



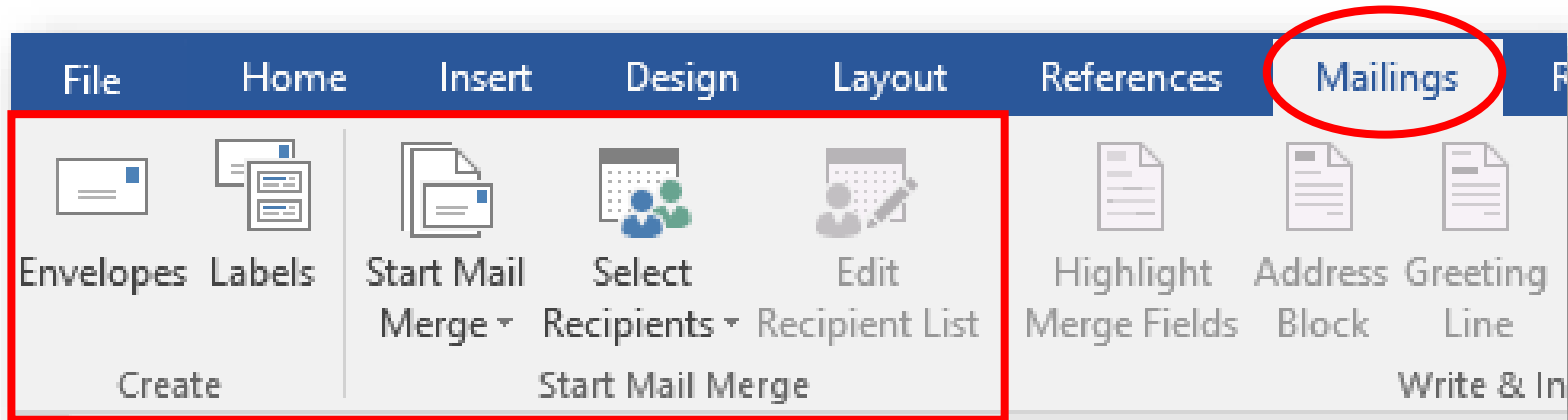
Wilmette Public Library

Mail Merge from Excel to Word

MICROSOFT WORD/EXCEL 2016
BEYOND BASICS

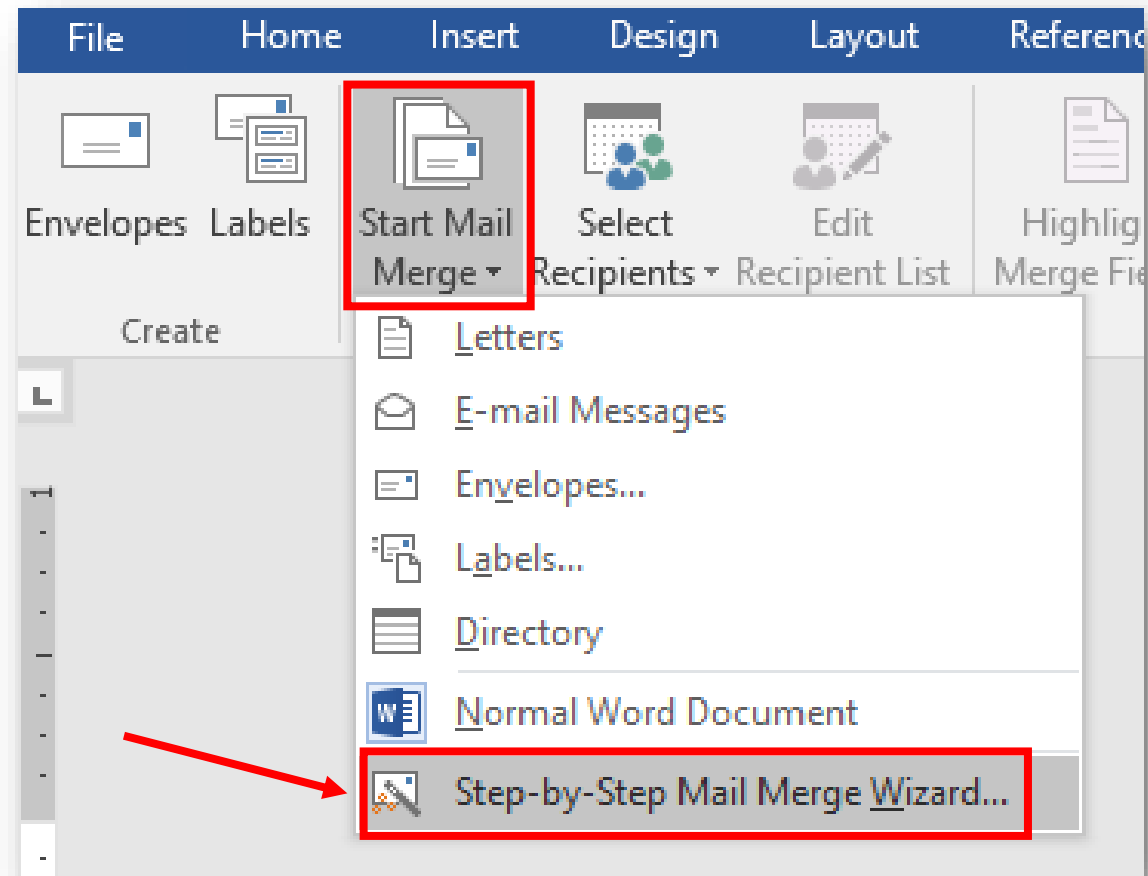
Introduction

- Use mail merge, if you want to create multiple letters, labels, envelopes, name-tags, and more.
- You find the tab called “Mailings” in Word 2016.



To start Mail Merge

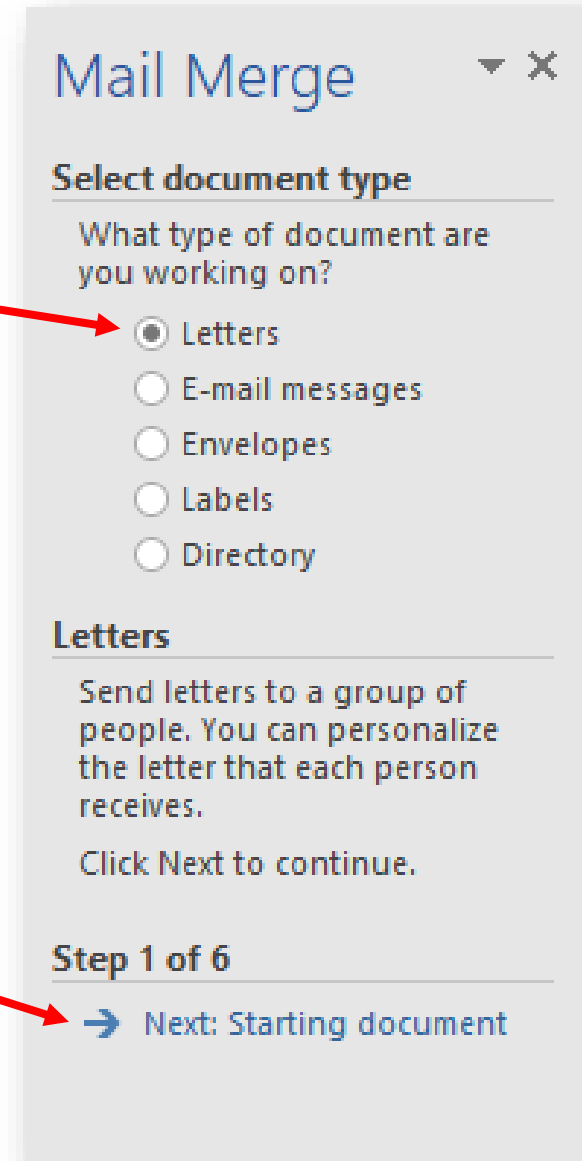
- Open an existing Word document called “letter_invitation”
- From the Mailings tab, click Start Mail Merge and then choose Step-by-step Mail Merge Wizard.



1. Select document type

Choose Letters

Click Next at the bottom



Mail Merge ▼ ✕

Select document type

What type of document are you working on?

- ☒ Letters
- ☐ E-mail messages
- ☐ Envelopes
- ☐ Labels
- ☐ Directory

Letters

Send letters to a group of people. You can personalize the letter that each person receives.

Click Next to continue.

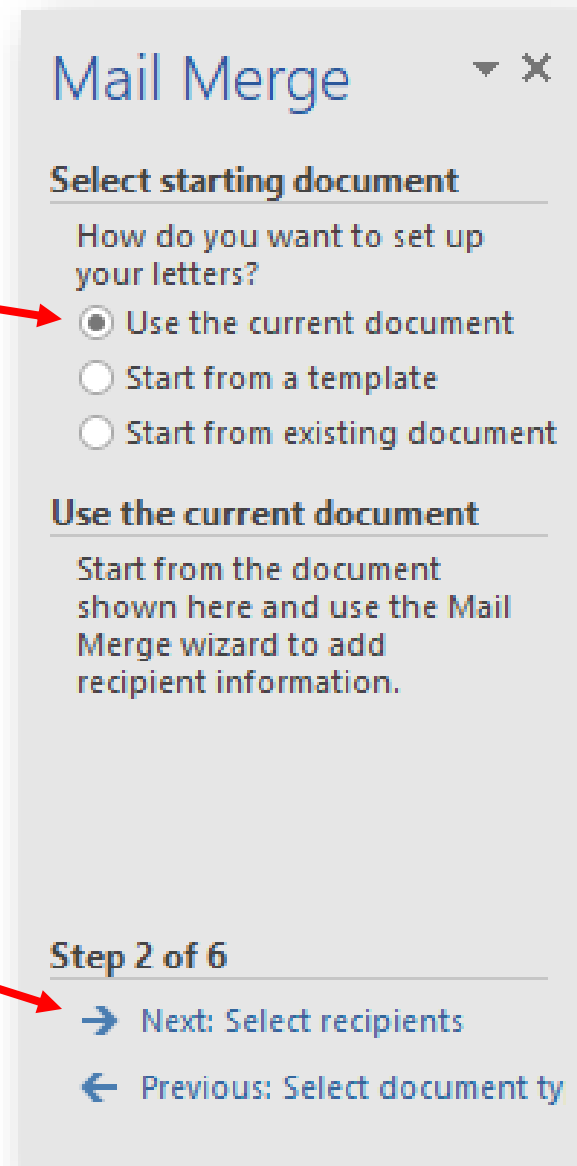
Step 1 of 6

→ Next: Starting document

2. Select starting document

Choose: Use current document

Click: Next to select recipients



The screenshot shows a 'Mail Merge' dialog box with a title bar containing a dropdown arrow and a close button. The main content is divided into sections. The first section, 'Select starting document', asks 'How do you want to set up your letters?' and offers three radio button options: 'Use the current document' (which is selected), 'Start from a template', and 'Start from existing document'. The second section, 'Use the current document', provides instructions: 'Start from the document shown here and use the Mail Merge wizard to add recipient information.' The third section, 'Step 2 of 6', contains two navigation links: 'Next: Select recipients' with a right-pointing arrow, and 'Previous: Select document ty' with a left-pointing arrow. Two red arrows from the text on the left point to the 'Use the current document' radio button and the 'Next: Select recipients' link.

Mail Merge

Select starting document

How do you want to set up your letters?

- ☒ Use the current document
- ☐ Start from a template
- ☐ Start from existing document

Use the current document

Start from the document shown here and use the Mail Merge wizard to add recipient information.

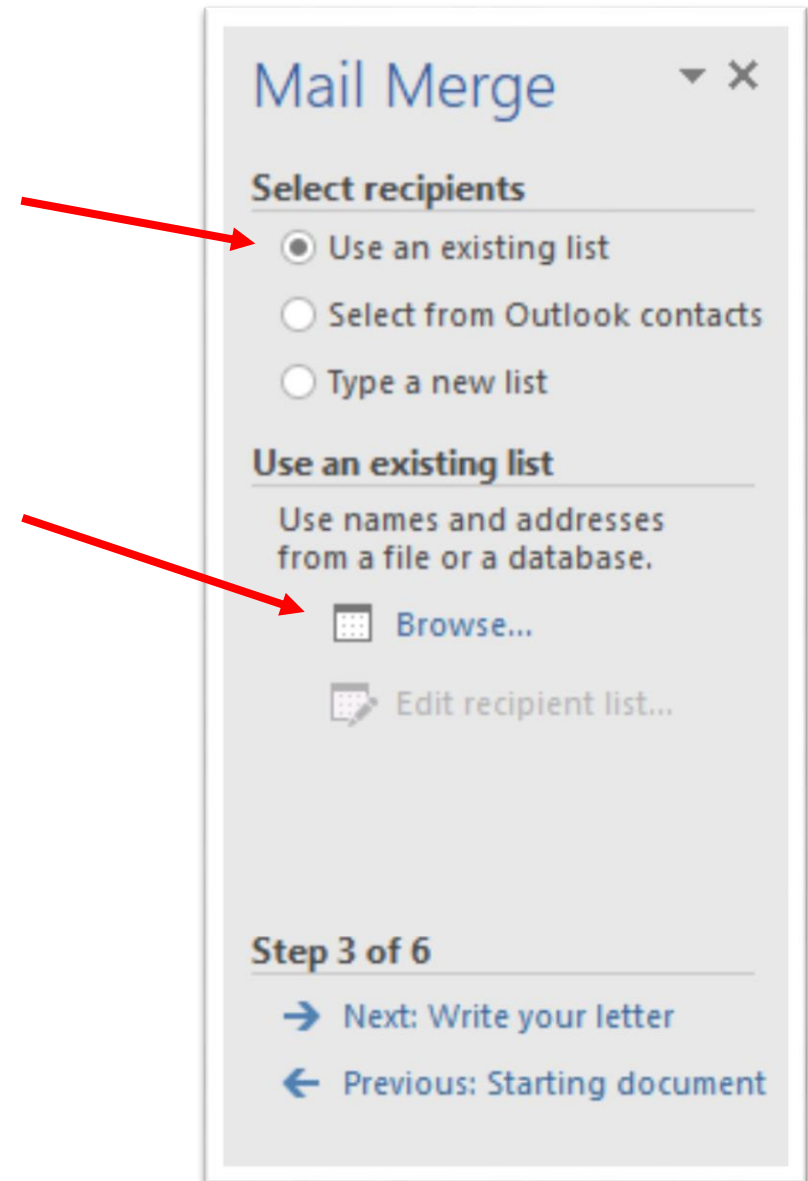
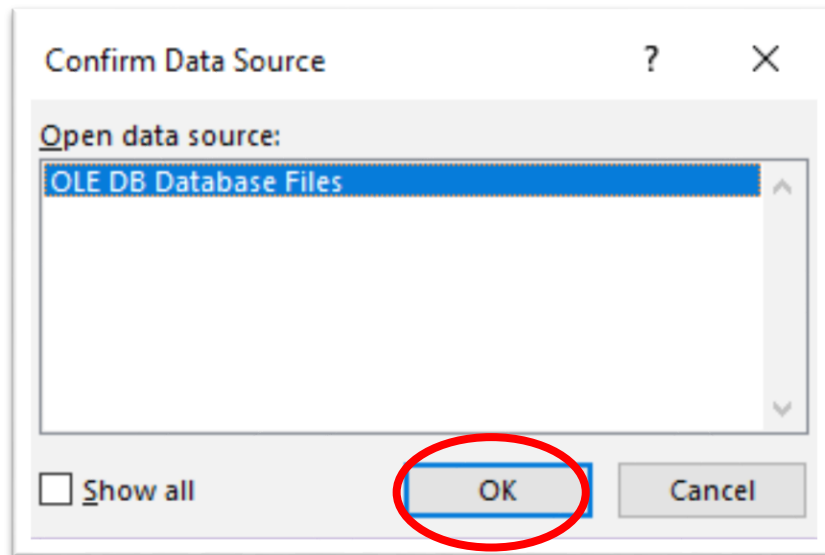
Step 2 of 6

→ Next: Select recipients

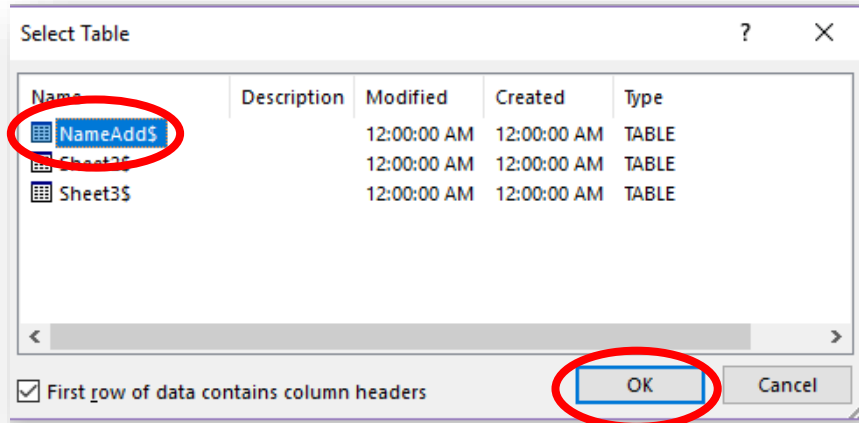
← Previous: Select document ty

3. Select recipients

Choose: Use an existing list
Click Browse to find Excel document
called “Mail Merge”
Click OK to confirm data source

