

Word - Mail Merge



IT Training
St. George's, University
of London

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If you have a St. George's username and password you can access all the files that goes with this manual.

Files can be found in a folder on the **N** drive in the **IT Training** folder named:

Word - Mail Merge

H-lookup N:\IT Training\ Word - Mail Merge

UNDERSTANDING MAIL MERGE

Mail Merge is a very handy feature in Word. It allows you to send identical or very similar letters to large volumes of people with ease. Instead of having to type each address and name as you

go, **Mail Merge** inserts this information automatically so all you have to do is print the letters and put them in an envelope! You can also create emails, envelopes, labels or a directory.

What Is Mail Merge?

The **mail merge** process is where you merge **variable data** (content that will change from document to document) with **consistent data** (content that will be the same in each document). For example, you may want to send an end-of-year letter to all members of staff at your workplace. The message in each letter will be the same, wishing everyone the best for the coming year and thanking them for their hard work. This end-of-year message is the **consistent data** because it will be the same in each letter. The names and addresses of each staff member (or recipient) are the **variable data** because no two letters will have exactly the same name and address.

Typing these letters individually would take quite a long time and would be a very boring and tedious job!

How Does It Work?

For the **mail merge** to work, you must have two documents which are known in Word as the **recipient list** (contains the variable data) and the **starting document** (contains the consistent data).

- The **recipient list** comprises the contact details for each person who will receive the mail merge document. This list must be set out in a table or some other tabular layout where each recipient occupies a row in the table and each item of data, such as their title and first name, is stored in separate columns in the table.
- The **starting document** contains the content you want to send to the recipients. This document is often a letter or an email. You can use an existing document, a Word mail merge letter template, or even create a new document during the **mail merge**.

When you have finished merging the **recipient list** with the **starting document**, you will have created your **mail merge document** which is the final, finished product.

Mail Merge Fields

As part of the **mail merge** process, you insert **mail merge** fields into the starting document. These fields take information you specify and add it to each letter so that you don't have to manually type the information into each letter. For instance, the **Address Block** is a single mail merge field that combines several mail merge fields including Title, First Name, Last Name, Company Name, Address and so on. The **Address Block** gathers the information from your **recipient list**. Additionally, the **Greeting Line** mail merge field lets you determine how you wish to start each letter, such as '**Dear Miss Smith**' or '**Hi Anne**' and then inserts the appropriate greeting line into each letter based on the information you specified.

The Mail Merge Wizard

If you use the **Step-by-Step Mail Merge Wizard** (as we recommend) to perform a **mail merge**, you'll find the **mail merge** process really easy. Once initiated, the Wizard opens the **Mail Merge** pane to the right of the window (see the image to the right).

As the name suggests the Wizard takes you step-by-step through the six steps of the **Mail Merge** process, explaining each step as you come to it and prompting you to complete each task as necessary.

Mail Merge

Select document type

What type of document are you working on?

☒ Letters

☐ E-mail messages

☐ Envelopes

☐ Labels

☐ Directory

Letters

Send letters to a group of people. You can personalize the letter that each person receives.

Click Next to continue.

Step 1 of 6

→ Next: Starting document

UNDERSTANDING THE MAIL MERGE PROCESS

There are three main stages involved in the **mail merge** process. Firstly you must have an existing or create a new **recipient list**, then you must have or create a **starting document** which you

will insert **mail merge fields** into. Finally you merge the two documents together to create a **mail merge document** that is ready to distribute.

Recipient List

Title	First Name	Surname	Address	City	State	Post code
Miss	Kate	Patford	1234 Main Road	Eltham	VIC	3095
Ms	Suzanne	O'Dowd	99 Station Street	Box Hill	VIC	3128
Mr	Peter	Dawson	69 Edwards Road	Kew	VIC	3101

Starting Document

«AddressBlock»

«GreetingLine»

Being the Alpheius Global Enterprise's Employee of the Year in your region, we are delighted to advise you that your salary will increase by 10% from the first pay period of next month.

Congratulations and keep up the good work!

Mail Merge Document

Miss Kate Patford
1234 Main Road
Eltham VIC

Dear Miss Patford,

Being the Alpheius Global Enterprise's Employee of the Year in your region, we are delighted to advise you that your salary will increase by 10% from the first pay period of next month.

Congratulations and keep up the good work!

Ms Suzanne O'Dowd
99 Station Street
Box Hill VIC

Dear Ms O'Dowd,

Being the Alpheius Global Enterprise's Employee of the Year in your region, we are delighted to advise you that your salary will increase by 10% from the first pay period of next month.

Congratulations and keep up the good work!

Mr Peter Dawson
69 Edwards Road
Kew VIC

Dear Mr Dawson,

Being the Alpheius Global Enterprise's Employee of the Year in your region, we are delighted to advise you that your salary will increase by 10% from the first pay period of next month.

Congratulations and keep up the great work!

CREATING A RECIPIENT LIST

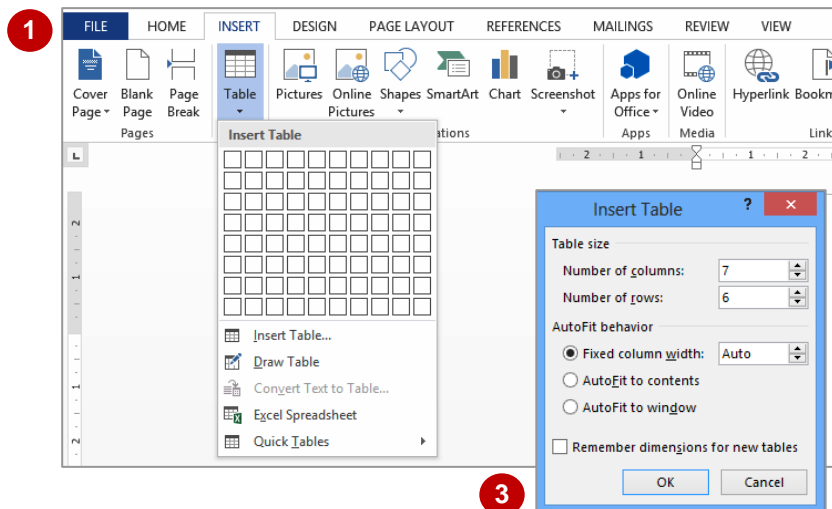
To complete a **mail merge** you must have access to, or create your own **recipient list** (or **mailing list**). A recipient list contains contact information such as the names and addresses of

those you wish to send your document to. This data is merged with the content of your document so it's important this information is accurate. Here we will create our recipient list in a Word document table.

Try This Yourself:

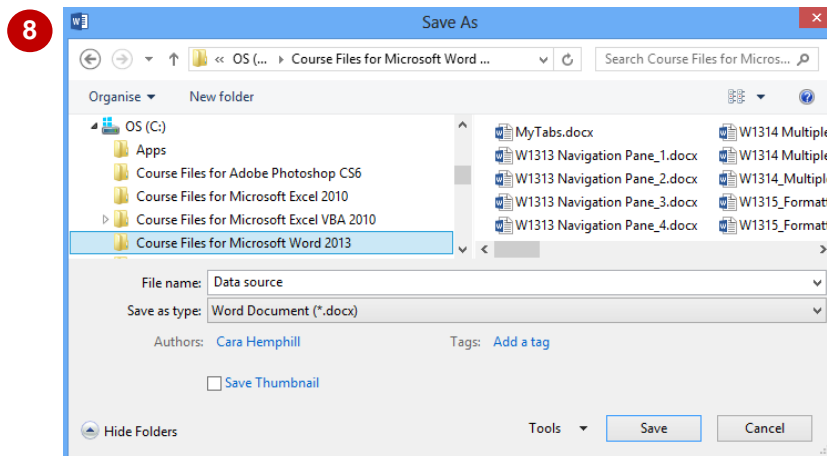
Before starting this exercise open a new blank document...

