

Word 2013 Mail Merge Quick Reference Guide

A. Use an Excel File and the Ribbon to Perform Mail Merge

1. Create new document or open existing document.
2. Click **Mailings** tab.
3. Click **Start Mail Merge**.
4. Select from list the type of document for this merge (i.e., is this a letter or labels?).

NOTE: If you are creating envelopes or labels, you can choose envelope or label size and style you want, or open an existing envelope or label document you created previously.

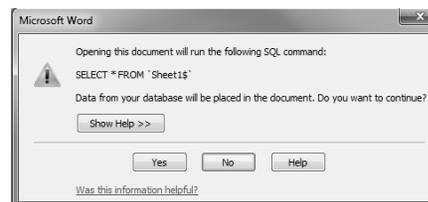
5. Click **Select Recipients**.
 6. Select **Use Existing List**.
- NOTE:** If you do not have an external data source, you can type a new list.

7. Navigate to Excel file, select it, and then click **Open**.
8. Select sheet which contains data, then click **OK**. (Though the actual Excel file will not display, it is now linked so you can insert field names.)
9. Place your cursor where you want to place the fieldname, then click **Insert Merge Fields** to manually insert each fieldname as appropriate. (Don't forget to insert spaces, punctuation and additional content as necessary.)
10. If you are working with labels, click **Update Labels** once the field names are inserted.
11. Click **Preview Results** to display data from Excel file (use Previous and Next Record arrows to preview each record). Make corrections as necessary.
12. To save the main document and retain link to Excel file, if necessary switch to main document (click **Preview Results** to deselect it) and then click **File > Save**.
13. Click **Finish & Merge**.
14. Select **Edit Individual Documents** and then click **OK**. This will create a new document that contains all merged data.

NOTE: If you choose *Print Documents*, this will merge the files and send document directly to printer. You can also send the merged document as individual e-mail messages.

B. Open Main Document Linked to a Data Source

When you open a document that is linked to a data source, Word will prompt you with something similar to this:



To confirm the link to external data source, click **Yes**.

To use a different data source, click **No** then navigate to new data source file you wish to link with main document.

C. Select a Different Data Source File (Recipient List)

You may select another data source file to use with the main document, but only one data source file can be linked to the main document at a time.

1. If necessary, open main document and click **Mailings** tab.
2. Click **Select Recipients > Use existing list**.
3. Navigate to the file, select it, and then click **Open**.
4. If it is an Excel file, select sheet which contains data, then click **OK**.

NOTE: If different field names are used in the newly chosen data source file, replace the existing field names within main document with the most current ones.

(cont'd on Side 2)

Side 2: Word 2013 Mail Merge Quick Reference Guide

D. Modify the Data Source (Recipient List) When Using an Excel File

Once a data source (i.e., an Excel file) has been linked to the main document, you can add or modify recipient list from Word.

Add new record to recipient list

1. If necessary, open the main document and click **Mailings** tab.
2. Click **Edit Recipient List** on the ribbon.
3. Double-click filename of data source file (under *Data Source* at lower left).
4. From Edit Data Source dialog box, click **New Entry**.
5. Enter new record using Tab key to move to next field.
6. When done, click **OK** and then **Yes** to save new entry to data source file.

Modify recipient list

1. If necessary, open the main document and click **Mailings** tab.
2. Click **Edit Recipient List** on the ribbon.
3. Double-click filename of data source file (under *Data Source* at lower left).
4. Click in the cell to modify information.
5. When done, click **OK** and then **Yes** to save new entry to data source file.

NOTE: You cannot delete a record from recipient list. You need to launch Excel and then open the data source file to delete the record.

E. Sort/Filter Recipients List

You have the ability to sort the entire list (i.e., Last Name) and the ability to define criteria for which records you want to merge (i.e., State equals TX).

Sort all records

1. If necessary, open main document and click **Mailings** tab.
2. Click **Edit Recipient List** on the ribbon.
3. Click once on the column heading to sort by that field (i.e., Last Name).

NOTE: To sort by multiple fields, click **Sort** link (under *Refine recipient list*), select fieldname(s) to sort by, and then click **OK**.

Filter records

1. If necessary, open main document and click **Mailings** tab.
2. Click **Edit Recipient List** on the ribbon.
3. Click **Filter** link (under *Refine recipient list*).
4. Define your criteria to filter the records (i.e., State equals TX).
5. Click **OK**.

NOTE: To clear the sort order or a filter, click either the **Sort** or **Filter** link, click **Clear All**, and then **OK**.