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WORD 2013

MAIL MERGE

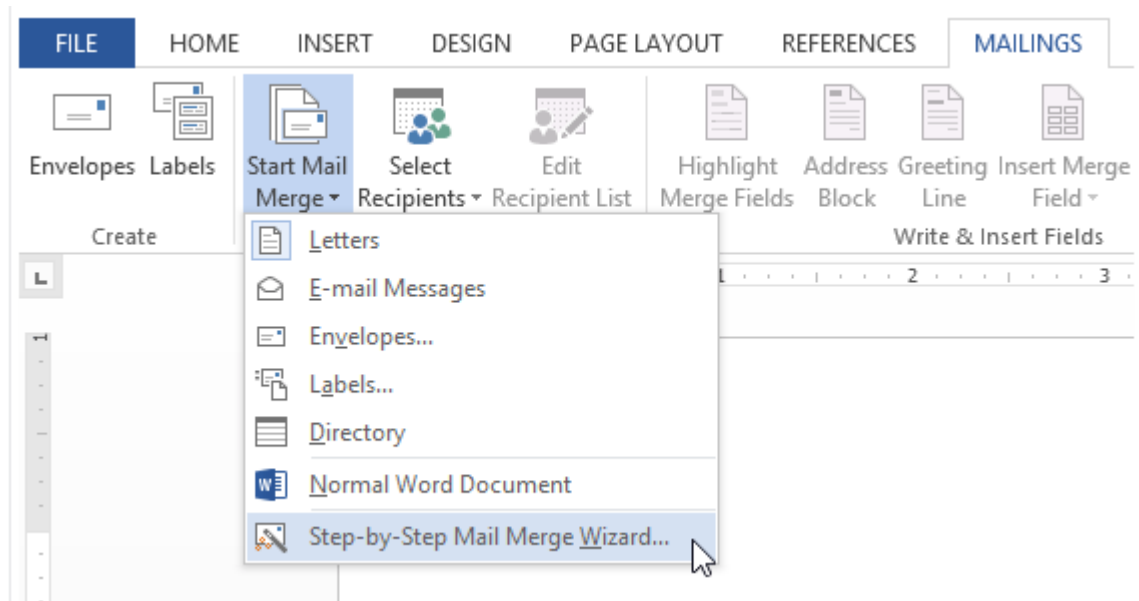
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Information Technology  
September 26, 2014

## To use Main Merge:

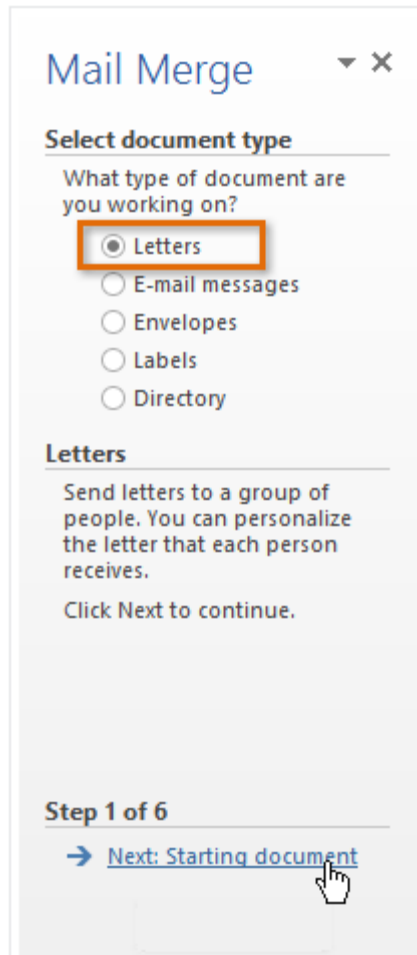
1. Open and **existing** Word document, or create a **new** one.
2. From the **Mailings** tab, click the Start Mail Merge command and select **Step by Step Mail Merge Wizard...** from the drop-down menu.



