

# University Information Technology Services

## Microsoft Office Word 2013 Mail Merge and Creating Forms

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## **Introduction**

This booklet is the companion document to the Word 2013: Mail Merge and Creating Forms workshop. The booklet will show users how to create fillable forms, restrict editing in the forms, and save the form as a template. This booklet will also show how to use the Mail Merge Wizard to quickly create personalized letters to multiple people.

## **Learning Objectives**

After completing the instructions in this booklet, you will be able to:

- Create fillable forms in Word
- Add the Developer tab to the Ribbon
- Understand content controls and how to add them to your form
- How to lock and restrict your form
- How to save your form as a template
- How to unlock a form
- How to use the Mail Merge Wizard
- How to reassign fields using the matching fields tool

## Creating Forms

You can create fillable forms in Word 2013 that can be used to collect information, and when building your form, you can add a variety of tools to assist with data collection (See Figure 1).


	
Recent Photograph:	
Name: Scrappy Owl	
Sex: Male <input checked="" type="checkbox"/> Female <input type="checkbox"/>	Birth Date: 10/9/1963
Address: 1000 Chastain Point	Major: Communications
City: Kennesaw	Graduated: <input checked="" type="checkbox"/>
State: Georgia	Currently Employed: <input checked="" type="checkbox"/>
Zip: 30144	How did you hear about us? Magazine

Figure 1 - Example Form

Once your form is complete, you can then save it as a template, so that the user fills in a copy and the original (template) does not change. This section on Creating Forms will explain how to re-create the Example Form above.

## Enable the Developer Tab

Before you can begin creating your form, you will need to make sure the *Developer* tab is displayed in your *Ribbon* (See Figure 2). The *Developer Tab* contains the tools necessary to create your form.

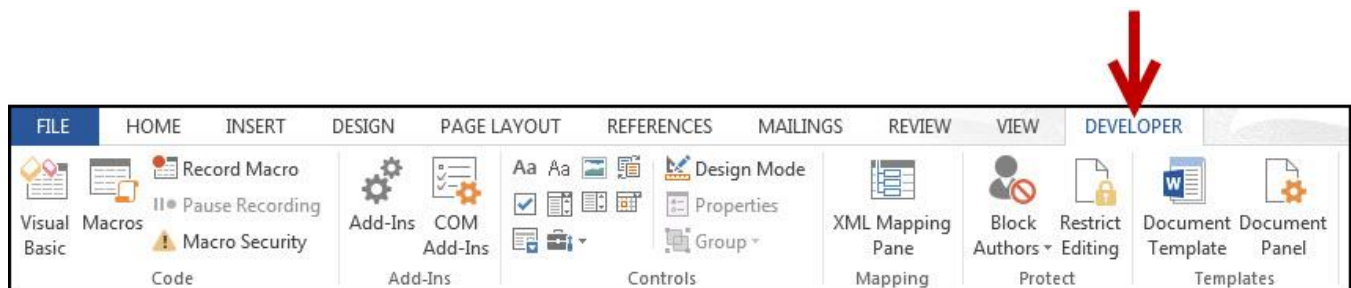


Figure 2 - Developer Tab

If you do not see the *Developer* tab, follow the steps below to activate it:

1. Right-click on any **blank area** within the *Ribbon*.

2. A context sensitive menu will appear. Click on **Customize the Ribbon...** (See Figure 3).

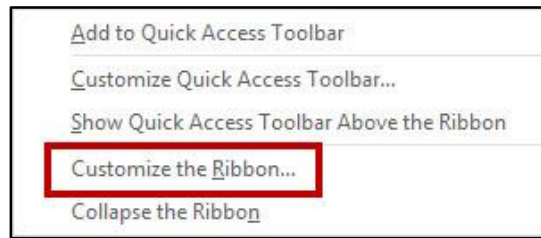


Figure 3 - Customize the Ribbon

3. The *Word Options – Customize the Ribbon* window will appear. In the right list, check the box for **Developer** (See Figure 4).

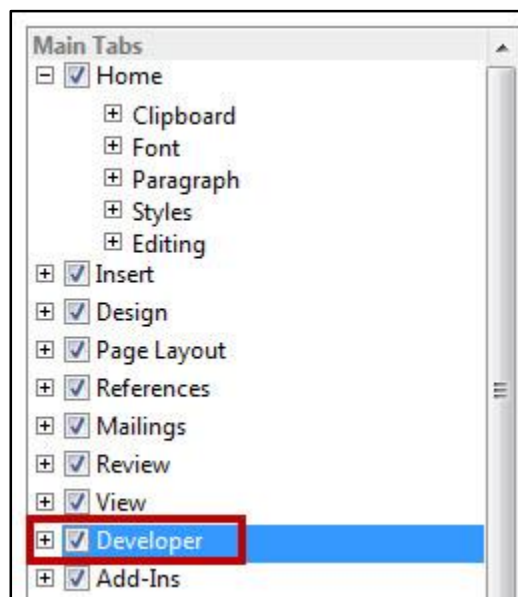


Figure 4 - Adding Developer Tab

4. Click on **OK**. The *Developer Tab* will be added to the *Ribbon*.

## Beginning your Form

The easiest way to create fields for your form is to create a table, then insert the sections of your form. The following will show how to begin your form:

1. Click on the **Insert** tab (See Figure 5).



Figure 5 - Insert Tab

2. Click the **Table** icon. A dropdown menu with additional options will appear (See Figure 6).

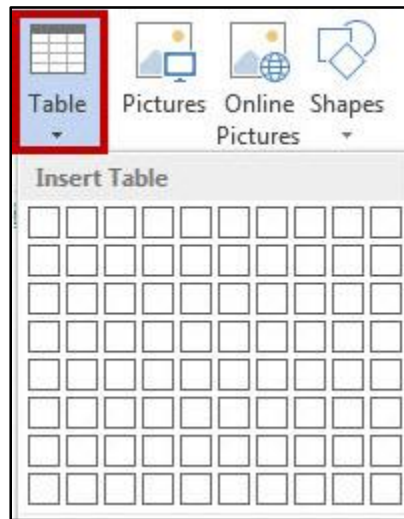


Figure 6 - Table Icon

3. Under *Insert Table*, move your mouse pointer over the boxes until you have the number of rows and columns that you want in the table.
4. Click to **confirm** your table.
5. Your table will be placed within your document.

*Note:* For more information on creating tables and using the *Table Tools* tab, refer to the documentation *Word 2013: Formatting your Document* at <https://uits.kennesaw.edu/cdoc>.

### Inserting Content Controls

By inserting *Content Controls* into your document, you can control what type of information users can (or should) enter into the form. The following *content controls* will be covered (See Figure 7).

	Rich Text Content Control	Text can be formatted and saved (e.g. <b>Bold</b> , <i>Italics</i> )
	Plain Text Content Control	Text cannot be formatted (e.g. plain text)
	Picture Content Control	Allows a picture to be uploaded
	Check Box Content Control	Inserts a checkbox
	Combo Box Content Control	Contains a list of choices that can be updated by the user
	Drop-Down List Content Control	Contains a list of restricted choices
	Date Picker Content Control	Contains a calendar. User can type a date, or select from the calendar

Figure 7 - Content Controls

To insert a content control into your form:

1. Click to **place your cursor** on the form where the *content control* will be inserted.
2. Click the **Developer** tab (See Figure 8).

