



Mail Merge For Word 2013

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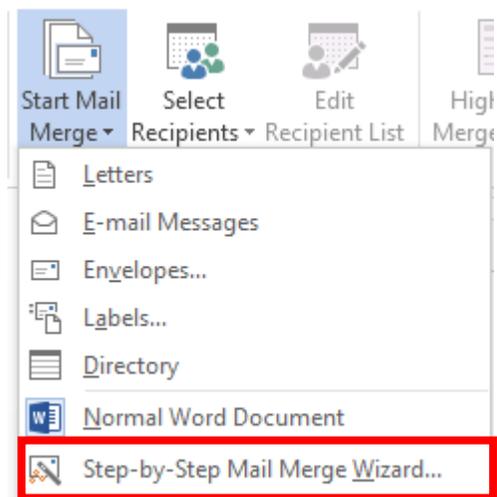
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INTRODUCTION

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.

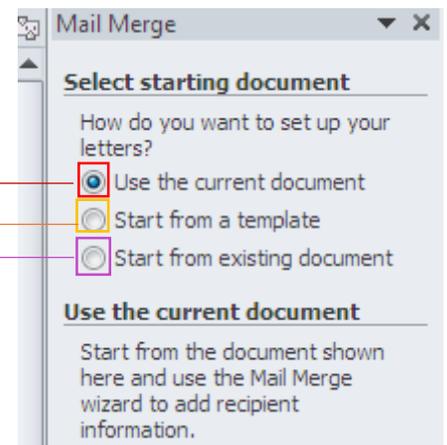
SELECT STARTING DOCUMENT

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

This allows you to start from the document that is already open. Be aware that this option is not available for envelopes or labels.

This allows you to start from a ready-to-use template that can be customized to suit your needs.

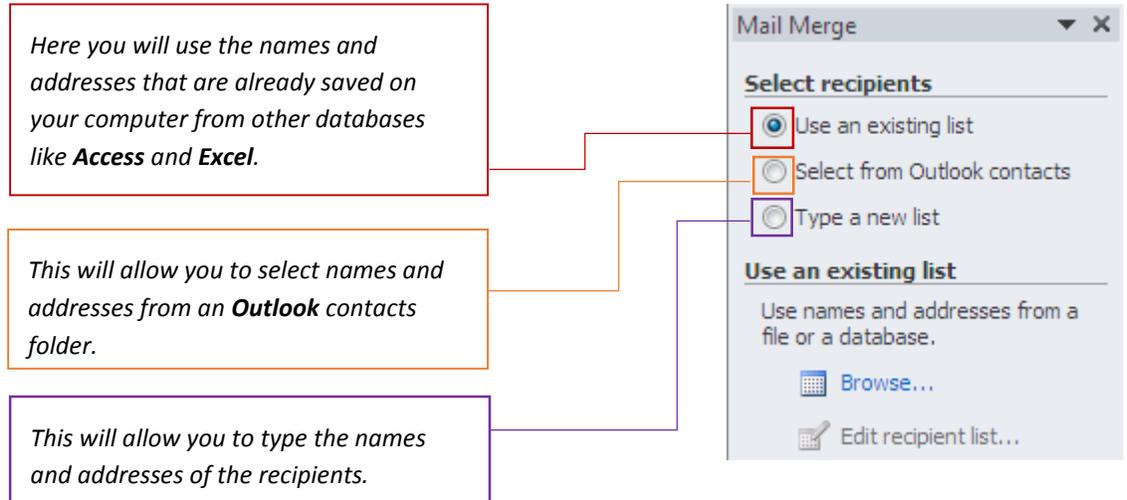
This allows you to start from a document that has already been created and saved on your computer.



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

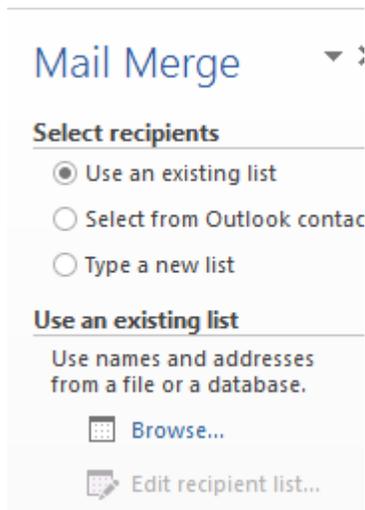
SELECT RECIPIENTS

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

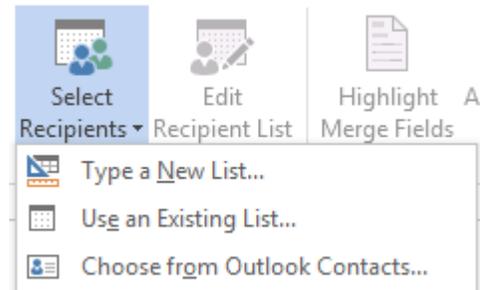


Note: You can also select your recipients from the Ribbon Bar. Under the **Start Mail Merge** Group, select **Select Recipients**. The same options that appear on the task pane now appear available on your Ribbon Bar as well. The following image is a comparison of both ways you can select your recipients.

