>z</u> e Columns				ОК	Ci	ancel

Here you will create your list of recipients. To create your list, follow these steps:

Home Phone Work Phone

1) First you will need to click on *Customize Columns* to customize the address list. Please delete the following entries by clicking highlighting them, then clicking the delete button on the right.

Field Names		
Title	^	<u>A</u> dd
First Name		
Company Name		<u>D</u> elete
Address Line 1		
Address Line 2	R	ename
City		
7IP Code		
Country or Region		
Home Phone		
Work Phone		
E-mail Address	N	/love Up
	- Mo	ove Dowi

We are deleting these entries because they are usually not needed on a letter or envelope.

- 2) Click OK.
- 3) Enter the following names on the list one by one. After the first one is entered, click on **New Entry** (upper left hand corner) to add another entry into the address list.

Mr. David Judge 155 S. New Street West Chester, PA 19382 United States djudge155@gmail.com

Mr. Peter Lennon 36 Spice Court Downingtown, PA 19335 United States lenbones@verizon.net

Mrs. Carole King 5988 Larkspur Lane Phoenix, AZ 54622 United States tapestry5@comcast.net Ms. Pamela Allen-Brown 4774 Steel Mill Road Apartment 25 Claymont, DE 97013 United States pabrown@gmail.com

Dr. William Petit 900 Lookout Court Denver, CO 59744 United States billpetit@streamline.com

Dr. Sandra Carpenter 101 Drummers Lane PO Box 4001 STN A Victoria BC V8X 3X4 drsandy@aol.com

- 4) Once you have finished the list, click **OK**.
- 5) Now you will be prompted to save the address list. Name the file *address1* and click *Save*.
- 6) You will be brought into a recipient table:

Data Source		Last Name	➡ First Name	➡ Title	Address Line 1 .	 Addre
address1.mdb		Judge	David	Mr.	155 S. New Street	
address1.mdb	~	Lennon	Peter	Mr.	36 Spice Court	
address1.mdb	~	King	Carole	Mrs.	5988 Larkspur Lane	
address1.mdb	~	Allen-Brown	Pamela	Ms.	4774 Steel Mill Road	Apar
address1.mdb	~	Petit	William	Dr.	900 Lookout Court	
address1.mdb	V	Carpenter	Sandra	Dr.	101 Drummers Lane	
address1.mdb	v	Carpenter	Sandra cipient list	Dr.	101 Drummers Lane	
address1.mdb	V	Carpenter III Refine re ▲ 2↓ Sor	Sandra cipient list	Dr.	101 Drummers Lane	
eddress1.mdb e ata Source address1.mdb	v	Carpenter III Refine re Â↓ Son Filt	Sandra cipient list	Dr.	101 Drummers Lane	
address1.mdb	V	Carpenter Refine re Â↓ Sou Filt Filt	Sandra cipient list t er d duplicates	Dr.	101 Drummers Lane	
eddress1.mdb	V	Carpenter Refine re Â↓ Sor Fint Fint Fint Fint Fint Fint Fint	Sandra cipient list tt id duplicates d recipient	Dr.	101 Drummers Lane	

- 7) Press **OK** after you review your list.
- 8) Now select *Next: Write your letter* to continue onto the next step.

EDIT THE RECIPIENT LIST



If you need to edit your recipient list, click the **file name** (circled). The Edit and Refresh buttons will be activated.

Mail Merge Recipients							? <mark>x</mark>
This is the list of recipi Use the checkboxes to	ents add	that will be use or remove recip	d in your n ients from	nerge. Use the the merge. W	e options be /hen your li:	elow to add to or change y st is ready, click OK.	our list.
Data Source	$\overline{}$	Last Name		Name .		 Address Line 1 	→ Address
MM2013ClassList	~	Judge	Dav	id	Mr.	155 S. New Street	
MM2013ClassList	\checkmark	Lennon	Pete	er	Mr.	36 Spice Court	
MM2013ClassList	✓	King	Car	ole	Mrs.	5988 Larkspur Lane	
MM2013ClassList	✓	Allen-Brown	Pan	nela	Ms.	4774 Steel Mill Road	Apartn
MM2013ClassList	✓	Petit	Will	iam	Dr.	900 Lookout Court	
MM2013ClassList	~	Carpenter	San	dra	Dr.	101 Drummers Lane	PO Bos
•							4
Data Source		Refine	recipient	ist			
address1.accdb			Sort				
		1	Filter				
		N	Find duplic	ates			
		- 🔽	Find recipi	ent			
			Validate ad	ldresses			
	ketres	<u>n</u>					
							ок
C	_						

Click the **Edit** button to make changes.

When you are finished, click the **OK** button to save your changes.

WRITING YOUR LETTER

Now is the time to write the letter. *Please note:* to enter in the address block and greeting line, select **Address block**... and **Greeting line**... from the mail merge task pane and the choose the desired style. Be sure to select **Always include the country/region in the address**. To insert the **First Name** merge field, click on **More items...** from the mail merge task pane, select first name and click the Insert button. Notice the **Ribbon Bar** contains the same options.



FORMATTING THE ADDRESS BLOCK

ecify address elements	Preview
Insert recipient's name in this format:	Here is a preview from your recipient list:
Josh Josh Randall Jr. Josh Q. Randall Jr. Joshua Joshua Randall Jr. Joshua Q. Randall Ir.	
Insert company name	
Insert postal <u>a</u> ddress:	
Never include the country/region in the address	
 Always include the country/region in the address Only include the country/region if different than: 	Correct Problems
United States	Match Fields to identify the correct address elements from your mailing list.
Format address according to the <u>d</u> estination country/regi	ion <u>M</u> atch Fields

Please note: When you click on the hyperlink Greeting line... you will be given options of salutations to choose.

Insert Greeting Line
Greeting line format: Dear ▼ Joshua Randall Jr. ▼ , ▼
Gr <u>e</u> eting line for invalid recipient names: Dear Sir or Madam,
Preview
Here is a preview from your recipient list:
Dear Sir or Madam,
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.
<u>M</u> atch Fields
OK Cancel

Now, please write the following letter:

««AddressBlock»»

««Greeting Line»»

This letter is to inform you that you are a finalist in our Grand Prize Sweepstakes Drawing. The drawing will take place on Saturday, November 5, 2015. You do not have to be present to win but it would be so exciting, «FirstName», if you were here when we select the winner.

I hope you will join us on November 5th!!

Sincerely,

The Game Master

PREVIEW YOUR LETTERS

Now that you have finished typing your letter, click on **Next: Preview** your letters in the mail merge task pane to get a preview of your letters with the recipients names in the merge fields. You will also have the option to exclude a recipient. You can view the letters one by one. To see a preview of the rest of the recipients, use the arrows seen below to scroll through the remaining recipients.



You can also preview your letters from the Ribbon Bar as well. Under the Preview Results group on the Ribbon Bar, you can easily sort through and preview your letters.



Once the letters have been previewed, click on *Next: Complete the merge* in the task pane to complete the merge. You can also complete the mail merge under the *Finish Group* on your Ribbon Bar.



Once you have completed the merge, simply click on *Print...* in the mail merge task pane to print out your letters. You can also edit individual letters by clicking on the hyperlink *Edit individual letters...* in the mail merge task pane. Editing individual letters will open a new window and you will be able to go through your letters one by one.

ENVELOPES

SELECT DOCUMENT TYPE

Like before, the first step in the mail merge pane will be selecting a document type. Instead of choosing *Letters*, you will choose <u>Envelopes</u> and click *Next: Starting document*.

SELECT STARTING DOCUMENT

Unlike with the Letters, you will not have the option to stay in the document as is. Instead, when you are selecting your starting document for an envelope:

- 1. *Change document layout* (if you already have something saved, you can start from that existing document).
- 2. Click the hyperlink that says *Envelope options...* and the following window will open:

Envelope Options		? 💌
Envelope Options	Printing Options	
Envelope size:		
Size 10	(4 1/8 x 9 1/2 in)	•
Delivery address		
Eont	From left:	Auto 🚖
	From top:	Auto 🚖
Return address		
Font	From left:	Auto 🚔
	From top:	Auto 🌲
Preview		
	OK	Crarel
	OK	

3. Within the *Envelope Options* window, select the envelope size desired. For this manual, please go with the default size.

SELECT RECIPIENTS

Since we created a recipient list for the letters, you can use that same recipient list again for the envelopes.

1. Select *Use an existing list*, then to find your list click on *Browse…* and the following window will open:



- 2. Find your recipient list and click on **Open**. Remember, you can also perform this task action by looking to your Ribbon Bar for the step by step mail merge process.
- 3. Once you click on Open, the following window will open so you can confirm and edit your list of recipients.

Mail Merge Recipient	ts					? <mark>X</mark>
This is the list of recip Use the checkboxes t	pients f	that will be used i or remove recipier	n your merge. Use t hts from the merge.	he options be When your li	elow to add to or change y st is ready, click OK.	our list.
Data Source		Last Name	➡ First Name	➡ Title	 Address Line 1 	+ Address
address1.mdb	$\mathbf{\overline{\mathbf{v}}}$	Judge	David	Mr.	155 S. New Street	
address1.mdb	~	Lennon	Peter	Mr.	36 Spice Court	
address1.mdb	~	King	Carole	Mrs.	5988 Larkspur Lane	
address1.mdb	~	Allen-Brown	Pamela	Ms.	4774 Steel Mill Road	Apartn
address1.mdb	V	Petit	William	Dr.	900 Lookout Court	
address1.mdb	~	Carpenter	Sandra	Dr.	101 Drummers Lane	
•		III				4
Data Source		Refine re	cipient list			
address1.mdb		A 2↓ Sol	<u>t</u>			
		Filt	<u>er</u>			
		🔀 Ein	d duplicates			
		🚽 🔽 Fin	d recipient			
Edit	Refres	ih 🔜 💀 Val	idate addresses			
						ОК

- 4. Click **OK** once you are satisfied with your recipient list.
- 5. Then click on *Next: Arrange your envelope* in the mail merge task pane.

ARRANGE YOUR ENVELOPE

This is when you lay out your envelope. To add recipient information to your envelope, click the desired location. For this manual, I am going to put the address block in the center, as seen here:

«AddressBlock»

Please note: For our sample merge, be sure to follow the same steps as before in entering the Address Block.

PREVIEW YOUR ENVELOPES

Once you have finished setting up your envelope:

- 1. Click on *Next: Preview your envelopes* in the mail merge task pane. You can view your envelopes one by one.
- 2. To see a preview of the rest of the recipients, use the arrows seen below to scroll through the remaining recipients. Remember, you can also preview your envelopes from the Ribbon Bar as well.

<< Recipient: 1 >>	Preview Results
	Preview Results

Once you have previewed your envelopes:

- 1. Click on *Next: Complete the merge*.
- 2. Once you have completed the merge, simply click on *Print...* in the mail merge task pane to print out your envelopes.
- To print your envelopes, you will have to manually feed them into your printer. You can also edit individual envelopes by clicking on *Edit individual envelopes…* in the mail merge task pane.
 Note: Editing individual envelopes will open a new window and you can go through your envelopes one by one.

LABELS

SELECT DOCUMENT TYPE

Like before, the first step in the mail merge process is selecting a document type. Instead of choosing *Envelopes*, choose *Labels* and click *Next: Starting document*.

SELECT STARTING DOCUMENT

When selecting your starting document:

1. Select Change document layout, click on Label options... and the following window will appear:

Printer information Continuous-feed printers Page printers Tray: Bypass Tray Label information
<u>C</u> ontinuous-feed printers <u>Page printers Tray</u> Label information
Page printers <u>T</u> ray: Bypass Tray Label information
Label information
Label vendere: Microsoft
Laber vendors: Microsoft
Find updates on Office.com
Product number: Label information
1/2 Letter Type: 1/2 Letter Postcard
1/2 Letter Height: 8.5"
1/4 Letter Width: 5.5"
30 Per Page Page size: 11" × 8.5"
30 Per Page
Details New Label Delete OK Cancel

2. Within the *Label Options* window, please select the desired size of your labels.

SELECT RECIPIENTS

- 1. Since we created and saved a recipient list before, select Use an existing list.
- 2. To find your list, click on **Browse...** and the following window will appear:



3. Find your recipient list and click on the *Open* button.

Data Source		Last Name	➡ First Name	➡ Title	Address Line 1 Addr	🗕 🖌 🕂
address1.mdb	I	Judge	David	Mr.	155 S. New Street	
address1.mdb	~	Lennon	Peter	Mr.	36 Spice Court	
address1.mdb	~	King	Carole	Mrs.	5988 Larkspur Lane	
address1.mdb	~	Allen-Brown	Pamela	Ms.	4774 Steel Mill Road	Apa
				-	2001 I	
address1.mdb	~	Petit	William	Dr.	900 Lookout Court	
address1.mdb address1.mdb	>	Petit Carpenter	William Sandra	Dr. Dr.	900 Lookout Court 101 Drummers Lane	
address1.mdb address1.mdb < Data Source	v	Petit Carpenter III Refine re	William Sandra ecipient list	Dr. Dr.	900 Lookout Court 101 Drummers Lane	
address1.mdb address1.mdb < ata Source address1.mdb	V	Petit Carpenter	William Sandra ecipient list	Dr. Dr.	900 Lookout Court 101 Drummers Lane	
address1.mdb address1.mdb < ata Source address1.mdb	V	Petit Carpenter Refine re	William Sandra ecipient list rt	Dr. Dr.	900 Lookout Court 101 Drummers Lane	
address1.mdb address1.mdb < Data Source address1.mdb		Petit Carpenter	William Sandra ecipient list rt ter	Dr. Dr.	900 Lookout Court 101 Drummers Lane	
address1.mdb address1.mdb < Data Source address1.mdb		Petit Carpenter Refine re 2↓ So The Fill Fill Fill	William Sandra ecipient list rt ter nd duplicates nd recipient	Dr. Dr.	900 Lookout Court 101 Drummers Lane	

4. Once you click on *Open*, the following window will open so you can confirm and edit your list of recipients.

- 5. Click **OK** once you are satisfied with your recipient list.
- 6. Then click on *Next: Arrange your labels* in the mail merge task pane.

ARRANGE YOUR LABELS

This is when you lay out your labels. To add recipient information to your label:

1. Click the desired location in the document, but be aware "Next Record" will appear as well.

Once you have set-up your first label:

1. Click on *Update all labels* (underneath Replicate labels on your mail merge task pane) to give all of your labels the same layout.

PREVIEW YOUR LABELS

Once you have finished setting up your label:

- 1. Click on *Next: Preview your labels* in the mail merge task pane.
- 2. Here the "Next Record" label will disappear.
- 3. You can also view the labels one by one. To see a preview of the rest of the recipients, use the arrows seen below to scroll through the remaining recipients.

< < Recipient: 1	>>
------------------	----

Once you have previewed your labels:

- 1. Click on *Next: Complete the merge*.
- 2. Once you have completed the merge, simply click on *Print…* in the mail merge task pane to print out your labels.
- 3. You can also edit the individual labels by clicking on *Edit Individual labels...* in the mail merge task pane.
- 4. Editing individual labels will open a new window and you can go through your labels one by one.

TIPS FROM THE TRAINING STAFF

TIP #1:

To make your merge easier for you to manage and work with, we recommend creating your list of recipients in an Excel spreadsheet or an Access database. By doing this, you will always have access to certain spreadsheets or databases containing specific recipients. You can also save these spreadsheets or databases according to the population of recipients that you are working with. Also, it makes it easier for you to actually go into the spreadsheet or database while working on a Mail Merge, make changes to your recipients and save your spreadsheet or database with the updated information.



TIP #2:

After you have selected the recipient list you plan on using in your Mail Merge, it is essential that you use the Match Fields button on the Ribbon Bar to make sure that all your fields in your recipient data source (Excel Spreadsheet or Access Database) are appropriately matched with the fields in your mail merge document. Matching your fields involves you looking through all the fields you decided to include in your recipient data source and compare/match them to the fields in your Mail Merge document. Match Fields look like this:

To match a field, go to Write and Insert Fields group then Match Field, then the value you want to select. In the Match Fields dialog box, click the arrow of the field you want to match and select the field in your data file that you want to match to the Word field name. You can do this as many times as you need to in order to match all the fields you want to include. If you plan to use this data file regularly in different merges, click the **Remember this matching for this data source on this computer** check box to save the settings. Click OK to save your changes.

NOTES: