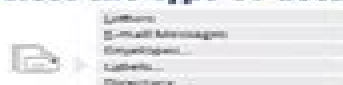


Word 2016 Mail Merge

1. Select the type of document



2. Choose the list of recipients



	A	B	C	D
1.	First	Last	Co	Street
2.	State	City		
3.	Phone	Address		
4.	Twitter	Address		

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 boxes, 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 AN 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 CHOOSE 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 recognize:

- 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 facilitate 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, MailingAddress, etc.
- Headings should realistically be less than 40 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> or <Shift>+<Tab>.
 - To add a new entry, press <Tab> after the last column, or [Click] NEW ENTRY or press <Alt>+<N>.
 - To add/remove/rename 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] [X] at the top to deselect/select all.
 - To sort, [Click] on a column header, [Click] again to reverse the sort.
 - [Click] [V] on a header to sort and filter entries. Choose ADVANCED for more options.
- Or, choose [Filter] for advanced filtering and [Sort] for advanced sorting.

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." Each additional row of criteria should begin with a selection of either "AND" or "OR" by [Clicking] the drop-down list at the left. "And" indicates the records must match all criteria rows. "Or" indicates the records can match any one criteria row.

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 successive THEN BY lists 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, [Click] NEW ENTRY or press <Alt>+<N>.
4. To add/remove/change columns, [Click] CUSTOMIZE COLUMNS, ADD/DELETE or RENAME the columns, as required. [Click] OK when finished. [Click] YES or OK as many times as required to exit all the dialog boxes.

3. Write the Document

Writing the Document

Write your document in the usual way, inserting field codes to indicate where merged data is to be placed, e.g., Dear <First, Name>.

- To insert a field code, 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 Labels

1. Choose START MAIL MERGE, LABELS, then specify the PRINTER INFORMATION.
2. [Select] the preferred LABEL VENDOR and PRODUCT NUMBER, e.g., JREX10 US Letter/5262 Easy Peel Address Labels. If the label type is not shown, [Click] NEW LABEL, define the label margins and dimensions, name these settings, and [Click] OK.
3. Verify the LABEL INFORMATION is correct. [Click] OK.
4. A table appears that matches label dimensions. Choose TABLE TOOLS, LAYOUT, VIEW GRIDLINES to see it.
5. Select the recipient list in the usual way.
6. Enter all text, merge fields, and graphics in the first label.
7. Choose MAILINGS, then [Update Labels] to copy the first label over the remaining labels.

Microsoft Mail Merge Quick Guide

Lei Huang

A red circular graphic with a gradient, appearing as a semi-circle or a partial circle, located to the right of the author's name.

Microsoft Mail Merge Quick Guide:

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