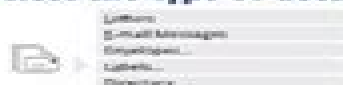


# Word 2016 Mail Merge

## 1. Select the type of document



## 2. Choose the list of recipients



|    | A     | B       | C    | D     |
|----|-------|---------|------|-------|
| 1. | First | Last    | City | State |
| 2. | State | City    |      |       |
| 3. | First | Last    |      |       |
| 4. | First | Initial |      |       |

## 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

**J Dewey**



## **Microsoft Mail Merge Quick Guide:**

Microsoft Word 2010 Mail Merge and Forms Quick Reference Guide (Cheat Sheet of Instructions, Tips and Shortcuts - Laminated Card) Beezix, Inc Staff,2010-12-31 Laminated quick reference card showing step by step instructions and shortcuts for how to use mail merge and forms features of Microsoft Office Word 2010 The following topics are covered Mail Merge Choosing the Document Type Recipient Lists Creating a Recipient List in Word Selecting an Existing Recipient List Using Outlook Contacts Editing an Existing Recipient List Selecting and Sorting Recipients Writing the Document Creating a Label Document Using an If Then Else Rule Previewing the Merge Merging The Mail Merge Wizard Highlighting Merge Fields Forms Showing Macro and Form Controls Creating a Template Library in Windows 7 Creating the Template File Inserting Content Controls Setting Content Control Properties Add a Title Format Contents Using a Style Self Destruct Plain or Rich Text For Plain Text For Building Block Gallery For Combo Box and Drop Down List For Date Picker For Check Box Turning On Off Design Mode Changing Placeholder Text Protecting a Form from Changes Unprotecting a Form Protecting Only Parts of a Form Preventing Editing of a Control s Content Prevent Editing Parts of a Document Preventing Deletions Accessing the Form to Fill it Out Changing the Form Template This guide is one of several titles available for Word 2010 Word 2010 Introduction Word 2010 Formatting Word 2010 Advanced Word 2010 Mail Merge Forms Word 2010 Templates Macros Word 2010 Collaboration Features Microsoft Word 2016 Mail Merge Quick Reference Guide - Windows Version (Cheat Sheet of Instructions, Tips and Shortcuts - Laminate Beezix Software Services,2016-02-22 This two page laminated quick reference card showing step by step instructions and shortcuts for how to use mail merge features of Microsoft Word 2016 Windows Version Written with Beezix s trademark focus on clarity accuracy and the user s perspective this guide will be a valuable resource to improve your proficiency in using Word Mail Merge This guide is suitable as a training handout or simply an easy to use reference guide for any type of user The following topics are covered Select the Type of Document Choosing the Document Type Choose the List of Recipients Formats for Recipient Lists Creating a Recipient List Directly Creating a Recipient List in Word Selecting an Existing Recipient List Using Outlook Contacts Editing an Existing Recipient List Selecting and Sorting Recipients Writing the Document Creating Envelopes Creating Labels Using an If Then Else Rule Suppressing Blank Address Lines Changing Case of Output Text Changing Format of Date Time Merge the Document with the Recipients Previewing the Merge Merging Merging to a New Document Merging to Email General Merge Tips Recommendations for Effective Post Mail Addressing The Mail Merge Wizard Highlighting Merge Fields **Microsoft Word 2003 Mail Merge and Forms Quick Reference Guide** Beezix, Inc Staff,2004-03 Laminated quick reference guide showing step by step instructions and shortcuts for how to use mail merge and forms features in Microsoft Word 2003 The following topics are covered Mail Merge Task Pane vs Toolbar Merging Form Letters Preparing a Data Document Editing Fields in a Data Document Data Sources Merging Mailing Labels Merging Envelopes Merging Email Merging Selected

Records Sorting Records Conditional Statements and Viewing Field Codes Forms Preparing the Form Layout Inserting Form Fields Text Boxes Drop Down Lists Check Boxes Setting Form Field Options Creating Help for a Form Field Form Field Shading Protecting a Form from Changes Using the Form Saving Form Field Data Only Printing Field Data Only and Making Changes to the Form Template This guide is suitable as a training handout or simply an easy to use reference guide for any type of user *Publisher for Microsoft 365 Training Manual Classroom in a Book TeachUcomp,2024-06-13* Complete classroom training manual for Publisher for Microsoft 365 128 pages and 64 individual topics Includes practice exercises and keyboard shortcuts You will learn how to create publications format objects customize schemes create tables perform mailings prepare print files and much more Topics Covered Getting Acquainted with Publisher 1 The Publisher Environment 2 The Title Bar 3 The Ribbon 4 The File Tab and Backstage View 5 The Quick Access Toolbar 6 Touch Mode 7 The Scroll Bars 8 The Page Layout View Buttons 9 The Zoom Slider and Zoom Button 10 The Status Bar 11 The Mini Toolbar 12 Keyboard Shortcuts Creating Basic Publications 1 Creating New Publications 2 Changing the Publication Template 3 Using Business Information 4 Saving Publications 5 Closing Publications 6 Opening Publications 7 Inserting New Pages 8 Deleting Pages 9 Moving Pages Basic Skills 1 Inserting Text Boxes 2 Inserting Shapes 3 Adding Text to Shapes 4 Inserting Pictures Saved Locally 5 Inserting Online Pictures 6 Inserting Picture Placeholders 7 Using the Scratch Area 8 Moving Resizing and Rotating Objects 9 Deleting Objects 10 Using Find and Replace 11 Using AutoCorrect 12 Inserting WordArt Formatting Objects 1 Formatting Text 2 Formatting Shapes 3 Formatting Pictures Using Building Blocks 1 Creating Basic Building Blocks 2 Using Building Blocks Master Pages 1 Using Master Pages Customizing Schemes 1 Creating a Custom Color Scheme 2 Creating a Custom Font Scheme 3 Customizing Page Backgrounds Using Tables 1 Creating and Deleting Tables 2 Selecting Table Elements 3 Inserting and Deleting Columns and Rows 4 Merging Text in Table Cells 5 Modifying Text in Table Cells 6 Formatting Tables Page Setup and Layouts 1 Using Page Setup 2 Using Layout Guides 3 Using the Rulers Mailings 1 Mail Merge 2 The Step by Step Mail Merge Wizard 3 Creating a Data Source 4 Selecting Recipients 5 Inserting and Deleting Merge Fields 6 Previewing a Merge 7 Detaching the Data Source 8 Finishing a Mail Merge 9 Merging a Catalog Printing 1 Previewing and Printing 2 Using the Pack and Go Feature 3 Sharing and Exporting Publications Helping Yourself 1 Using Publisher Help **Word Processing 2023: Fast Learning Quick Reference** Pasquale De Marco,2025-04-10 In the ever evolving world of digital communication mastering word processing has become an essential skill for individuals across all walks of life Whether you are a student crafting essays a professional creating reports or an entrepreneur developing marketing materials the ability to create and edit documents efficiently is paramount Introducing Word Processing 2023 Fast Learning Quick Reference the ultimate guide to mastering Microsoft Word 2023 the industry leading word processing software This comprehensive resource is designed to empower you with the knowledge and skills you need to harness the full potential of Word transforming you into a confident and proficient user With clear and concise explanations step by step

instructions and real world examples Word Processing 2023 Fast Learning Quick Reference takes you on a journey through the world of word processing covering everything from the basics to advanced techniques You will learn how to navigate the user interface edit and format text insert images and objects create tables and charts and collaborate on documents with others In addition to the core functionalities of Word Word Processing 2023 Fast Learning Quick Reference delves into more advanced topics such as styles templates and macros You will discover how to use these features to streamline your workflow create professional looking documents and automate repetitive tasks saving you time and effort Whether you are new to word processing or looking to refine your skills Word Processing 2023 Fast Learning Quick Reference is the perfect companion With its comprehensive coverage practical advice and engaging writing style this book will equip you with the knowledge and confidence you need to tackle any word processing task with ease Join the ranks of word processing experts and unlock the full potential of Microsoft Word 2023 with Word Processing 2023 Fast Learning Quick Reference Elevate your productivity enhance your communication and create documents that leave a lasting impression If you like this book write a review [Word for Microsoft 365 for Lawyers Training Manual Classroom in a Book TeachUcomp,2024-03-26](#) Complete

