

Microsoft Word 2019 - Mail Merge

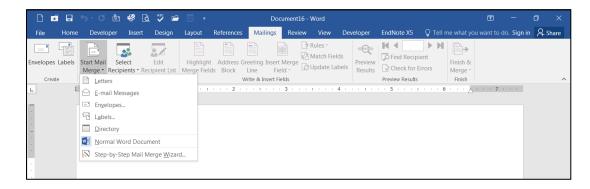
Mail merge is a tool which allows you to create form letters, mailing labels and envelopes by linking a main document to a data source. It is the process of combining a list of data with a template.

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 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 – Select Document Type

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

Step 2 – Select Starting Document

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

Step 3 – 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

| ata Source | | Last Name | ➡ First Name | ▼ Address Line 1 | Address Line 2 |
|-------------------------------|----------|-----------------------------|----------------|------------------|------------------------------------|
| riends.mdb | ~ | Jones | Kim | 10 Park Ave | |
| riends.mdb | | Oberg | Judi | 5 Main Street | |
| riends.mdb | | Smith | Peter | 11 Apple Lane | |
| riends.mdb | | Volpe | Julie | 7 Mill Street | |
| | | mi | | | |
| | | | recipient list | | |
| <a>ata Source friends.mdb | | | | | |
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| ata Source | | Refine r 24 S Maria E | ort iter | | |

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

| Ne | w Address | List | | | | | | [| ? 🗙 |
|----|--------------|--------|---------------------|---------------|--------------------|--------------|--------------|--------|-------|
| Тy | pe recipient | inform | nation in the table | . To add more | entries, click New | Entry. | | | |
| | Title | • | First Name 👻 | Last Name 👻 | Company 👻 | Address Li 👻 | Address Li 👻 | City 👻 | State |
| D | > | | | | | | | | |
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| | New Entry | | Eind | | | | | | |
| | Delete Entr | 6 | Customize Col | lumns | | | ОК | | ancel |
| | Derete Chu | | customize co | | | | UN | | // |

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

| Field Names | ? 💌 |
|---------------------------------------|-------------------|
| Title | Add |
| Last Name | Delete |
| Company Name Address Line 1 | Rename |
| Address Line 2 City | <u>Rename</u> |
| State ZIP Code | |
| Country or Region Home Phone | |
| Work Phone E-mail Address | Move Up |
| | |
| · · · · · · · · · · · · · · · · · · · | Move Dow <u>n</u> |
| ОК | Cancel |

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

| | Title | - | First Name | • | Last Name | - | Company | 🗸 🗛 Address Li 👻 | Address Li 👻 | City | |
|---|-------|---|------------|---|-----------|---|---------|------------------|--------------|-----------|----|
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- 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 – 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 Randall Jr. Joshua Q. Randall Jr. Joshua Q. Randall Jr. Vinsert company name | Preview Here is a preview from your recipient list: I D P N Kim Jones 10 Park Ave Denville, NJ 07834 |
| Insert postal address: Never include the country/region in the address Always include the country/region in the address Only include the country/region if different than: United States Format address according to the gestination 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>D</u> atabase Fields |
| <u>F</u> ields: | |
| Unique Identifier | |
| Courtesy Title | |
| First Name | |
| Middle Name | |
| Last Name | Ξ |
| Suffix | |
| Nickname | |
| Job Title | |
| Company | |
| Address 1 | |
| Address 2 | |
| City | |
| State | |
| Postal Code | - |
| Country or Region | |
| Match Fields Insert | 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

Step 5 – Preview Your Letters

Here is where you can preview the first page with the fields filled in.

Click Next: Complete the merge

Step 6 – 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 – Select Document Type

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

Step 2 – Select Starting Document

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

| Label Options | ? 💌 |
|---|--|
| Printer information © continuous-feed printers • Page printers Iray: Default tray (Automatically | Select) |
| Label information Label yendors: Avery US Letter Find updates on Office.com Product nymber: | Label information |
| 5150 Maling Labels \$ 5150 Jaking Labels \$ 5160 Lasy Peel Address Labels \$ 5162 Ray Peel Address Labels \$ 5163 Shipping Labels \$ 5164 Shipping Labels * | Type: Easy Peel Address Labels Height 1° Width: 2.63° Page size: 8.5° × 11° |
| Details New Label Delete | OK Cancel |

5) Click Next: Select recipients

Step 3 – Select Recipients

- 1) Click Use an existing list under Select recipients (or you can create a new list)
- 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 – Arrange Your Labels

- 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

| • •• 🖓 • • • • • • • • • • • • • • • • | ξ · · · · [∆∥ ∥ · 3 · · · · · · · 4 · · · · · · | | Mail Merge |
|--|--|---------------|---|
| | | | Arrange your labels |
| | | | If you have not already done lay out your label using the fit label on the sheet. |
| | «Next Record» | «Next Record» | To add recipient information t your label, click a location in t first label, and then click one the items below. |
| | | | Address block |
| | | | Greeting line |
| | | | Electronic postage |
| | | | More Rems |
| «Next Record» | «Next Record» | «Next Record» | When you have finished an anging your label, clock Me Then you can preview each recipient's label and make an individual changes. |
| | | | Replicate labels |
| | | | You can copy the layout first label to the other la |
| «Next Record» | «Next Record» | «Next Record» | below. |
| | | | Update all labels |
| | | | |
| | | | |
| «Next Record» | «Next Record» | «Next Record» | |
| | | | |
| | | | Step 4 of 6 |
| | | | Next: Preview your labe |
| | | | Previous: Select recipier |
| | No. 1 | No. 1 | |

Step 5 – Preview Your Labels

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

Step 6 – Complete the Merge

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

Click Edit individual labels to create a new file