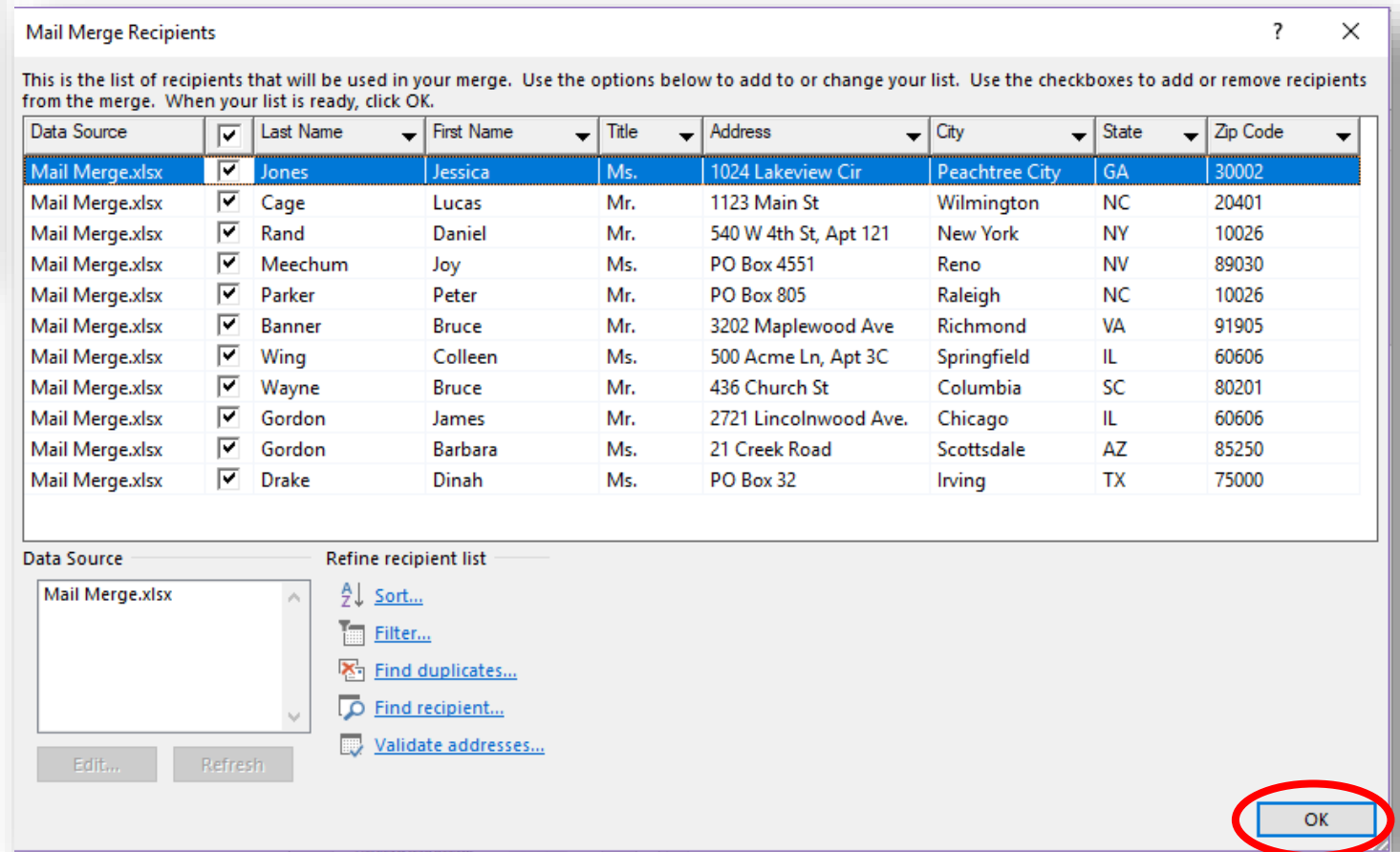


Select recipients



Choose “NameAdd\$” and click OK

A window “Mail Merge Recipients” pops up and there you can add or remove recipients from the merge. When you are done, click OK



Next: Write your letter

Mail Merge

Select recipients


☒ Use an existing list


☐ Select from Outlook contacts

☐ Type a new list

Use an existing list

Use names and addresses from a file or a database.

 [Browse...](#)

 [Edit recipient list...](#)

Step 3 of 6

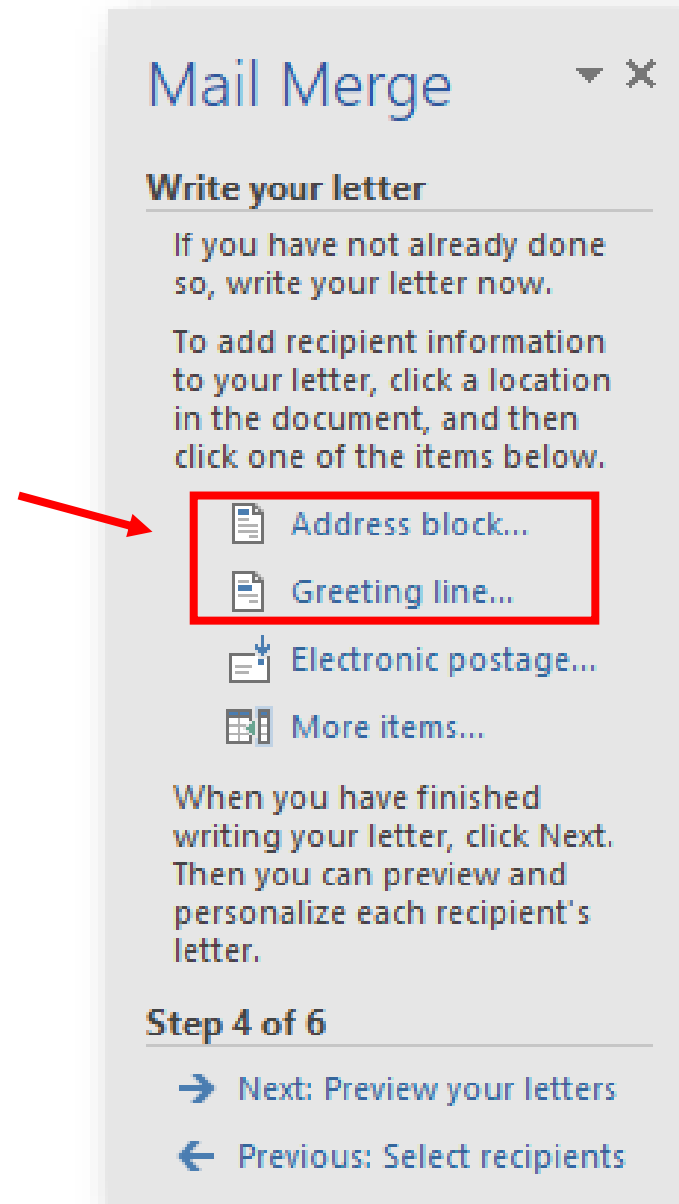
[→ Next: Write your letter](#)

[← Previous: Starting document](#)

4. Write your letter

We have already written one, let's choose "Address block" to add the address and also the "Greeting line".