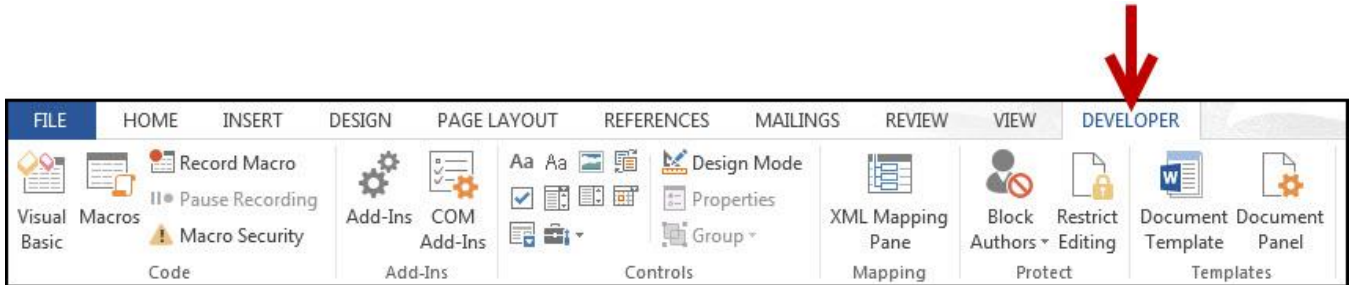


Figure 8 - Developer Tab

3. In the *Controls* group, click the **content control** that you want to insert.

### Replacing Instructional Text

All content controls contain “instructional” text that indicates what the end user is to do with the control (See Figure 9). Whenever the user enters information into a content control, the instructional text is automatically replaced.

Name: Click here to enter text.
Sex: Male <input type="checkbox"/> Female <input type="checkbox"/>
Major: Choose an item.
City: Click here to enter text.
State: Click here to enter text.
Zip: Click here to enter text.

Figure 9 - Example of Instructional Text

To change the instructional text that appears in the content control:

1. Click the **Developer** tab (See Figure 10).

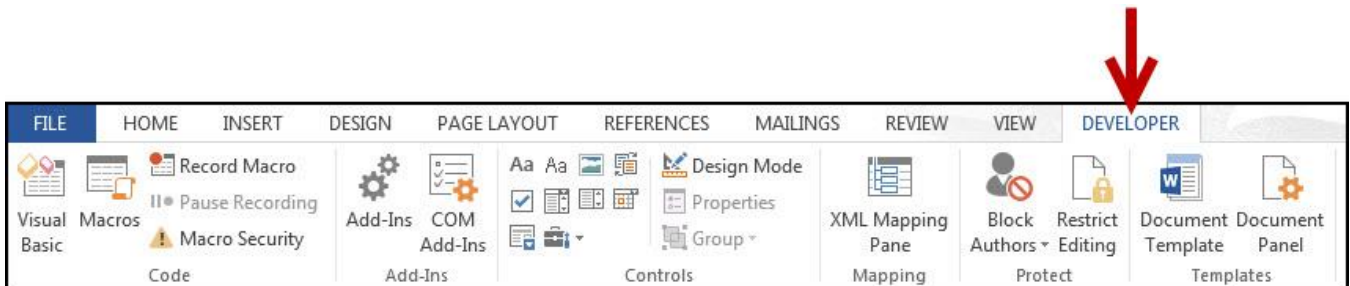


Figure 10 - Developer Tab

2. Click on **Design Mode** in the *Controls* group (See Figure 11).

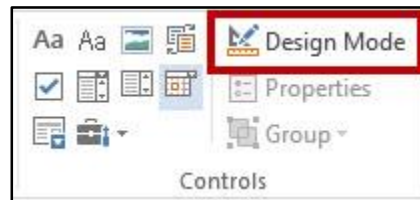


Figure 11 - Design Mode

3. The *content controls* in your document will enter *design mode* (See Figure 12).



Figure 12 - Design Mode Active

4. Click the **control** to edit.
5. Type in the **new text**.
6. When finished editing, click on **Design Mode** in the *Controls* group.
7. Your edits will be applied (See Figure 13).

Name: Type Last name, First name.
Sex: Male <input type="checkbox"/> Female <input type="checkbox"/>
Major: Select one option.
City: Type in your City.
State: Type in your State.
Zip: Type in your 5-digit Zip Code.

Figure 13 - Instructional Text Edited

## Setting Content Control Properties

After inserting a content control, you may need to alter certain properties for that control. For example, after inserting a *drop-down content control*, you will need to access the properties so you can add choices to the drop-down list. The following explains how to access the *content control properties*.

1. Click on the **Content Control** you wish to alter properties for.

2. Click the **Developer** tab (See Figure 14).

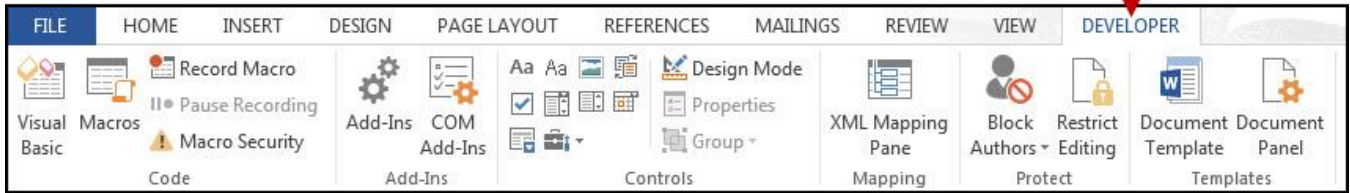


Figure 14 - Developer Tab

3. Click on **Properties** in the *Controls* group (See Figure 15).

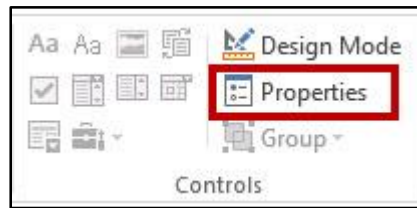


Figure 15 - Properties

4. A *properties* window will appear. The options under *General* and *Locking* are available for most content controls (See Figure 16).

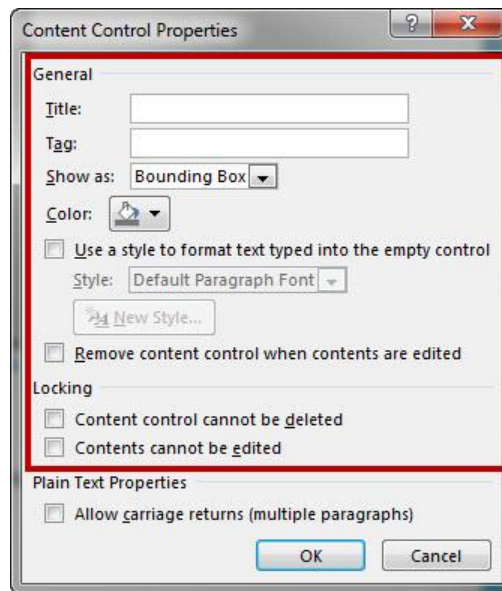


Figure 16 - Content Control Properties: General and Locking

5. Typing text in the **title** field will display the text over the content control when selected (See Figure 17).



Figure 17 - Content Control: Title



6. Checking **Use a style to format text typed into the empty control** allows you to select a Style from the drop-down list that will be used to format the text which the user enters into the field (See Figure 18).

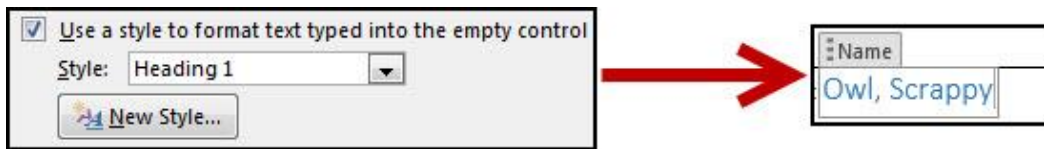


Figure 18 - Adding Style to Content Controls

7. Checking *Remove content control when contents are edited* will make the content control disappear once the user has entered information, leaving just the text (See Figure 19).

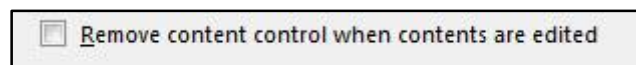


Figure 19 - Remove Content Control

8. Checking **Content control cannot be deleted** prevents the content control from being deleted while the form is being created or edited (See Figure 20).

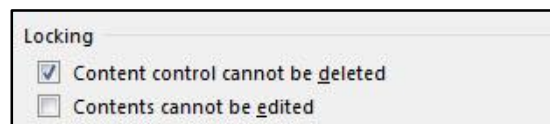


Figure 20 - Locking Content Controls

*Note:* Controls cannot be deleted by the end user once the form is protected. See Lock and Restrict your Form for more information.

9. Checking **Contents cannot be edited checkbox** prevents the instructional text from being changed while the form is being created or edited.

**Make sure the *Contents cannot be edited checkbox* is not checked when it is distributed to end users; otherwise, they will not be able to enter information into the field.**

10. After making your selections, click on **OK**.

### Rich Text and Plain Text Properties

Rich text/Plain text content controls have additional options for allowing multiple paragraphs. With this option selected, users will be able to enter multiple lines of text (See Figure 21).



Figure 21 - Additional Options for Rich/Plain Text

## Combo Box and Drop-down List Properties

When adding combo box and drop-down lists context controls, you will need to enter the properties for these controls in order to add the choices users will select from the list (See Figure 22).

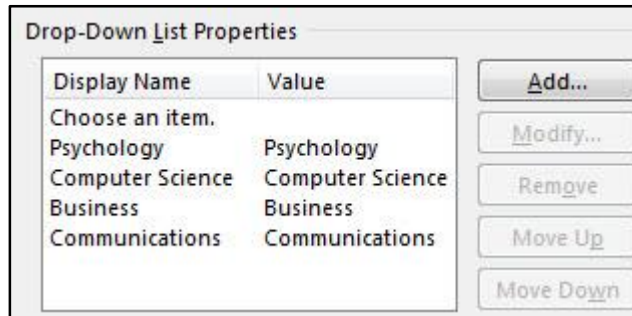


Figure 22 - Combo Box/Drop-down List Properties

To add entries to the combo box/drop-down list:

1. Click the **Add** button.
2. The *Add Choice* window will open. In the *Display Name* field, enter the name of your **list item** (See Figure 23).

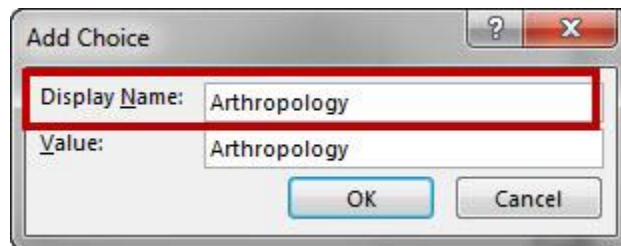


Figure 23 - Add Choice Window

*Note:* The *Value* field will automatically fill when the *Display Name* field is entered.

3. Click the **OK** button.
4. Repeat steps 1-3 to add more values to your list.

- When finished adding values, click the **OK** button in the *Content Control Properties* window (See Figure 24).

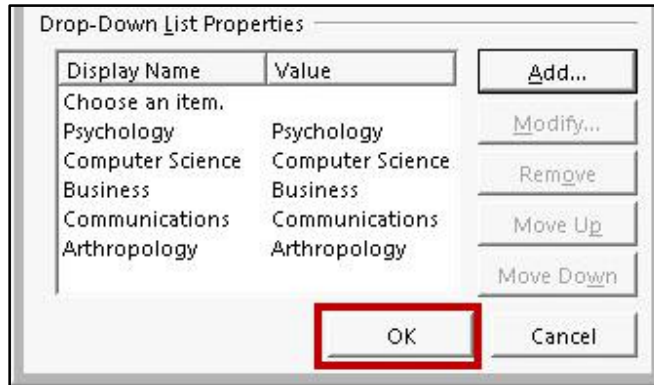


Figure 24 - Content Control Properties: OK

To edit existing entries in the combo box/drop-down list:

- Select a value from the *Drop-Down List Properties* (See Figure 25).

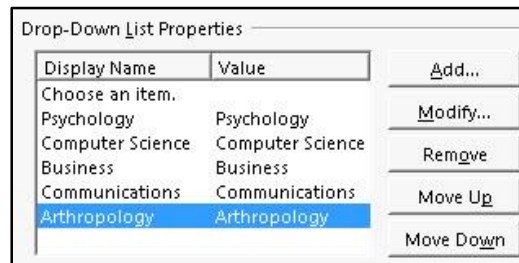


Figure 25 - Select a Value

- Click the **Modify** button to edit the selected value.
- Click the **Remove** button to delete the selected value.
- Click the **Move Up/Move Down** buttons to reposition the value within the list.
- When finished making your edits, click the **OK** button.

## Date Picker Properties

The *Date Picker Properties* provide options how you would like the date to display in the field once selected by the user (the other options can be left as they are).

To change how your date will be displayed in the field:

1. Under *Display the date like this:*, select one of the **options** from the list (See Figure 26).

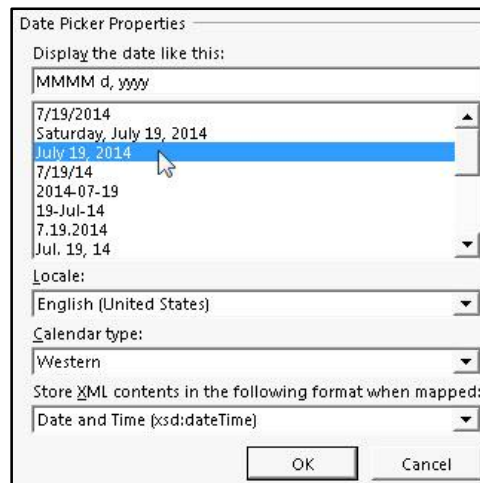


Figure 26 - Date Picker Properties

2. Click the **OK** button to confirm.

## Picture Properties

The picture properties window will display some of the same general options. There are no special control options for the *Picture Content Control* (See Figure 27).



Figure 27 -Picture Content Control Options

## Check Box Properties

The check box properties provide options for changing the symbols that appear when the box is checked and unchecked.

To change the symbols that appear when the box is checked/unchecked:

1. Click the **Change...** button to set the symbol for checked/unchecked (See Figure 28).



Figure 28 - Check Box Properties

2. The *Symbols* window will appear. Select a **symbol** from the list (See Figure 29).

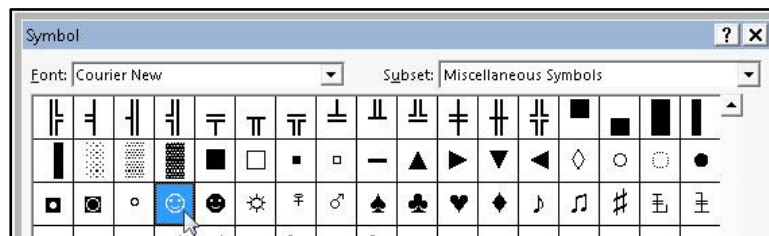


Figure 29 - Symbol Window

3. Click the **OK** button.
4. Repeat steps 1-3 to change the symbol for the checked/unchecked box.
5. When finished, click the **OK** button on the *Check Box Properties* window.

## Lock and Restrict your Form

Once you have prepared your form for data entry, it is a good idea to lock the fields from deletion so users won't accidentally remove key fields. In addition, you can restrict users to using the content controls available to fill in the form.

Before locking your form to restrict editing, you will need to lock all the content controls in your form from deletion:

1. Click on the **Content Control** you wish to alter properties for.

2. Click the **Developer** tab (See Figure 30).

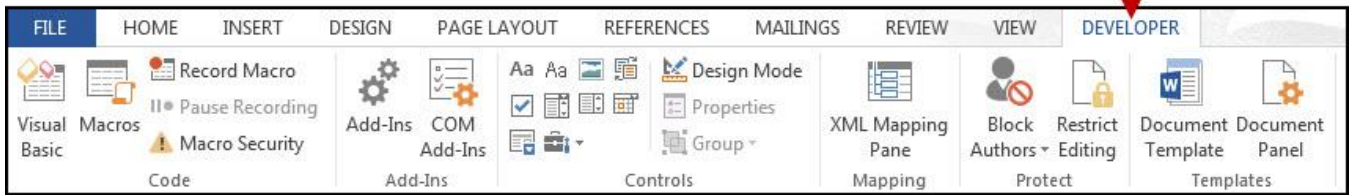


Figure 30 - Developer Tab

3. Click on **Properties** in the *Controls* group (See Figure 31).

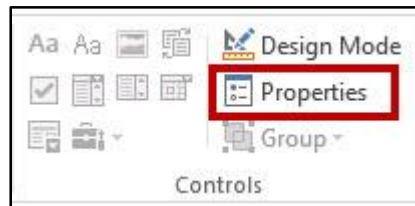


Figure 31 - Properties

4. The *properties* window will appear. Under *Locking*, check the **Content control cannot be deleted** box (See Figure 32).

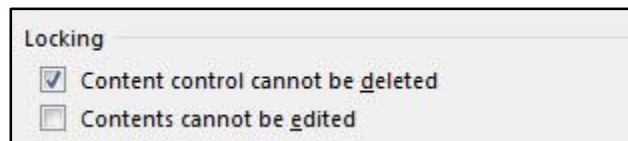


Figure 32 - Locking the Form

5. Click the **OK** button.
6. Repeat steps 1-5 for the rest of the content controls in your form.

Once all your content controls have been locked against deletion:

7. Click on the **Developer** tab (See Figure 33).

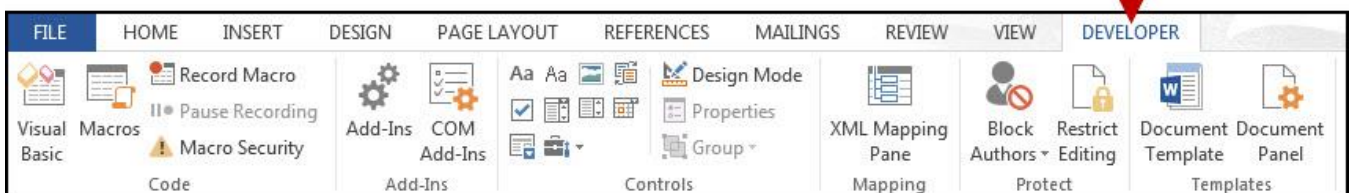


Figure 33 - Developer Tab

8. In the *Protect* grouping, click on **Restrict Editing** (See Figure 34).



Figure 34 - Restrict Editing

9. The *Restrict Editing* side menu will appear to the right of your document. Under *Editing restrictions*, click the box that says **Allow only this type of editing in the document:** (See Figure 35).



Figure 35 - Restrict Editing Options

10. Under *Editing restrictions*, select **Filling in forms** from the drop-down list (See Figure 36).



Figure 36 - Filling in Forms

11. Under *Start enforcement*, click on **Yes, Start Enforcing Protection** (See Figure 37).



Figure 37 - Start Enforcement

12. The *Start Enforcing Protection* window will appear. From here, you can choose to create a password to unlock editing of the form for an extra layer of control. If no password is needed leave the fields blank (See Figure 38).



Figure 38 - Start Enforcing Protection

**Make note of your password! If forgotten, there is no way to retrieve it and thus remove protection from the document!**

13. When finished, click the **OK** button.



## Unlocking a Form

If you need to edit a form that has been restricted for editing, the form will need to be unlocked before any changes can be made. The following explains how to unlock your form.

1. Click on the **File** tab (See Figure 39).

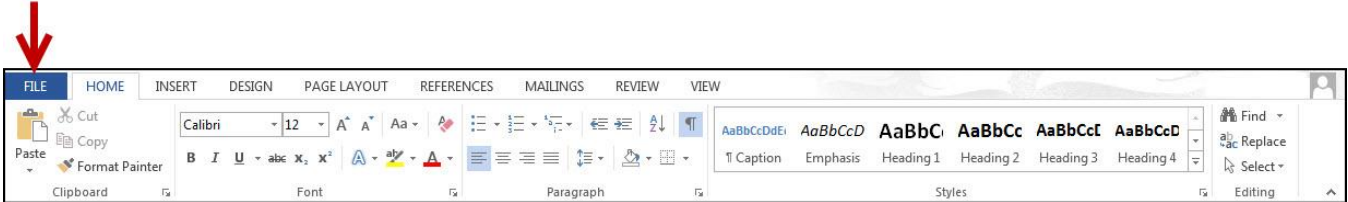


Figure 39 - File Tab

2. The *Backstage - Info* view will appear. Click on **Protect Document** (See Figure 40).



Figure 40 - Backstage View: Protect Document

3. A drop-down list will appear. Click on **Restrict Editing** (See Figure 41).



Figure 41 - Protect Document: Restrict Editing

4. The *Restrict Editing* window will open to the right of your document. Click on **Stop Protection** at the bottom of the window (See Figure 42).



Figure 42 - Restrict Editing: Stop Protection

5. If the document is password protected, you will be prompted to enter in the password to stop protection. If the document has no password, protection will stop.

### Saving your Fillable Form as a Template

Once you have created and locked your form, you can save the form as a template. Then when a user is ready to save their completed form, they will be prompted to save the form as a new document. This way, you can share the form and won't have to worry about users saving over the master copy. To save your form as a template:


1. Click on the **Form** tab in the *Ribbon*. 
2. The *Backstage* view will open. Click on **Save As** (See Figure 43).



Figure 43 - Save As

3. Select a location on your computer to save your document. The *Save As* window will open.
4. For *File name:*, type a name for your file.
5. For *Save as type:* click the **dropdown** arrow.

6. Select **Word Template** from the dropdown list (See Figure 44).

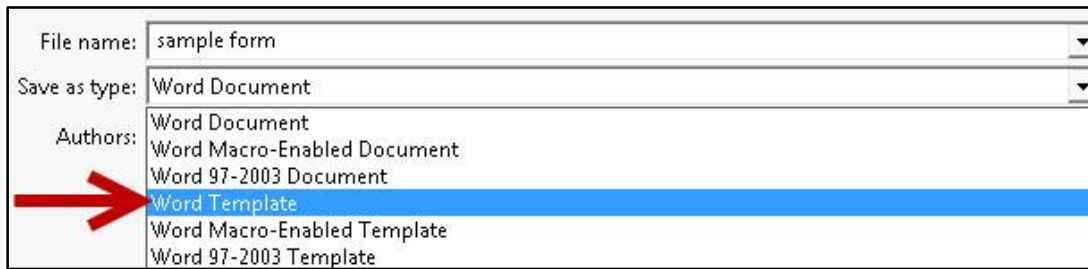


Figure 44 - Word Template

7. Click the **Save** button. Your form will be saved as a word template.

## Mail Merge

Mail Merge is a useful tool that allows you to create multiple letters, labels, envelopes, name tags, emails, and more. By using information stored in a list, database, or spreadsheet, you can create personalized documents by merging the information with a form letter, mailing labels, or envelopes.

You can perform a mail merge by using the Mail Merge Wizard, or by using the commands on the Mailings tab.

### Using the Mail Merge Wizard

The following example starts with an existing letter (See Figure 45) and shows the steps for merging the letter with names and addresses in an existing Excel spreadsheet.

