University Information
Technology Services

Microsoft Office
Word 2016 for Windows

Mail Merge and Creating Forms

University Information Technology Services

Learning Technologies, Training & Audiovisual Outreach

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University Information Technology Services

Microsoft Office: Word 2016 for Windows
Mail Merge and Creating Forms

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Introduction

This booklet is the companion document to the Word 2016: 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.
- Recognize content controls and how to add them to your form.
- Lock and restrict your form.
- Save your form as a template.
- Unlock a form.
- Use the Mail Merge Wizard.
- Reassign fields using the matching fields tool.

Creating Forms

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

	Recent Photograph:
Name: Scrappy Owl	
Sex: Male ☒ Female ☐	Birth Date: 10/9/1963
Address: 1000 Chastain Point	Major: Communications
City: Kennesaw	Graduated: ☒
State: Georgia	Currently Employed: ☒
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*. The *Developer Tab* contains the tools necessary to create your form. If you do not see the *Developer* tab, follow the steps below to activate it:

1. Click the **File** tab.
2. In the *Backstage View*, click **Options**.

3. In the *Word Options* dialog box, click **Customize Ribbon** (See Figure 2).
4. In the *Main Tabs* list, click the check box for **Developer** (See Figure 2).
5. Click the **OK** button (See Figure 2).

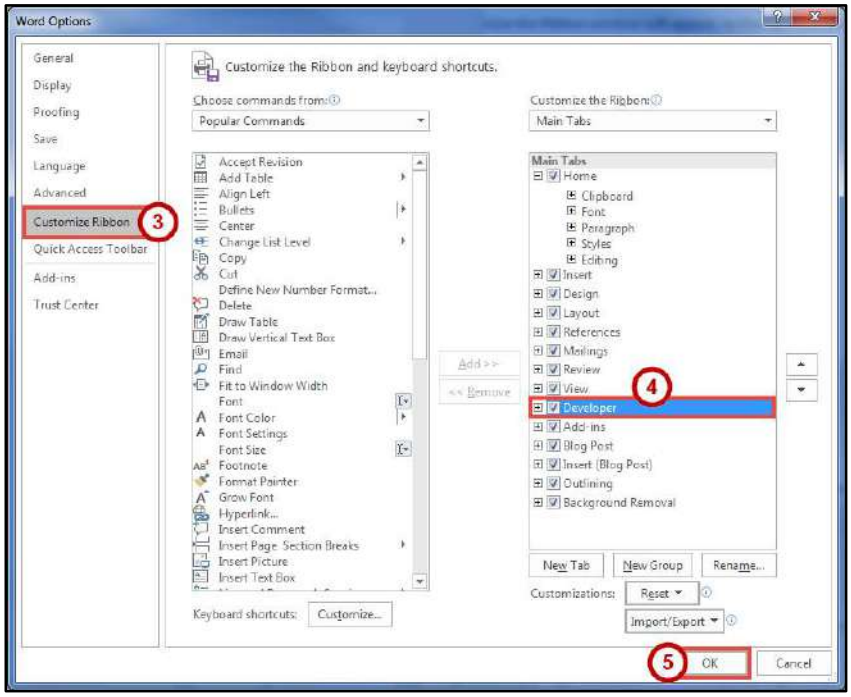

Figure 2 - Adding Developer Tab

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 the **Insert** tab (See Figure 3).
2. Click **Table** (See Figure 3).
3. In the *Insert Table* drop-down menu, move your mouse pointer over the **boxes** until you have the number of rows and columns that you want in the table (See Figure 3).

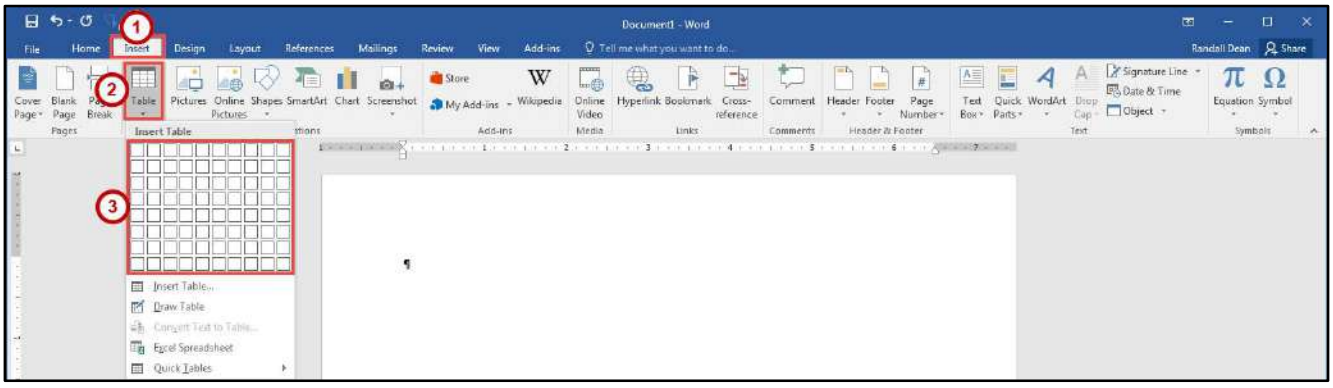

Figure 3 - Table Icon

4. The *Live Preview* feature will show what the table will look like in your document. Click to **confirm** your table.

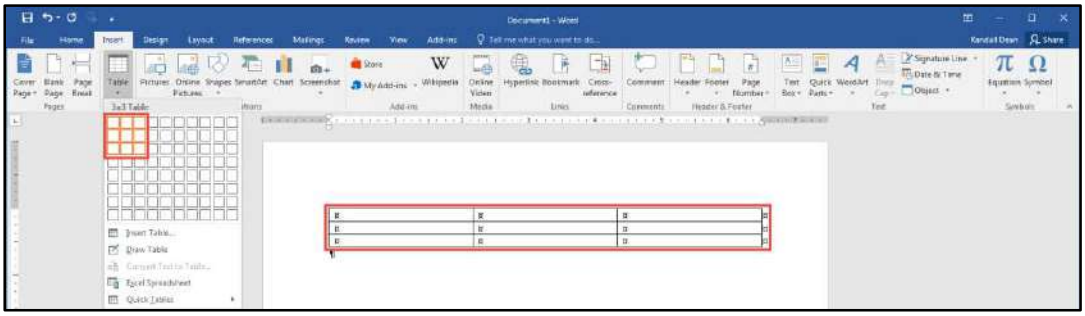

Figure 4 - Click to Confirm Your Table

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 2016: 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.

Aa	Rich Text Content Control	Text can be formatted and saved (e.g. **Bold**, *Italics*).
Aa	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 5 - Content Controls

The following explains how 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 6).
3. Click the **content control** that you want to insert (See Figure 6).

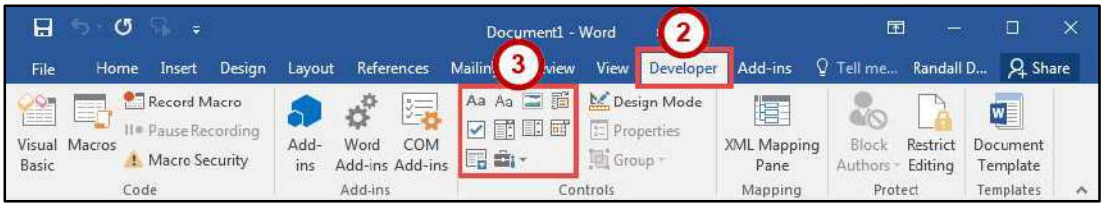

Figure 6 - Developer Tab

Replacing Instructional Text

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

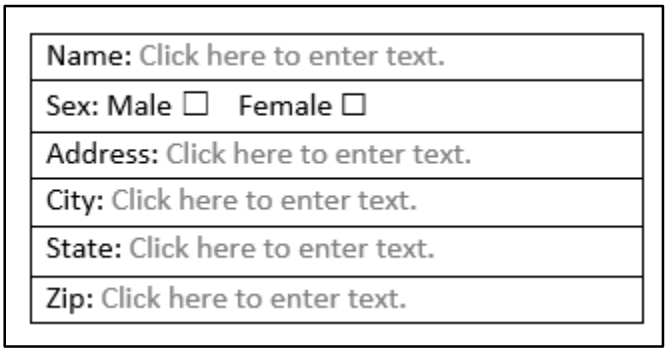

Figure 7 - Example of Instructional Text

The following explains how to change the instructional text that appears in the *content control*:

1. Click the **Developer** tab (See Figure 8).
2. Click **Design Mode** (See Figure 8).

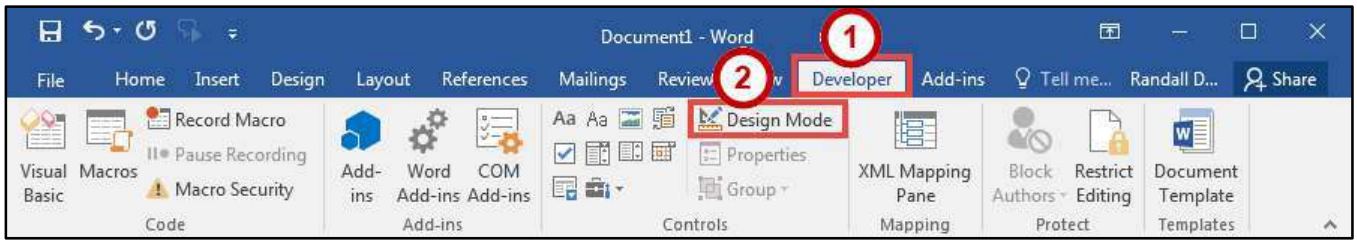

Figure 8 - Developer Tab

3. The *content controls* in your document will enter *design mode*.

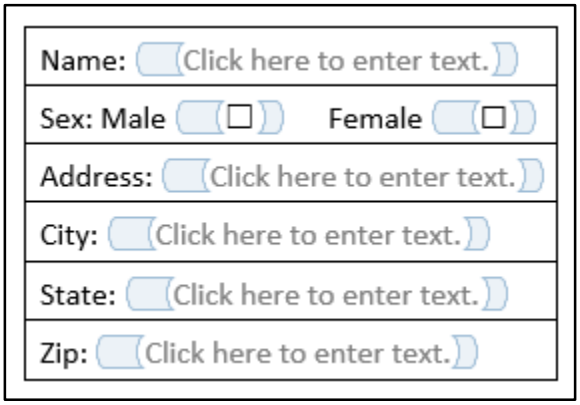

Figure 9 - Design Mode Active

4. Click the **control** to edit and type in the **new text**.
5. When finished editing, click **Design Mode**.
6. Your edits will be applied.

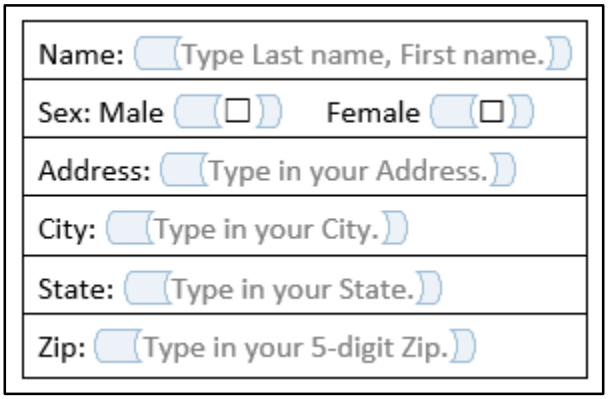

Figure 10 - Instructional Text Edited

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 the **Content Control** you wish to alter properties for.
2. Click the **Developer** tab (See Figure 11).
3. Click **Properties** (See Figure 11).

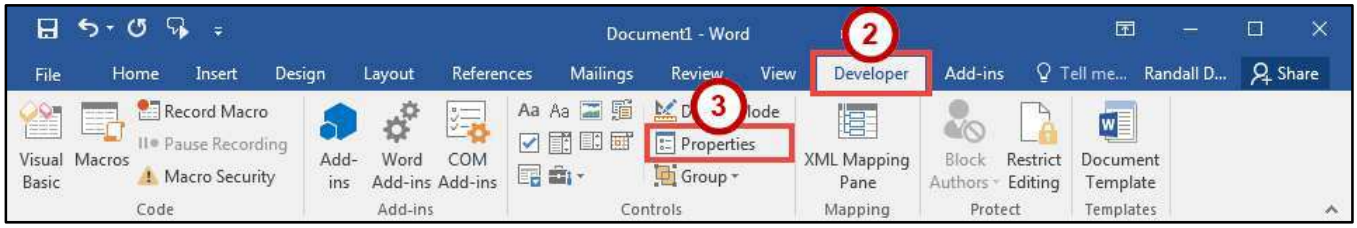

Figure 11 - Developer Properties

4. A *Content Control* P*roperties* window will appear. The options under *General* and *Locking* are available for most content controls. You can apply the following properties:
   a. **Use a style to format text typed into the empty control** - This 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 12).
   b. **Remove content control when contents are edited** - This will make the content control disappear once the user has entered information, leaving just the text (See Figure 12).
   c. **Content control cannot be deleted** - This prevents the content control from being deleted while the form is being created or edited (See Figure 12).

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

   d. **Contents cannot be edited** - This prevents the instructional text from being changed while the form is being created or edited (See Figure 12).

   Note: 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.

   e. **Allow carriage returns (multiple paragraphs)** - 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 12).
5. Click the **OK** button (See Figure 12).