Place your cursor on the document where you wish to place the <address block> holder then click "Address block..."



Write your letter

Specify your elements and use the arrow to preview each address format

The screenshot shows the 'Insert Address Block' dialog box. A yellow callout box at the top points to the 'Specify address elements' section with the text 'Specify your elements and use the arrow to preview each address format'. Two red arrows originate from this box: one points to the 'Insert recipient's name in this format:' checkbox and the list of names, and the other points to the 'Preview' section. The 'Specify address elements' section includes checkboxes for 'Insert recipient's name in this format:', 'Insert company name', and 'Insert postal address:'. Under 'Insert postal address:', there are radio buttons for 'Never include the country/region in the address', 'Always include the country/region in the address', and 'Only include the country/region if different than:', followed by a dropdown menu showing 'United States'. There is also a checkbox for 'Format address according to the destination country/region'. The 'Preview' section shows a list of names with 'Mr. Joshua Randall Jr.' selected, a page number '1' in a box, and a preview of the address: 'Ms. Jessica Jones, 1024 Lakeview Cir, Peachtree City, GA 30002'. At the bottom right, there is a 'Correct Problems' section with a 'Match Fields...' button and 'OK' and 'Cancel' buttons.

Insert Address Block

Specify address elements

☒ Insert recipient's name in this format:

Joshua
Joshua Randall Jr.
Joshua Q. Randall Jr.
Mr. Josh Randall Jr.
Mr. Josh Q. Randall Jr.
Mr. Joshua Randall Jr.

☒ Insert company name

☒ Insert postal address:

☐ Never include the country/region in the address
☐ Always include the country/region in the address
☒ Only include the country/region if different than:

United States

☒ Format address according to the destination country/region

Preview

Here is a preview from your recipient list:

1

Ms. Jessica Jones
1024 Lakeview Cir
Peachtree City, GA 30002

Correct Problems

If items in your address block are missing or out of order, use Match Fields to identify the correct address elements from your mailing list.

Match Fields...

OK Cancel

Click OK when done and then do the same for Greeting line

5. Preview your letter and finish your merge

April 24th 2018

«AddressBlock»

«GreetingLine»|


Thank you for coming to our monthly co

Mail Merge ▾ ×

Preview your letters


One of the merged letters is previewed here. To preview another letter, click one of the following:

<< Recipient: 10 >>

 Find a recipient...

Make changes

You can also change your recipient list:

 Edit recipient list...

Exclude this recipient

When you have finished previewing your letters, click Next. Then you can print the merged letters or edit individual letters to add personal comments.

