Word 2016: Mail Merge
Labels and Form Letters
Microsoft Word 2016: Mail Merge Labels and Form Letters

In this workshop we will use Word’s Merge tools to create labels, letters, and directories from a preexisting data source. We will learn how to properly set up a data source, change the data source, sort and filter the data, and exclude specific data records from inside the Word merge file. We will work with the Address Block, Greeting Lines, and other Merge fields. This workshop assumes you are comfortable with the basics of Microsoft Word.

Mail Merge

Creating Mail Merge with the Mailings Tab

Opening a saved Main Document

Things to Remember

Pandora Rose Cowart
Education/Training Specialist
UF Health IT Training

C3-013 Communicore (352) 273-5051 prcowart@ufl.edu
PO Box 100152 http://training.health.ufl.edu
Gainesville, FL 32610-0152

Updated 12/04/16
Mail Merge
Mail Merge is used when you want to create a set of documents such as a Form Letter or Mailing labels. The Main Document is the structured format of how you want each result to look. The Data Sources is a structured list of related data, such as an Excel spreadsheet or Access database. The Merged Document will consist of one format (Main Document) for each Data Source item.

Step by Step Mail Merge Wizard
To create a Mail Merge using the wizard Select the Mailings tab. Click the Start Mail Merge button in the Start Mail Merge group. Choose the last option on the menu: Step by Step Mail Merge Wizard.

This will open a Mail Merge panel along the right side of your window. This is the same wizard used in Word XP and Word 2003. If you are using an earlier version of Word, please see the Word 2000 documentation found on our training web page.

There are six steps to create your Mail Merge.
1. Select Document Type
2. Select Starting Document
3. Select Recipients
4. Write your Letter
5. Preview your Letter
6. Complete the Merge
Step 1 of 6: Select Document Type
The first step is to choose the kind of Mail Merge document you want to create.

A description of each type will be displayed as you choose that option:

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

**E-mail messages**
Send e-mail messages to a group of people through Microsoft Outlook. You can personalize the e-mail messages that each person receives.

**Envelopes**
Print addressed envelopes for a group mailing.

**Labels**
Print address labels for a group mailing.

**Directory**
Create a single document containing a catalog or printed list of addresses.
Step 2 of 6: Select Starting Document

Step two determines which document will become your main Mail Merge file.

*Use the current document*

Start from the document shown here and use the Mail Merge wizard to add recipient information.
- This option is for Letters, E-mail Messages and Directories.

*Start from a template*

Start from a ready to use Mail Merge template that can be customized to suit your needs. This option comes with a Select Templates link.
- This option is for Letters, E-mail Messages and Directories.

*Change Document Layout*

Click the options link to set up the Envelope Options or the Label Options.
- This option is available for Envelopes and Labels.

*Start from an existing document*

Start from an existing Mail Merge document and make changes to the content or recipients.
- This option has a list of recently used files, a (More files...) option and an Open... button to allow you to choose the document you want to use.
  This option is available for all document types.

Step 3 of 6: Select Recipients

Step three has you choose the recipients, the Data Source.

*Use an Existing List*

Word provides a Browse... link, which will open a Select Data Source window.

If choose an Excel spreadsheet, Word will ask you which worksheet or named range contains your data.

If you choose an Access database, Word will provide you with a list of tables and Queries to choose from.

Once the data source has already been selected, then the Edit Recipient List... option will be available.
When you first choose your data source or if you click the **Edit Recipient List...** link, you will see the **Mail Merge Recipients** window.

![Mail Merge Recipients window](image)

The **Mail Merge Recipients** window allows you to limit and organize your Data Source. The arrows next to each Column Heading allow you to "filter" the data, so you can include or exclude your data based on the values. The **(Advanced...)** option on the filter menu opens a Filter and Sort window:

![Filter and Sort window](image)
Select from Outlook contacts
If you use Microsoft Outlook, you can Select from Outlook contacts.

Depending on your IT Security options, you may need to click one or two confirmation messages for each email that will be sent.

Click on Choose Contacts Folder, and Word will give you a list of the Outlook address books on your computer.

Type a new list
This option allows you to be able to Create a data source. Microsoft Word will create an Access Database with a table containing the recipients you enter.

Sort/Filter: You can sort and filter the list you are creating by using the drop down arrows next to each of the column headings.

New Entry: Create a new record

Delete Entry: Erase current record

Customize Columns...: Change the column headings (field names) for your data source. From this window you can use the Move Up and Move Down buttons to rearrange the existing fields.
Step 4 of 6: Write your letters

Step four is where we build the main document (letter, labels, and envelopes). During this step you have the ability to create and design your document using your own words, pictures and Mail Merge fields.

Special note about labels

If you are creating labels you will have an extra step to replicate the first label throughout the entire page.

It's important to Update all labels or the Mail Merge will only bring in the first record. This button also appears on the Mailings tab, in the Write & Insert Fields group.

Address Block...

Mail Merges is usually used to create "mailings"; letters, envelopes, mailing labels. In anticipation of this, Word has an Address block... option that organizes your fields into a standard mailing address block.

You can specify the different parts of the address block from the left side of this window. If the address block is missing data, or misreporting the data, click the Match Fields... button.
The **Match Fields** button is also available on the **Mailings** tab, in the **Write & Insert Fields** group. From this window you can confirm that Word made the correct matches and create any that Word might have missed.

You can click the "Remember this matching..." check box so Word will remember the correct matching for this data set if you use it again in future merges.

Word will place an «AddressBlock» field in your main document.

The **Address Block** option is also available through the **Mailings** tab, in the **Write & Insert Fields** group.

**Greeting Line**

Greeting lines, such as “Dear Sir or Madam,” and “To Whom it May Concern:” are usually found at the top of form letters. Notice that you have a **Match fields** button here as well. Word gives you an alternative option for when the recipient names are invalid. The **Greeting Line** option is also available through the **Mailings** tab, in the **Write & Insert Fields** group.
Electronic Postage

You can utilize [http://www.stamps.com](http://www.stamps.com) with Microsoft Word to incorporate the postage into your printouts, so you won't have to "stamp" your envelopes. When you first click on the Electronic Postage option, you will receive a message; click the Yes button to find more information.

![Microsoft Word screenshot](image)

More Items...

If you have other fields outside of the address block and greeting line that you would like to appear in your main document, you can access them through the More Items... option.

![Insert Merge Field](image)

Make sure you leave your cursor where you would like the field to appear, click on the More Items... option, chose the field you want and click Insert. You will need to repeat this process for each field you wish to insert.

More Items... is also available through the Mailings tab, in the Write & Insert Fields group by clicking the top button of Insert Merge Field.

The bottom button of the Insert Merge Field, offers a menu of the current fields in your data source. Word will place the chosen field where the cursor is active in the document.
Step 5 of 6: Preview your Main Document

This step allows you to see how your data falls within the structure of your document. You can use the navigation arrows [<< Recipient: 1 >>>] to move through the data records, previewing how each record will appear in the final result.

Find a recipient…: Search through existing records to find a specific value. You can choose to look in all fields (the whole dataset) or one field (column).

Edit recipient list…: Sort and Filter your dataset through the Edit Recipient List window (see Page 4 of this packet).

Exclude this recipient: Prevent the current record from being printed. To exclude several records, or to re-include a record, click on the Edit recipient list… button.

Step 6 of 6: Complete the merge

The final step is to decide whether to send your new document to the printer (Print…) or to a new Word document (Edit individual…).

It’s safer to choose the Edit individual… option, so you can see what will be printed.

This will also give you the ability to make minor changes throughout the resulting document such as adjusting a name, rearranging an address and personalizing any of the results.

This option also allows you to be able to reprint any one of the individual items in case of printer errors such as paper jams.

As this pane says, if you discover a change that needs to be made on all the results, you can come back to this window, make the change and then "re"-merge by clicking on the Edit individual… option again.
**Note about E-Mails**
You will not get a chance to **Edit individual...e-mails**. For E-mails the only option is to **Merge the Electronic Mail...**

You can choose which database field contains the recipient's e-mail address, type in a Subject line for all the e-mails, choose a **Mail Format** (**HTML** – will keep all of your basic formatting; **text** – plain text; or **attachment** – will keep all of your formatting by attaching the word document to the e-mails) and decide how many records to send at once (All, Current, or a Range).

If you send the e-mail as an attachment or text you may get a warning message for each email. If the merge goes through, Word does not give you a confirmation message, the email just goes out. It's always a good idea to use yourself as one of the recipients, but check your sent messages to see if the emails were mailed.

**Creating Mail Merge with the Mailings Tab**
There are three buttons in the **Start Mail Merge** group on the **Mailings** tab that can be used to turn your current document into a Main Document for your Merge.

**Start Mail Merge**
The first step in creating a Mail Merge is to determine the document type, i.e. Letters, E-Mail Messages, Envelopes, Labels, or Directory. See Page 2 of this packet for a visual.

This menu can also be used to reset your document to a **Normal Word Document**. This will remove the linked Data Source and all Mail Merge properties.

This menu is also used to launch the Mail Merge Wizard, described on the previous pages of this packet.

**Select Recipients**
Once you have set the document type, you need to choose your Data Source from the **Select Recipients** button.

You can type in a new list, Use an Existing List, or Select a list from your Outlook Contacts. See **Step 3 of 6: Select Recipients** starting on Page 3 of this packet for more information on selecting/creating your data source.

Once you have selected the recipients the rest of the **Mailings** tab will become available.

**Edit Recipient List**
The third button opens the list of recipients. You can sort, filter, and exclude records from this window.
**Write & Insert Fields**

**Highlight Merge Fields** – Toggle the shading behind each of the fields. Turning this option on makes the fields stand out on the page.

**Address Block** – Modify and insert an Address Block. See Page 6 for more details.

**Greeting Line** – Modify and insert a Greeting Line. See Page 7 for more details.

**Insert Merge Field** – Insert fields from the data source. The top button will open a selection window and the bottom will open a selection list of fields. See Page 8 for more details.

**Rules** – The Rules option gives a list of advanced Mail Merge fields. You will see the **Next Record** field when you create labels.

**Match Fields** – You can specify the parts of the Address Block and Greeting Line from the **Match Fields**… button. See Page 7 for more details.

**Update Labels** – When you make a change to the first label, you must press the **Update Labels** button to change ALL the labels.

**Preview Results**

**Preview Results** – will show the Recipient (data source) values in place of the field names.

**Navigation buttons** – When you are looking at the previewed results, you can use the navigation arrows to go to the First Record, Previous Record, Next Record and Last Record. Or type in a record number between the navigation buttons and press enter.

**Find Recipient** – Locate a particular record. You can ask Word to search the whole dataset, or only one field (column).

**Auto Check for Errors** – This button gives you three choices on how to report any errors that may occur with your mail merge.

**Finish and Merge**

The final step in creating a Mail Merge is to decide what to do with the final result, i.e. creating individual documents, sending the documents directly to the Printer, or sending them through Microsoft Outlook.
**Data Source**
Excel is an excellent place to store your recipients. It has the table grid structure that Word needs to pull in the dataset. In class we’ll use Word, Excel, and Access data as a list of Mail Merge recipients.

Word is looking for the first line of the data to be the titles. You can tell it otherwise and have Field1, Field2… but it’s helpful to have titles in the original data.

Row 1 should be either the titles, or the first line of data. If you have created a “header” or formulas above your dataset you may have issues. Delete any rows that will not be brought into the Word merge before you start.

**Opening a saved Main Document**
When you open a saved main document, you will get a warning message. This is asking permission to link to the outside file.

If you answer No, word will open the main document, but remove the linked document. If you save the file this way, it will save without a data source. Use the Select Recipient list to attach the data source.

If you answer yes, Word will open the main document and link it to the data source. If it cannot find the record source you will get a series of error messages, and Word will give you a chance to find the file.
Things to Remember

- The first line of your Excel data source should be the title row.

- LABELS
  
  o Don't forget the **UPDATE LABELS** button.
  
  o The first time you make labels you may need to turn on the gridlines from the Table Tools Layout tab.
  
  o The Labels button on the mailing tab is to make one label, if you're merging, use the START MAIL MERGE option, and choose labels.
  
  o If you can't find the label number you need, make sure you're using the right "Label vendor" in the label options window

- When using **DIRECTORIES** don't forget to press **ENTER** at the end to make sure the next entry appears on a new line.

- When using **ENVELOPES** the area for the address block is already setup, it's just invisible. Click a little more than half way down, near the center of the page.