Mail Merge Wizard Task Pane

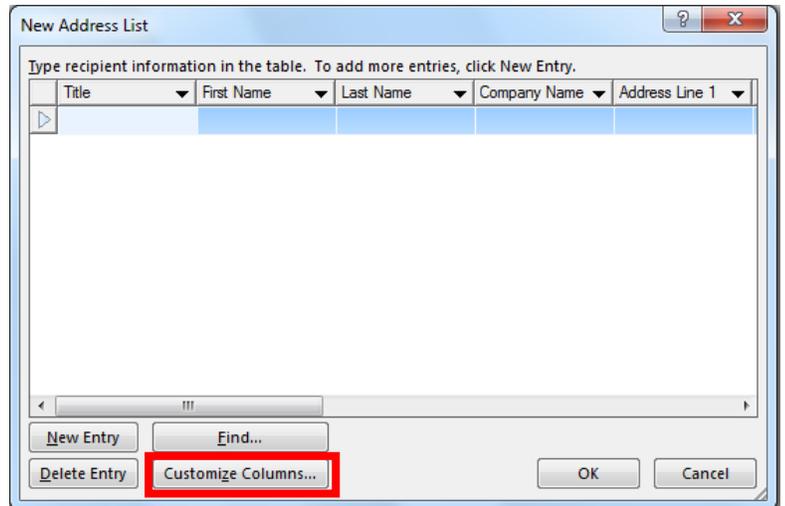
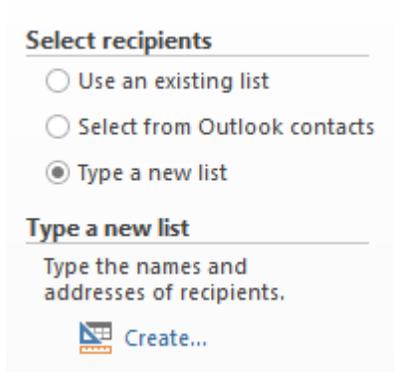


Ribbon Bar



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

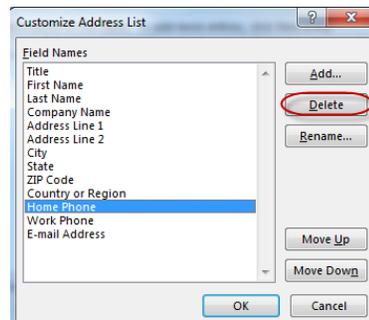
Now, click the hyperlink titled **Create...** and the following window will appear:



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

- 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.

- Home Phone
- Work Phone



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
djjudge155@gmail.com

Ms. Pamela Allen-Brown
4774 Steel Mill Road
Apartment 25
Claymont, DE 97013
United States
pabrown@gmail.com

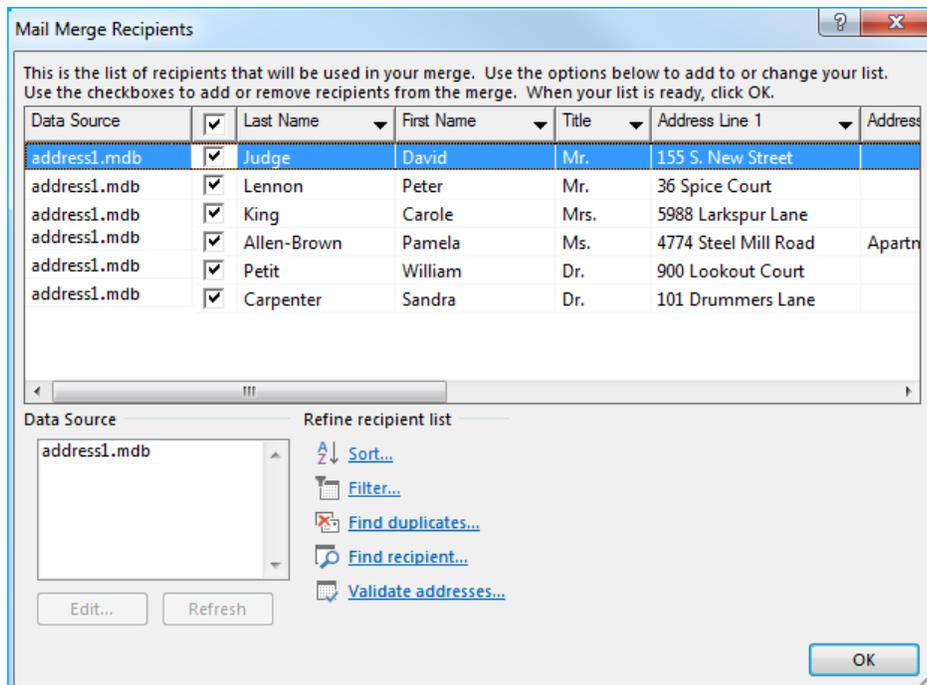
Mr. Peter Lennon
36 Spice Court
Downingtown, PA 19335
United States
lenbones@verizon.net

