Word 2013- Mail Merge

Using the Mail Merge Wizard
1. Open the desired Word document to merge.
2. Click the MAILINGS tab > Start Mail Merge > Step by Step Mail Merge Wizard...
3. Choose the desired document type.
4. At the bottom right corner of the window, click Next: Starting document.
5. Verify that Use the current document is selected.
6. Click Next: Select recipients.
7. Choose the desired option for selecting recipients and click the option below the Select recipients section.
   a. E.g., under Use an existing list, click Browse...
8. Make any modifications to the recipients and click OK.
9. Click Next: Write your letter.
10. Place the cursor in the desired location for the merge field.
11. Click More items...
12. Click the desired field > Insert > Close.
13. Repeat steps 9 – 11 for all remaining merge fields.
14. Click Next: Preview your letters.
15. Under Preview your letters, click the forward arrow (>>) and backward arrow (<<) to preview the letters to recipients.
16. Click Next: Complete the merge.
17. Under Merge, click Print to print the merged documents, or click Edit individual letters... to save the document for printing later.
   a. The Edit individual letters method will open all merged documents into one file.

Exporting Word Tables to Excel
1. Open the Word document containing the table to be exported.
2. Click anywhere inside the table.
3. Under the TABLE TOOLS section, click the LAYOUT tab.
4. In the Table group, click Select > Select Table.
5. In the Data group, click Convert to Text.
6. Verify Tabs is selected and click OK.
7. With all of the text still highlighted, press Ctrl + C to copy the text.
   a. Alternatively, right-click the text and click Copy.
8. Open an Excel spreadsheet.
9. Verify the first cell, A1, is selected and press Ctrl + V on the keyboard.
   a. Alternatively, right-click cell A1 and click Paste (formatting options do not matter).
10. Make any formatting changes in the Excel spreadsheet.
11. Select the entire table.
12. In the Style group, click Format as table and choose the desired table format.
13. Click OK.
14. Save the spreadsheet.

Using Excel as a Data Source
1. Open the desired Word document to merge.
2. Click the MAILINGS tab > Start Mail Merge > Step by Step Mail Merge Wizard...
3. Choose the desired document type and click Next: Starting document.
4. Verify Use the current document is selected.
5. Click Next: Select recipients.
6. In the Select recipients section, verify Use an existing list is selected.
7. In the Use an existing list section, click Browse...
8. Find and select the Excel spreadsheet and click Open.
9. Choose the desired sheet and click OK.
10. Make any modifications to the recipients and click OK.
11. Click Next: Write your letter.
12. Place the cursor in the desired location for the merge field.
13. Click More items...
14. Click the desired field type > Insert > Close.
15. Repeat steps 12 – 14 for all remaining fields.
16. Click Next: Preview your letters.
17. Under Preview letters, click the forward arrow (>>) and backward arrow (<<) to preview the letters for recipients.
18. Click Next: Complete the merge.
19. Under Merge, click **Print** to print the merged documents, or click **Edit individual letters**... to save the document for printing later.
   a. The **Edit individual letters** method will open all merged documents into one field.

**Advanced Merge Fields**

**Note:** These steps will no longer be using the Mail Merge Wizard.

1. Open the desired Word document.
2. Click the **MAILINGS** tab.
3. In the Start Mail Merge group, click **Start Mail Merge** and choose the desired document type.
4. In the same group, click **Select Recipients** and choose the desired option.
   a. **Note:** Once the recipient source has been selected, the **Edit Recipient List** button become available.
5. Click **Edit Recipient List** to make any changes to the recipients and click **OK**.
6. Follow the proceeding instruction sets to insert the desired merge fields.

**Inserting an Address Block Merge Field**

**Note:** Follow the steps for Advanced Merge Fields before following the proceeding set of instructions.

1. Place the cursor in the desired location.
2. Click the **MAILINGS** tab.
3. In the Write & Insert Fields group, click **Address block**...
4. Under Insert recipient’s name in this format, choose the desired name format.
   a. The Preview section will display how the address block will look.

**Inserting a Greeting Line Merge Field**

**Note:** Follow the steps for Advanced Merge Fields before following the proceeding set of instructions.

1. Place the cursor in the desired location.
2. Click the **MAILINGS** tab.
3. In the Write & Insert Fields group, click **Greeting line**...
4. Under Greeting line format, set the options to the desired format.
   a. The Preview section will display how the greeting will look.
5. If the preview displays information incorrectly, under Correct Problems, click **Match Fields** and set the correct fields.
6. Click **OK** when done.
   a. The field will be displayed as **<<AddressBlock>>**.

**Inserting a Merge Field**

**Note:** Follow the steps for Advanced Merge Fields before following the proceeding set of instructions.

1. Place the cursor in the desired location.
2. Click the **MAILINGS** tab.
3. In the Write & Insert Field group, click **Insert Merge Field**.
4. Choose the desired data field to insert.

**Adding a Formatting Switch to a Merge Field containing a date**

**Note:** Follow the steps for Inserting a Merge Field before following the proceeding set of instructions.

1. Right-click the merge field containing a date.
2. Click **Toggle Field Codes**.
   a. The field should look similar to: `{MERGEFIELD fieldname}`
3. Verify the cursor is at the end of the field name, inside the brackets, and type: `\@
4. Press the spacebar and enter the desired combination of date codes, separated by spaces, within quotations, e.g., `{MERGEFIELD fieldname\@ “dddd, MMMM dd, yyyy”}` will display as `Friday, May 31, 2013`.
   a. `dd` – numerical day
   b. `dddd` – full name of day of week
   c. `MM` – numerical month
   d. `MMM` – abbreviated month
   e. `MMMM` – full month name
   f. `yyyy` – four-digit year
5. Right-click the merge field.
6. Click **Toggle Field codes**.
7. Right-click the merge field.
8. Click **Update Field**.

**Correcting Merge Problems**

- Formatting corrections are usually done in the Write your letter phase of a mail merge.
- If field data is incorrect, modify the data source file.

**Conditional Mail Merge**

**Note:** A conditional merge inserts text based on whether a given condition is true of false.
Open the desired document to merge.
2. Click the MAILINGS tab.
3. In the Start Mail Merge group, click Start Mail Merge and choose the desired option.
4. In the same group, click Select Recipients and choose the desired option.
5. Insert the desired merge fields.
6. Place the cursor where the conditional text will be inserted.
7. In the Write & Insert Fields group, click Rules > If...Then...Else...
8. Click the Field name drop-down menu, choose the field that will be the condition.
9. Click the Comparison drop-down menu, choose the operator.
10. Click the Compare to field, enter the value for the condition.
11. In the Insert this text field, insert the text for if the value is true to the condition.
12. In the Otherwise insert this text field, insert the text for if the value is false to the condition.
13. Click OK when done.

Create Envelopes

Note: Enable paragraph mark-up to easily see the delivery address area by click the HOME tab and in the Paragraph group, click the Paragraph icon. Alternatively, press Ctrl + Shift + 8.

1. Open a new Word document.
2. Click the MAILINGS tab.
3. Click Start Mail Merge > Envelopes...
   a. The Envelope Options dialog box appears.
4. In the Envelope Size drop-down menu, choose the desired envelop size.
5. Modify the Delivery address and Return address options as desired.
6. Click OK.
7. In the Start Mail Merge group, click Select Recipients and choose the desired option.
   a. Once the recipient source has been selected, the Edit Recipient List button becomes available.
8. Click Edit Recipient List to make any changes to the recipients and click OK.
9. Click the return address area and enter the desired return address.
10. In the Write & Insert Fields group, click Address Block.
11. In the Write & Insert Fields group, click Address Block.
12. Choose the desired format and click OK.
13. In the Preview Results group, click Preview Results to preview to output of the merge.
14. In the Finish group, click Finish & Merge and choose the desired option.

Using Mail Merge to Create Labels

1. Open a new Word document.
2. Click the MAILINGS tab.
3. Click Start Mail Merge > Labels...
4. Choose the desired label layouts.
   a. If gridlines are desired, click the LAYOUT tab, in the Table group, click View Gridlines.
   b. Click the MAILINGS tab to continue the merge set up.
5. In the Start Mail Merge group, click Select Recipients and choose the desired option.
   a. Once the recipient source has been selected, the Edit Recipient List button becomes available.
6. Click Edit Recipient List to make any changes to the recipients and click OK.
7. In the Write & Insert Fields group, click Address Block.
8. Choose the desired format and click OK.

To Adjust Label Formatting for All Labels

1. Format the first label accordingly.
2. Click the MAILINGS tab.
3. In the Write & Insert Fields group, click Update Labels.
   a. <<AddressBlock>> should now appear in all labels.
4. In the Preview Results group, click Preview Results to preview the output of the merge.
5. In the Finish group, click Finish & Merge and choose the desired option.

To Adjust Alignment

1. In the upper left hand corner of the table, click the move icon to select the entire table.
2. Click the LAYOUT tab.
3. In the Alignment group, click the desired alignment option.