- 1 Click on the **INSERT** tab, then click on **Table** in the **Tables** group to open the **Insert Table** gallery
- 2 Select **Insert Table** to open the **Insert Table** dialog box
- 3 Type **7** in **Number of columns** then press **Tab** and type **6** in **Number of rows**
- 4 Click on **[OK]** to insert the table into your document
- 5 Type the text as shown
- 6 Click on the **FILE** tab, then click on **Save As** to open the **Save As** place
- 7 Ensure **Computer** is selected, then click on **[Browse]** to open the **Save As** dialog box
- 8 Click on **(C:)** drive and navigate to **Course Files for Microsoft Word 2013**
- 9 Type **My Data Source** in **File name** then click on **[Save]** to save the document, then close the document



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Title	First Name	Surname	Address	City	State	Post code
Miss	Kate	Patford	1234 Main Road	Eltham	VIC	3095
Ms	Suzanne	O'Dowd	99 Station Street	Box Hill	Vic	3128
Mr	Peter	Dawson	69 Edwards Road	Kew	Vic	3101
Dr	Chantelle	Smith	72 Gardner Avenue	Bundoora	VIC	3083
Ms	Melissa	Quinn	2 Thomas Terrace	Nunawading	VIC	3131



For Your Reference...

To **create** a **recipient list** in **Word**:

1. Insert a table with the appropriate number of columns (one per merge field) and rows (one per recipient)
2. Add the relevant data
3. Save your document

Handy to Know...

- If you have the contact details of your recipients stored in an existing Excel worksheet, you can use it as your recipient list instead of creating a new one. You can also use your Outlook contacts.

CREATING THE STARTING DOCUMENT

During the first step of the **mail merge** process you need to produce the **starting document**. Depending on the type of document you want to create, you may find it easier to quickly type one

during the **mail merge** process or you could use an existing document instead. Generally more complex documents such as certificates and the like will need to be created beforehand.

Try This Yourself:

Before starting this exercise open a new blank document...

- 1 Type the first paragraph as shown then press **Enter**
- 2 Type the second paragraph as shown
- 3 Press **Enter** twice and type **Yours sincerely,**

This doesn't look much like a letter yet but it's important to remember the missing parts, such as the name of the addressee, are mail merge fields and will be added from the data in our recipient list...

- 4 Click on the **FILE** tab, then click on **Save As** to open the **Save As** place
- 5 Ensure **Computer** is selected in the middle pane, then click on **[Browse]** to open the **Save As** dialog box
- 6 Open the **(C:)** drive, then navigate to **Course Files for Microsoft Word 2013** and save your document as **My Letter.docx**
- 7 Close the document

Being the Alpheius Global Enterprise's Employee of the Year in your region, we are delighted to advise you that your salary will increase by 10% from the first pay period of next month.

1

Being the Alpheius Global Enterprise's Employee of the Year in your region, we are delighted to advise you that your salary will increase by 10% from the first pay period of next month.

Congratulations and keep up the good work!

2

Being the Alpheius Global Enterprise's Employee of the Year in your region, we are delighted to advise you that your salary will increase by 10% from the first pay period of next month.

Congratulations and keep up the good work!

Yours sincerely,

3

For Your Reference...

To **create** the **starting document**:

1. Type the content of your document
2. Save the document

Handy to Know...

- Instead of typing a document, saving it and then reopening it when you start the Wizard, it is possible to create a document as part of the **mail merge** process. Simply open a blank document, start the Mail Merge Wizard and begin typing!

STARTING THE MAIL MERGE WIZARD

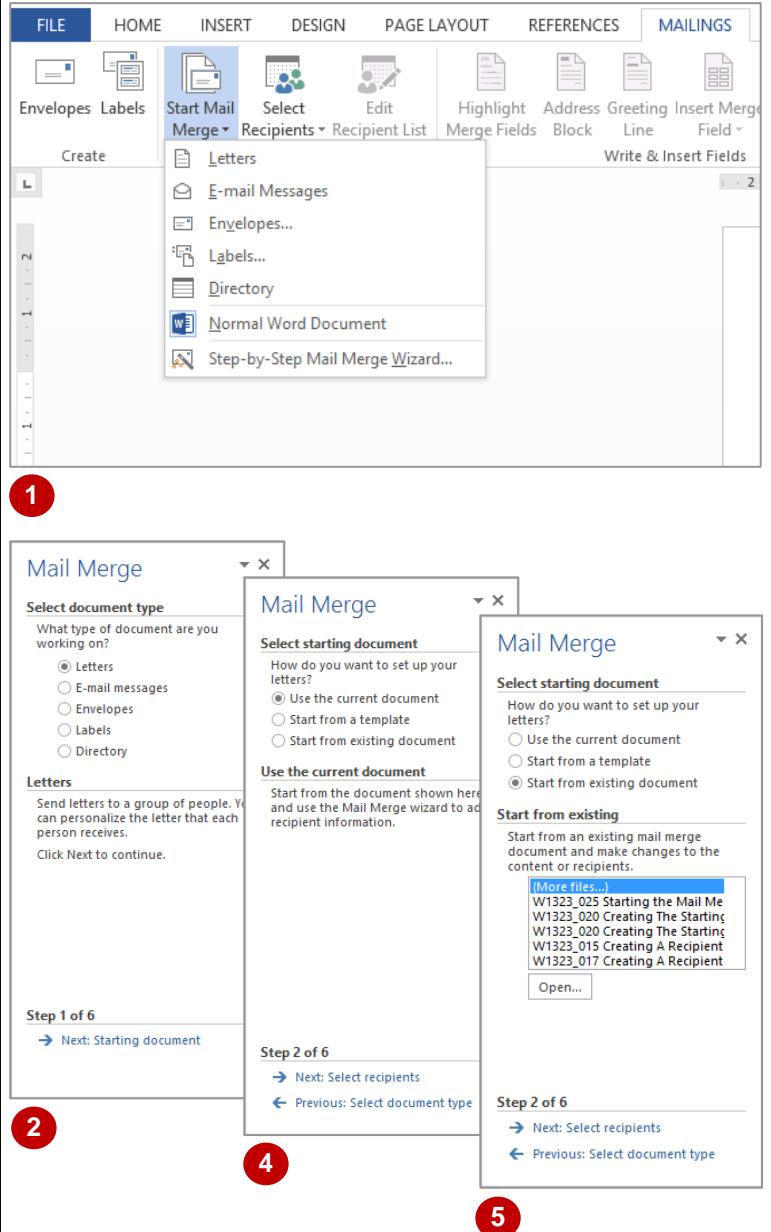
There are two ways you can conduct a **mail merge** using the merge tools in Word. You can use the individual commands on the **MAILINGS** tab of the ribbon or you can use the **Step-by-**

Step Mail Merge Wizard. The Wizard is by far the easiest and quickest method as it guides you through each step of the merge process so you always know what you need to do at each point.

Try This Yourself:

Before starting this exercise ensure you open a new blank document...

- 1 Click on the **MAILINGS** tab, then click on **Start Mail Merge** to open a menu of options
- 2 Select **Step-by-Step Mail Merge Wizard** to open the **Mail Merge** pane
- 3 Click on each option under **Select document type** to see a brief description of it under the second heading
As our starting document is a letter, we must select 'Letters'...
- 4 Ensure **Letters** is selected, then click on **Next: Starting document** at the bottom of the pane to go to **Step 2 of 6**
- 5 Select **Start from existing document** under **Select starting document**
We could have kept the file created in the last exercise open and selected Use the current document, but this way you see how to use an existing document...
- 6 Click on **[Open]** under **Start from existing** to display the **Open** dialog box
- 7 Navigate to and select **W1323 Mail Merge Letter.docx**, click on **[Open]** to open it, then leave it open for the next exercise



For Your Reference...

To **start** the **Mail Merge Wizard**:

1. Click on the **MAILINGS** tab, then click on **Start Mail Merge**
2. Select **Step-by-Step Mail Merge Wizard**
3. Follow the steps

Handy to Know...

- You can move and resize the **Mail Merge** pane quickly and easily by using the drop arrow to the right of the title. If you select **Move** from the menu, your pointer becomes a four-headed arrow. You can then move the pane by pointing wherever you like and clicking to anchor it in its new location.

SELECTING A RECIPIENT LIST

The **recipient list** is vital to performing a **mail merge** as without it you would not be able to complete the merge. The Wizard gives you the option of using an existing list, selecting from

your list of Outlook contacts or typing a new list. If you want to use an existing list you can either choose to use a document that was created in Word or in another application such as Excel.

Try This Yourself:

Same File

Continue using the previous file with this exercise or open **W1323 Mail Merge Letter.docx...**

1 In the **Mail Merge** pane, ensure **Step 2 of 6** is completed then click on **Next: Select recipients** to go to **Step 3 of 6**

2 Ensure **Use an existing list** is selected under **Select recipients**

3 Click on **[Browse]** under **Use an existing list** to open the **Select Data Source** dialog box

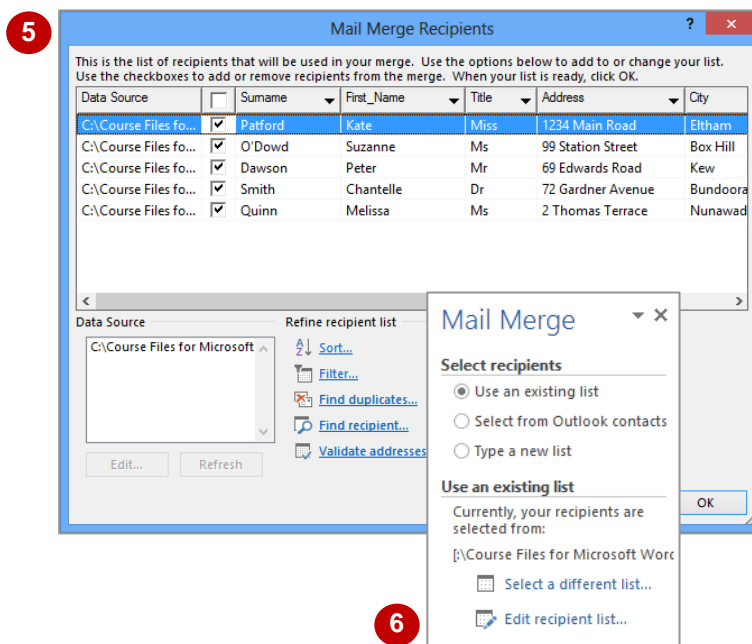
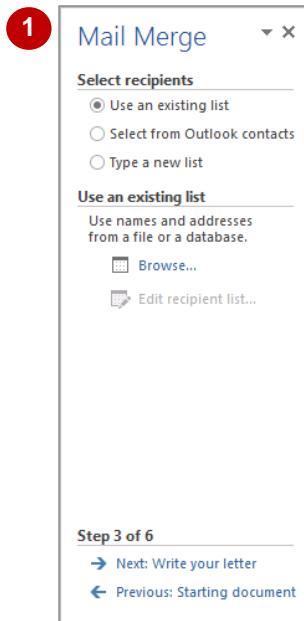
4 Navigate to **(C:) drive** then click on **Course Files for Microsoft Word 2013**

5 Click on **W1323 Mail Merge Data.docx** then click on **[Open]** to open the **Mail Merge Recipients** dialog box

6 Click on **[OK]** to confirm that this is the correct mailing list and it is in the desired format

Notice the file path of your recipient list now appears under **Use an existing list** and you have the option to **Select a different list** or **Edit the recipient list...**

7 In the **Mail Merge** pane, click on **Next: Write your letter** to go to **Step 4 of 6**



For Your Reference...

To **select** an **existing recipient list**:

1. Proceed to step **3** of the **Mail Merge Wizard**, then ensure **Use an existing list** is selected
2. Click on **Browse** and navigate to the folder containing the data source
3. Double-click on the data source file, select the recipients, then click on **[OK]**

Handy to Know...

- To remove individual records (recipients) from the recipient list, click on **Edit recipient list** in the **Mail Merge** pane at step **3** to display the **Mail Merge Recipients** dialog box. Click on the tick box beside the required recipient until it appears without a tick. Click on **[OK]**.

INSERTING MAIL MERGE FIELDS

Once you've selected your starting document and told the Wizard what file you want to use as your data source, it's time to decide where you want to place your **mail merge fields**. These fields, such

as **Address**, **First Name** and **Title** can be placed anywhere in your document by positioning your insertion point and selecting the field you require in the **Mail Merge** pane.

Try This Yourself:

Same File

You must continue using the previous file with this exercise...

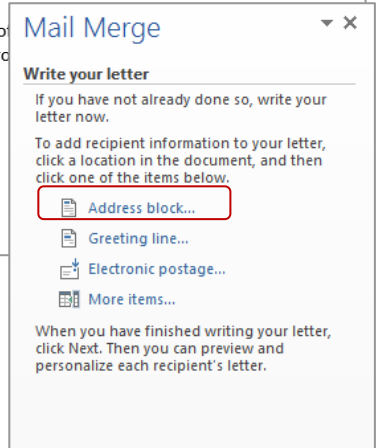
- 1 Ensure you are at **Step 4 of 6** in the **Mail Merge** pane
You can still add content to your document. Let's add our name to the end of the letter...
- 2 In the document, click at the end of **Yours sincerely**, press **Enter** and type your name
- 3 Click in front of the word **Being** and press **Enter** three times to move the paragraph down
- 4 Press **Ctrl** + **Home** to position the insertion point at the start of the document, then click on **Address block** in the **Mail Merge** pane to open the **Insert Address Block** dialog box
- 5 Click on **[OK]** to insert the **Address block** with the default formatting at the insertion point
- 6 Click above the word **Being** and click on **Greeting line** in the **Mail Merge** pane to open the **Insert Greeting Line** dialog box
- 7 Click on **[OK]** to insert the greeting line with the default formatting at the insertion point
Leave this file open for the next exercise

Being the Alpheius Global Enterprise's Employee of the Year, we are delighted to advise you that your salary will increase by 10% from the first pay period of next month.

Congratulations and keep up the good work!

Yours sincerely,
Fred Smith

4



«AddressBlock»

«GreetingLine»

Being the Alpheius Global Enterprise's Employee of the Year in your region, we are delighted to advise you that your salary will increase by 10% from the first pay period of next month.

Congratulations and keep up the good work!

Yours sincerely,
Fred Smith

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For Your Reference...

To **insert merge fields** into a **document**:

1. Proceed to step **4** of the **Mail Merge Wizard**
2. Position the insertion point for the address, click on **Address block** and click on **[OK]**
3. Position the insertion point for the greeting line, click on **Greeting line**, adjust the settings as required and click on **[OK]**

Handy to Know...

- When you are at **Step 4 of 6** of the Wizard there is an option called **More items**. If you click on it, the **Insert Merge Field** displays. If you had included additional information such as the company name or phone number in your recipient list, you could use **More items** to add these fields to the **Address block**.

PREVIEWING THE MERGED DOCUMENTS

The **Mail Merge Wizard** gives you the option of previewing the merged documents to see how they will appear when printed or distributed. At this step you can check the merge process has

worked correctly, and if necessary, go back and make any final adjustments to areas such as the formatting and page layout. You can also select recipients to exclude from the merge if desired.

Try This Yourself:

Same Continue using the previous file with this exercise...

1 In the **Mail Merge** pane, click on **Next: Preview your letters** to go to **Step 5 of 6** of the Wizard

Notice the **Address block** and **Greeting line** have been replaced with data from your recipient list...

2 Click on the **next** arrow under **Preview your letters** to preview each letter

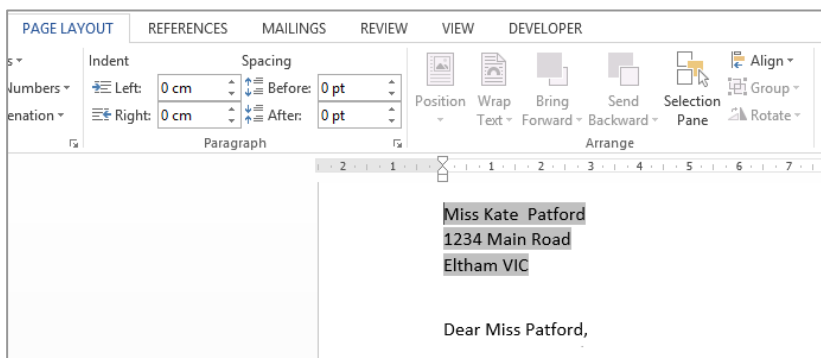
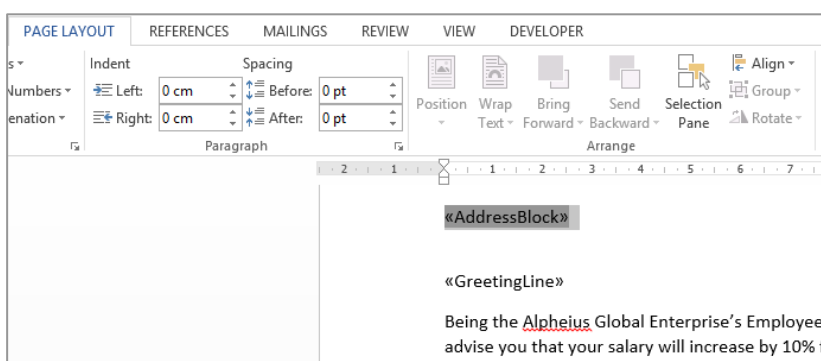
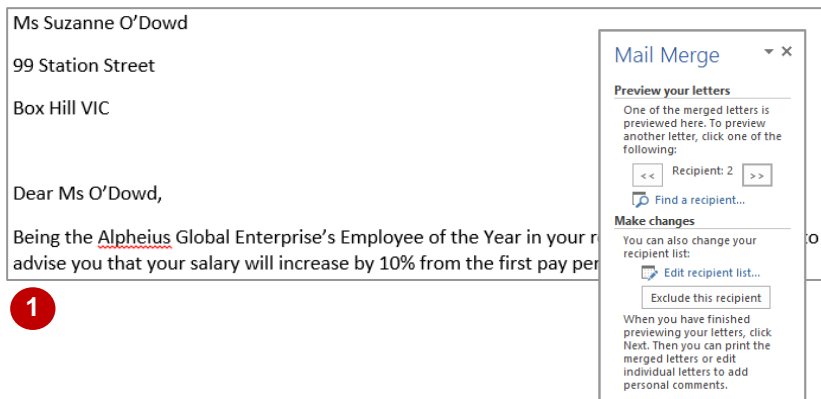
3 Click on **Previous: Write your letter** to return to step 4 of the Wizard

4 In the document, select the **«AddressBlock»** field, click on the **PAGE LAYOUT** tab then click on the down spinner arrow for **After** in the **Paragraph** group until it reaches **0**

Let's exclude Recipient 5...

5 In the **Mail Merge** pane, click on **Next: Preview your letters** to return to **Step 5 of 6**

6 Click on the **next** arrow until **Melissa Quinn's** letter is displayed, then click on **[Exclude this recipient]**
Melissa Quinn is no longer a recipient



5 Notice the spacing you applied to the Address block has been applied to the data.

For Your Reference...

To **preview merged documents**:

1. Proceed to step 5 of the **Mail Merge Wizard**
2. Click on **Next** and **Previous** recipient to preview the merged document for each recipient

Handy to Know...

- To include a recipient in the **Mail Merge**, go to **Step 5: Preview your letters** of the **Mail Merge Wizard** and click on **Edit recipient list** to open the **Mail Merge Recipients** dialog box. Find the recipient and click in the tick box that appears beside their name so that it appears with a tick. Click on **[OK]**.

COMPLETING THE MERGE

At the final step of the **Mail Merge Wizard**, **Completing the merge**, Word will merge the records (recipients) with the main document and create a **merge document** for each record. At

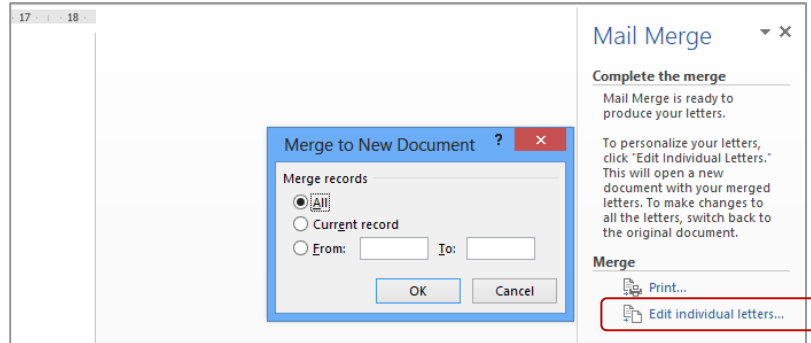
this step you need to choose whether to merge the records directly to the printer and print the letters, or merge the records into a new document which lets you edit individual letters if desired.

Try This Yourself:

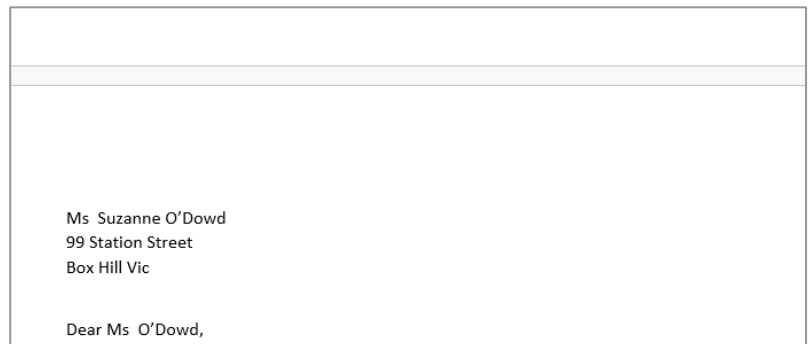
Same File

You must continue using the previous file with this exercise...

- 1 In the **Mail Merge** pane, click on **Next: Complete the merge** to display **Step 6 of 6**
- 2 Click on **Edit individual letters** to open the **Merge to New Document** dialog box
Let's save all merged letters as a new document...
- 3 Ensure **All** is selected under **Merge records**, then click on **[OK]** to create a new document
- 4 Scroll through the document
Each letter is on a separate page as you can see here...
- 5 Click on the **FILE** tab, then click on **Save As** to open the **Save As** place
- 6 Ensure **Computer** is selected then click on **[Browse]** to open the **Save As** dialog box
- 7 Open the **(C:)** drive then navigate to **Course Files for Microsoft Word 2013** and save the document as **My Merged Letters.docx**
- 8 Close the document then save and close the **Mail Merge** document



2



4

For Your Reference...

To **merge** the **records**:

1. Proceed to step 6 of the **Mail Merge Wizard**
2. Click on **Edit individual letters** to edit and save the merged records, or
Click on **Print** to print the form letters

Handy to Know...

- If you wish to print the **merge document** without editing any of the individual letters, click on **Print** in the **Mail Merge** pane. The **Merge to Printer** dialog box will open which lets you select which letters to print.

PRACTICE EXERCISE

Performing A Mail Merge

Tasks:

Completed:

Before starting this exercise you MUST have completed all of the topics in the chapter Performing A Mail Merge...

- 1 Using a blank document, create the recipients list as shown at sample **A** on the next page and save it as **PE_Data Source (Completed).docx**
- 2 Using a blank document, start the mail merge wizard and create a letter from the current page
- 3 Select the recipients list that you created at step 1
- 4 Write the letter using the details shown at sample **B** on the next page
Note: You will have to reduce the Spacing After for all paragraphs to 0 pt (PAGE LAYOUT tab)...
- 5 Preview the merged document, then complete the merge creating a new merged document containing the four recipients' letters
- 6 Use the **Save As** command to save the merged document as **PE_Performing A Mail Merge (Completed).docx**

☐☐☐☐☐☐

Files required for exercise:

None

Files/work created by student:

PE_Data Source (Completed).docx, PE_Performing A Mail Merge (Completed).docx

Exercise Completed:

☐

PRACTICE EXERCISE DATA

Performing A Mail Merge

A

Title	First Name	Surname	Address	City
Miss	Kathryn	Smith	234 Speedster Road	Nunawading 3130
Ms	Caitlin	Browning	99 Upper Abbey Street	Blackburn 3129
Mr	Peter	Dawson	69 Edwards Road	Box Hill 3128
Dr	Chantelle	Butterworth	72 Gardner Avenue	Box Hill 3128

B

Celia Macintosh
Coffee Galore
3 Main Road
Box Hill VIC 3128

«AddressBlock»

5/12/2013

«GreetingLine»

Congratulations! Your business card was one of four lucky entries drawn for this month. Please bring along this letter to have your next coffee and muffin on us.

Yours sincerely

Celia Macintosh
Coffee Galore