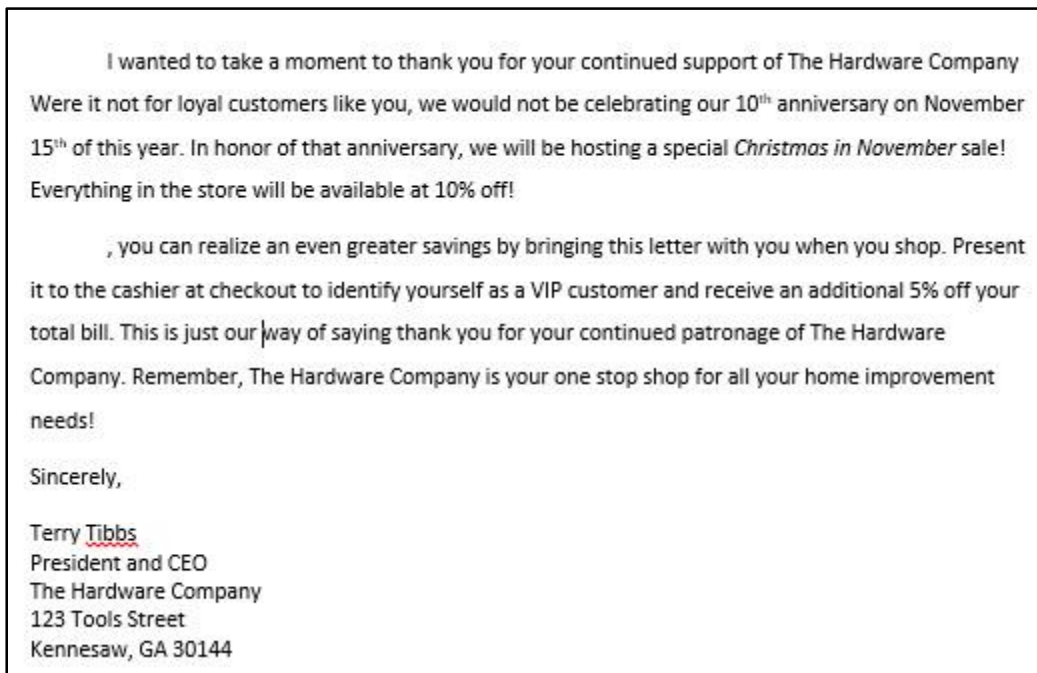


Figure 45 - Sample Letter

1. Click the **Mailings** tab (See Figure 46).

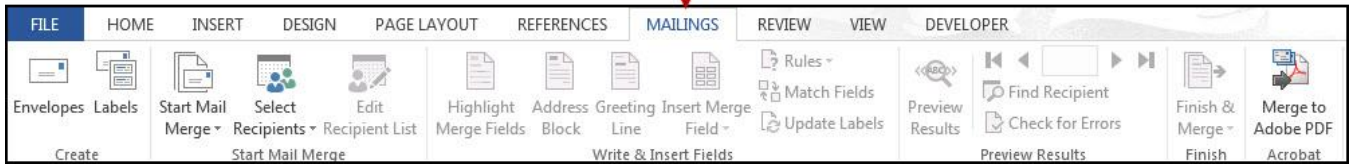


Figure 46 - Mailings Tab

2. In the Start Mail Merge group, click on **Start Mail Merge** (See Figure 47).

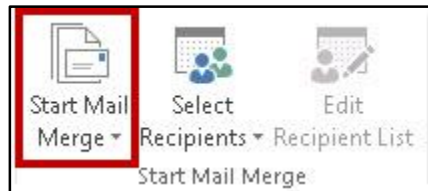


Figure 47 - Start Mail Merge

3. A dropdown list will appear. Click on **Step by Step Mail Merge Wizard** (See Figure 48).

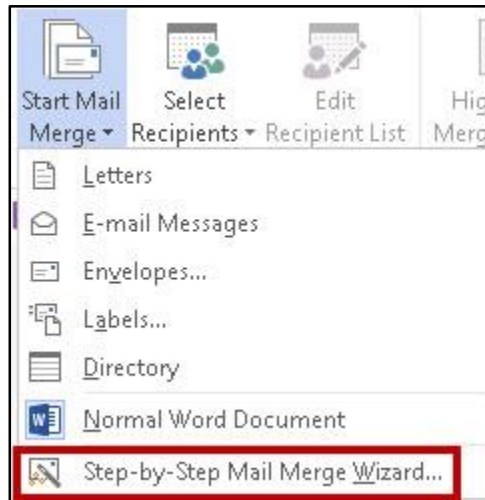


Figure 48 - Step by Step Mail Merge Wizard

4. The *Mail Merge: Select document type* window will open to the right of your document. Under *Select Document Type*, click on **letters** (See Figure 49).



Figure 49 - Select Document Type

5. At the bottom of the *Mail Merge* window, click on **Next: Starting Document** (See Figure 50).



Figure 50 - Next: Starting Document

6. The *Mail Merge: Select Starting Document* window will appear. Select **Use the current document** from the list (See Figure 51).

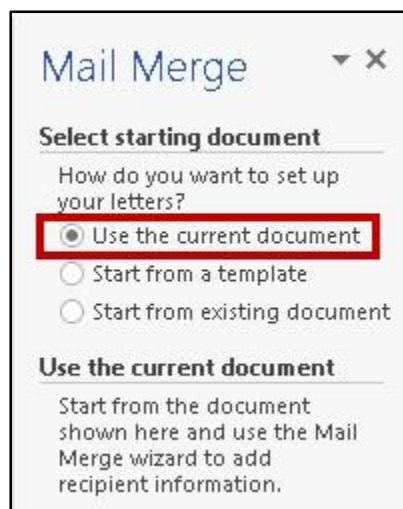


Figure 51 - Use the Current Document

7. At the bottom of the window, click on **Next: Select recipients** (See Figure 52).



Figure 52 - Next: Select Recipients

8. The *Mail Merge: Select Recipients* window will appear. Select **Use an existing list** from under *Select Recipients* (See Figure 53).

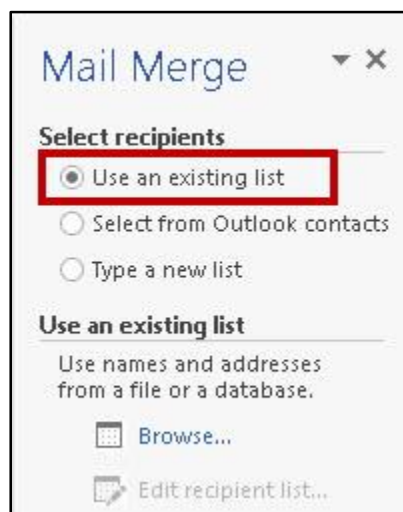


Figure 53 - Select Recipients

*Note:* If you don't have an existing list saved on your computer, you can select **Type a new list**. See Using the Mail Merge Wizard to create your own list of recipients.

9. Under *Use an existing list*, click on **Browse...** (See Figure 54).



Figure 54 - Use an Existing List

10. The *Select Data Source* window will appear. Navigate to the **Excel spreadsheet** that contains the contact information you want to use (See Figure 55).

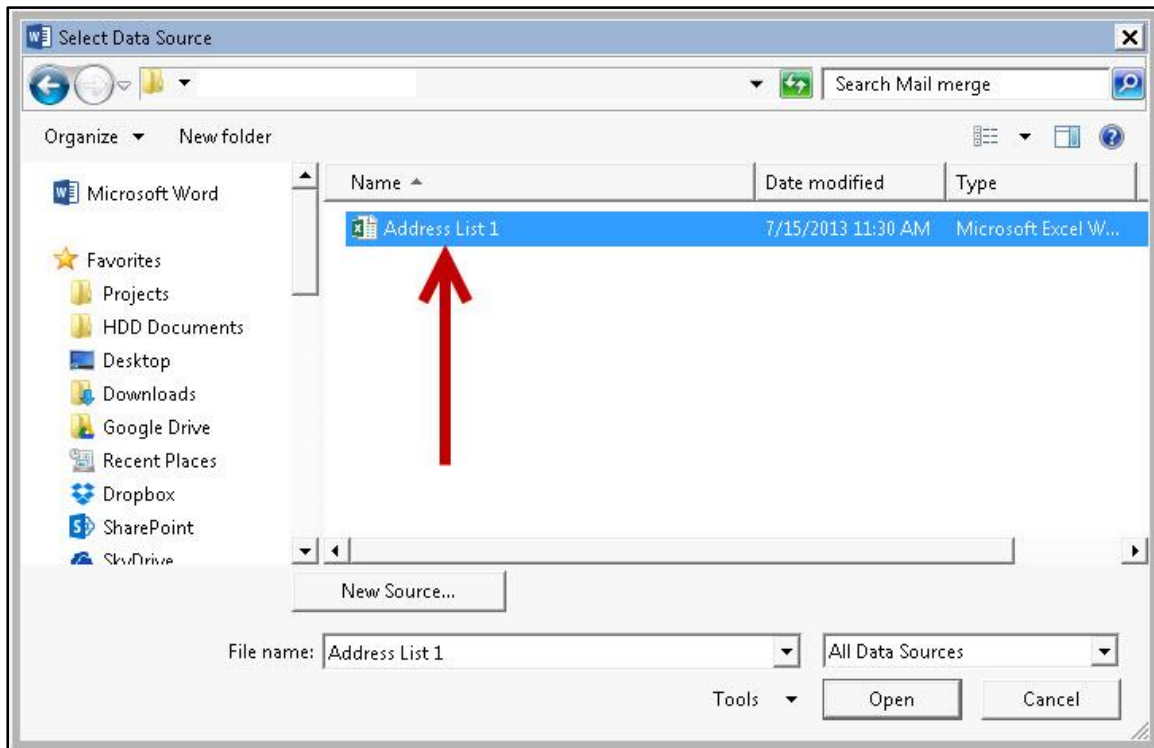


Figure 55 - Select Data Source

*Note:* An Access database can also be selected as the data source.