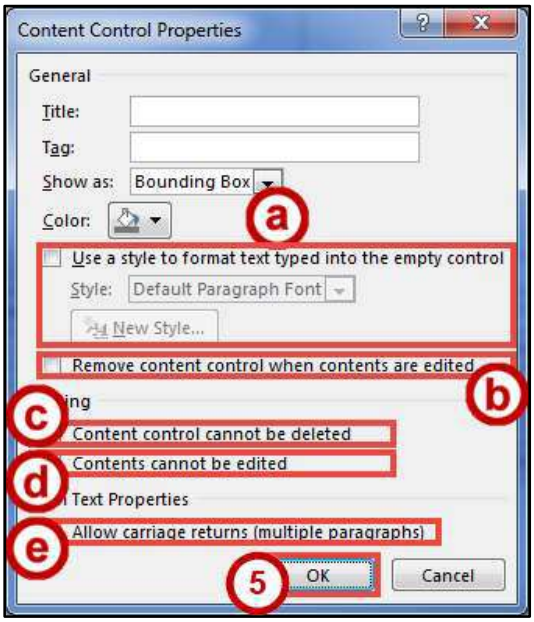

Figure 12 - Content Control Properties

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.

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. The following explains how to add entries to the combo box/drop-down list:

1. Click the **Combo Box Content Control** you wish to alter properties for.
2. Click the **Developer** tab.
3. Click **Properties**.
4. In the *Content Control Properties* dialog box, click the **Add** button.
5. In the *Add Choice* dialog box, enter the name of your **list item** (See Figure 13).

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

6. Click the **OK** button (See Figure 13).
7. Repeat steps 4-6 to add more values to your list.

Figure 13 - Add Choice Dialog Box

The following explains how to edit existing entries in the combo box/drop-down list:

1. Select a value from the *Drop-Down List Properties* (See Figure 14).
   a. **Modify** - Edit the selected value (See Figure 14).
   b. **Remove** - Delete the selected value (See Figure 14).
   c. **Move Up/Move Down** - Reposition the value within the list (See Figure 14).
2. Click the **OK** button (See Figure 14).

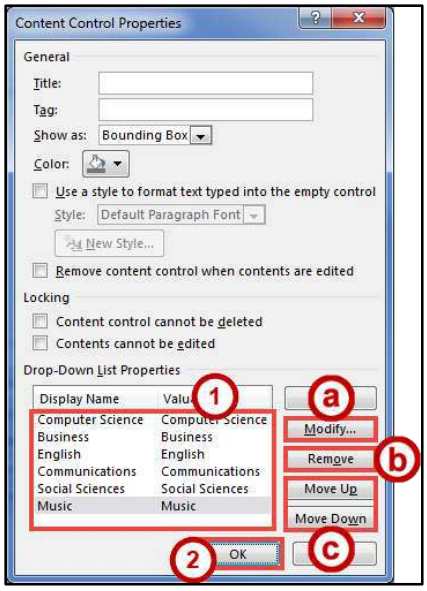

Figure 14 - Content Control Properties for Combo Box

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). The follow explains how to change how your date will be displayed in the field:

1. Click the **Date Picker Content Control** you wish to alter properties for.
2. Click the **Developer** tab.
3. Click **Properties**.
4. In the *Content Control Properties* dialog box under *Date Picker Properties*, select one of the **options** from the list (See Figure 15).
5. Click the **OK** button (See Figure 15).

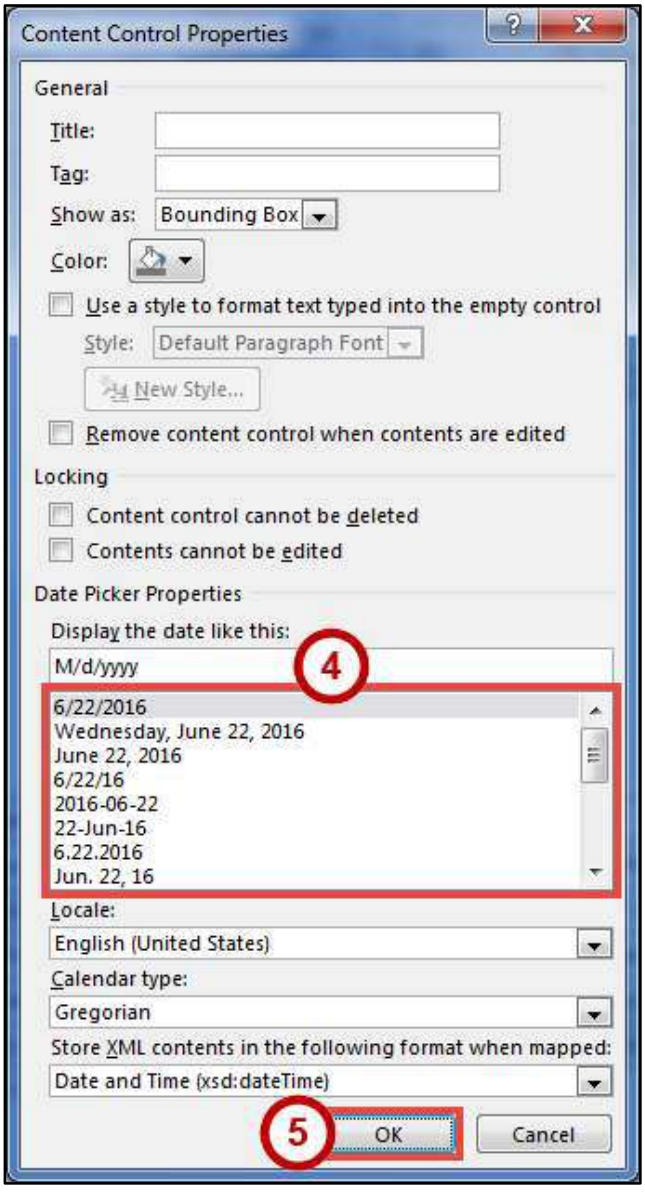

Figure 15 - Content Control Properties for Date Picker

Picture Properties

The *Picture Content Control* properties window will display some of the same general options. There are no special control options for the *Picture Content Control*.

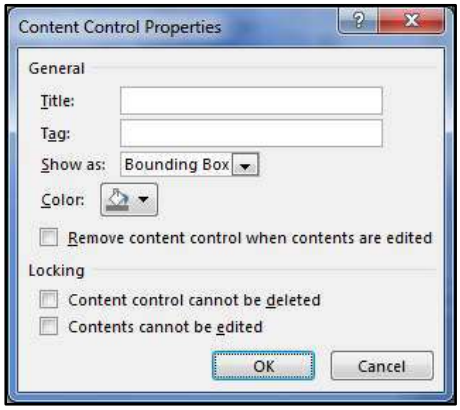

Figure 16 - Content Control Properties for Picture

Check Box Properties

The *Check Box Content Control* properties provide options for changing the symbols that appear when the box is checked and unchecked. The following explains how to change the symbols that appear when the box is checked/unchecked:

1. Click the **Check Box Content Control** you wish to alter properties for.
2. Click the **Developer** tab.
3. Click **Properties**.
4. In the *Content Control Properties* dialog box, click the **Change** button to set the symbol for *Checked* or *Unchecked*.