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

Mrs. Carole King
5988 Larkspur Lane
Phoenix, AZ 54622
United States
tapestry5@comcast.net

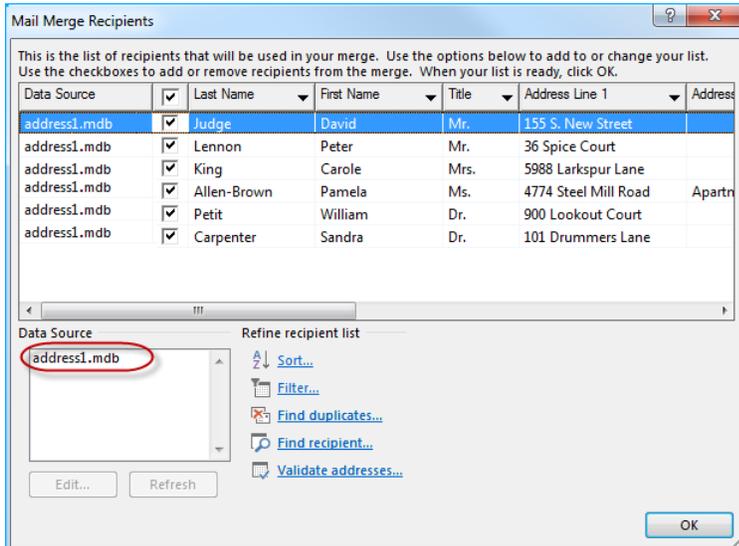
Dr. Sandra Carpenter
101 Drummers Lane
PO Box 4001 STN A
Victoria BC V8X 3X4
drsandy@aol.com

- 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:

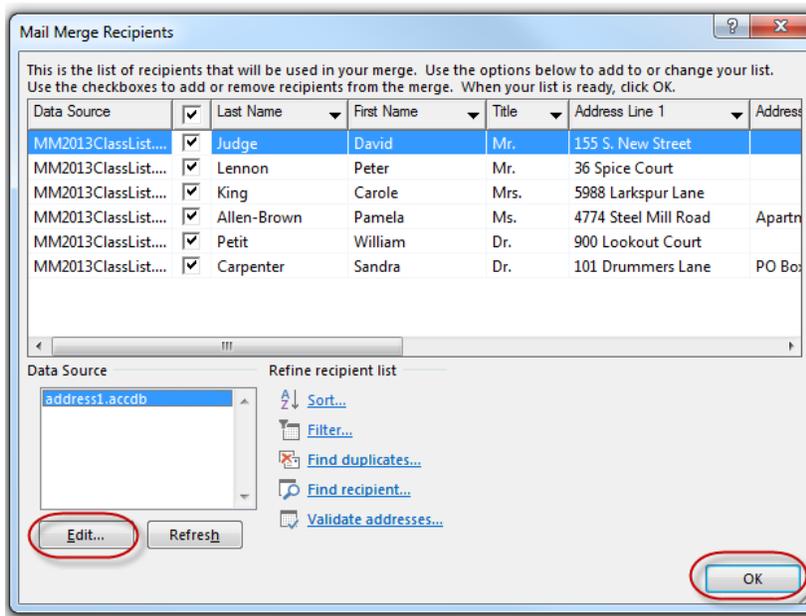


- 7) Press **OK** after you review your list.
- 8) Now select **Next: Write your letter** to continue onto the next step.

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.

