

# 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	<ul> <li>Address Line 2</li> </ul>
riends.mdb	<b>~</b>	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</a> friends.mdb					
ata Source		Refine r			
ata Source		Refine r	ort iter		
ata Source		Refine r 24 S Maria E	ind duplicates		
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	>								
4									•
	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	
Þ					Brown		MSU	1 Normal Av		Montclair	NJ
4											

- 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

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			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