The Mail Merge pane appears and will guide you through the **six main steps** to complete a merge. The following example demonstrates how to complete a form letter and merge the letter with **recipient list**.

## Step 1:

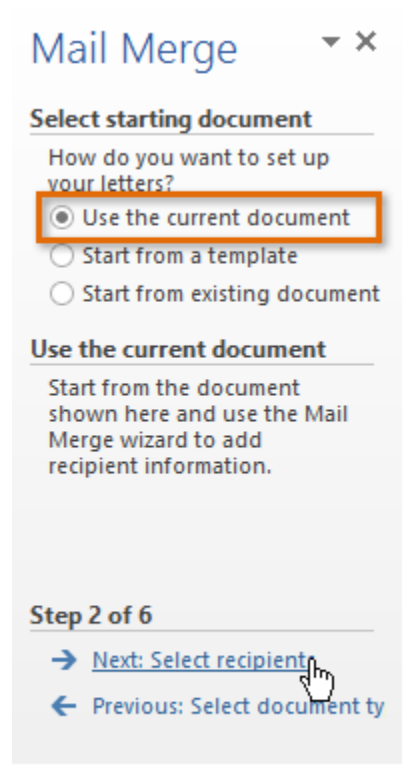
- Choose the **type** of document you wish to create. In our example, we will select **Letters**. Then click **Next: Starting document** to move to Step 2.



The screenshot shows a 'Mail Merge' dialog box with a title bar containing a dropdown arrow and a close button. The main heading is 'Select document type'. Below this is the question 'What type of document are you working on?'. There are five radio button options: 'Letters' (which is selected and highlighted with an orange border), 'E-mail messages', 'Envelopes', 'Labels', and 'Directory'. Below the options is a section titled 'Letters' with a description: 'Send letters to a group of people. You can personalize the letter that each person receives.' and the instruction 'Click Next to continue.'. At the bottom, it says 'Step 1 of 6' and has a blue link '→ Next: Starting document' with a mouse cursor pointing to it.

## Step 2:

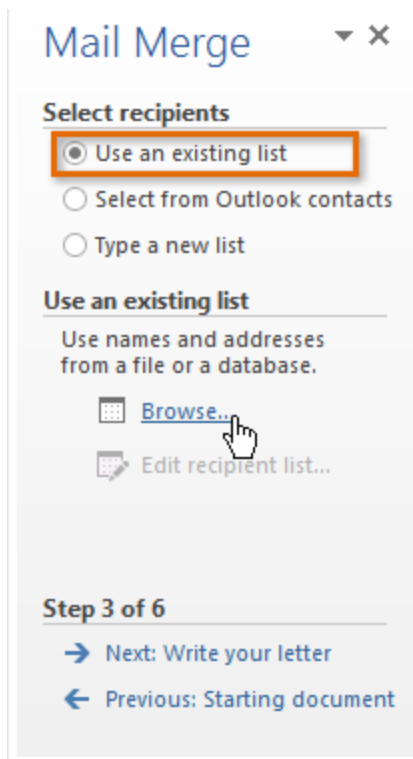
- Select Use the current document, then click **Next: Select recipients** to move to Step 3.