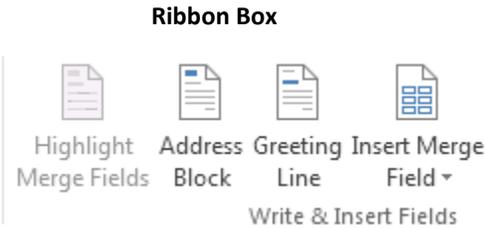


Click the **Edit** button to make changes.

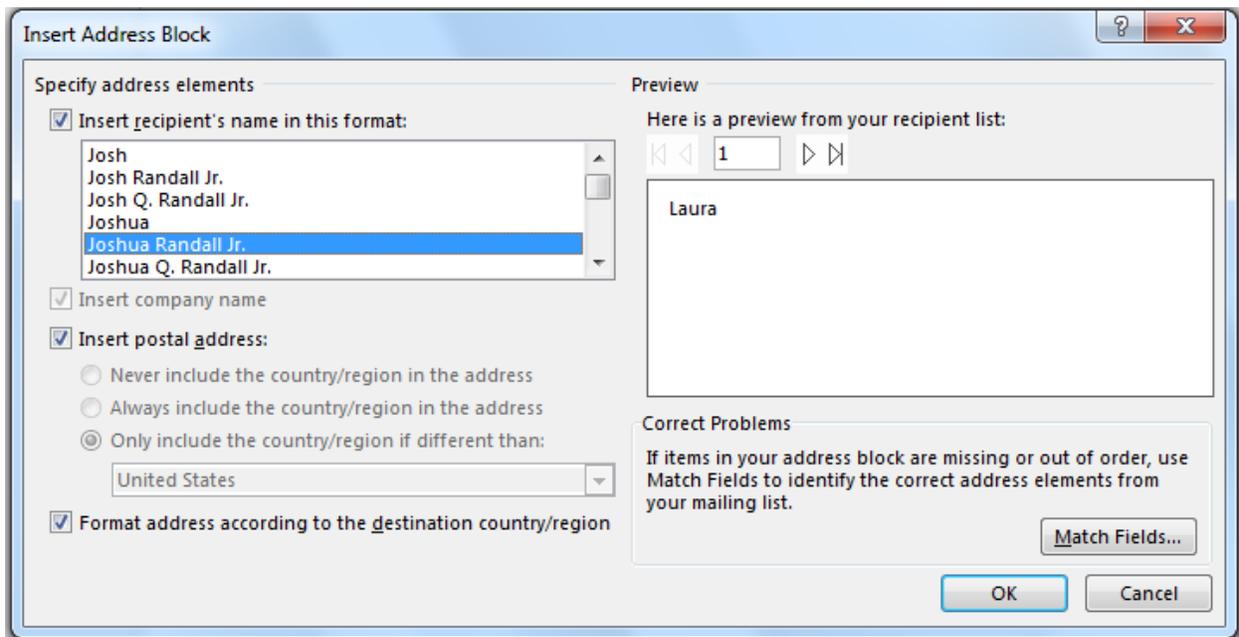
When you are finished, click the **OK** button to save your changes.

WRITING YOUR LETTER

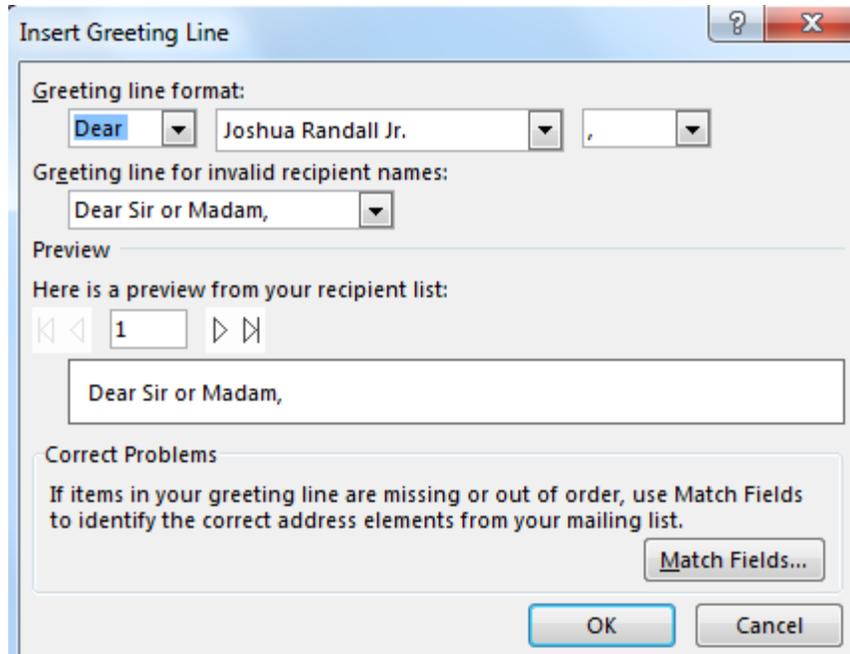
Now is the time to write the letter. **Please note:** to enter in the address block and greeting line, select **Address block...** and **Greeting line...** from the mail merge task pane and then choose the desired style. Be sure to select **Always include the country/region in the address.** To insert 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