Step 5 of 6

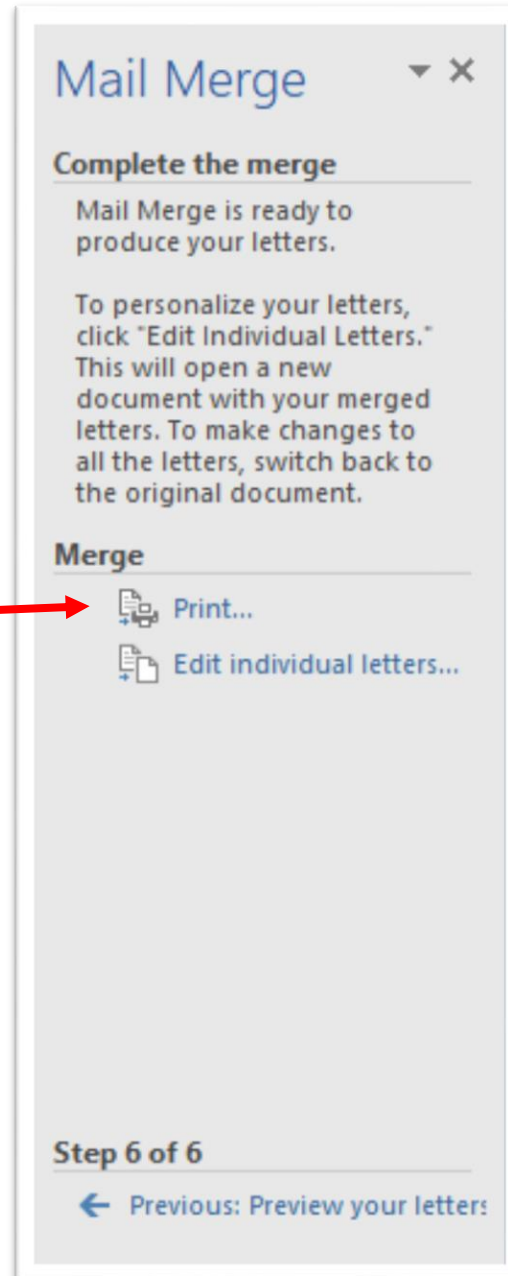
→ Next: Complete the merge

← Previous: Write your letter

Use arrow to preview each letter

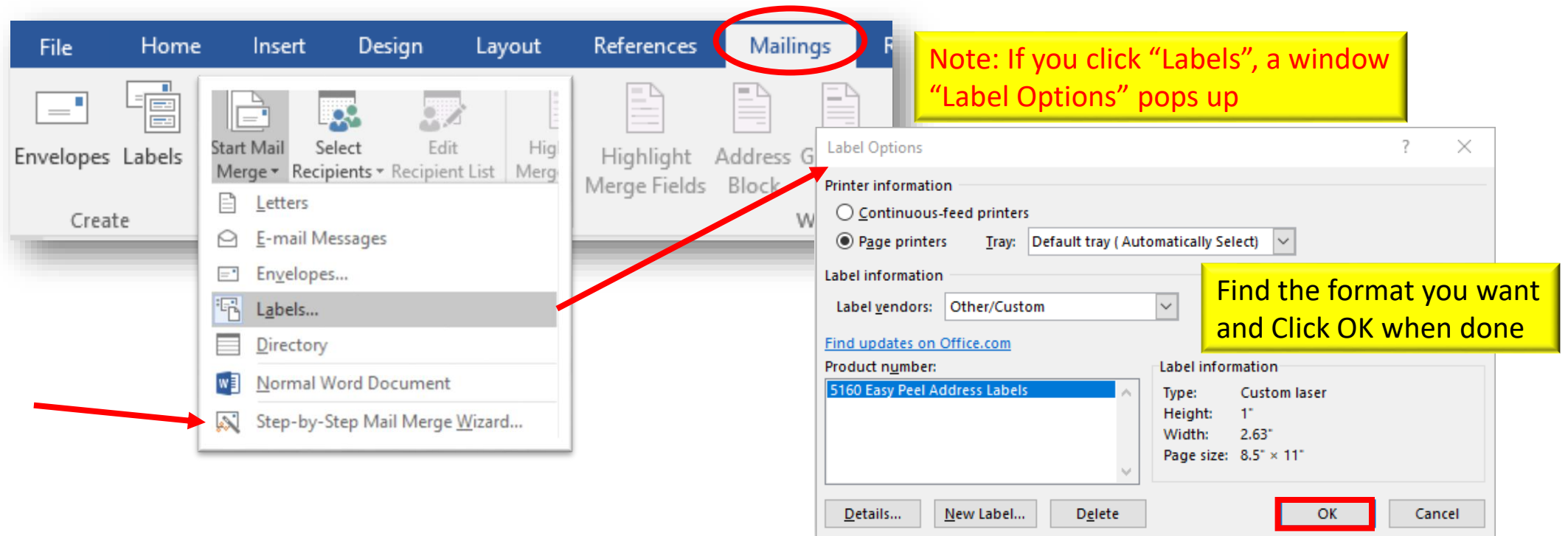
Complete the merge

6. Print your letter



Create labels

- We do the same for labels. Open a new word document.
- You find the tab called “Mailings” in Word 2016.
- Click Step-by-Step Mail Merge Wizard and choose Labels.



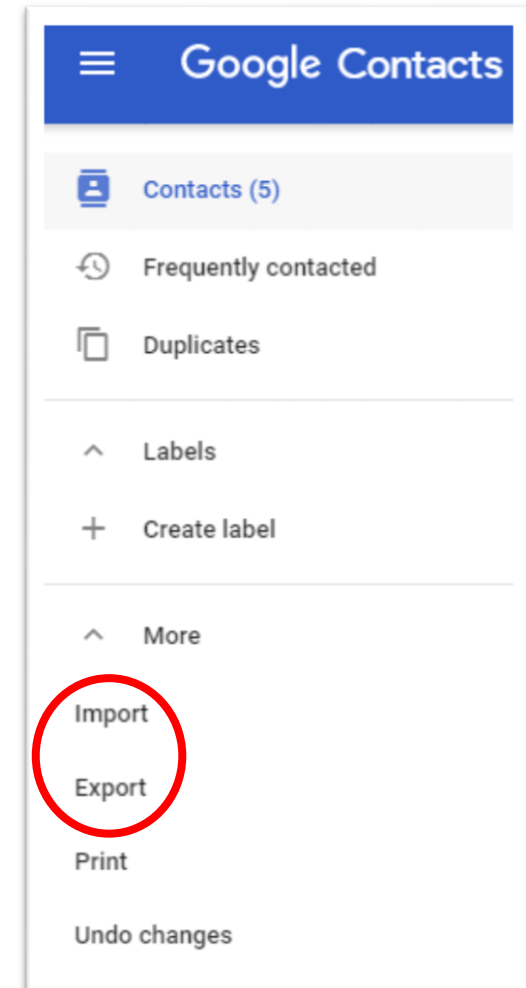
To send e-mail to multiple recipients

Import/Export a CSV (Comma-Separated Values) file and merge it to an outlook e-mail contacts.

CSV file stores tabular data/records: Text such as names and email addresses, numbers like phone numbers or zip-codes in an Excel Spreadsheet.

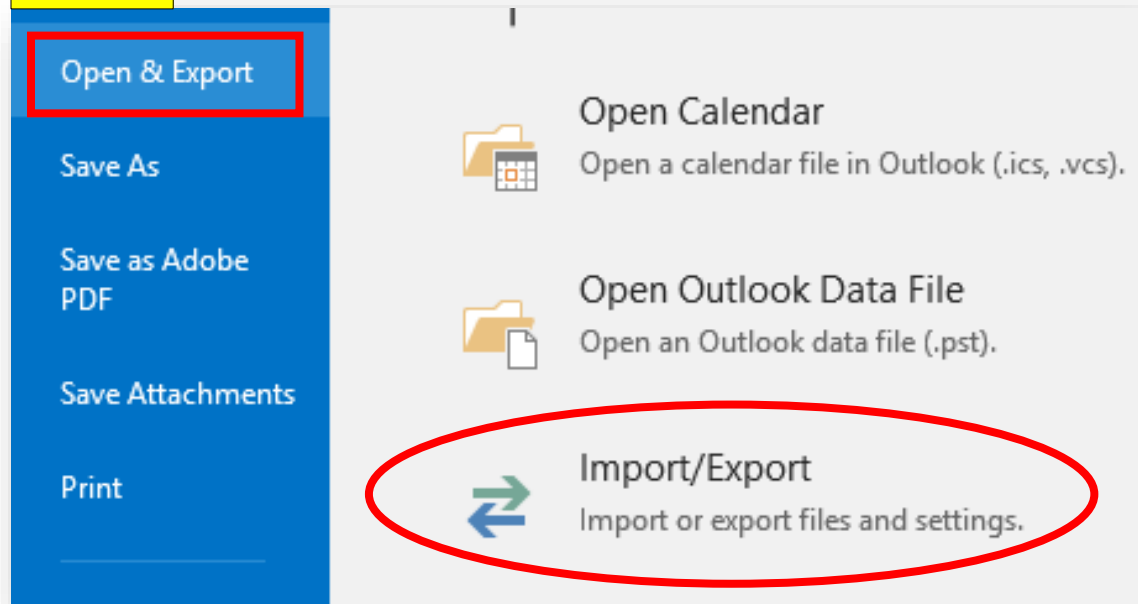
You can import “**your_export_records.csv**” file to your Gmail, Yahoo, or any type of webmail provider. You can also export contacts from another e-mail account and import it to another e-mail account.

