

# Mail Merge: Microsoft Office 2021

Any type of mail merge has two components, the main document and the data file. The main document contains the body of the text, plus any graphics, photos, etc. It is usually composed in a word processing program (Word). The data file contains a list of names, addresses, etc. The data file is often created in a spreadsheet program (Excel), or uses a list of contacts from an email program (Outlook). Selected components from the data file are inserted into the main document and the two files are merged to create one seamless document.

## Using Excel to Create a Data File

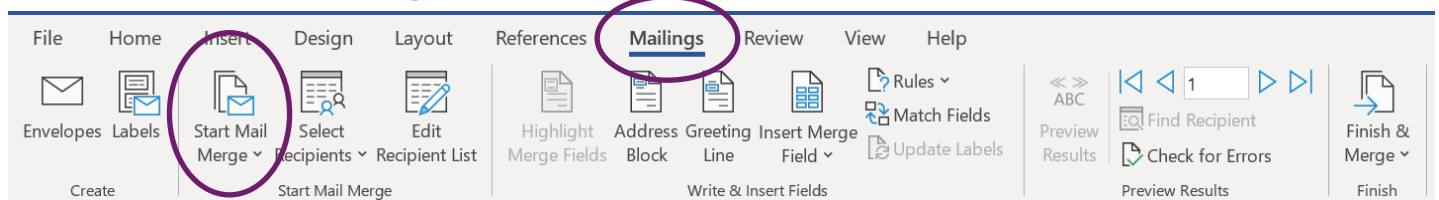
1. Open Excel.
2. Create Headings in Row 1 for all components of the mail merge.
  - Recommended: Last Name, First Name, Address, City, State, Zip Code.
  - Optional: Title, Middle Initial, Suffix, Partner Name, etc.
  - They do not need to be in any particular order.

C	D	E	F	G	H	I	
LAST NAME	FIRST NAME	ADDRESS	CITY	STATE	ZIPCODE	START DATE	

3. Enter all data into the data file. Take time to proofread your data, and make sure addresses are current. If it's wrong in the data file, it will be wrong when you merge it into the main document.

**Note:** Zip codes in the New England states begin with a 0 (e.g. 07924). Excel does not recognize the zero and will remove it from the zip code (e.g. 7924). To correct this, **select the entire Zip Code column by clicking the column heading letter at the top of the column. Go to Home → Number → Number Format (pulldown). Choose More Number Formats. In the Category Box, select Special. Click Zip Code or Zip Code +4.** The zeros will be back where they belong. Additionally, any hyphens (e.g. 60187-5342) will appear automatically.

## Start Mail Merge



Go to **Mailings → Start Mail Merge → Start Mail Merge**

- Select Document Type
  - **Letters** – Easily insert addresses, greetings, etc. into a letter
  - **E-Mail Messages** – Send a mass e-mail that's personally addressed to each individual (only works if you use the Outlook e-mail program).
  - **Envelopes** – Print a stack of envelopes instead of typing them individually.

- **Labels** – Create mailing labels to be printed.
  - If you select labels, be ready to provide the type of label (e.g. Avery 5160). This information is typically found on the bottom right corner of the box.
  - Word 2021 will automatically select Microsoft as the brand of the label; make sure you change this, if necessary.
- **Directory** – Create a printed list of addresses (like a phone book).

## Select Recipients

- **Type New List** – Word has a limited capacity for storing names and addresses. If you do not have Excel or any other type of spreadsheet program, this can be a good alternative.
- **Use Existing List** – This refers to a data file, such as one created in Excel or Access.
  - Browse to locate the file where the addresses are stored.
  - If using Excel, you may need to select the name of the sheet tab (found at the bottom of the Excel screen) where the data is stored.
- **Select from Outlook Contacts** – Pull your contacts list from Microsoft Outlook.

## Edit Recipient List

- Scroll through the list to make sure all entries are correct. You may uncheck names that are not needed for the merge. This allows you to keep the data file intact, while still providing the flexibility to remove irrelevant names from your merge.
- **Sort** – Click on any heading to sort A to Z.
- **Filter** – If you have a large contact list, but only need to use a portion, you can filter by any criteria (e.g. IL state, only contacts with the last name Smith, etc.)
- **Find Duplicates** – locates contacts that appear to be duplications, and gives you the option to remove them from the list.

## Write and Insert Fields

First, move your blinking cursor to the correct location on your screen.

- **Address Block – Look at the preview to see how your addresses will look.**
  - Scroll through the name formats to choose the most appropriate form for your letter – first name only, first name and last name, etc. The name *Joshua Q. Randall Jr.* appears as a sample name to help you choose the name format.
  - **Insert Company Name** – if you are sending a personal letter which doesn't require a contact's company name, you can uncheck this box.
- **Greeting Line** – the appropriate greeting can make a difference in the tone of the letter. *Dear Joshua* is a personal greeting, *To Mr. Randall* is a business greeting.
- **Insert Merge Field** - Insert any field anywhere in the document. This allows you to personalize your document further.

## Match Fields

- Match Fields is a button appearing in the Address Block and Greeting Line. It is used to help Word correlate your Heading title with its own Headings. You only need it if you do not see elements of your address displayed correctly. Look for the phrase **[not matched]**. Use the pulldown menu to help Word find the correct Heading (e.g. you used Business Name, not Company).

Match Fields

In order to use special features, Mail Merge needs to know which fields in your recipient list match to the required fields. Use the drop-down list to select the appropriate recipient list field for each address field component

Unique Identifier	(not matched)
Courtesy Title	(not matched)
First Name	First Name
Middle Name	(not matched)
Last Name	Last Name
Suffix	Suffix
Nickname	(not matched)
Job Title	(not matched)
Company	Business Name
Address 1	(not matched)
Address 2	(not matched)
City	City
State	State
Postal Code	ZIP
Country or Region	(not matched)

Use the drop-down lists to choose the field from your database that corresponds to the address information Mail Merge expects (listed on the left.)

Remember this matching for this set of data sources on this computer

OK Cancel

## Update Labels

When merging Labels, it is crucial to click *Update Labels*. Skipping this step results in a single label printing.

Bill Blakley  
15900  
Washington  
Somerset Center, MI 49787

Before clicking **Update Labels**

Bill Blakley  
15900  
Washington  
Somerset Center, MI 49787

Gary Spencer  
17479  
Towne  
Oakland, CA 94601

Julia Hiles  
Kansas City, MO 64108

After clicking **Update Labels**

## Preview Results

- Displays the address, greeting line, etc. as you'll see it in the final document, instead of <<address block>> or <<greeting line>>. Browse through the recipients to ensure that names are spelled correctly, that addresses are aligned properly, etc.

## Finish and Merge

- Click **Print Documents** to print the entire merge. To make changes to individual letters within the merge, click **Edit Individual Documents** and this opens a **new document** containing the merged items. If printing labels or envelopes, make sure the correct media is loaded into the printer before printing.

IF YOU HAVE QUESTIONS, FEEL FREE TO EMAIL:  
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