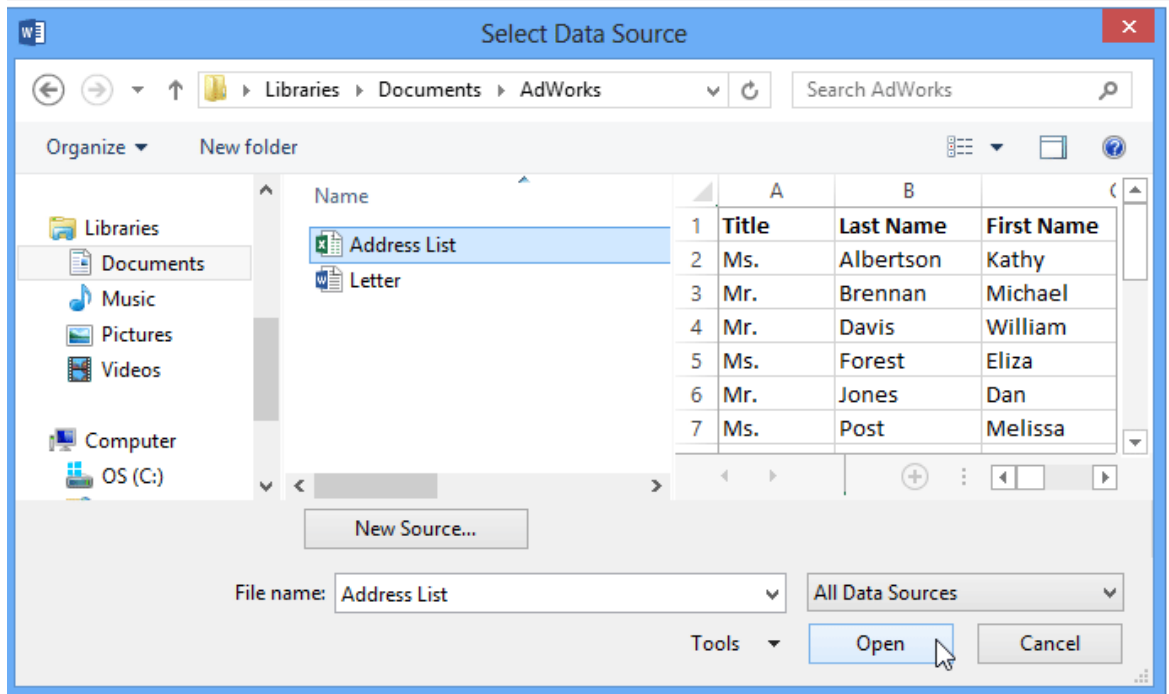
## Step 3:

Now you will need an address list so Word can automatically place each address into the document. The list can be in an existing file, such as an **Excel workbook** or you can **type a new address list** from within the Mail Merge Wizard.

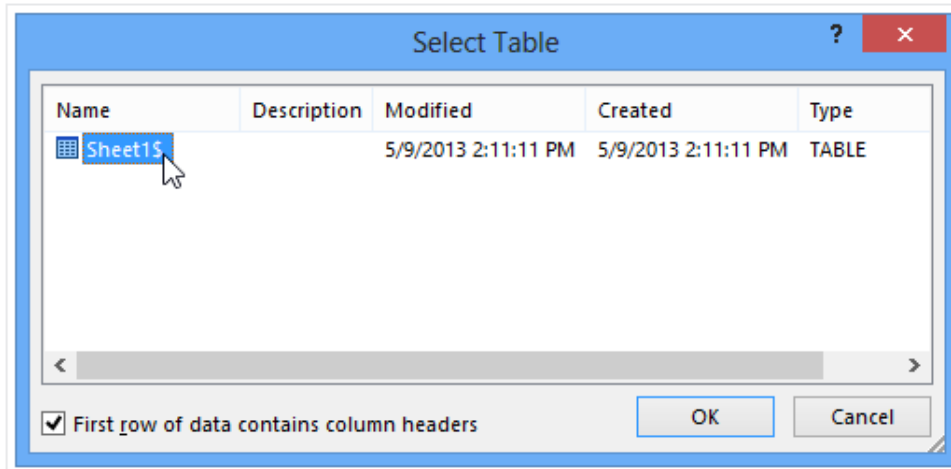
1. From the **Mail Merge** task pane, select **Use an existing list**, then click **Browse...** to select the file.