Ex: Google Contacts



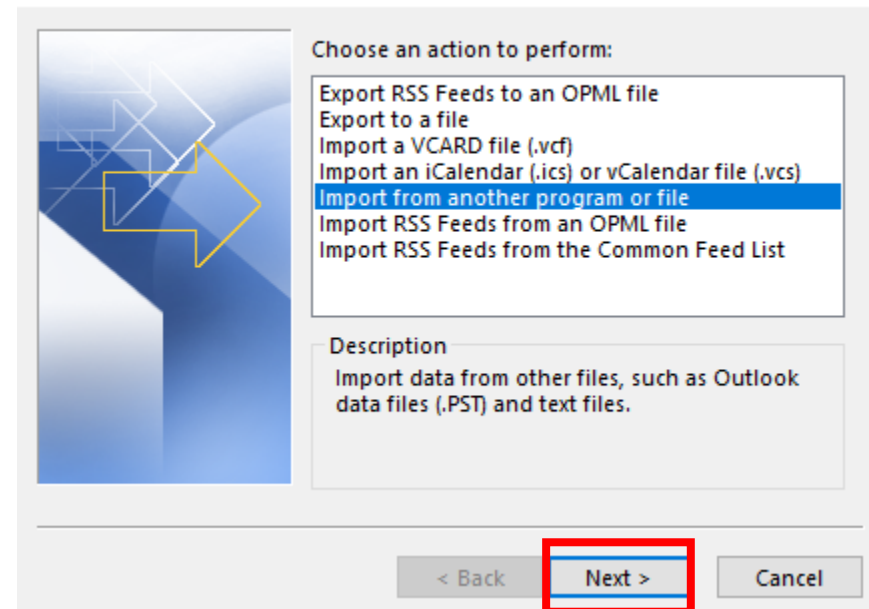
Ex: Outlook Contacts (if you have Office 365)

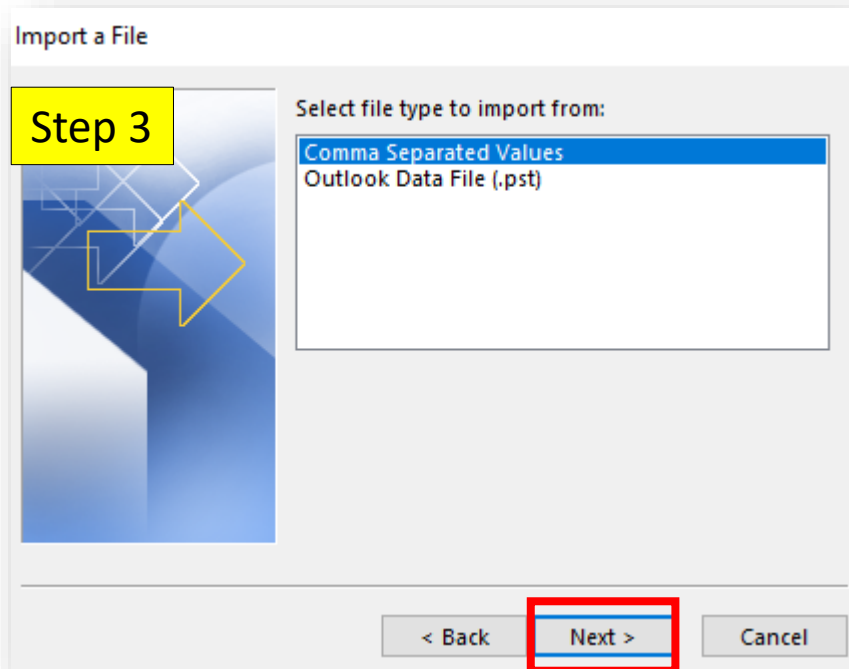
Step 1



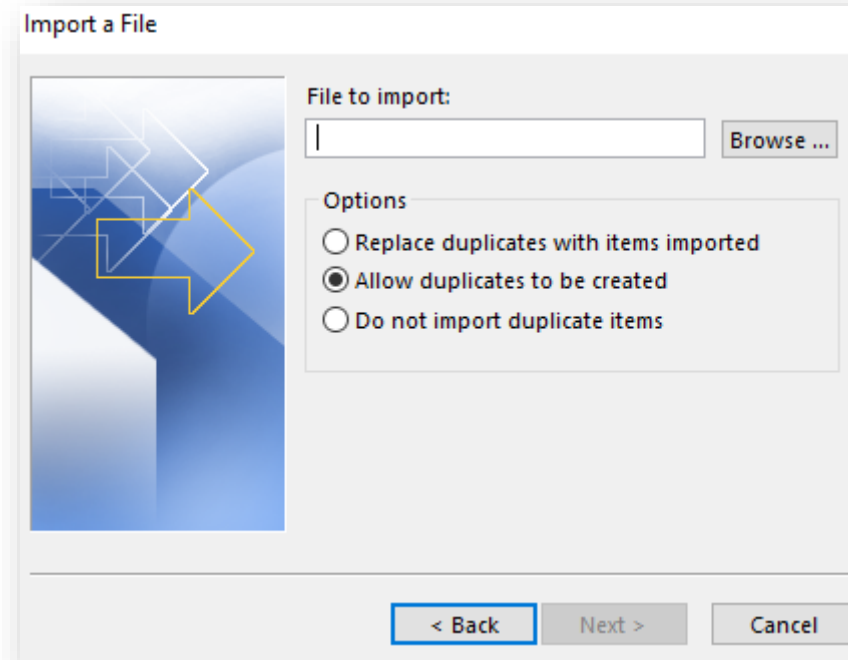
Step 2

Import and Export Wizard





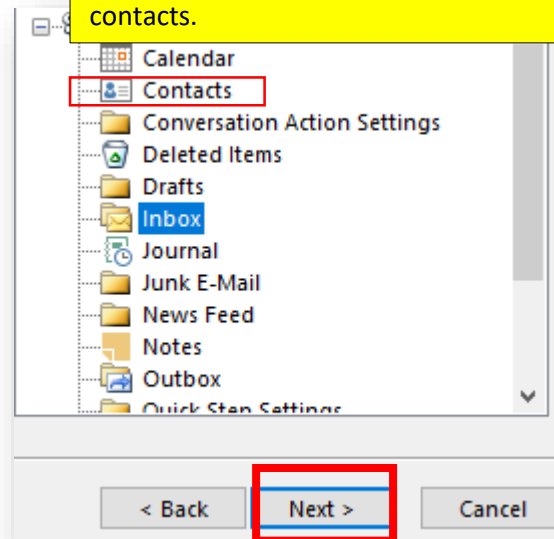
Step 4



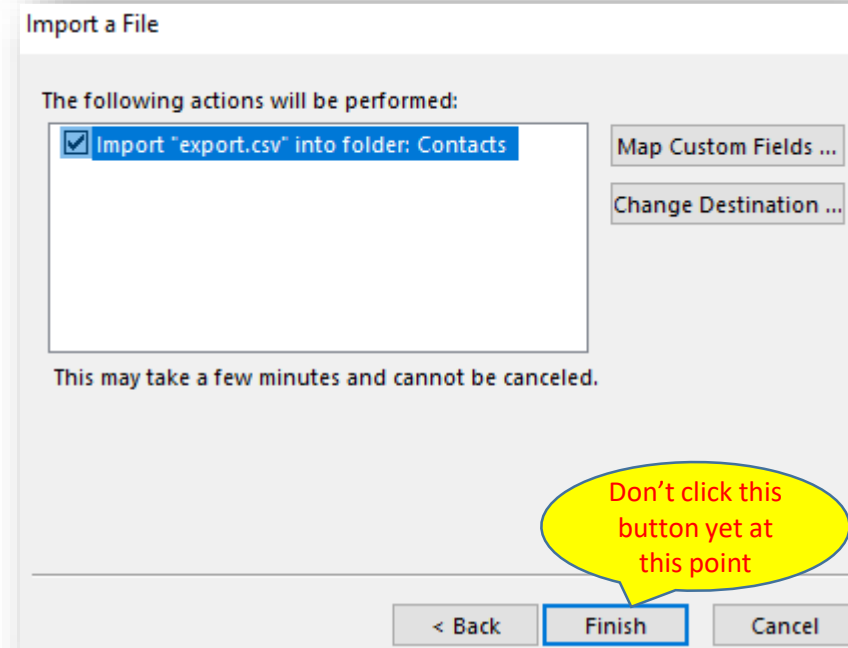
Browse and import your CSV file.

Step 5

By default, "Inbox" is highlighted, so choose Contacts to merge your new contacts.



Step 6



Click Map Custom Fields

Don't click this button yet at this point

Step 7

Map Custom Fields

Drag the values from the source file on the left, and drop them on the appropriate destination field on the right. Drag the item from the right to the left to remove it from the

From: Comma Separated Values
export.csv

To: Microsoft Office Outlook
Contacts

Value

- First name
- Last Name
- Email
- Phone
- Library card
- Guests
- Status

Field

- Directory Server
- E-mail
- E-mail 2
- E-mail 3
- Gender
- Government ID...
- Hobby

Map Custom Fields ...

Change Destination ...

< Previous

Next >

Clear Map

Default Map

OK

Cancel

Click OK
when done

Step 8

Import a File

The following actions will be performed:

☒ Import "export.csv" into folder: Contacts

Map Custom Fields ...

Change Destination ...

This may take a few minutes and cannot be canceled.

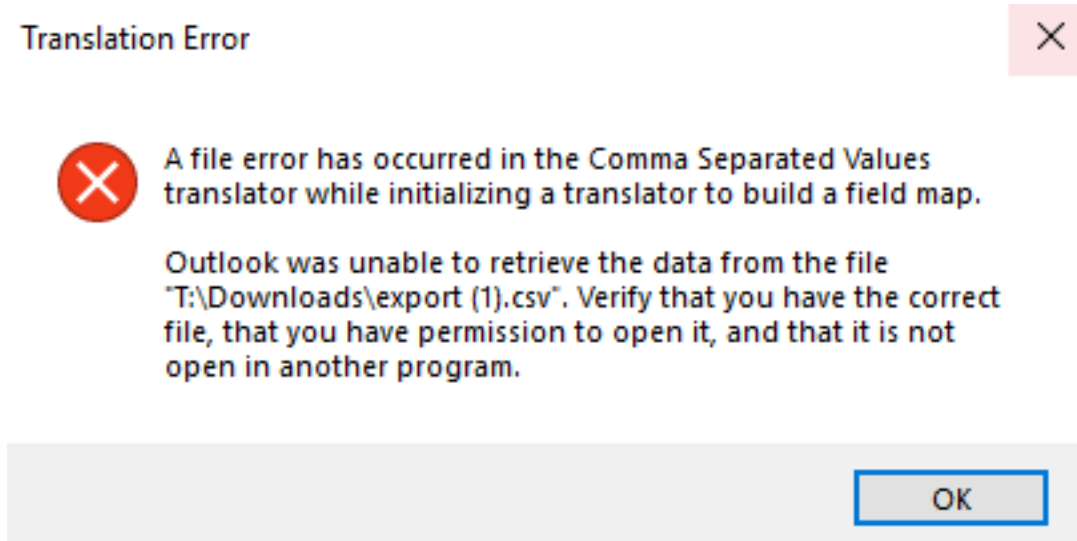
< Back

Finish

Cancel

When you are done mapping, click Finish. Then go back to your outlook account and go to contacts list. There you will find new contacts merged in.

If you see the following error, when you try to import a comma-separated values (.csv) file into Microsoft Email Outlook 2016,



Do the following: Open the .csv file in Microsoft Excel and save the file as a new .csv file, and then use Outlook to import the new file. In Microsoft Excel, save the new file as CSV (comma delimited).