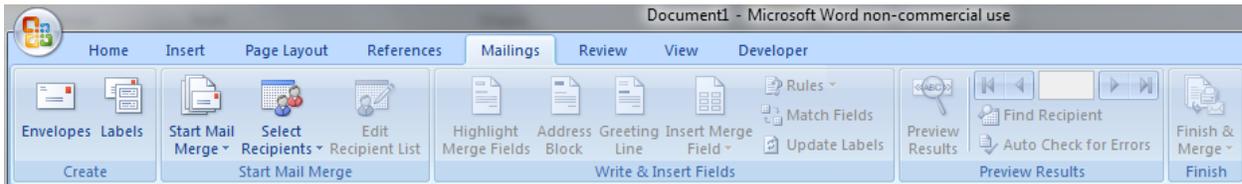# Using Mail Merge in Microsoft Word

Performing Mail Merge with Microsoft Word 2007 and later

1. Open Word and click on the "Mailings" tab, which displays the Mailings ribbon.

2. Now you simply follow the icons from left to right, as it walks you through. Each icon when hovered over displays its function. If you have not reached the point to perform that function, the icon remains grayed out until you perform the necessary pre-required steps.

3. The first icon starts the mail merge process, and provides the opportunity to choose the project (letters, envelopes, labels, etc.).
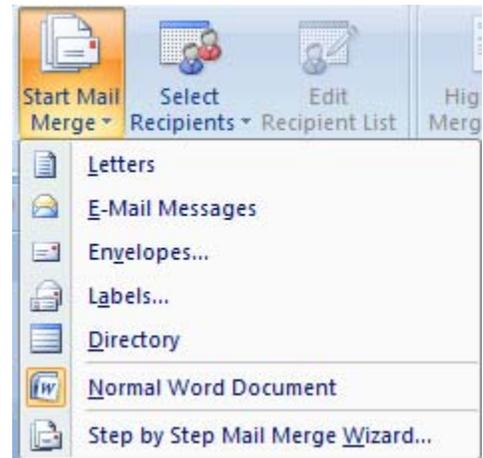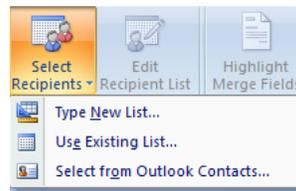
4. A new document will open displaying either a letter, envelope or label sheet.

5. Next you will select recipients. Choose "Use existing list" (again, you did create your database right?)

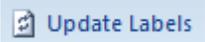6. Navigate to the folder your database is saved in and select it.

7. Once the database has been selected edit the recipient list by clicking on that icon. This assumes you want to exclude some entries in your database (or check to be sure it is the correct database). Otherwise skip this step and go on to the next.

8. Now enter the fields you wish to use by either clicking the drop-down arrow to the right of the "Insert Merge Field" button. This presents a drop-down list of the available fields, allowing formatting as each field is added; or click on the "Insert Merge Field" button (not the arrow), and get the traditional box containing fields. Use this option if you wish to insert multiple fields at once, and format items later (as older versions did). Double-click each field in order to insert it.
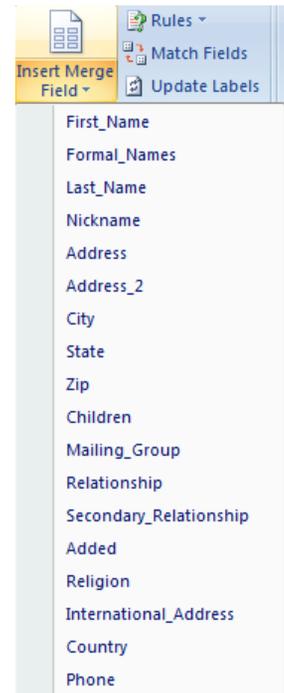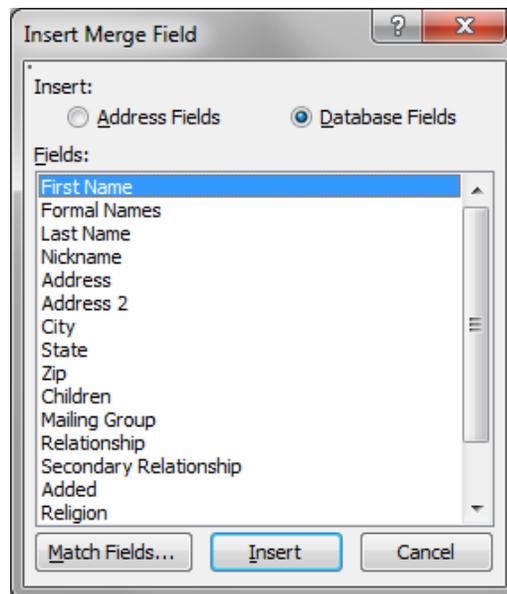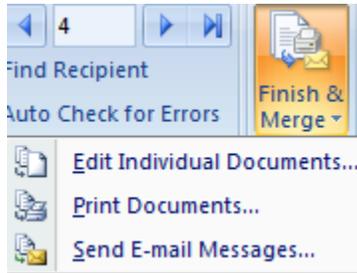
9.