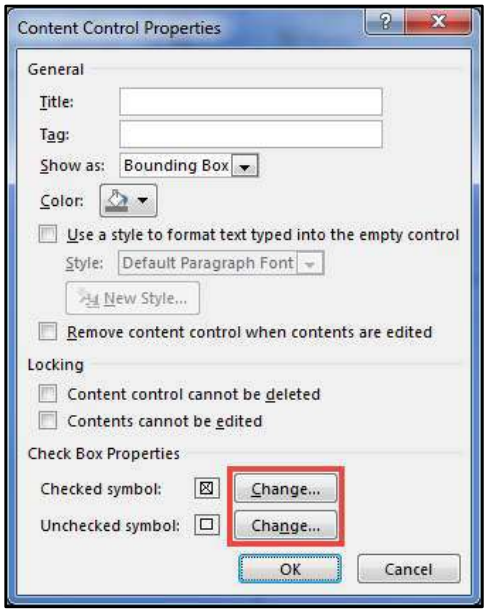

Figure 17 - Content Control Properties for Check Box

5. In the *Symbols* dialog box, select a **symbol** from the list (See Figure 18).
6. Click the **OK** button (See Figure 18).

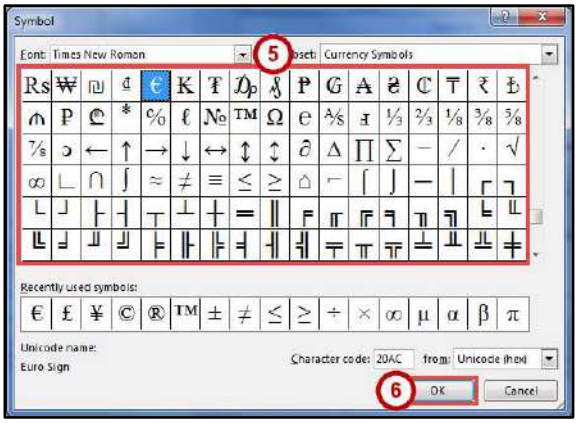

Figure 18 - Symbol

7. When finished, in the *Content Control Properties* dialog box, click the **OK** button.

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 accidently remove key fields. In addition, you can restrict users to using the content controls available to fill in the form.

Lock Content

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

1. Click the **Content Control** you wish to alter properties for.
2. Click the **Developer** tab.
3. Click **Properties**.
4. In the *Content Control Properties* dialog box under *Locking,* check the **Content control cannot be deleted** box (See Figure 19).
5. Click the **OK** button (See Figure 19).

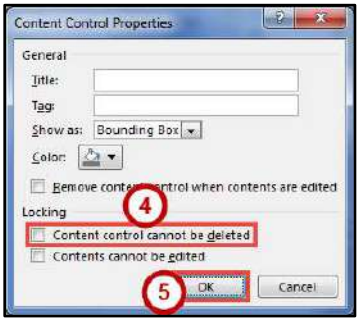

Figure 19 - Lock Content

6. Repeat steps 1-5 for the rest of the *Content Controls* in your form.

Restrict Editing

The following explains how to lock against deletion:

1. Click the **Developer** tab (See Figure 20).
2. Click **Restrict Editing** (See Figure 20).

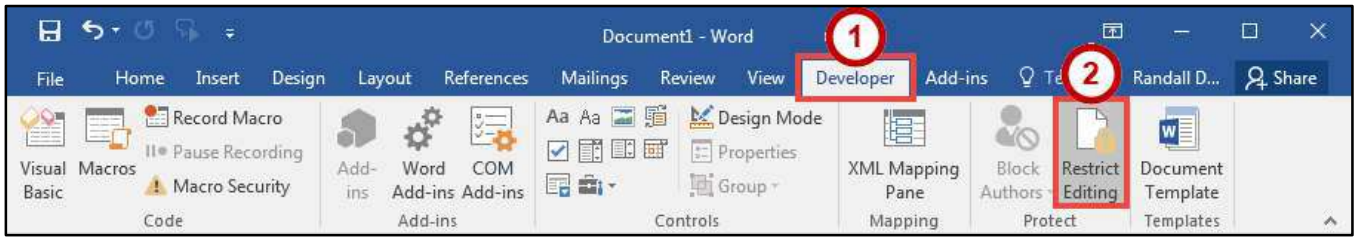

Figure 20 - Restrict Editing

3. In the *Restrict Editing* pane under *Editing restrictions,* click the box that says **Allow only this type of editing in the document** (See Figure 21).
4. Select **Filling in forms** from the drop-down list (See Figure 21).
5. Under *Start enforcement*, click **Yes, Start Enforcing Protection** (See Figure 21).

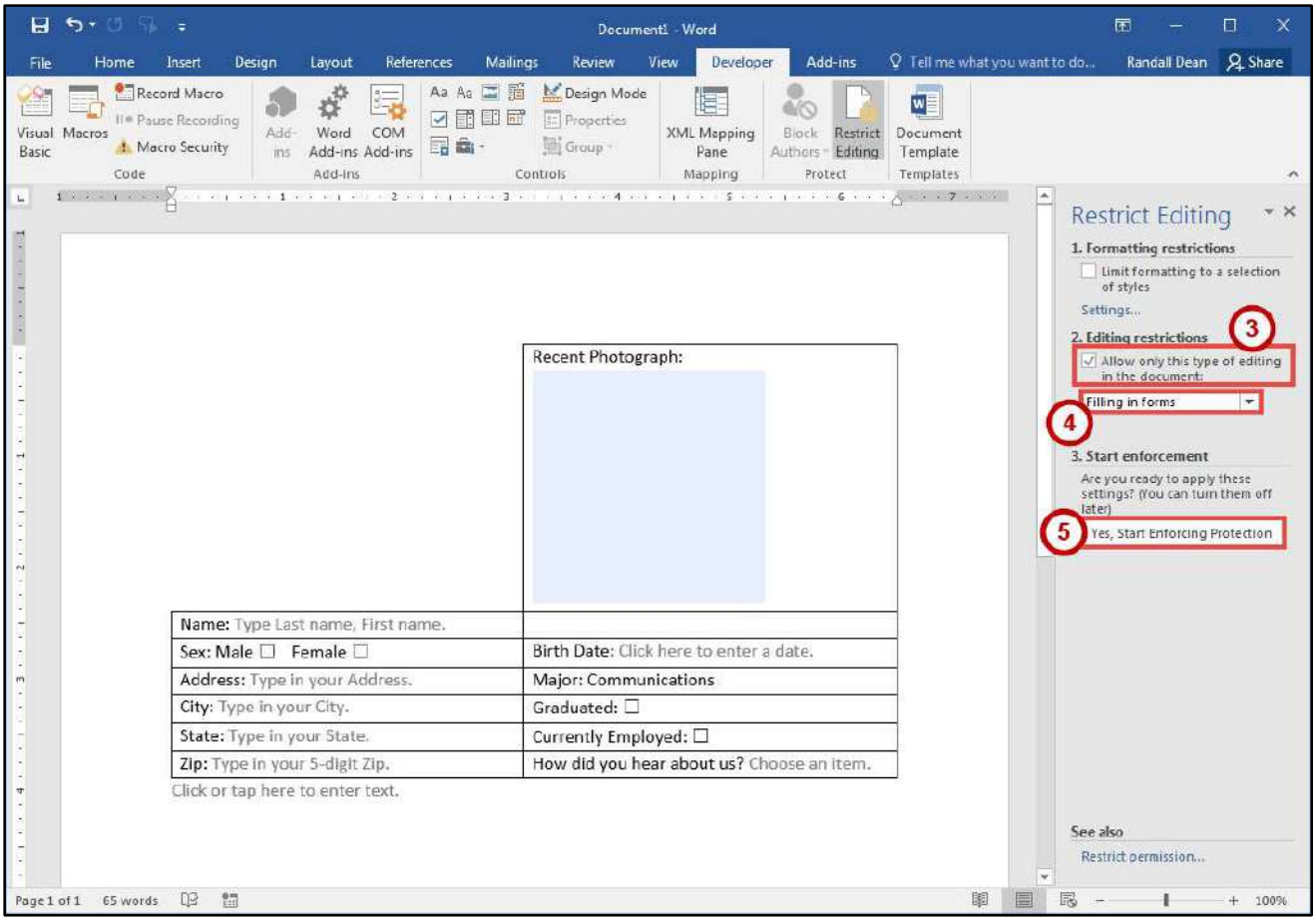

Figure 21 - Start Enforcing Protection

6. In the *Start Enforcing Protection* dialog box, 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 22).

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

7. Click the **OK** button (See Figure 22).

Figure 22 - Start Enforcing Protection

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 the **Developer** tab.
2. Click **Restrict Editing**.
3. In the *Restrict Editing* pane, click the **Stop Protection** button.

Note: 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.

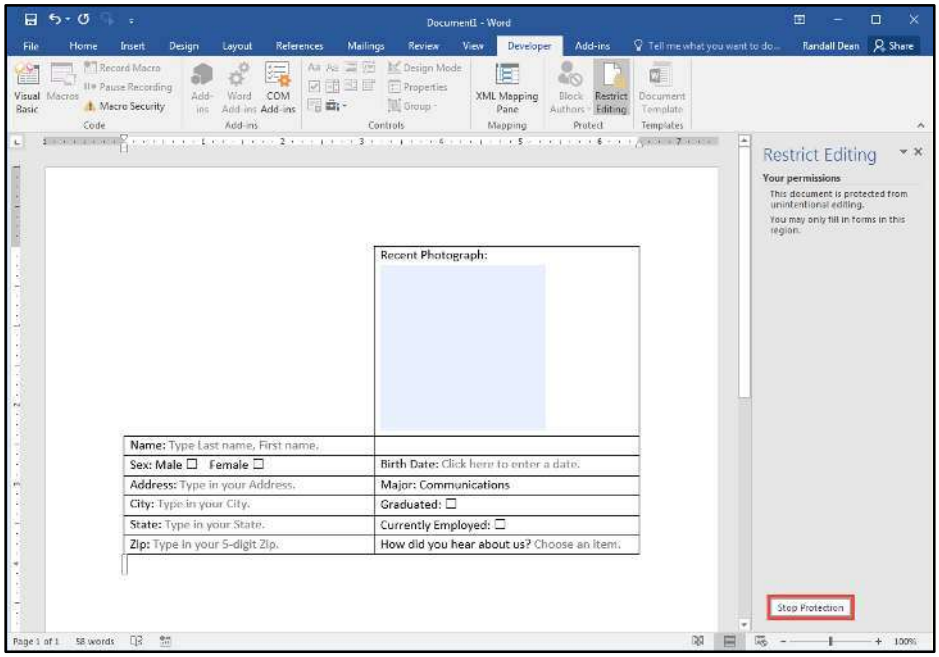

Figure 23 - Stop Protection

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. The following explains how to save your form as a template:

1. Click the **File** tab.
2. In the *Backstage view*, click **Save As**.
3. Select a **location** on your computer to save your document.
4. In the *Save As* dialog box, type a **name** for your *File name* (See Figure 24).
5. Select **Word Template (*.dotx)** as your *Save as type* (See Figure 24).
6. Click the **Save** button (See Figure 24).

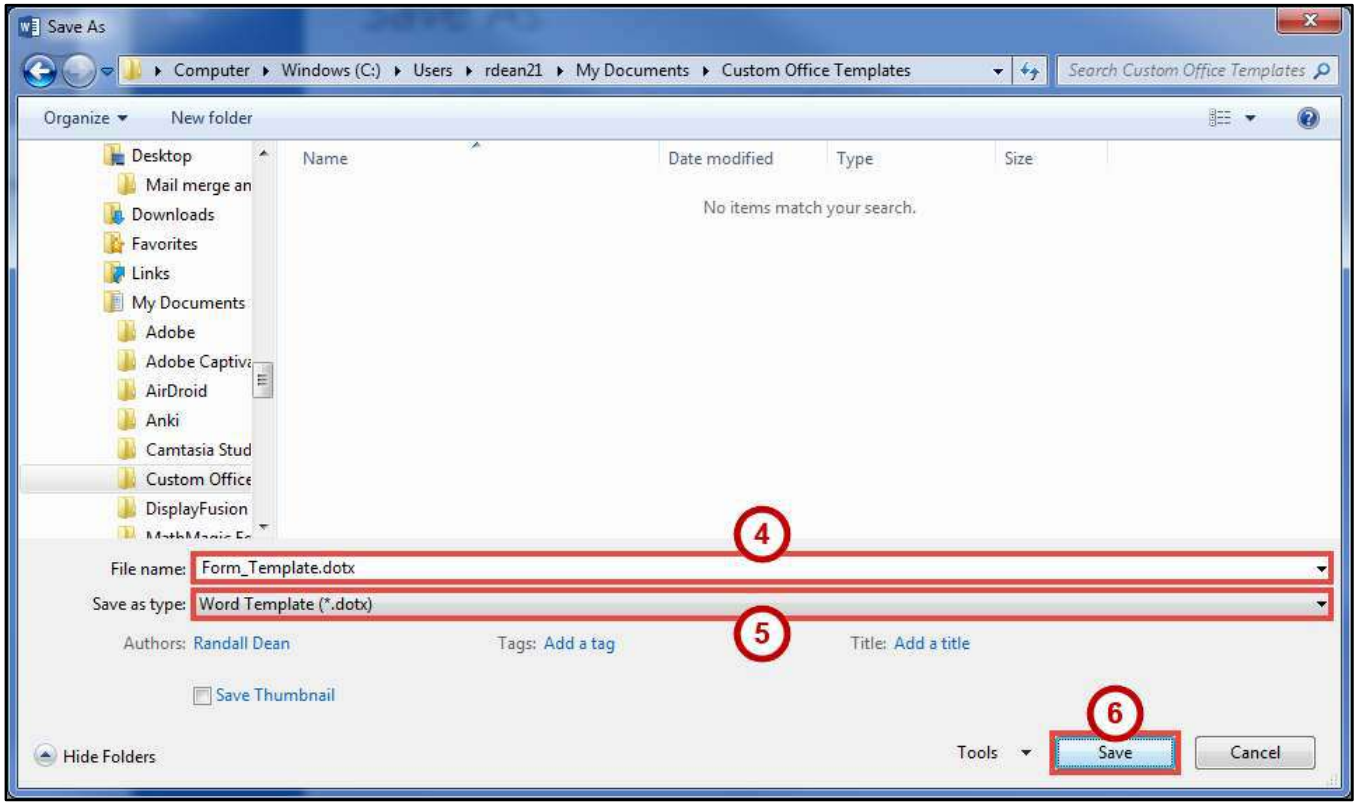

Figure 24 - Save As Dialog Box

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 and shows the steps for merging the letter with names and addresses in an existing Excel spreadsheet.

I wanted to take a moment to thank you for your continued support of The Hardware Company Were it not for loyal customers like you, we would not be celebrating our 10th anniversary on November 15th of this year. In honor of that anniversary, we will be hosting a special *Christmas in November* sale! Everything in the store will be available at 10% off!

, you can realize an even greater savings by bringing this letter with you when you shop. Present it to the cashier at checkout to identify yourself as a VIP customer and receive an additional 5% off your total bill. This is just our way of saying thank you for your continued patronage of The Hardware Company. Remember, The Hardware Company is your one stop shop for all your home improvement needs!

We can't wait to see you, !

Sincerely,

Terry Tibbs
President and CEO
The Hardware Company
123 Tools Street
Kennesaw, GA 30144

Figure 25 - Sample Letter

1. Click the **Mailings** tab (See Figure 26).
2. Click **Start Mail Merge** (See Figure 26).
3. In the *Start Mail Merge* drop-down, click **Step-by-Step Mail Merge Wizard** (See Figure 26).

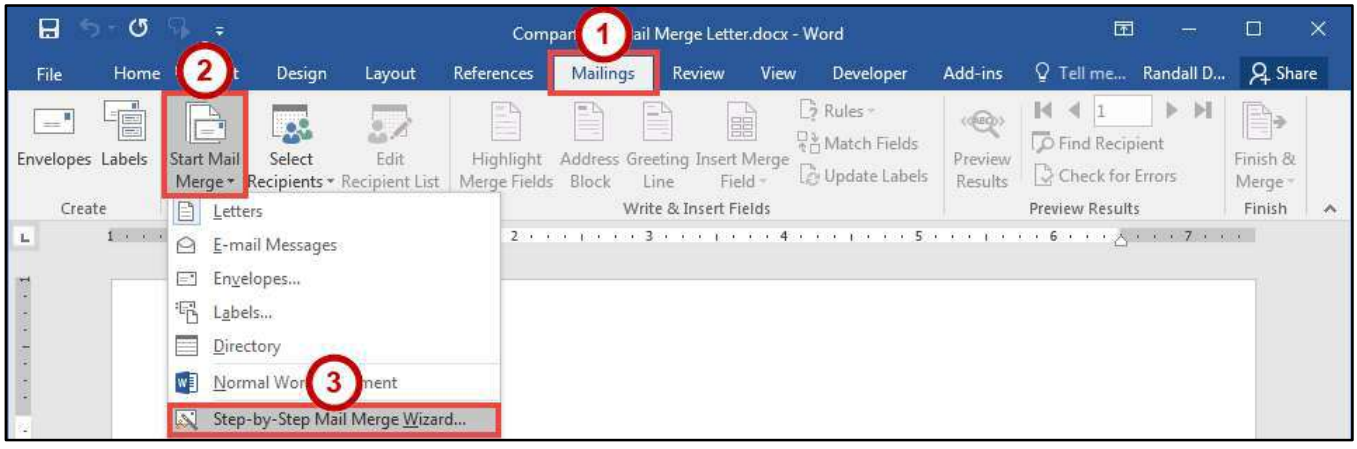

Figure 26 - Step-by-Step Mail Merge Wizard

4. In the *Mail Merge* pane under *Select document type*, click **Letters** (See Figure 27).
5. Click **Next: Starting document** (See Figure 27).

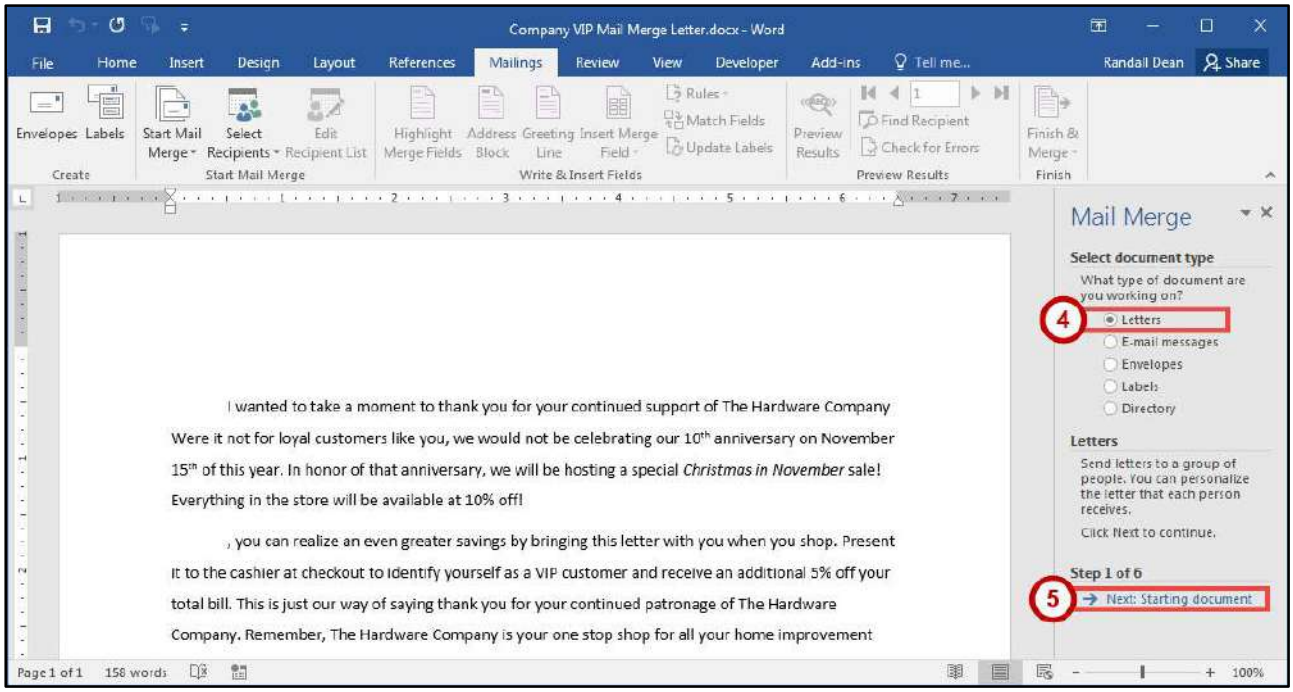

Figure 27 - Mail Merge Step 1 of 6

6. In the *Mail Merge* pane under *Select starting document*, click **Use the current document** (See Figure 28).
7. Click **Next: Select recipients** (See Figure 28).

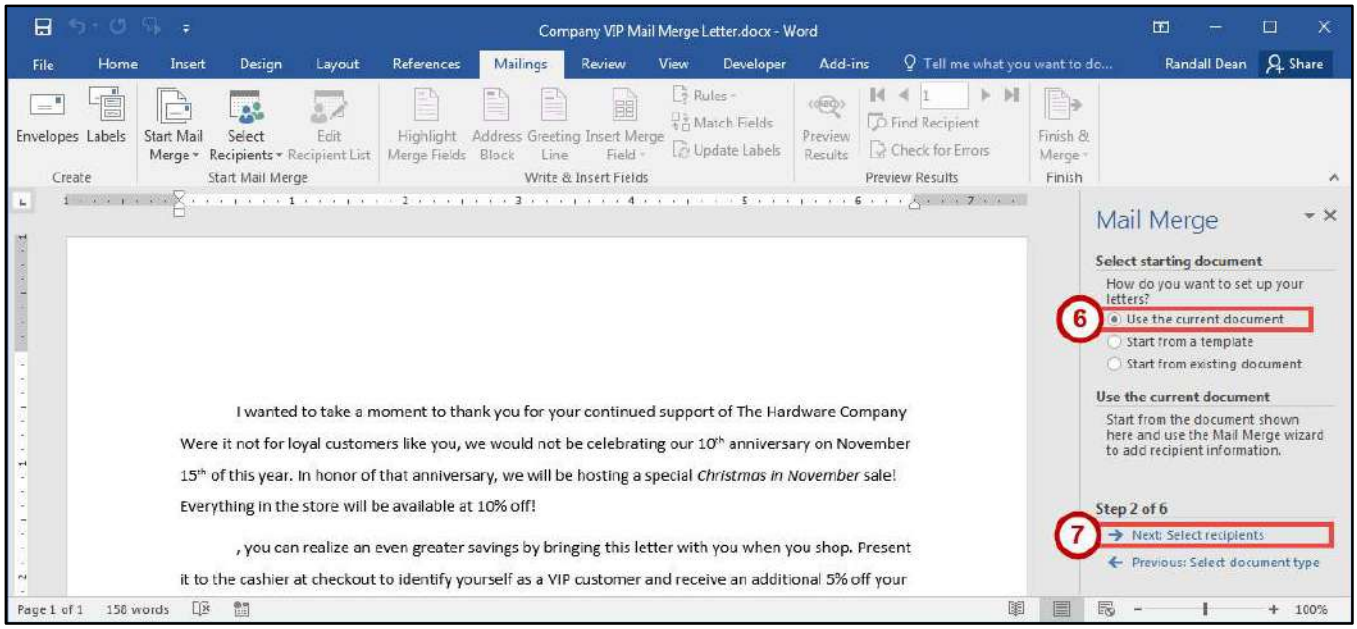

Figure 28 - Mail Merge Step 2 of 6

8. In the *Mail Merge* pane under *Select recipients*, click **Use an existing list** (See Figure 29).
9. Click **Browse** (See Figure 29).

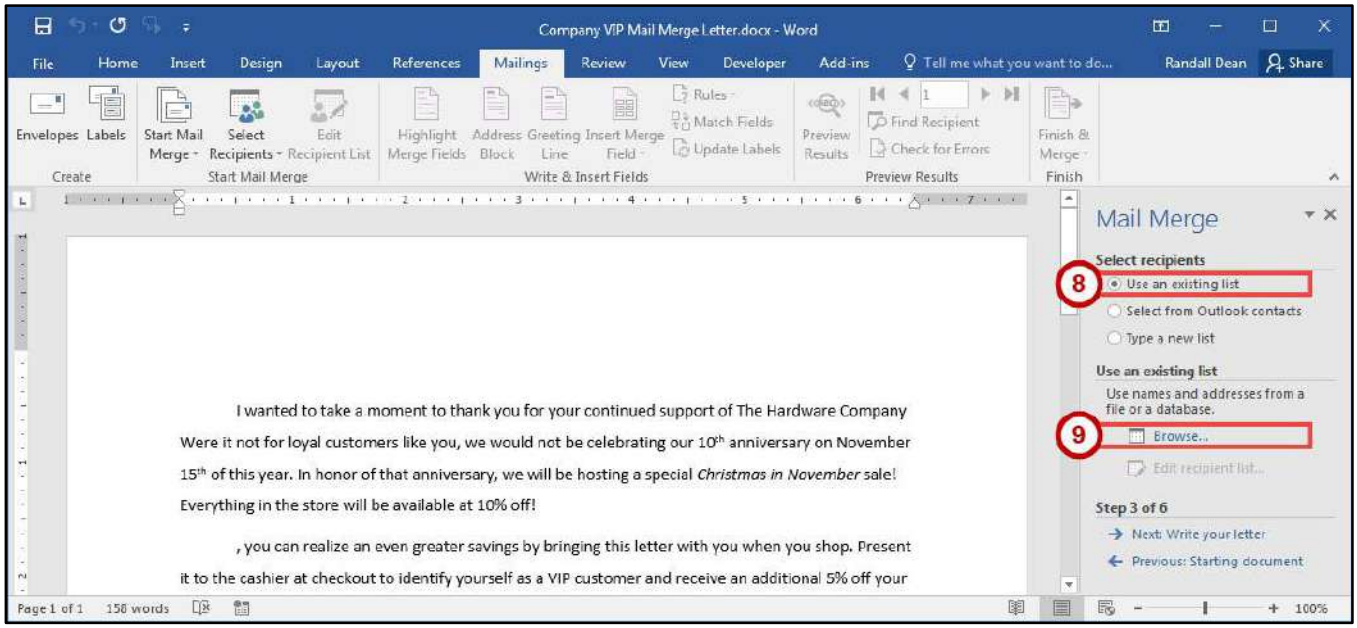

Figure 29 - Mail Merge Step 3 of 6

10. In the *Select Data Source* dialog box, navigate to and select the **Excel spreadsheet** that contains the contact information you want to use (See Figure 30).

