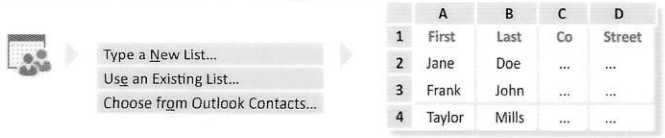
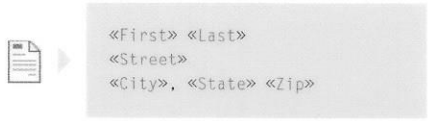
Word 2013 Mail Merge

1. Select the type of document

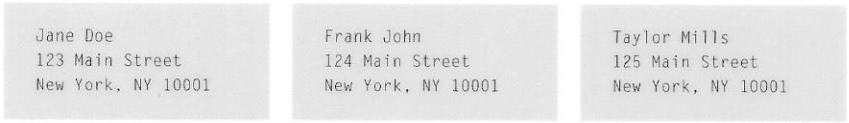
2. Choose the list of recipients



3. Write the document



4. Merge the document with the recipients



1. Select the Type of Document

Use a mail merge to automatically create personalized letters, envelopes, labels, group faxes, and e-mail by merging a document (letter, envelope, or label sheet) with data (usually a list of names and addresses). For e-mail or faxes, your computer must have compatible e-mail software and the capability to send a fax. During the merge, options on the MAILINGS tab only become available (not grayed) if previous required steps have been completed.

Choosing the Document Type

1. Open the document you want to merge, or create a new one. For envelopes and labels it is best to specify the document type before adding content.
2. Choose MAILINGS, then START MAIL MERGE then choose one of the document types. To merge to a regular letter, choose LETTERS. For ENVELOPES and LABELS, see the specific topics later on card.

2. Choose List of Recipients

Formats for Recipient Lists

Acceptable formats for the recipient list (data) include:

- Word or HTML (with a single table)
- Tab- or comma-delimited text
- Excel worksheet or named range
- Access Database
- Outlook Contact list
- OLE DB or ODBC accessible databases.

Selecting an Existing Recipient List

1. Choose MAILINGS, SELECT RECIPIENTS then USE EXISTING LIST.
2. Find and select your recipient list, then [Click] OPEN.
3. With an Excel workbook or an Access database, select the sheet, named range, or table, then [Click] OK.

Using Outlook Contacts

1. Choose MAILINGS, SELECT RECIPIENTS then SELECT FROM OUTLOOK CONTACTS.
2. If prompted, select the contact folder. [Click] OK twice.

Creating a Recipient List Directly

Use these easy-to-follow rules to make a well-designed dataset or data source that Word will recognise:

- Use separate columns for first name, last name, street address, city, state or province, zip or postal code. This will allow more control when making the merge document and accurate sorting.
- Use a single row for column headings or field labels.
- Ensure each heading is unique.
- Avoid spaces in headings. E.g., use FirstName, StreetAddress, MemberID, etc.
- Headings can be up to 64 characters long.
- Ensure there are no blank or empty rows or columns within the dataset.
- Ensure dates/times are entered as true date/time values and not text for chronological sorting and filtering.
- Ensure dates, times, currency, and numbers are formatted the way you want them output.

In Excel: Keep the data table in a separate sheet without titles, statistics, or other embellishments. Alternatively, specify a defined range name that tightly fits the data and column headings only.

In Word: Ensure there are no titles or embellishments above the table.

Creating a Recipient List In Word

1. Choose MAILINGS, SELECT RECIPIENTS then TYPE A NEW LIST.
2. Begin typing names and addresses. Enter other data if required. To move between fields, [Click] a field or press <Tab>/<Shift-Tab>.
   - To add a new entry, press <Tab> after the last column, or [Click] NEW ENTRY, or press <Alt-N>.
   - To add/remove/change columns, [Click] CUSTOMIZE COLUMNS.
3. [Click] OK.
4. Enter a FILE NAME, then [Click] SAVE. The recipient list is stored in a Microsoft Access database file.

Selecting and Sorting Recipients

By default, all the recipients from your recipient list are selected. To filter the list to be used for your mail merge:

1. Choose MAILINGS, then EDIT RECIPIENT LIST.
2. In the MAIL MERGE RECIPIENTS dialog box:
   - Uncheck any recipients you do not want.
   - [Click] at the top to deselect/select all.
   - To sort, [Click] on a column header, [Click] again to reverse the sort.
   - [Click] on a header to sort and filter entries. Choose ADVANCED for more options.
     Or, choose Filter...
     Advanced Filter:
     On the FILTER RECORDS tab, choose from the FIELD and COMPARISON lists, and enter a value or text in the COMPARE TO box, e.g., "City equal to Paris."
     If specifying additional criteria, [Click] the drop-down list in the second row and choose either "AND" or "OR." "And" indicates the records must match all the criteria. "Or" indicates the records can match any of the criteria.
     Advanced (multi-level) Sorts:
     On the SORT RECORDS tab, use the SORT BY list to indicate which field to sort by. Choose ASCENDING/DESCENDING as required. Use the THEN BY list to sort by more than one field. [Click] OK.
   - [Click] Find duplicates... to see a list of possible duplicates. Deselect any recipient on the list, then [Click] OK.
3. [Click] OK.

Editing an Existing Recipient List

Not all types of recipient lists can be edited directly in Word. If editing options are not available, edit the list in the original program (such as Microsoft Outlook).

1. Choose MAILINGS, then EDIT RECIPIENT LIST.
2. Select the DATA SOURCE, then [Click] EDIT.
3. To add a new entry, press <Tab> after the last column, or [Click] NEW ENTRY, or press <Alt-N>.
4. To add/remove/change columns, [Click] CUSTOMIZE COLUMNS. ADD/DELETE or RENAME the columns, i.e., fields, as required. [Click] OK when finished. [Click] OK and OK to exit all the dialog boxes.

3. Write the Document

Writing the Document

Write your document as you would any Word document, then insert field codes to control where merged data is to be placed in the document.

- To insert a field to be filled in from your recipient list, choose MAILINGS, then INSERT MERGE FIELD.
- Use ADDRESS BLOCK or GREETING LINE to quickly insert common components of letters.
- Save the document if you want to use it again for another mail merge.

Creating a Label Document

1. Choose START MAIL MERGE, LABELS, then specify the PRINTER INFORMATION.
2. [Select] the preferred LABEL VENDOR.
3. [Select] the label PRODUCT NUMBER, e.g., AVERY US Letter/5262 Easy Peel Address Labels. If the label type is not shown, [Click] NEW LABEL, define the label margins and dimensions, and [Click] OK.
4. Verify the LABEL INFORMATION is correct. [Click] OK.
5. Optionally, show the table gridlines. Choose TABLE TOOLS, LAYOUT, VIEW GRIDLINES.
6. Select the recipient data in the usual way.
7. Prepare a blank label document in the usual way, then enter all the text, merge fields, and graphics in the first label.
8. Choose MAILINGS, then Update Labels to copy the first label over the remaining labels.

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Creating an Envelope Document

1. Choose START MAIL MERGE, ENVELOPES then [Click] the ENVELOPE OPTIONS tab.
   a. [Select] the ENVELOPE SIZE, e.g., SIZE 10.
   b. [Click] the DELIVERY ADDRESS FONT button and choose an appropriate font face, e.g., COURIER.
   c. [Click] the RETURN ADDRESS FONT button and choose an appropriate font face, e.g., COURIER.
2. [Click] the PRINTING OPTIONS tab.
   a. [Select] the FEED METHOD and CLOCKWISE ROTATION required for your printer.
   b. [Select] FACE UP or FACE DOWN.
   c. [Select] the appropriate paper source or bin for your printer in the FEED FROM menu.
3. [Click] OK.
4. Select the recipient data in the usual way.
5. Enter the return address at the top-left corner of the envelope, if not using pre-printed envelopes. Insert a logo graphic, if required.
6. [Click] slightly below center-middle of the envelope to reveal the text box for the recipient address.
7. Prepare the envelope recipient address in the usual way, entering all the text and merge fields or ADDRESS BOOK as required.

Using an If... Then... Else... Rule

Use the **If...Then...Else** rule to insert text only if the recipient matches a condition (rule).

1. Place the insertion point where you want the text based on the IF...THEN...ELSE... statement to appear.
2. Choose MAILINGS, then Rules then IF...THEN...ELSE....
3. In the dialog box, choose from the FIELD NAME list and COMPARISON list, and enter a value or text in the COMPARE TO box, e.g., "City Equal to Paris".
4. Under INSERT THIS TEXT, fill in the text you want to appear when the IF Statement is true.
5. Under OTHERWISE INSERT THIS TEXT, fill in the text to appear when the IF Statement is false. [Click] OK.

When you run the Mail Merge, different information is printed in each merged record depending on whether it meets the comparison criteria or not.

Suppressing Blank Address Lines

If a data source includes multiple address lines for company name or suite information which is periodically left empty, blank lines can appear in merged addresses, particularly if using line breaks (vs. paragraph breaks).

1. Create a blank line after the recipient or company name fields by pressing <Shift-Enter>.
2. Choose MAILINGS, Rules then IF...THEN...ELSE...
3. [Select] the FIELD NAME with periodic blanks, e.g., AddrLine2.
4. [Select] IS BLANK from COMPARISON. [Click] OK.
5. Press <Alt-F9>. The merge code will look like:
   `{ IF { MERGEFIELD AddrLine2 }= "" "" "" }`
6. [Click] in the last pair of quotes.
7. Choose MAILINGS, then INSERT MERGE FIELD.
8. Insert the occasionally populated field. Again, AddrLine2.
9. Immediately after new field code, press <Shift-Enter>.
10. Delete the line break after the closing IF brace. The merge codes should appear as follows:
    `{ MERGEFIELD AddrLine1 }` <line break>
    `{ IF { MERGEFIELD AddrLine2 } = "" ""`
    `"{MERGEFIELD AddrLine2 }` <line break>
    `" }{ MERGEFIELD City }`
11. Press <Alt-F9> then preview the results to verify the format is correct (see **Previewing the Merge**).

Changing Output Case

Text in your data source may not be in the right case.

1. [Right Click] an individual field code and choose EDIT FIELD.
2. In the FIELD PROPERTIES section, select the preferred FORMAT. [Click] OK.

Alternatively, add the option inside the field code, e.g., `{ADDRESSBLOCK... \*UPPER}`

Changing Output Date/Time Format

Date and time data, as it is merged, may not be formatted as you require. You can change the date and time formats for consistency and clarity.

1. [Right Click] a field code and choose TOGGLE FIELD CODES or press <Alt-F9>. The merge code will be shown something like `{ MERGEFIELD MyDateOrTimeField }`.
2. Carefully append the following text immediately after the date/time field name: `\@"MyDateOrTimeFormat"`
3. Substitute appropriate codes (see **Date/Time Codes**) for "MyDateOrTimeFormat". For example, `{ MERGEFIELD MyDateOrTimeField \@ "MMMM d, yyyy" }` would produce January 24, 2014.
   Tip: Without the am/pm switch, time will be shown in military or 24-hour format.
4. Preview the results to verify the format is correct.

Date/Time Codes

d	day number without leading zero
dd	day number with leading zero
MMM	month word in short form
MMMM	full month word
yy	2-digit year
yyyy	year with century digits
h	hour without leading zero
hh	hour with leading zero
m	minute without leading zero
mm	minute with leading zero
am/pm	show AM or PM after time

Note: See the Help for additional codes.

4. Merge the Document with the Recipients

Previewing the Merge

To see the document as it will look when merged, choose MAILINGS, then PREVIEW RESULTS.

[Click] or to browse through recipients.

Or, [Click] Find Recipient to search for a specific recipient.

To turn off preview, choose MAILINGS, then PREVIEW RESULTS again.

Tip: You may have to [Click] or at least once to see the effect of your changes.

Merging

1. Choose MAILINGS, then FINISH & MERGE.
2. Select a merge option:
   - EDIT INDIVIDUAL DOCUMENTS to put the merged documents into a new Word document.
   - PRINT DOCUMENTS to send the merge directly to a printer (good for really large mailings).
   - SEND E-MAIL MESSAGES to send individual merged emails to each recipient with an email address.
3. Choose which records (recipients) to merge. Any recipients previously deselected (through EDIT RECIPIENT LIST) will not be included, regardless of choices made here.

Merging to E-mail

Before finishing the merge:

1. Select field that contains the e-mail address from the TO drop-down.
2. Type a SUBJECT LINE to be used for each e-mail.
3. Select the MAIL FORMAT.
   PLAIN TEXT is guaranteed to work for all recipients but does not include formatting or pictures.
   HTML works for most recipients and includes formatting and pictures similar to your Word layout.
   ATTACHMENT sends a Word document as an attachment. This is exact but requires the recipient to have a compatible version of Microsoft Word.
   [Click] OK. If prompted, ALLOW Word to access your e-mail program or select printer options. [Click] OK.

Merging to a New Document

There are a number of considerations for using the EDIT INDIVIDUAL DOCUMENTS option during merging.

- You can conduct a thorough review of the merge results. For example, a one-page letter might "fall off the page" to a second page due to long addresses or long data.
- While records can be filtered during the Recipient List steps, you can delete letters or envelopes in the combined document.
- You can customize the merged letters. This can give merged letters a personal touch.
- Printing from the combined document offers much better printer and printing control. For example, if the combined document has hundreds of letters or envelopes, printing can be done in small batches replenishing the paper supply.
- If an audit trail or record is required, the combined document can be kept. For example, keep the merged envelopes document as a record of who received the last mailing.
- The combined document can be a large file. If there are embedded rich graphics, it can be extremely large therefore use linked graphics instead. See blog.beezix.com/LinkingGraphicsInWord.

General Merge Tips

Recommendations for Effective Post Mail Addressing

Your country's postal service has specific requirements for mailing addresses, particularly if applying for reduced bulk mailing rates. In the USA, Canada, the UK, and Australia, follow these guidelines. This also means your mail should be processed faster.

- Use a point size of 12 for the recipient address.
- Use a simple, clear font, such as Courier.
- Do not use any punctuation symbols such as commas or periods. Avoid the # symbol.
- Use capital letters.
- Ensure the address is left aligned.

In the USA, Canada, and Australia, the city, state, province, or territory, and postal code should be included in the same line with one space after the city and two spaces in front of the postal code.

The Mail Merge Wizard

The MAIL MERGE WIZARD task pane provides step-by-step, interactive instructions throughout the merging process. To show, choose MAILINGS, then START MAIL MERGE, then STEP-BY-STEP MAIL MERGE WIZARD. A task pane opens to lead you through the process. At any point in the wizard you can also use the MAILINGS tab on the Ribbon to perform tasks out of sequence.

Highlighting Merge Fields

To shade merge fields for easier identification, choose MAILINGS, HIGHLIGHT MERGE FIELDS.

Need to know more? See our other Word and Office guides.

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