11. Click **Open**.

12. The *Select Table* window will appear with a list of active sheets in your workbook. Select the **sheet** that contains the information you want to import (See Figure 56).

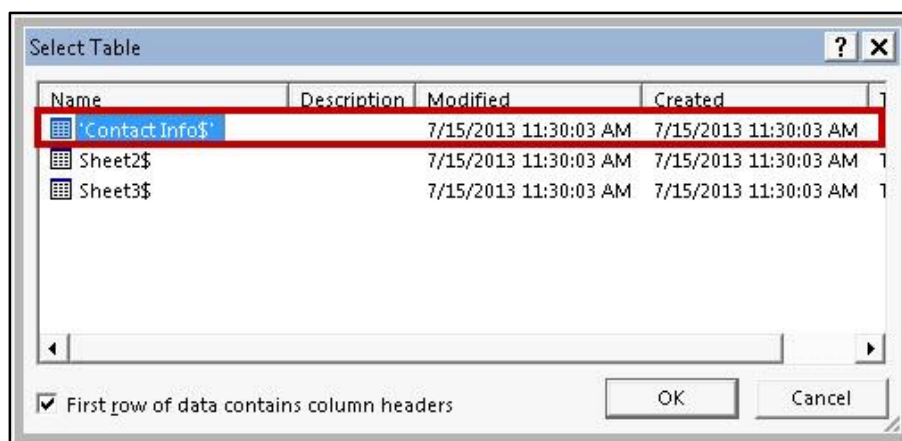


Figure 56 - Select Table

13. Click on **OK**.

14. The *Mail Merge Recipients* window will appear. From this window you can use the options to edit the information that is used during the mail merge (See Figure 57).

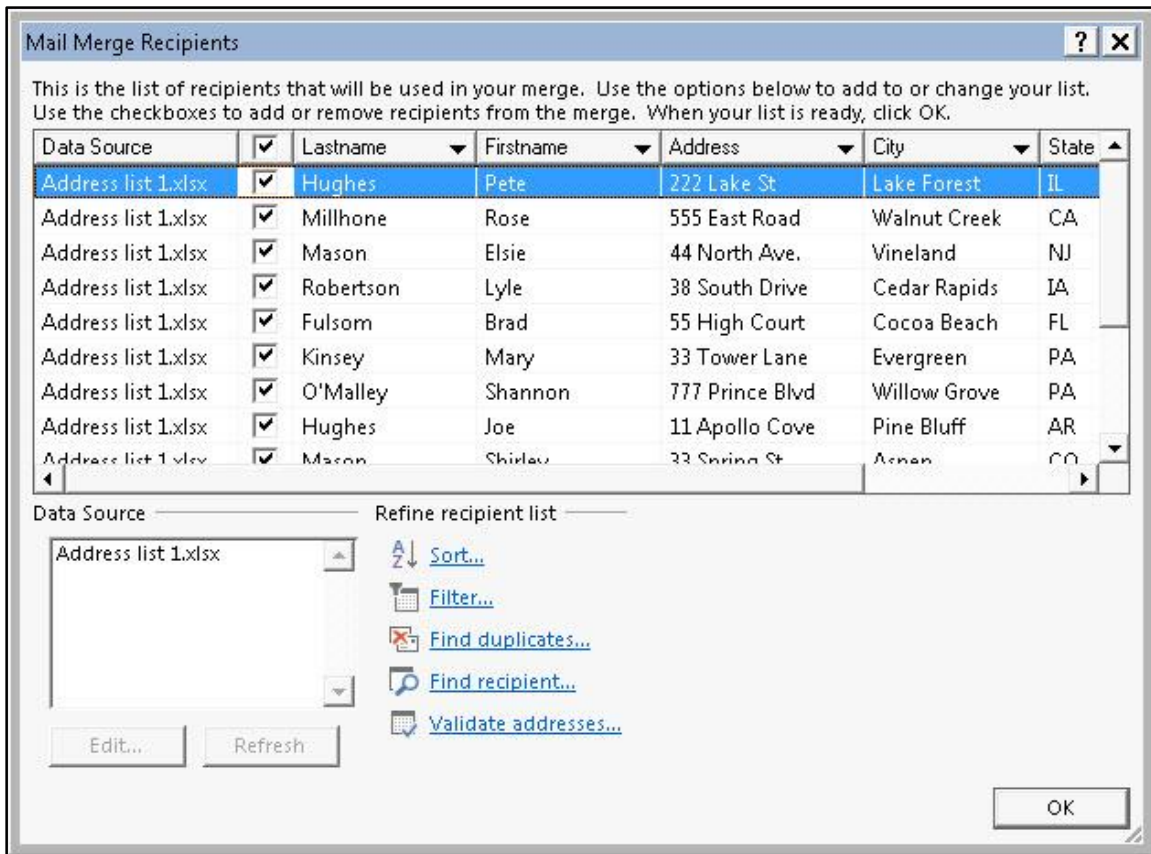


Figure 57 - Mail Merge Recipients

A. To remove/add recipients from the mail merge, click the checkbox next to the entry (See Figure 58).



Figure 58 - Selected/Deselected Recipients

B. To sort your contacts (e.g. Ascending order by Last name, then by State), click on **Sort...** (See Figure 59).

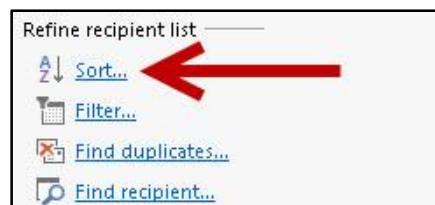


Figure 59 - Refine List: Sort



- i. The *Filter and Sort* window will appear showing the *sort records* tab. Use the options provided to create your sort parameters. When finished, click on **OK** (See Figure 60).

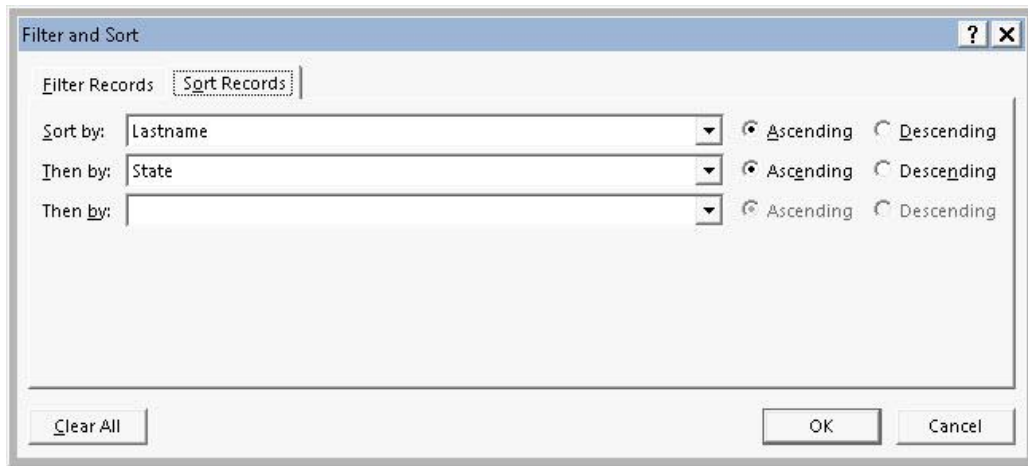


Figure 60 - Filter and Sort: Sort Options

- C. To filter your contacts (e.g. Filter for only address in California), click on **Filter...** (See Figure 61).



Figure 61 – Refine List: Filter

- i. The *Filter and Sort* window will appear showing the *Filter Records* tab. Use the options provided to create your sort parameters. When finished, click on **OK** (See Figure 62).

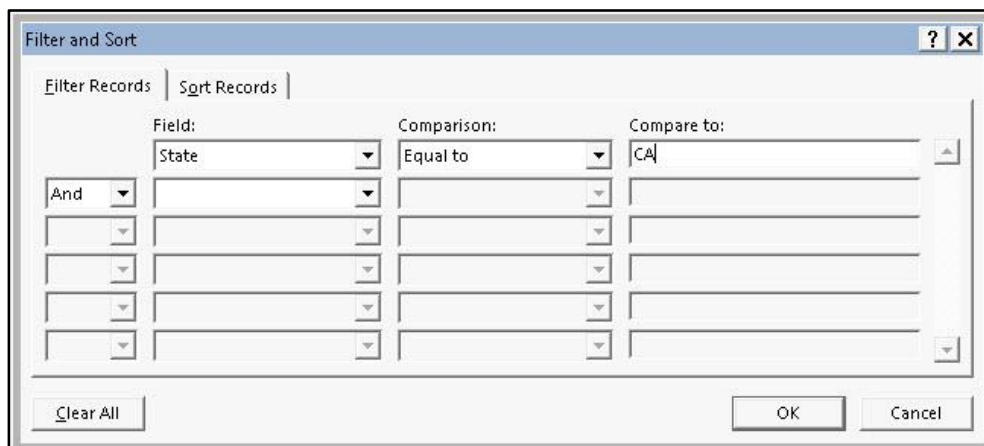


Figure 62 - Filter and Sort: Filter Options

D. To filter out duplicate data in your contacts (e.g. a person's name appears twice), click on **Find Duplicates...** (See Figure 63).



Figure 63 - Refine List - Find Duplicates

i. The *Find Duplicates* window will open, and any duplicate data will be show. To remove one of the duplicate entries, click on the **checkbox** (See Figure 64).

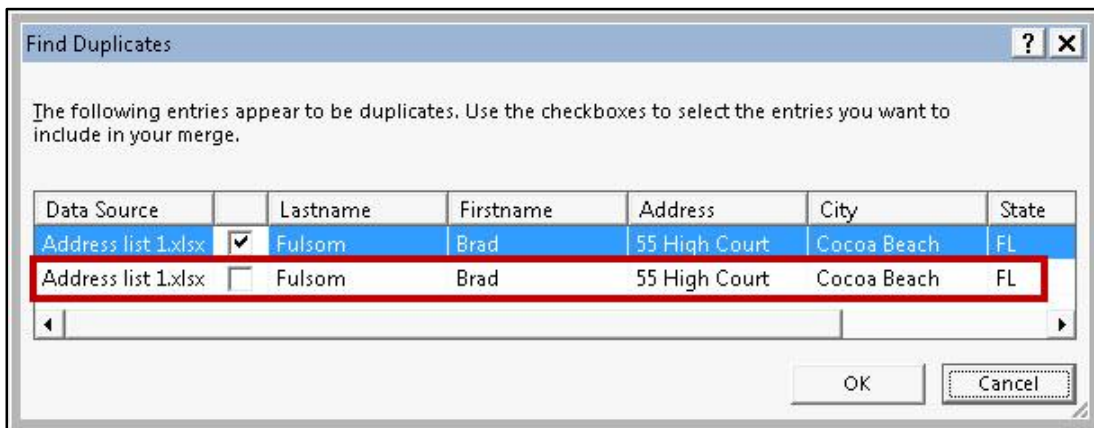


Figure 64 - Find Duplicates

ii. Click on **OK** when finished.

E. To find a record in your list, click on **Find Recipient...** (See Figure 65).



Figure 65 - Refine List: Find Recipient

- i. The *Find Entry* window will open. Type the **name of the record** you want to find in the *find* field (See Figure 66).

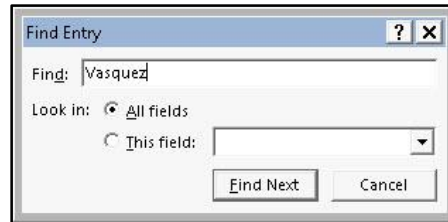


Figure 66 - Find Entry

- ii. Click on **Find Next** to run your search.
- iii. If the entry is stored in the list, it will be highlighted in the *Mail Merge Recipients* window.

*Note:* The *Validate Address* feature will not be covered in this booklet. If you wish to use it, you will be prompted to visit the Microsoft Office store to download additional software to use this feature.

15. When finished making edits to the recipient list, click the **OK** button.

16. At the bottom of the window, click on **Next: Write your letter** (See Figure 67).



Figure 67 - Next: Write your Letter

17. The *Mail Merge: Write your Letter* window will appear to the right of your document and present you with four options adding the recipient information to your letter (See Figure 68).



Figure 68 - Write your Letter

A. The *Address block...* option will allow you to add address information to your letter. Click on **Address block...**

i. The *Insert Address Block* window will open (See Figure 69).

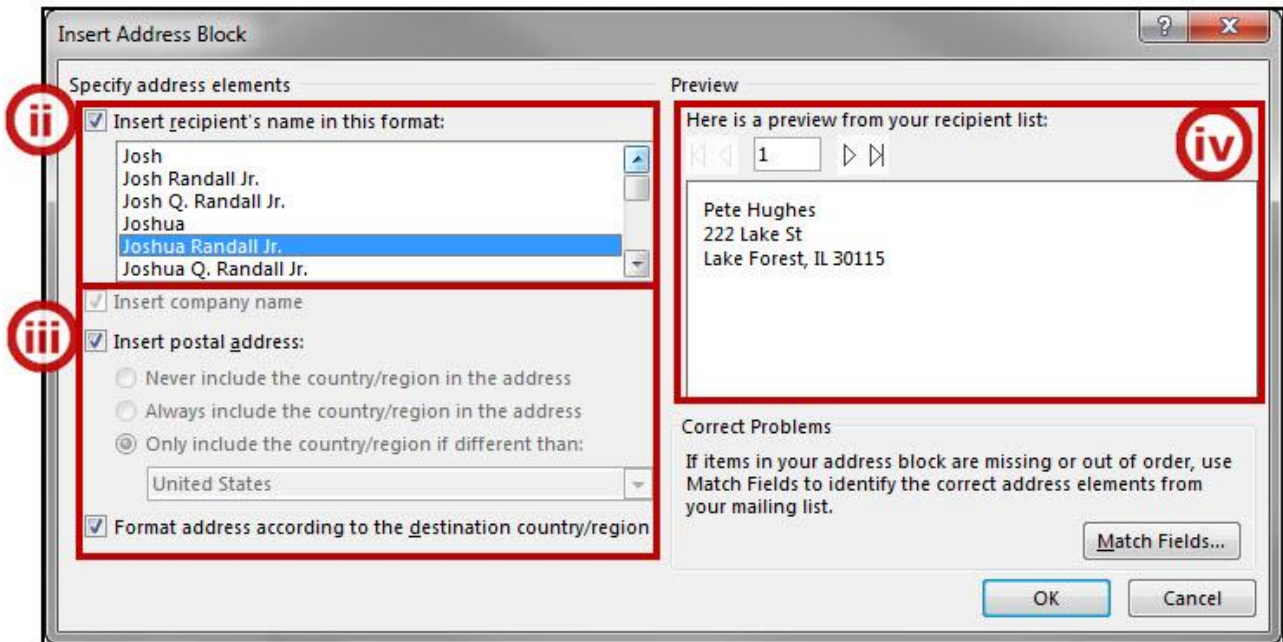


Figure 69 - Insert Address Block

- ii. Under the *Insert recipient's name in this format* field, you can select a format from the dropdown list for how you want the recipient's name to appear.
- iii. In this section, you can choose to insert a company's name, insert the country/region in the postal address, and to format the address according to the destination country/region.
- iv. The *Preview* field allows you to preview how your address will look in your letter. Use the arrow buttons to navigate through your list.
- v. When finished, click the **OK** button. Your address will be inserted into your document at the location of your cursor.

