

Microsoft Word: Mail Merge



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Abstract: Microsoft Word is a powerful word processing program. This document explores the use of Mail Merge utility by showing you how to create a form letter and merge mailing lists to create individualized letters.

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Introduction

Microsoft Word is a word processing program that can be used to create various types of documents from letters and memos to calendars and lists. Features of Microsoft Word, such as Mail Merge, can be useful when creating generic documents to be sent to large numbers of people. Microsoft Word also allows you to create and print labels or envelopes on your printer.

Note: This handout is designed for Microsoft Word XP. Much of the content will be the same if Word 97 or 2000 is used, however the steps to create a mail merge document are very different between previous versions of Word and XP.

Objectives

The goal of this workshop is to introduce participants to the Mail Merge functions of Microsoft Word. After today's workshop, participants will be able to:

- Create and edit a main document and a data source for Mail Merge
- Create and print envelopes using the Mail Merge tool

Prerequisites

The prerequisite is the **Microsoft Word: Everyday Tasks** workshop or equivalent skills.

Related Training Available from Instructional Services

All workshops offered by Information Services are free to KU students, staff, faculty, and [approved affiliates](#).

To learn more about or register for workshops, receive automatic announcements of upcoming workshops, and track workshops you've registered for and have attended, visit the www.lib.ku.edu/instruction. You can also check our online schedule at www.lib.ku.edu/instruction/workshops for a list of class offerings and their availability. For further workshop related questions, please email training@ku.edu.

Definitions

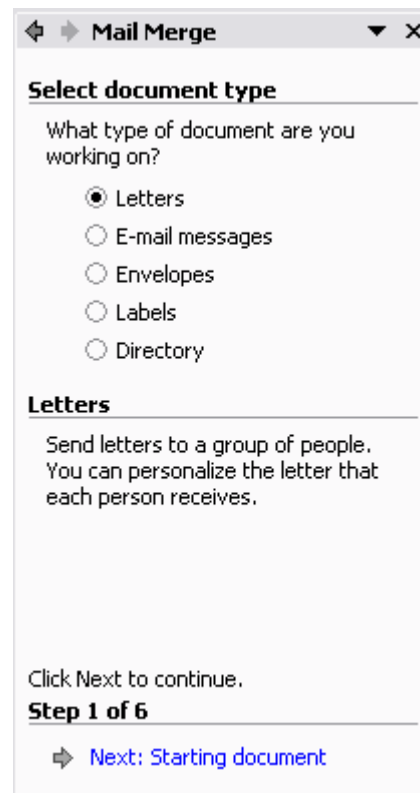
Term	Definition
Mail Merge	Use the Mail Merge Wizard to create form letters, mailing labels, envelopes, directories, and mass e-mail and fax distributions.
Main Document	The document that contains the text and graphics that are the same for each version of the merged document, for example, the return address or salutation in a form letter.
Data Source	A file that contains information to be merged into a document. For example, the list of names and addresses you want to use in a mail merge.
Merge Field	A placeholder that you insert in the main document that instructs Word to insert text, graphics, page numbers, and other material into a document automatically. For example, insert the merge field <<City>> to have Word insert a city name, such as "Lawrence," that's stored in the City data field.

Mail Merge

Mail merge is a process of combining generic information (such as a form letter or mass email) with specific information (such as a specific recipient's address, name, or title). In Word, this process is completed using two components: a main document (for example a form letter you want sent to a number of people), and a data source (a list of recipients that includes names, addresses, phone numbers, titles, etc.). This data source could be an email address book, a Microsoft Excel spreadsheet, a database, or various other files. The main document contains standard text that all final letters will contain, but it also contains variable placeholders, such as the "Address Block" or the "Greeting Line". These generic placeholders are replaced with the specific information for each recipient obtained from the data source records.

Creating a Mail Merge using the Wizard

1. Click the **Tools** menu, point at **Letters and Mailings**, and select **Mail Merge...** The Mail Merge task pane appears.



Step 1

2. Under the *Select document type* section, click **Letters** or choose which type of document you will be creating. The active document becomes the main document, even if the active document is blank.
3. Click **Next: Starting document** at the bottom of the task pane.

Step 2

4. Under the *Select starting document* section, choose how you want to set up your letter.
 - **Use the current document** – Start with the document currently shown in the document window. You can then either type the letter in the document window, or wait until the wizard prompts you to do so in a later step.
 - **Start from a template** – Click **Select template**. On the **Mail Merge** tab in the Select Template dialog box, select the template you want. Then click **OK**.
 - **Start from existing document** – Start with any other existing document. In the *Start from existing* box, select the document you want, and then click **Open**. If you don't see the document, click **More files**, and then click **Open**, in the Open dialog box, locate the document you want and then click **Open**.
5. Click **Next: Select recipients** at the bottom of the task pane.

Step 3

6. Under the *Select recipients* section, locate or create a data source and then select recipients.
 - **Use an existing list** – Click **Browse...** In the Select Data Source dialog box, locate and click the data source you want. By default, the My Data Sources folder opens. Click **Open**. Depending on the type of data source you select, other dialog boxes may appear asking you to request specific information. All the entries in the data source appear in the Mail Merge Recipients dialog box, where you can refine the list of recipients to include in the merge.
 - **Select from Outlook contacts** – Click **Choose Contacts Folder**. In the Select Contact List folder dialog box, click the contact list you want, and then click **OK**. All of the contacts in the folder appear in the Mail Merge Recipients dialog box, where you can refine the list of recipients to include in the merge.
 - **Type a new list** – Click **Create...** In the New Address List dialog box, type the information you want to include for the first entry under *Enter Address Information*. To complete the first entry and move on to a new entry, click **New Entry**. Repeat these steps until you've added all the address entries you want and then click **Close**. In the *Save Address List* dialog box, type a name for the address list in the *File name* box, and select a folder to save the list in. By default, the address list is saved in the *My Data Sources* folder. Click **Save**. All

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the contacts in your new list appear in the Mail Merge Recipients dialog box, where you can refine the list of recipients to include in the merge.

Tip: You can use just about any type of data source you want for a mail merge. Some examples include Microsoft Outlook Contact List, Microsoft Excel worksheet, Microsoft Access database, or other database files.

7. Click **Next: Write your letter** at the bottom of the task pane.

Step 4

8. If you have not already done so, write your letter now.
9. To add recipient information to your letter, click a location in the document, and then click one of the following items:
 - **Address block...** -- In the Insert Address Block dialog box, select the address elements you want to include and the formats you want. Click **OK**. If the Match Fields dialog box appears, Word may have been unable to find some of the information it needs for the address block.
 - **Greeting line...** -- Select the greeting line format, which includes the salutation, name format, and the following punctuation. Select the text you want to appear in cases where Word can't interpret the recipient's name. Click **OK**. If the Match Fields dialog box appears, Word may have been unable to find some of the information it needs for the address block.
 - **Electronic postage...** -- In order to add electronic postage, you must first install an electronic postage program, such as one you purchased from a service on the World Wide Web.
 - **Postal bar code...** -- You must select a label or envelope type that supports the POSTNET bar code. **More items...** -- To select from address fields that will automatically map to corresponding fields in your data source, even if the data source's fields don't have the same name as your fields, click **Address Fields**. Or, select from fields that always take data directly from a column in a database by clicking **Database Fields**. In the *Fields* box, click the field you want. Click **Insert**, and then click **Close**. If the Match Fields dialog box appears, Word may have been unable to find some of the information it needs for the address block.

Tip: You can add formatting (**bold**, *italic*, **fonts**, etc.) to your merged document. To format merged data, you must format the merge fields in the main document. Don't format the data in the data source, because its formatting isn't retained when you merge the data into the document. In the main document, select the field containing the information you want to format, including the surrounding merge field characters (<< <<>> >>).

10. When you have finished writing your letter and adding the merge fields, you should save your document (**File > Save As**).
11. Click **Next: Preview your letters** at the bottom of the task pane. This allows you to preview and personalize each recipient's letter if needed.

Step 5

12. Under the *Preview your letters* section, you can:
 - View each individually merged letter by clicking on the arrows next to the *Recipient: number*.
 - If there is a specific recipient that you want to view, you can click **Find a recipient...** Enter the search criteria in the Find Entry dialog box.
13. If necessary, fine-tune the recipient list.
 - Click **Edit recipient list...** if you need to make changes to your recipient list.
 - Click **Exclude this recipient** to exclude a particular recipient from the merge.
14. When you have finished previewing your letters, click **Next: Complete the merge**.

Step 6

15. The Mail Merge Wizard is ready to produce your letters. Under the *Merge* section, choose one of the following:
 - **Print** – print the letters. The Merge to Printer dialog box appears allowing you to do one of the following:
 - To print all the documents, click **All**.
 - To print the document that you see in the document window, click **Current record**.
 - To print a range of documents, click **From**, and then type the record numbers in the **From** and **To** boxes.
 - **Edit individual letters** – to personalize the letters. This opens a new document with the merged letters allowing you to edit the information you want in the

resulting merged document. In the Merge to New Document dialog box, select the records you want to merge. Click **OK**. Your main document also remains open. You can switch back to it if you want to make a change to all the documents. Scroll to the information you want to edit and make your changes. Print or save the document just as you would any regular document. Choose Print from inside this open document.

- **Previous: Preview your letters** – to make changes to all the letters.

Stopping and Resuming Mail Merge Wizard

If you need to stop working on a mail merge, you can save the main document and resume the merge later. Word keeps your place in the Mail Merge Wizard so that the next time you are in the document and open the Mail Merge Wizard, the task pane opens to the step where you left off.

Creating and Printing Envelopes for a mass mailing using Mail Merge Wizard

You can use the same data file you just used to print form letters to print the names and addresses on envelopes.

1. Click on the **Tools** menu, point at **Letters and Mailings**, and then select **Mail Merge....** The Mail Merge task pane appears.

Step 1

2. Under *Select document type*, click **Envelopes**. The active document becomes the main document, even if it is blank. This can be changed in Step 2 below.
3. Click **Next: Starting document** at the bottom of the task pane.

Step 2

4. Under the *Select starting document* section choose how you want to set up your envelopes.
 - **Create a new envelope** - Click **Change document layout**. Click **Envelope options...** under the *Change document layout* section. In the Envelope Options dialog box, select the options you want, and then click **OK**. The active document changes to represent an envelope.
 - **Start with an existing envelope** - Click **Start from existing document**. In the *Start from existing* box, select the document containing the envelope you want, and then click **Open**. If you don't see the document, click (**More files...**), and then click **Open**. In the Open dialog box, locate the document you want, and then click **Open**. The document is displayed.
5. Click **Next: Select recipients** at the bottom of the task pane.

Step 3

6. Under the *Select recipients* section, locate or create a data source and then select recipients.
 - **Use an existing list** - Click **Browse....** In the Select Data Source dialog box, locate and click the data source you want. (By default, Microsoft Word opens the **My Data Sources** folder.) Once you have located the data source, click **Open**. Depending on the type of data source you select, other dialog boxes may appear asking you to request specific information. For example, if your data source is a Microsoft Excel worksheet that has information on multiple tabs, you need to select the tab containing the information you want. All the entries in the data source appear in the Mail Merge Recipients dialog box, where you can refine the list of recipients to include in the merge. See instructions directly below on how to select the recipients you want to include.
 - **Selecting from Outlook Contacts** - Click **Choose Contacts Folder**. In the Select Contact List folder dialog box, click the contact list you want, and then click **OK**. All of the contacts in the folder appear in the Mail Merge Recipients dialog box, where you can refine the list of recipients to include in the merge. All of the entries in the data source appear in the Mail Merge Recipients dialog box, where you can refine the list of recipients to include in the merge. See instructions directly below on how to select the recipients you want to include.
 - **Type a new list** - Click **Create....** In the New Address List dialog box, type the information you want to include for the first entry under *Enter Address information*; for example, title, names, and address information. You don't have to fill in every field. To complete the first entry and move on to a new entry, click **New Entry**. Repeat this process until you've added all the address entries you want, and then click **Close**. In the Save Address List dialog box, type a name for the address list in the *File name:* field, and select a folder to save the list in. By default, the address list is saved in the **My Data Sources** folder. It's best to keep the address list here because this is also the default folder in which Microsoft Word looks for data sources. So if you want to use this address list in a later mail merge, you won't have to navigate through files and folders to locate it. Click **Save**. All of the contacts in your new list appear in the Mail Merge Recipients dialog box, where you can refine the list of recipients to include in the merge. See instructions directly below.
7. In the Mail Merge Recipients dialog box, select the recipients you want to print envelopes for.
 - **Use the check boxes to designate recipients** - This method is most useful if your list is short. Select the check boxes next to the recipients you want to include, and clear the ones next to the recipients you want to exclude.

Tip: If you know you want to include most of the list in your merge, clicking **Select All** first makes it easy to clear particular records. Similarly, if you want to include only a few records in the list, click **Clear All**, and then select the records you want.

- **Sort items in the list** - This is useful if you want to see items in alphabetical or numeric order. Click the column heading of the item you want to sort by. For example, if you want to display the list alphabetically by last name, click the **Last Name** column heading.
- **Filter items in the list** - This is useful if the list contains records that you know you don't want to see or include in the merge. Once you've filtered the list, you can use the check boxes to include and exclude records as described in the previous section. Click the arrow next to the column heading of the item you want to filter by.

Click any of the following:

- **(Blanks)** -- Displays all the records in which the corresponding field is blank.
- **(Nonblanks)** -- Displays all the records in which the corresponding field contains information.
- **(Special conditions)** -- If your data source contains records that share the same information, and there are ten or fewer unique values in the column, you can filter by specific information. For example, if there are multiple addresses that list Australia as the country/region, you can filter on **Australia**.
- **(All)** -- Displays all the records again.
- **(Advanced...)** -- For advanced sorting and filtering. Use the **Filter Records** and **Sort Records** tabs to set up the sorting or filtering query you want.

Click **OK** to return to the Mail Merge Wizard. Microsoft Word will use the recipients you designated for the merge.

8. Click **Next: Arrange your envelope** at the bottom of the task pane.

Step 4

9. If you are not in print layout view, switch to it (**View menu > Print Layout**).
10. If you want to include a return address on your envelope, type it in the upper-left corner.
11. Click in the center of the envelope to insert a text box. Insert merge fields where you want to merge names, addresses, and other information such as a postal bar code.

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- **Address block...** -- In the Insert Address Block dialog box, select the address elements you want to include and the formats you want, and then click **OK**. An <<AddressBlock>> variable is inserted where the name, address, and other information will appear.
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Note: If the **Match Fields** dialog box appears, Microsoft Word may have been unable to find some of the information it needs for the address block. Click the arrow next to **(not available)**, and then select the field from your data source that corresponds to the field required for the mail merge.

- **Electronic postage...** -- In order to add electronic postage, you must first install an electronic postage program, such as one you purchased from a service on the World Wide Web. If you do not have an electronic postage program installed, Microsoft Word prompts you to install one and offers to connect to the Microsoft Office Website. There you can get more information and links to other sites that offer electronic postage. Insert the postage according to the program's instructions.
 - **Postal bar code...** -- You must select a label or envelope type that supports the POSTNET bar code. In the Insert Postal Bar Code dialog box, select the appropriate address fields. Repeat this process until all the fields you want are inserted.
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Note: The **Postal bar code** option only appears if you are using the U.S. language version of Microsoft Word.

- **More items...** -- allows you to insert other fields of information. The Insert Merge Field dialog box appears.

Under the *Insert:* section select:

- **Address Fields** -- Select from address fields that automatically map to corresponding fields in your data source, even if the data source's fields don't have the same name as your fields.
- **Database Fields** -- Select from fields that always take data directly from a column in a database.

In the *Fields:* section, click the field you want and click **Insert**. Repeat this until all the fields you need are placed. Then click **Close**.

If the **Match Fields** dialog box appears, Microsoft Word may have been unable to find some of the information it needs to insert the field. Click the arrow next to **(not available)**, and then select the field from your data source that corresponds to the field required for the mail merge.

Note: If you insert a field from the **Database Fields** list, and then later switch to a data source that doesn't have a column with the same name, Word won't be able to insert that field information into the merged document.

12. After you've completed the main document and inserted all of the merge fields, click **Save As** on the **File** menu. Name the document, and then click **Save**.
13. Click **Next: Preview your envelopes** at the bottom of the task pane.

Step 5

14. Now you're ready to preview your envelopes and fine-tune the recipient list. To preview the items in order, click the arrow buttons. To locate and preview a specific item, click **Find a recipient...**, and then enter the search criteria in the Find Entry dialog box.
15. If necessary, you can fine-tune the recipient list.
 - To exclude a particular recipient from the merge, click **Exclude this recipient**.
 - To change the list of recipients, click **Edit recipient list**, and then make your changes in the Mail Merge Recipients dialog box.
16. Click **Next: Complete the merge** at the bottom of the task pane.

Step 6

17. You are ready to complete the merge and produce your envelopes. Under the Merge section, do one of the following.
 - Print the envelopes -- In the Merge to Printer dialog box, do one of the following, and then click **OK**.
 - To print all the documents, click **All**.
 - To print the document that you see in the document window, click **Current record**.
 - To print a range of documents, click **From**, and then type the record numbers in the **From** and **To** boxes.

In the **Print** dialog box, select the options you want.

Additional Features:

Personalize individual envelopes

To personalize individual documents, you actually complete the merge, and then edit the information you want in the resulting merged document.

Click **Edit individual envelopes**.

In the **Merge to New Document** dialog box, select the records you want to merge.

Click **OK**.

Microsoft Word creates and opens a new merged document. Your main document also remains open, and you can switch back to it if you want to make a change to all the documents.

Scroll to the information you want to edit, and make your changes.

Print or save the document just as you would do with a regular document.

Save the envelopes for later use

If you want to edit merged envelopes or save them for later use, you can collect them into a single document.

Click **Edit individual envelopes**.

In the **Merge to a New Document** dialog box, do one of the following, and then click **OK**.

To merge all the documents, click **All**.

To merge only the document that you see in the document window, click **Current record**.

To merge a range of documents, click **From**, and then type the record numbers in the **From** and **To** boxes.

Microsoft Word opens a single new document that contains all the individual documents. You can then save the document for later use, just as you would any regular document.

Getting Additional Help

Information Services provides consulting and Q&A help in a variety of ways:

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