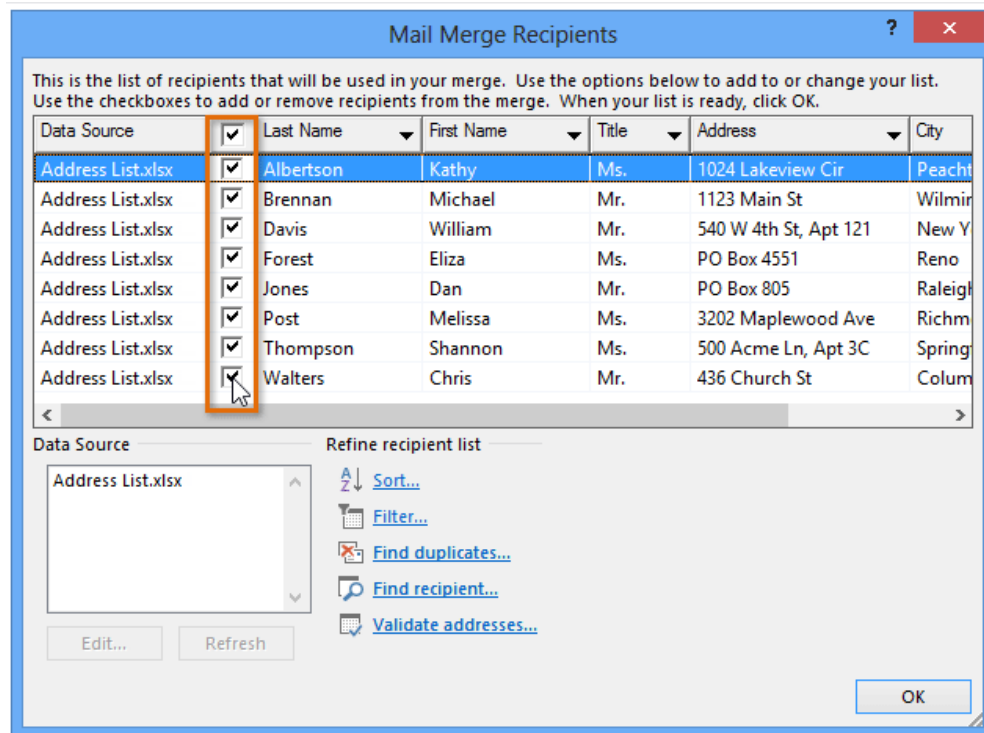
2. Locate your file and click **Open**.



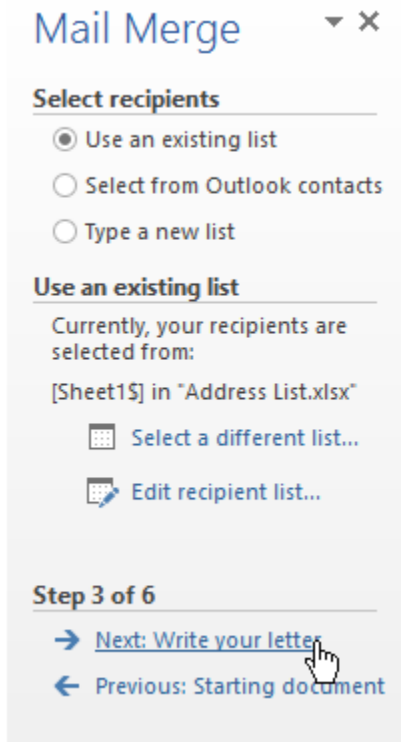
3. If the address list is in an Excel workbook, select the **worksheet** that contains the list and click **OK**.



4. In the **Mail Merge Recipients** dialog box, you can **check** or **uncheck** each box to control which recipients are in the merge. By default, all recipients should be selected. When you are done click **OK**.



5. From the **Mail Merge** task pane, click **Next: Write your letter** to move to Step 4.



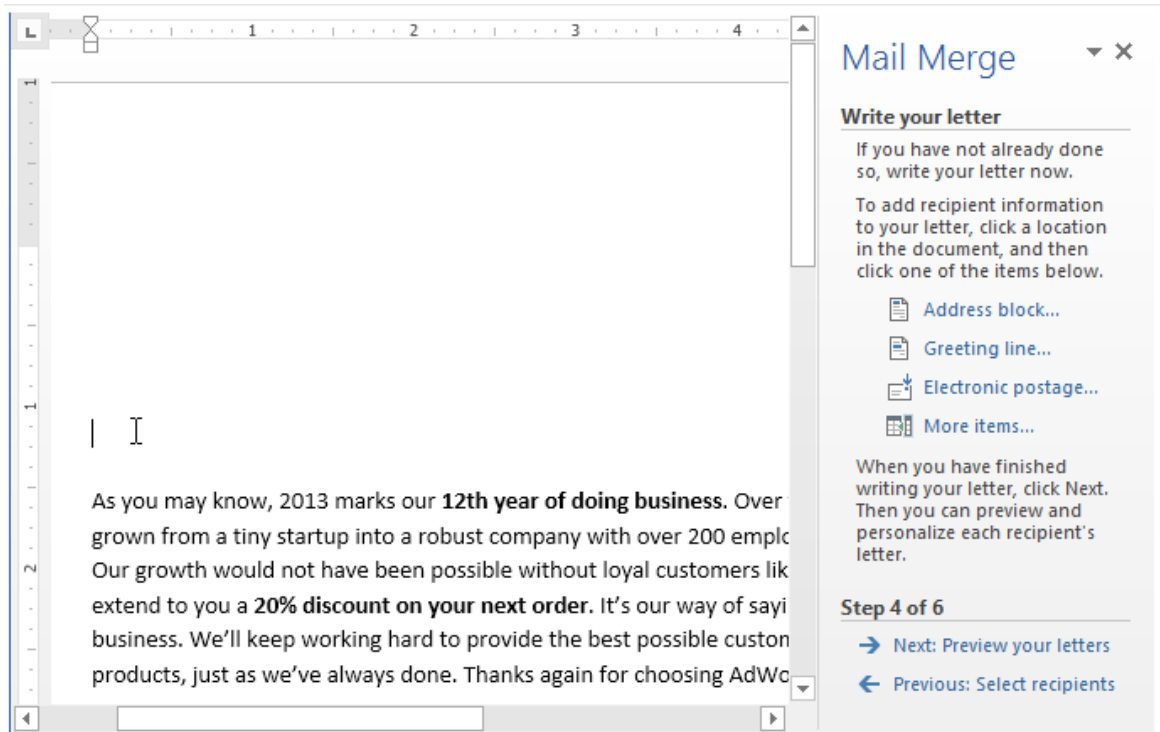
*Note: If you don't have an existing address list, you can click the **Type a new list** button and click **Create**. You can then type your address list.*

## Step 4:

Now you're ready to write your letter. When it's printed, each copy of the letter will basically be the same; only the **recipient data** (such as the **name** and **address**) will be different. You will need to add **placeholders** for the recipient data so Mail Merge knows exactly where to add the data.

## To insert recipient data:

1. Place the insertion point in the document where you wish the information to appear.



2. Choose one of the four **placeholder** options: **Address block**, **Greeting line**, **Electronic postage**, or **More items**.



## Mail Merge

### Write your letter

If you have not already done so, write your letter now.

To add recipient information to your letter, click a location in the document, and then click one of the items below.

- Address block...
- Greeting line...
- Electronic postage...
- More items...

When you have finished writing your letter, click Next. Then you can preview and personalize each recipient's letter.

### Step 4 of 6

→ Next: Preview your letters

← Previous: Select recipients

3. Depending on your selection, a dialog box may appear with various options. Select the desired options and click **OK**.

Insert Address Block

Specify address elements

- Insert recipient's name in this format:
  - Joshua
  - Joshua Randall Jr.
  - Joshua Q. Randall Jr.
  - Mr. Josh Randall Jr.
  - Mr. Josh Q. Randall Jr.
  - Mr. Joshua Randall Jr.
- Insert company name
- 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 destination country/region

Preview

Here is a preview from your recipient list:

Ms. Kathy Albertson  
1024 Lakeview Cir  
Peachtree City, GA

Correct Problems

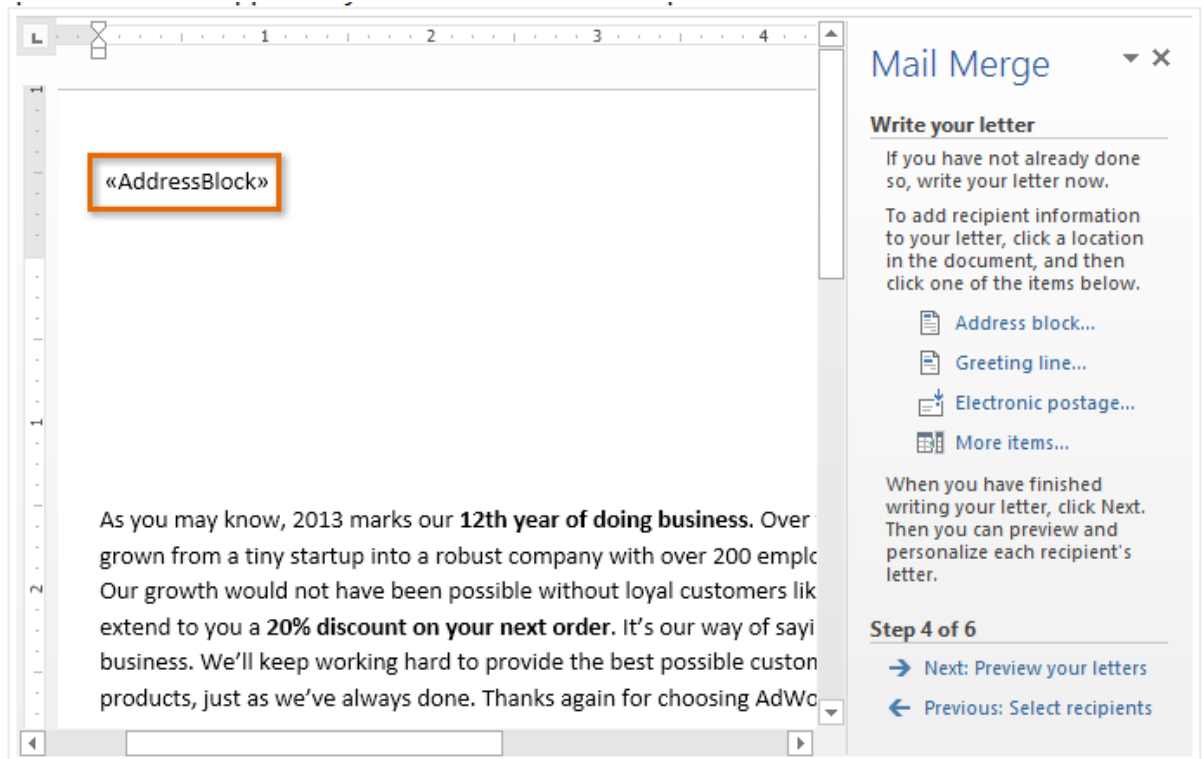
If items in your address block are missing or out of order, use Match Fields to identify the correct address elements from your mailing list.

Match Fields...

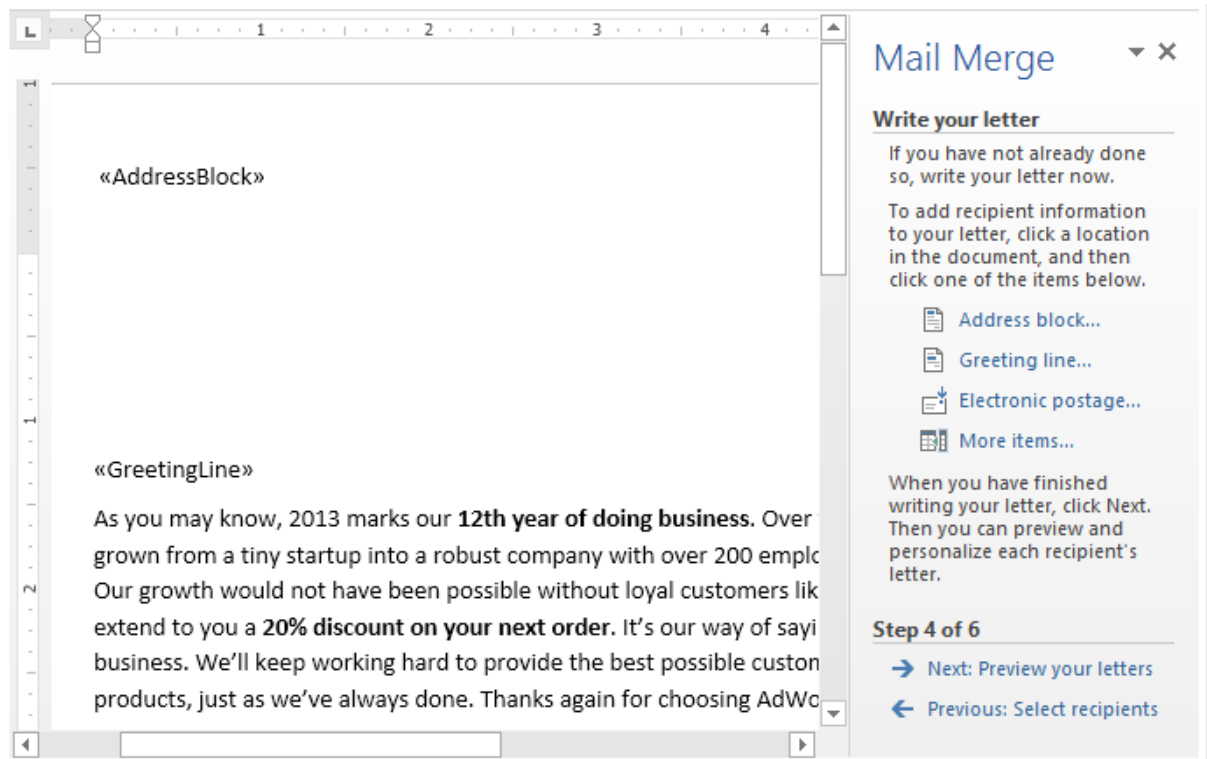
OK Cancel

4. A placeholder will appear in your document. For example:

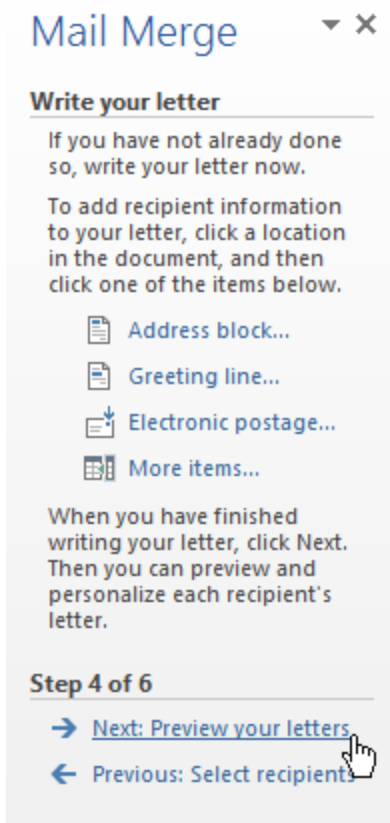
<<AddressBlock>>



5. Repeat these steps each time you need to enter information from your data record. In our example, we will add a **Greeting line**.



6. When you are done, click **Next: Preview your letters** to move to Step 5.



*Note: For some letter, you will only need to add an **Address block** and **Greeting line**. Sometime, however, you may wish to place recipient data within the body of the letter to **personalize it** even further.*

## Step 5:

1. Preview the letter to make sure the information from the recipient list appears correctly in the letter. You can use the left and right scroll arrows to view each document.

Ms. Kathy Albertson  
1024 Lakeview Cir  
Peachtree City, GA

Dear Ms. Albertson,

As you may know, 2013 marks our **12th year of doing business**. Overgrown from a tiny startup into a robust company with over 200 emplc. Our growth would not have been possible without loyal customers lik extend to you a **20% discount on your next order**. It's our way of sayi

Use the arrows to preview each letter

The preview allows you to see how recipient data will appear in each letter

Mail Merge

Preview your letters

One of the merged letters is previewed here. To preview another letter, click one of the following:

<< Recipient: 1 >>

Find a recipient...

Make changes

You can also change your recipient list:

Edit recipient list...

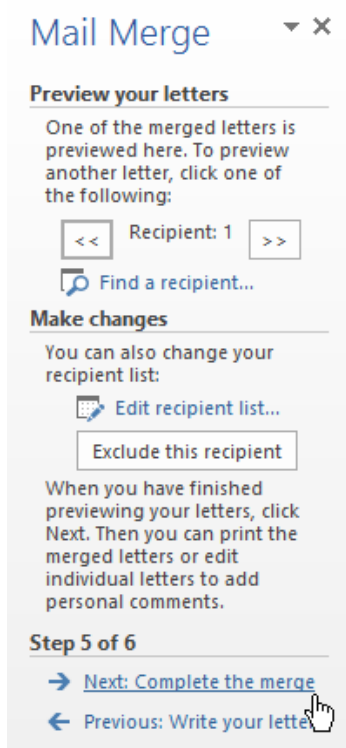
Exclude this recipient

When you have finished previewing your letters, click Next. Then you can print the merged letters or edit individual letters to add personal comments.

Step 5 of 6

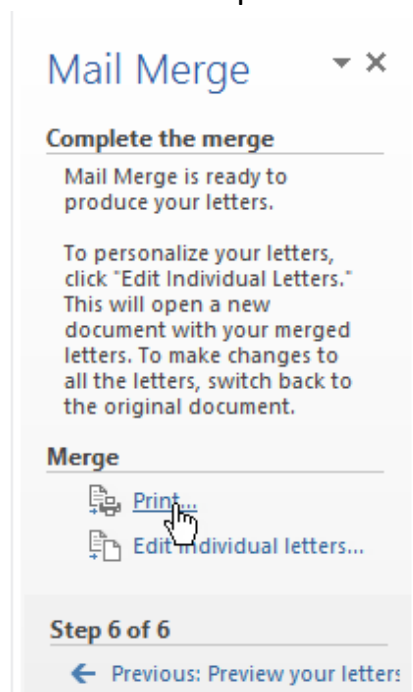
Next: Complete the merge

2. Click **Next: Complete the merge** to move to Step 6.

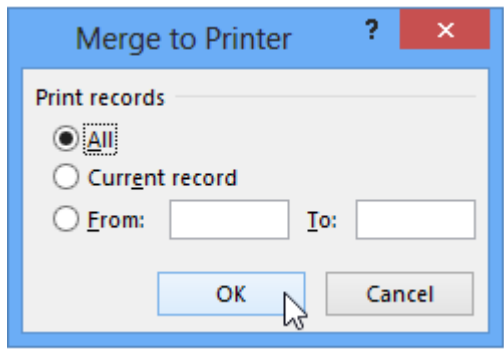


## Step 6:

1. Click **Print...** to print the letters.



2. A dialog box will appear. Click **All**, then click **OK**.



3. The **Print** dialog box will appear. Adjust the print settings if needed, then click **OK**. The letters will be printed.