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



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,

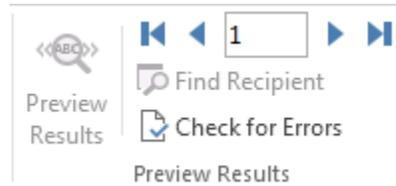
The Game Master

PREVIEW YOUR LETTERS

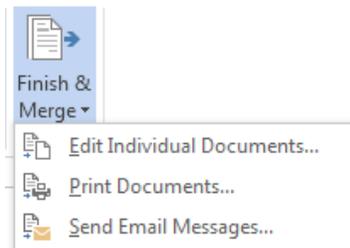
Now that you have finished typing your letter, click on **Next: Preview** your letters in the mail merge task pane to get a preview of your letters with the recipients names in the merge fields. You will also have the option to exclude a recipient. You can view the letters one by one. To see a preview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

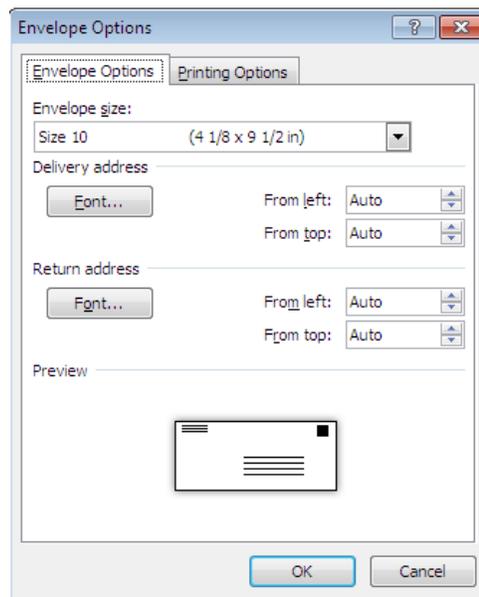
SELECT DOCUMENT TYPE

Like before, the first step in the mail merge pane will be selecting a document type. Instead of choosing **Letters**, you will choose **Envelopes** 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:

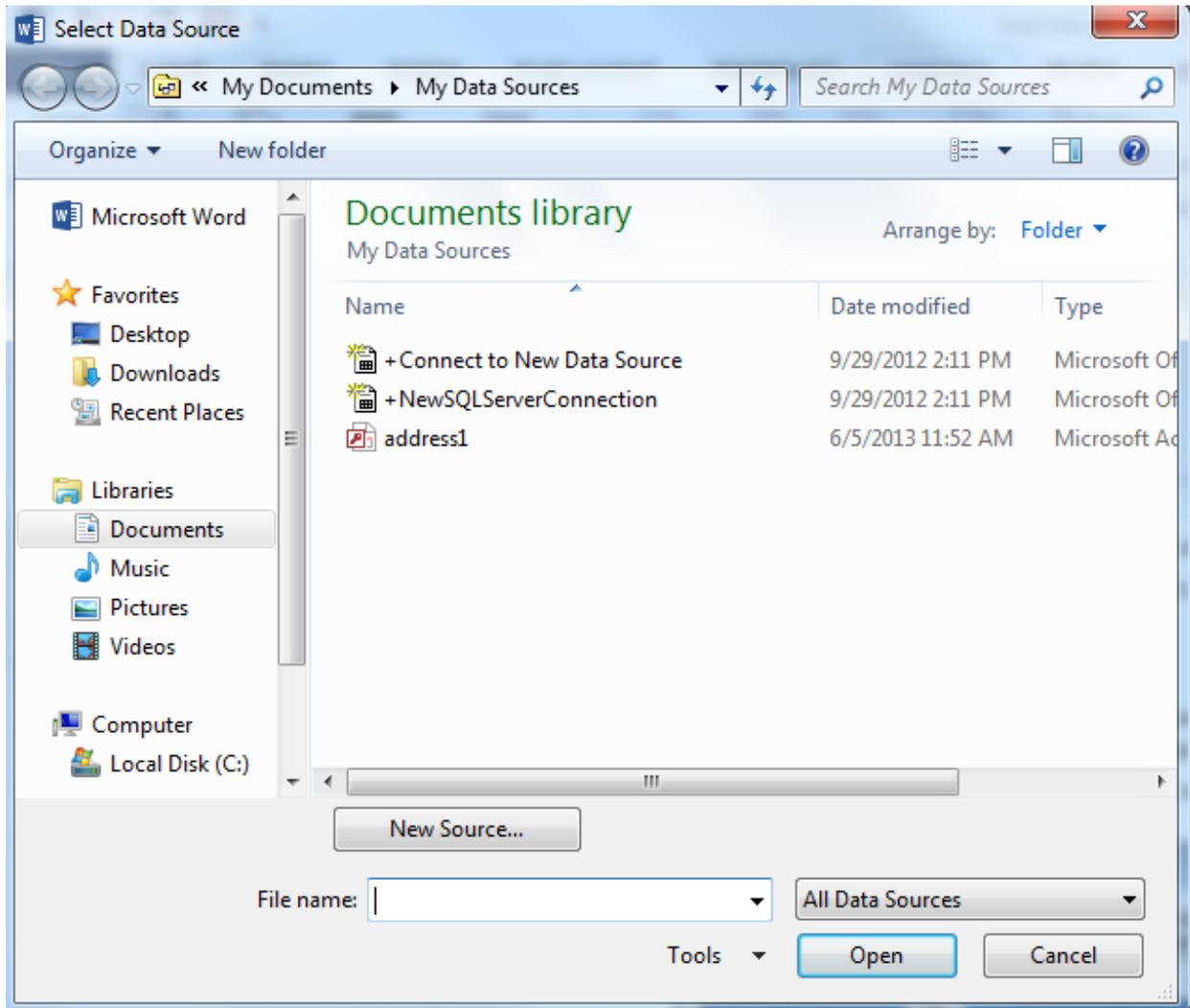


3. Within the **Envelope Options** window, select the envelope size desired. For this manual, please go with the default size.

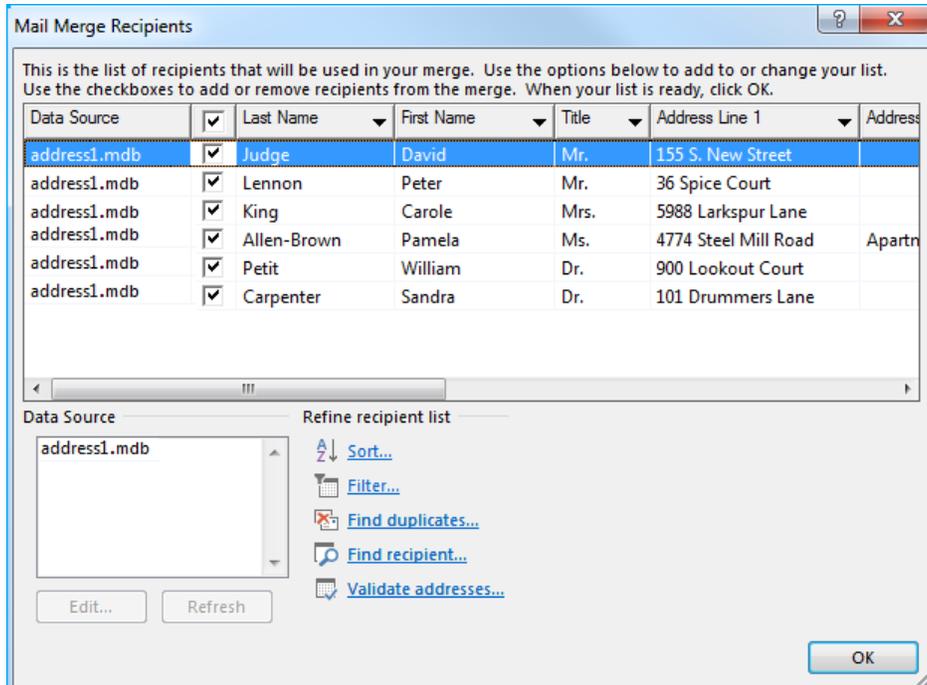
SELECT RECIPIENTS

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:



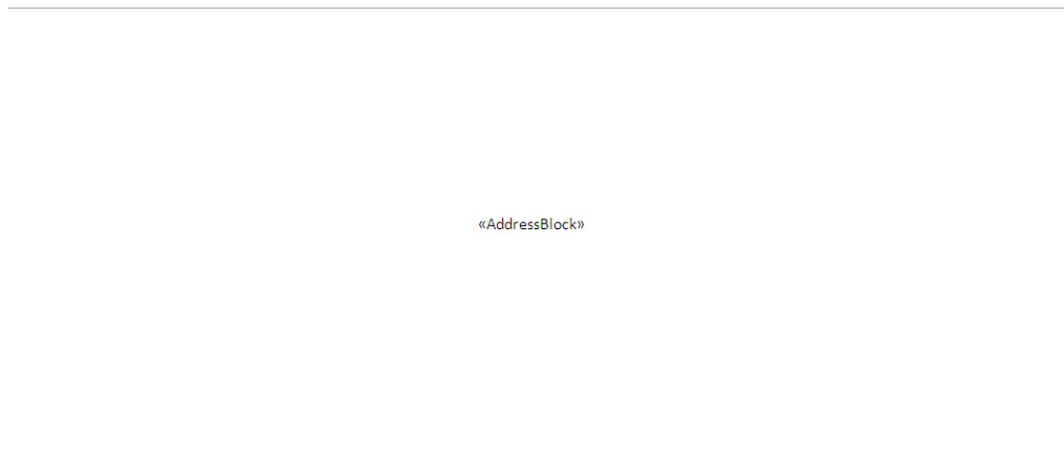
2. Find your recipient list and click on **Open**. Remember, you can also perform this task action by looking to your Ribbon Bar for the step by step mail merge process.
3. Once you click on Open, the following window will open so you can confirm and edit your list of recipients.



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:

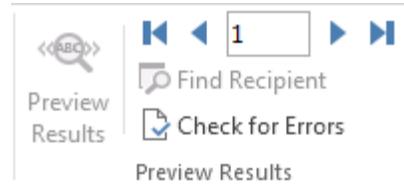


Please note: For our sample merge, be sure to follow the same steps as before in entering the **Address Block**.

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.



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.
3. 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

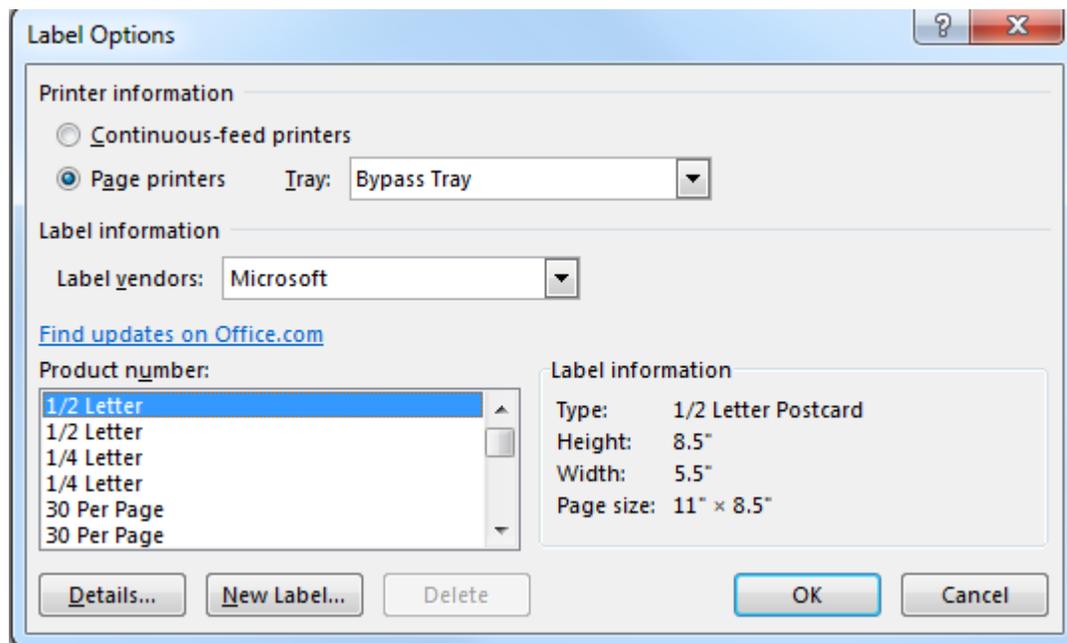
SELECT DOCUMENT TYPE

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:

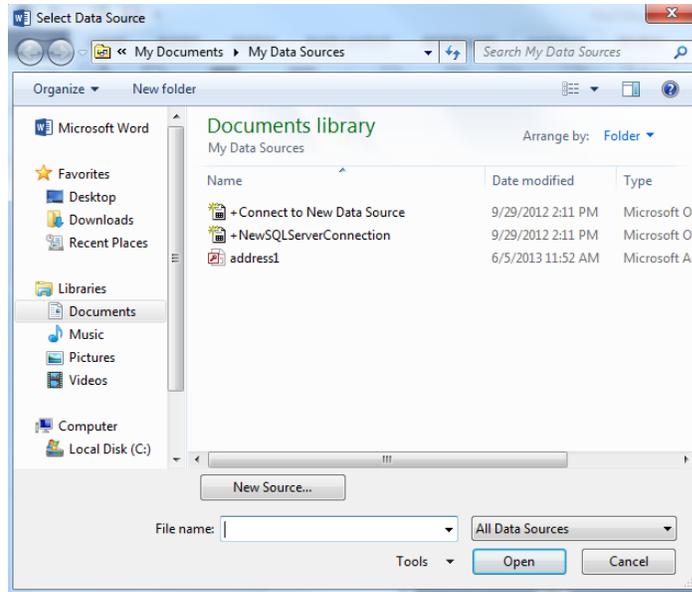
1. Select Change document layout, click on Label options... and the following window will appear:



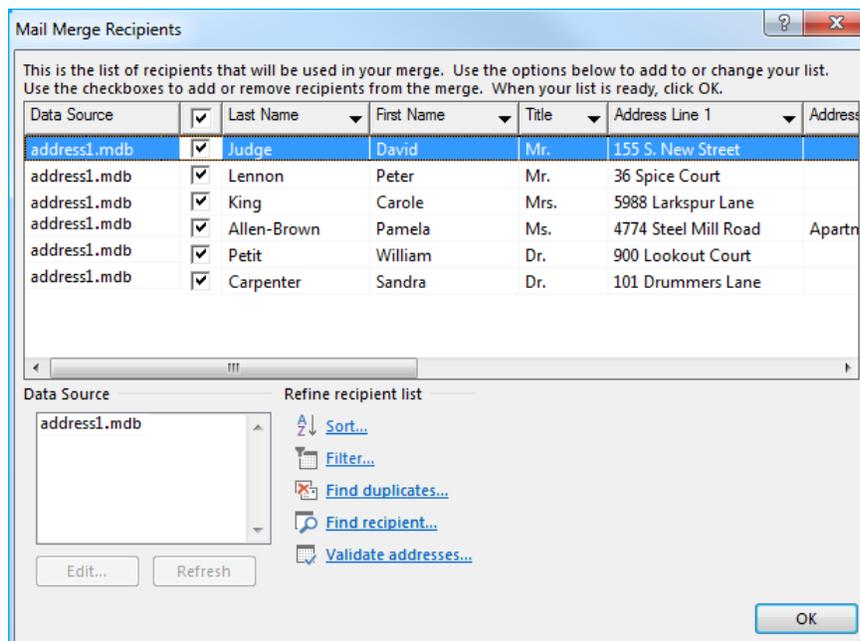
2. Within the *Label Options* window, please select the desired size of your labels.

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.



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.



Once you have previewed your labels:

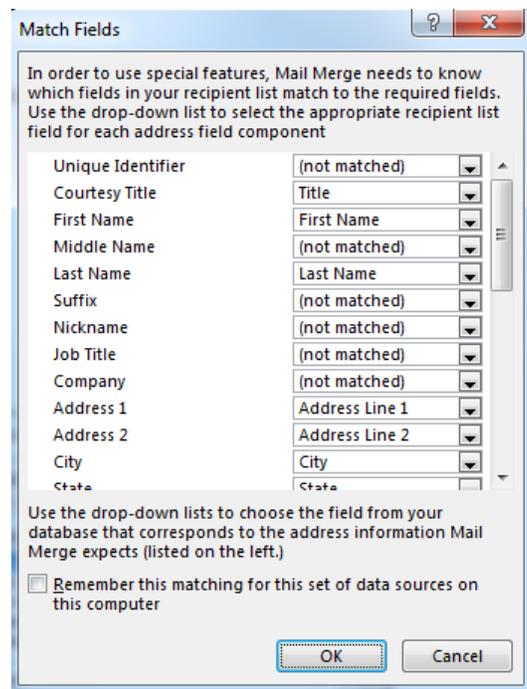
1. Click on **Next: Complete the merge**.
2. Once you have completed the merge, simply click on **Print...** in the mail merge task pane to print out your labels.
3. You can also edit the individual labels by clicking on **Edit Individual labels...** in the mail merge task pane.
4. Editing individual 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: