Salisbury UNIVERSITY

Performing Mail Merges in Word 2013

Word Guides

Mail merges are useful when you want to create form letters or other documents sent to or drawing information from multiple customers. The content may be the same, but it makes each document unique and personalized.

This guide will cover the basics of the Mail Merge process. For more detailed information, see http://office.microsoft.com/en-us/word-help/use-word-mail-merge-for-email-HA102809788.aspx?CTT=1

THE MAIL MERGE PROCESS

A mail merge consists of five main steps:

1. **Setting up the main document.** This will be the "template" for the merged documents, such as a form letter.
2. **Connect the main document to a data source.** The data source is the file that contains all of your information you wish to merge, like names and addresses. This is usually a database or spreadsheet.
3. **Refine the list of recipients or items.** If you want to create copies of only certain items, or send to certain recipients, you can choose which items to include or exclude.
4. **Add placeholders (mail merge fields) to the document.** Once you perform the mail merge, the mail merge fields are populated with information from your data source.
5. **Preview and complete the merge.**

A word of note: If you plan to use custom contact fields with the Contacts list in Microsoft Outlook, you must begin the mail merge process in Outlook.

SETTING UP THE MAIN DOCUMENT

1. Start Word.
2. On the **Mailings** tab, in the **Start Mail Merge** group, click **Start Mail Merge**.


3. Click **Letters**.
   a. You can also choose **E-mail Messages**, **Envelopes**, **Labels**, or **Directory**.

CONNECT THE MAIN DOCUMENT TO A DATA SOURCE

In order to create a mail merge, you must have a data source for the data you want to merge. If you don't already have a data file, you can create one during the mail merge process. If you are using an existing list, make sure it contains the data you wish to use. You can make changes during the merge, but you can't open the data source separately. Make sure your data source is prepared before starting the merge.

CHOOSE A DATA FILE

1. On the **Mailings** tab, in the **Start Mail Merge** group, click **Select Recipients**.
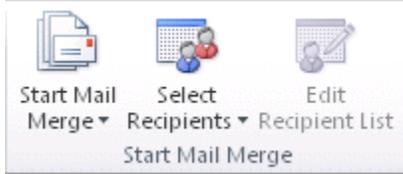
2. Choose one of the following:
   a. **Select From Outlook Contacts** if you want to use your Microsoft Outlook Contacts list.
   b. **Use Existing List** if you want to use an existing Excel worksheet or Access database, etc. **Select Data Source** to locate and select the file.
   c. **Type New List** to create a new data file in Word. The list will be saved as a database file.

REFINE THE LIST OF RECIPIENTS OR ITEMS

If you plan to use the entire list, you can skip this section. If you want to select or narrow the list of recipients, do the following:

1. On the **Mailings** tab, in the **Start Mail Merge** group, click **Edit Recipient List**.

2. In the **Mail Merge Recipients** dialog box, select any of the following.
   a. **Select Individual Records**. This will allow you to select individual customers by placing a check in the check box next to the recipients you want to include.
   b. **Sort Records**. This will allow you to sort the records by column heading.
   c. **Filter Records**. This is useful if you want to exclude records from the merge. To filter records, under **Refine recipient list**, click **Filter**. On the **Filter Records** tab, in the **Filter and Sort** dialog box, choose the criteria you want to use to filter. Click **And** or **Or** if you want to further refine the data.

ADD MAIL MERGE FIELDS

Now, you'll type the text of the document, and add mail merge fields that you'll insert from the data source during the merge. Mail merge fields correspond with the column headings of your data source. For example, a mail merge field <<First Name>> would correspond with a First Name column in your data file.

You can add any column heading from your data file into your main document as a mail merge field. These can be used just like normal text, including formatting and punctuation.

Word also has composite fields that can group a number of fields together, such as Address Blocks. The Address Block field combines several fields into one block that can be inserted into your document without having to insert and format each field individually.

To make sure that Word can find a column to match each mail merge field, click **Match Fields** in the **Write & Insert Fields** group of the **Mailings** tab.

The **Match Field** dialog box opens.
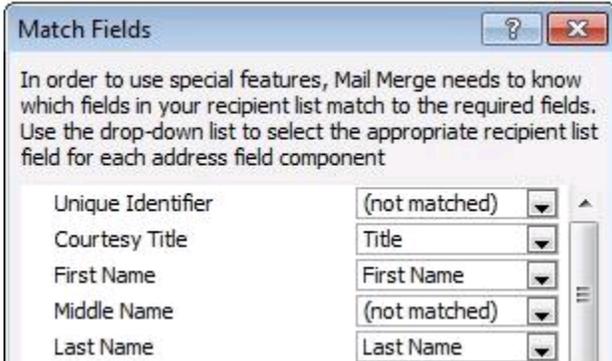
Word searches for the column that matches each element. You can use the drop down menus to select or change the matched columns. It's ok if **Unique Identifier** is not matched.

Once you've matched the mail merge fields with their corresponding headings, you can insert them in your document by clicking where you want to insert the field, and choosing **Insert Merge Field** from the **Write & Insert Fields** group on the **Mailings** tab.

You can add any of the following:

- **Address Block**
- **Greeting Line**
- **Individual Fields**
- **Custom fields from Outlook Contacts**.

PREVIEW AND COMPLETE THE MAIL MERGE

You can preview the mere to make sure it's working properly before you perform it. In the **Preview Results** group of the **Mailings** tab, click **Preview Results**.


Use **Next Record** and **Previous Record** to page through the merged documents. You can use **Find Recipient** to check a specific document.

COMPLETE THE MAIL MERGE

Once completed, you can print the merged document completely or individually, edit individual copies, and save the document.

PRINT THE MERGED DOCUMENTS

1. On the **Mailings** tab, in the **Finish** group, click **Finish & Merge** and then **Print Documents**.
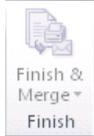
2. Choose whether to print the whole set, the currently visible copy, or a subset by record number.

CHANGE INDIVIDUAL COPIES OF THE DOCUMENT

1. On the **Mailings** tab, in the **Finish** group, click **Finish & Merge**, and then click **Edit Individual Documents**.
2. Choose whether you want to edit the whole set, the currently visible copy, or a subset by record number.

SAVE THE MAIN DOCUMENT

It's a good idea to save the main document if you plan to use it again later. When you save it, the next time you open the main document, you are prompted to choose whether you want the information from the data file to be merged again into the main document.

RESUME A MAIL MERGE

If you need to stop working on a mail merge, you can save the document and resume it later. To resume:

1. Open the document.
2. Word displays a message that asks you to confirm whether you want to open the document.
   a. Because this document is connected to a data source, and you want to retrieve the data, click **Yes**.
   b. If you are opening a document and don't know or aren't sure it's connected to a data source, click **No** to prevent potentially malicious data access.
3. The text of the document and any fields you inserted appears.
4. Click the **Mailings** tab and resume working.

USING THE MAIL MERGE WIZARD

Word also includes a **Step by Step Mail Merge Wizard** that will walk you through the above steps. This is very useful for making sure that all the steps required for a mail merge are completed. To use this, in **Mailings** tab, in the **Start Mail Merge** group, **click Start Mail Merge** and then choose **Step by Step Mail Merge Wizard…**
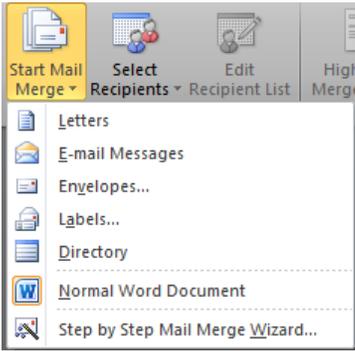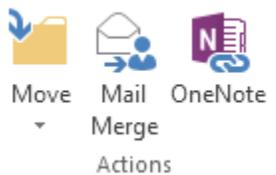
The Mail Merge wizard appears on the right side of the document, and walks you through the six steps to creating the merge.
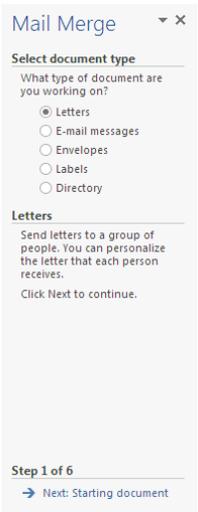

E-MAIL MERGE FROM OUTLOOK 2013

You can also perform a mail merge within Outlook to send a form email to recipients.

1. To start, in Outlook, select **People**.
2. In the **Home** tab, in the **Actions** group, select **Mail Merge**.

3. Choose the **Contacts**, **Document File**, and **Merge Options** in the **Mail Merge Contacts** window, and click **OK**. You may also wish to save the contact data for future reference in the **Contact data file** section. Since you want to do an E-mail merge,

select **E-mail** in the **Merge to:** section and give it a subject line in the **Message subject line:**
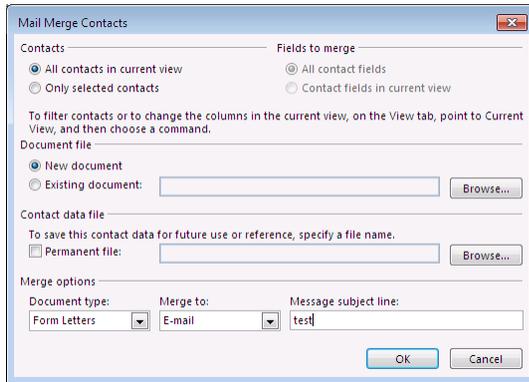
4. A mail merge document opens in Word, and you can finish the process as described above.