B. The *Greeting Block* option will allow you to add a personalized greeting to your letter. Click on **Greeting Block** (See Figure 68).

i. The *Insert Greeting Line* window will open (See Figure 70).



Figure 70 - Insert Greeting Line

ii. In the *Greeting line format* section, use the dropdown boxes to create the greeting line for your letter.

iii. In the *Greeting line for invalid recipient names*, you can set a generic greeting that will display when Word cannot find a name for an entry.

iv. The *Preview* section allows you to see how your selections will look in the final mail merge. Use the arrows to navigate between records.

v. When finished, click the **OK** button. Your greeting line will be inserted into your document at the location of your cursor.

C. The *Electronic Postage* option will allow you to add electronic postage to your letter. This will require the download of additional software that is not covered in this document.

- D. The *More items* option will allow you enter specific fields into your letter, one field at a time (See Figure 71).

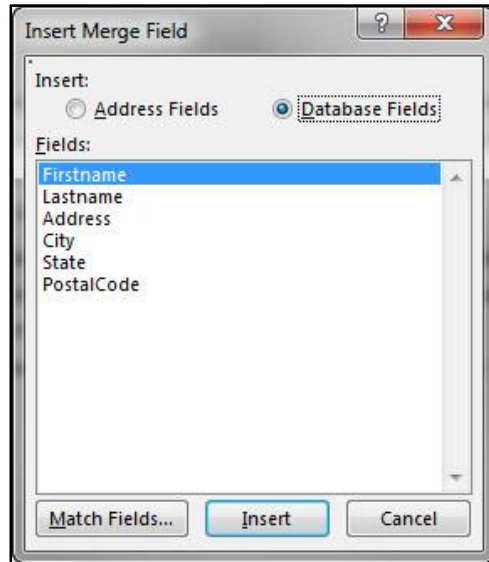


Figure 71 - Insert Merge Field: Database

18. When finished adding fields to your document, under *Mail Merge: Write your letter*, click on **Next: Preview your letters** (See Figure 72).

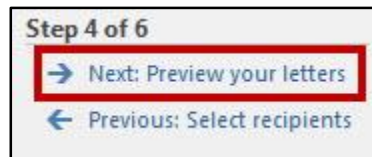


Figure 72 - Next: Preview Letters

19. The *Mail Merge: Preview your letters* window will appear to the right side of your document. From here you can preview all letters before completing your mail merge, or exclude a recipient from the merge (See Figure 73).

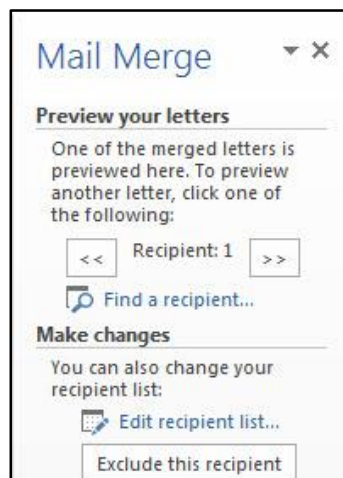


Figure 73 - Mail Merge: Preview your Letters

20. Click on **Next: Complete the Merge** (See Figure 74).

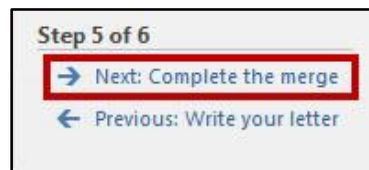


Figure 74 - Next: Complete the Merge

21. The *Mail Merge: Complete the Merge* window will appear to the right of your document. Click on **Print** (See Figure 75).



Figure 75 - Mail Merge: Complete the Merge

22. The *Merge to Printer* window will appear. Use the options to print *All* letters, the *current record* (letter), or a *range of letters* (See Figure 76).

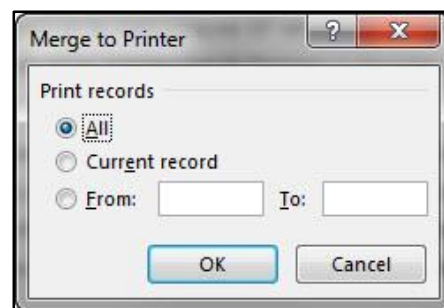


Figure 76 - Merge to Printer

23. After making your selection, click the **OK** button.

24. The *Print* window will open. Adjust your settings for your printer and print your documents.

## Using the Mail Merge Wizard to create your own list of recipients

If you do not have an existing list of names and addresses saved as an Excel file or Access database, you can create your own list of recipients. When creating your mail merge using the wizard, you will be prompted to *select recipients*:

1. Select the option **Type a new list** (See Figure 77).

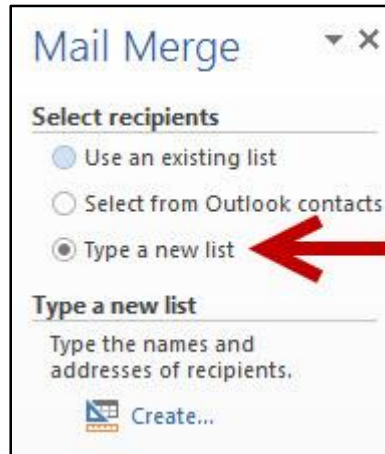


Figure 77 - Type a New List

2. Click on **Create...**
3. The *New Address List* window will appear. Type your **recipient information** into the table provided, filling in the fields as needed (See Figure 78).

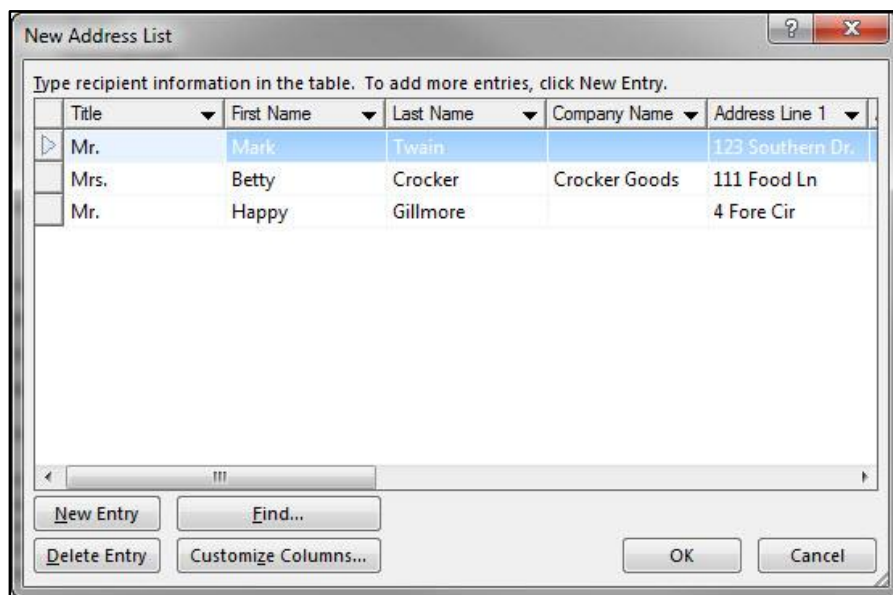


Figure 78 - New Address List

4. To create a new entry, click the **New Entry** button.