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*Microsoft Word 2019 for Lawyers Training Manual Classroom in a Book TeachUcomp*, 2020-10-27 Complete classroom training manuals for Microsoft Word 2019 for Lawyers 396 pages and 223 individual topics Includes practice exercises and keyboard shortcuts You will learn how to perform legal reviews create citations and authorities and use legal templates In addition you ll receive our complete Word curriculum Topics Covered Getting Acquainted with Word 1 About Word 2 The Word Environment 3 The Title Bar 4 The Ribbon 5 The File Tab and Backstage View 6 The Quick Access Toolbar 7 Touch Mode 8 The Ruler 9 The Scroll Bars 10 The Document View Buttons 11 The Zoom Slider 12 The Status Bar 13 The Mini Toolbar 14 Keyboard Shortcuts Creating Basic Documents 1 Opening Documents 2 Closing Documents 3 Creating New Documents 4 Saving Documents 5 Recovering Unsaved Documents 6 Entering Text 7 Moving through Text 8 Selecting Text 9 Non Printing Characters 10 Working with Word File Formats 11 AutoSave Online Documents Document Views 1 Changing Document Views 2 Showing and Hiding the Ruler 3 Showing and Hiding Gridlines 4 Showing and Hiding the Navigation Pane 5 Zooming the Document 6 Opening a Copy of a Document in a New Window 7 Arranging Open Document Windows 8 Split Window 9 Comparing Open Documents 10 Switching Open Documents 11 Switching to Full Screen View Basic Editing Skills 1 Deleting Text 2 Cutting Copying and Pasting 3 Undoing and Redoing Actions 4 Finding and Replacing Text 5 Selecting Text and Objects Basic Proofing Tools 1 The Spelling and Grammar Tool 2 Setting Default Proofing Options 3 Using the Thesaurus 4 Finding the Word Count 5 Translating Documents 6 Read Aloud in Word Font Formatting 1 Formatting Fonts 2 The Font Dialog Box 3 The Format Painter 4 Applying Styles to Text 5 Removing Styles from Text Formatting Paragraphs 1 Aligning Paragraphs 2 Indenting Paragraphs 3 Line Spacing and Paragraph Spacing Document Layout 1 About Documents and Sections 2 Setting Page and Section Breaks 3 Creating Columns in a Document 4 Creating Column Breaks 5 Using Headers and Footers 6 The Page Setup Dialog Box 7 Setting Margins 8 Paper Settings 9 Layout Settings 10 Adding Line Numbers 11

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**Microsoft Word Mail Merge the Step-By-Step Guide** C. J. Benton, 2016-11-07 Master Mail Merge in just a few short hours Mail Merge is a feature within Microsoft Word that allows you to create mass communications in which specific sections can be tailored to individuals or groups You may utilize existing lists of customer or employee data and can customize the communication medium without having to manually change each correspondence The Mail Merge feature saves time and reduces the chance of errors occurring when someone must physically type or modify each message This book is tailored for beginners and will quickly and easily guide you through the Microsoft Word Mail Merge functionality All examples include step by step instructions with screenshots demonstrating how to create Mail Merge Form letters Mailing labels Email messages How to use Excel as the Data Source to create Mail Merge invoices Imagine the time you'll save by not having to search the internet or help files to learn one of the best features in Microsoft Word

**Microsoft Publisher 2019 Training Manual Classroom in a Book** TeachUcomp, 2020-08-01 Complete classroom training manual for Microsoft Publisher 2019 124 pages and 64 individual topics Includes practice exercises and keyboard shortcuts You will learn how to create publications format objects customize schemes create tables perform mailings prepare print files and much more Topics Covered Getting Acquainted with Publisher 1 The Publisher Environment 2 The Title Bar 3 The Ribbon 4 The File Tab and Backstage View 5 The Quick Access Toolbar 6 Touch Mode 7 The Scroll Bars 8 The Page Layout View Buttons 9 The Zoom Slider and Zoom Button 10 The Status Bar 11 The Mini Toolbar 12 Keyboard Shortcuts Creating Basic Publications 1 Creating New Publications 2 Changing the Publication Template 3 Using Business Information 4 Saving Publications 5 Closing Publications 6 Opening Publications 7 Inserting New Pages 8 Deleting Pages 9 Moving Pages Basic Skills 1 Inserting Text Boxes 2 Inserting Shapes 3 Adding Text to Shapes 4 Inserting Pictures Saved Locally 5 Inserting Online Pictures 6 Inserting Picture Placeholders 7 Using the Scratch Area 8 Moving Resizing and Rotating Objects 9 Deleting

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