Using Mail Merge in Microsoft Word

9. If creating labels, the next step is to click on the "Update Labels icon. **Update Labels** This displays the entire page of labels (showing only the fields inserted and including the "Next record" command. If working with letters or envelopes, this step is not needed.

10. Next, click the Preview Results button to see if the label appearance is satisfactory.

11. You can toggle through records using the arrow controls.

12. The final step is to click the "Finish & Merge" button. This will display three choices, "Edit individual documents", "Print Document", or "Send E-mail messages". What to choose depends on your intent.
    - Edit individual documents creates a new document "fixed in time". The database entries have been "embedded" into this new document (still a set of labels if that was the original project), but they are now a part of the document, no longer **linked** to the database. They still include all the selected records from the database, just not linked. I will explain better later.
    - Choosing "Print Document", immediately sends your merged project to the printer to print the necessary letters, or labels, or envelopes.
    - Selecting "Send E-mail messages" only works if e-mail addresses were supplied. Ignore this for now.

13. Save your original project (the Mail Merge document). This saves the document, remembering it is **linked** to the selected database.

14. If you also chose "Edit individual documents", save this document as well. Remember these are two different documents, currently identical in appearance, but very different in function.

Understanding the important difference between the Mail Merge document and the "Edit individual documents" document (chosen from the Finish and Merge menu)
- The Mail Merge document is a project that creates individual letters, envelopes, or labels for all recipients you selected. It remembers the location and the name of your selected database (**linked**). If you choose to change any item in that database at a later date, when you open that Mail merge document, it loads the "changed" database, and prints the records using the new data.
    o However, if you either change the name or location of the database, the document will be unable to associate the data from that database.
        ▪ When such a document comes up, it notifies that it cannot find the database, and asks the user to find it, or start over.
        ▪ Assuming you merely changed the name or location, simply navigate to the new location or name. It should adjust.
    o By referring to the database each time, you are assured the document is using up-to-date information. It stays always current.
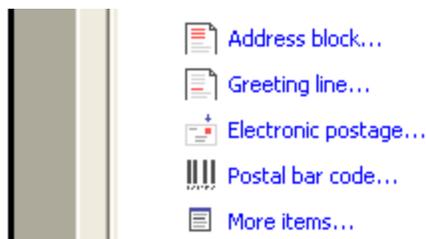
Using Mail Merge in Microsoft Word

- The "**Edit individual documents**" document will not change. Whatever the data was when it was created is the way it remains. If you update the data (information) in the database, it will **not** get updated in the Edit document. As for example, you were printing labels, if changes had been made to the database, you would be required to manually make each change in its respective label.
    - The purpose for "Edit individual documents" is if you want to preview all the labels; or if you need or want to use a professional printing service. They do not have your database file. When they try to print the Mail Merge document, it would have no entries. By instead providing them this "fixed, data-embedded document, printing is possible anywhere, without needing to take the database with.

Using Mail Merge in Microsoft Word

Mail Merge in earlier versions of Microsoft Word (2003 and earlier)
- Simply follow the Mail Merge Wizard
- Beginning with Word 2002, Microsoft Word can use Works databases very easily.
    - Word 2000 and earlier can use Works databases, but only:
        - By having Works Suite Add In for Word installed, or
        - By saving as a Comma Separated Values file (csv)
        - Remember to have first record of database repeat the field names, even though the column headings also display them, because the Works column headings are lost when saved as a Comma Separated Value (csv).
- Microsoft Word has always been able to use databases created in Word and Excel.
- Follow the immediate steps below to use Mail Merge in Microsoft Word 2003 and earlier. See farther below to use Mail Merge in Microsoft Word 2007 and later.

1. Go to Tools menu and choose Letters and Mailings (2002 & 2003) and then Mail Merge Wizard (choose Mail Merge Wizard directly from 2000 or before).
2. Also go to View/Toolbars and click on the Mail Merge Toolbar (if no check in front of it).
3. On the right, the wizard appears. Click on which radio button you want to mail merge into (Letters, Envelopes, Labels, etc).
4. Click at the right bottom on Next: Start Document.
5. For letters, use the Current document. For Envelopes or labels choose "Change document layout" and choose labels.
    a. For Labels or Envelopes choose Options to pick the size of envelopes or the style of labels.
6. Click Next: "Select Recipients".
7. You already have the database saved (or you should have), so click on "Use an existing List", and then click on "Browse". Navigate to the folder into which you saved you database or Word document containing the data table (See "Creating a database with Word").
    a. If you are using a database created in Excel, you may need to tell it to use "Sheet one".
8. The data base will appear showing all the entries. You can select all, clear all, or select individually.
    a. **Hint**: If you will use most names, select all then deselect the few unwanted. Similarly if you are using only a few, clear all then select on those few.
    b. Click OK, and the database base disappears, but has been associated with the document (whether letters, labels, or envelopes).
9. Click Next: "Write you letter" or "Arrange your label/envelope".
10. A letter, an envelope, or a sheet of labels appear ready to add fields as follows:
    a. If a letter, the blank letter with the cursor blinking appears. Start it (such as "Dear <space>). When you want to merge a field (such as First Name), click on the "Insert Merge Field (from the Mail Merge Toolbar), or click on "More Items" in the


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right pane.   The list field appears. You can now insert a
field.

- Either click on Insert, or double-click the field you want.

b. If an envelope or label, similarly use the Mail Merge toolbar or click on "More Items". The list field appears. You can now insert a field into the envelope/label.

- **Hint**: choose all the fields in the proper order desired. You can format the document later.

c. With the letter, add formatting as you type and add each field where and as you want it.

d. With the envelopes/labels, you now have all the necessary fields, but you must add spaces, commas, or line breaks (Enter key) as you need.
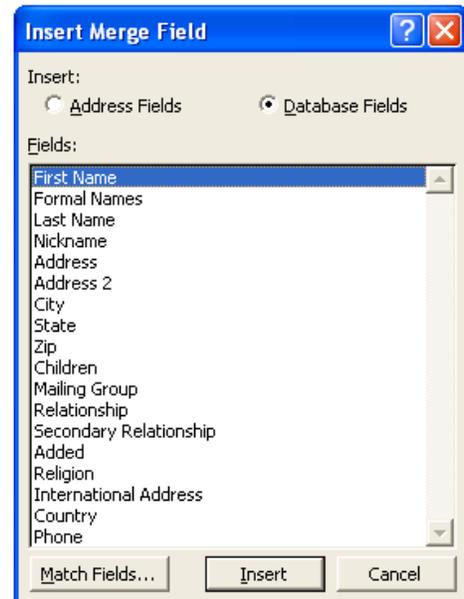
 Reminder, whether you're doing letters or envelopes/labels, you **must** add all the formatting. (this includes punctuation, spaces and new lines).

11. Click on Next: Preview your letter/envelope/labels. Your first row names, etc. appear.

   a.   On the right you can toggle through several or all records.

12. Click on "Complete the merge".

   a. With letters you see only the first entry. On the Merge Toolbar you can still toggle through entries. To see all the letters in the Preview, **and even edit specific ones**, click on "Edit individual letters", and choose "all" or "current record".

- To merely print them all, click on "Print", and again choose "all" or "current record".

   b. With labels you will also see only one at this point. In order to see (and print) them all, (and this is the step most forget) you must click on "**Propagate labels**" (icon just left of the < > for toggling through entries. Now all the labels appear on the document or Print Preview.

   c. If you have more than enough names to fill more than one page of labels, in order to print them all, you must click on the "Merge to Printer" icon (icon third from the right in Word 2002). The box asking for "all" or "current" comes up. Clicking OK bring up the Print dialog box. Click OK to print all the labels.

   13. You are finished and ready to click on Print (or already printing).

You also have the option of simply following along on the Mail Merge toolbar, icon by icon.
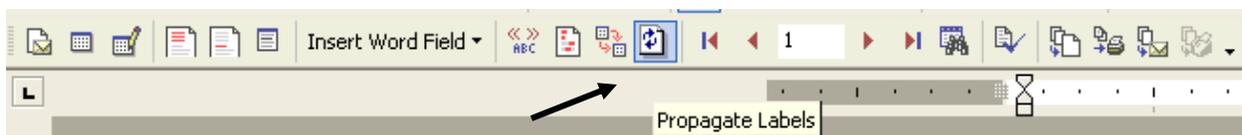
14. Save your original project (the Mail Merge document). This saves the document, remembering it is attached to the selected database.
15. If you chose "Edit individual letters (or labels)", save this document as well. Remember these are two different documents, currently identical in appearance, but very different in function.

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- The Mail Merge document is a project that creates individual letters, envelopes, or labels for all recipients you selected. It remembers the location and the name of your selected database. If you choose to change any item in that database at a later date, when you open that Mail merge document, it loads the "changed" database, and prints the records using the new data.
  - However, if you either change the name or location of the database, the document will be unable to associate the data from that database.
    - When such a document comes up, it notifies that it cannot find the database, and asks the user to find it, or start over.
  - By referring to the database each time, you are assured the document is using up-to-date information. It stays always current.
- The "Edit individual documents" document will not change. Whatever the data was when it was created is the way it stays. If for example, you were printing labels, if changes had occurred, you would be required to manually make each change.
  - The purpose is if you want (or need) to print the document (series of labels, letters, etc.) elsewhere such as a professional printing service, where they do not have the database file. When they try to print the Mail Merge document, it would fail. By instead providing them this "fixed, data-embedded document, printing is possible anywhere, without needing to take the database with.