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

11. Click the **Open** button (See Figure 30).

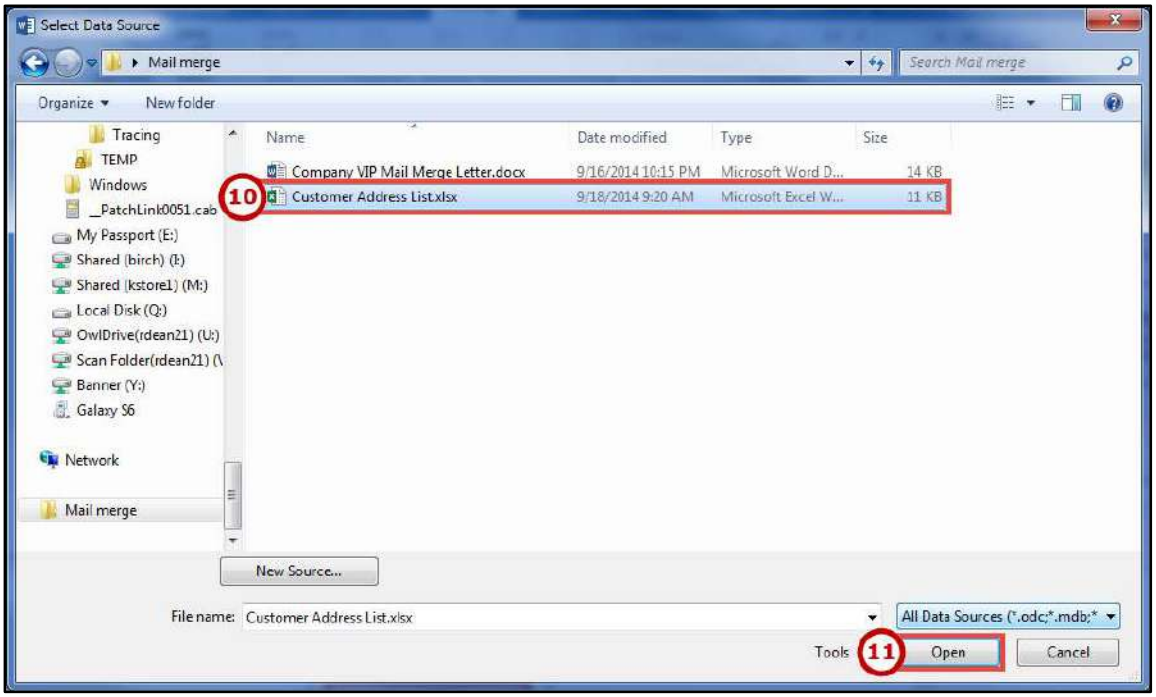

Figure 30 - Select Data Source

12. In the *Select Table* dialog box, select the **sheet** that contains the contact information you want to use (See Figure 31).
13. Click the **OK** button (See Figure 31).

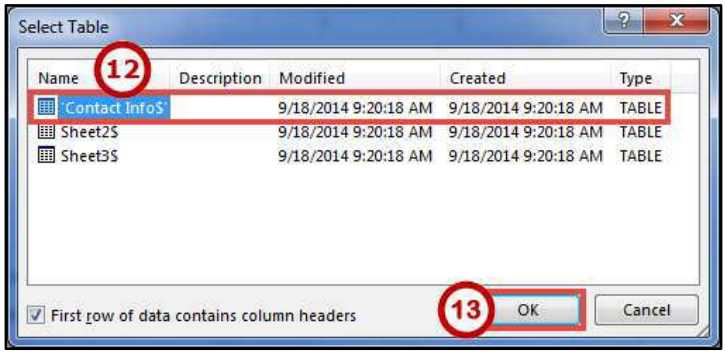

Figure 31 - Select Table

14. In the *Mail Merge Recipients* dialog box, you can use the following options to edit the information that is used during the mail merge.
    a. **Add/Remove Recipients** - Add or remove recipients from the mail merge (See Figure 32).
    b. **Sort** - Sort your records using specific parameters (See Figure 32).
    c. **Filter** - Filter your records using specific parameters (See Figure 32).
    d. **Find duplicates** - Find duplicate records and remove from the mail merge (See Figure 32).
    e. **Find recipient** - Find a recipient in your records (See Figure 32).

    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. Click the **OK** button (See Figure 32).

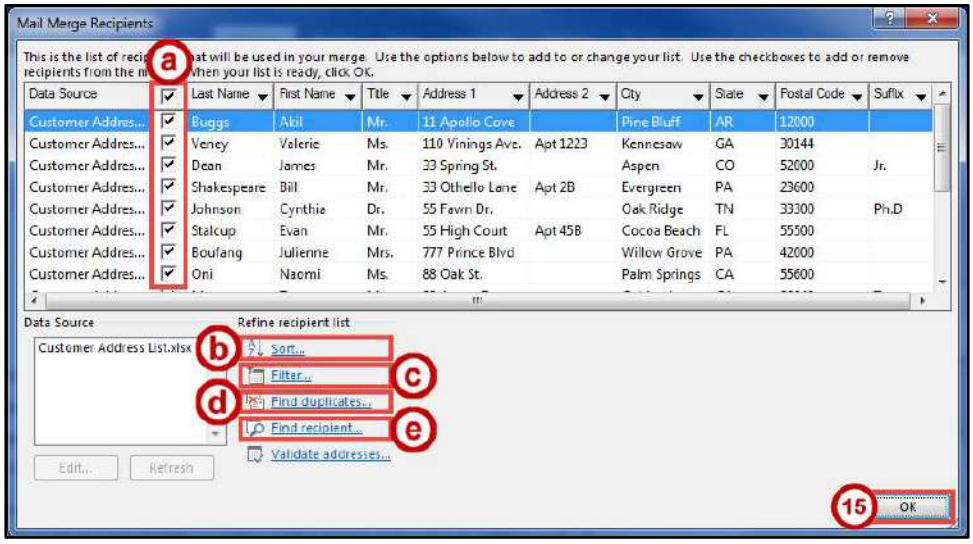

Figure 32 - Mail Merge Recipients

16. In the *Mail Merge* pane, click **Next: Write your letter**.

17. In the *Mail Merge* pane under *Write your letter*, you can use the following options to add the recipient information to your letter.
    a. **Address block** - Add address information to your letter (See Figure 33).
    b. **Greeting line** - Add a personalized greeting to your letter (See Figure 33).
    c. **Electronic postage** - Add electronic postage to your letter. (See Figure 33).

    Note: This will require the download of additional software that is not covered in this document.

    d. **More items** - Enter specific fields into your letter, one field at a time (See Figure 33).

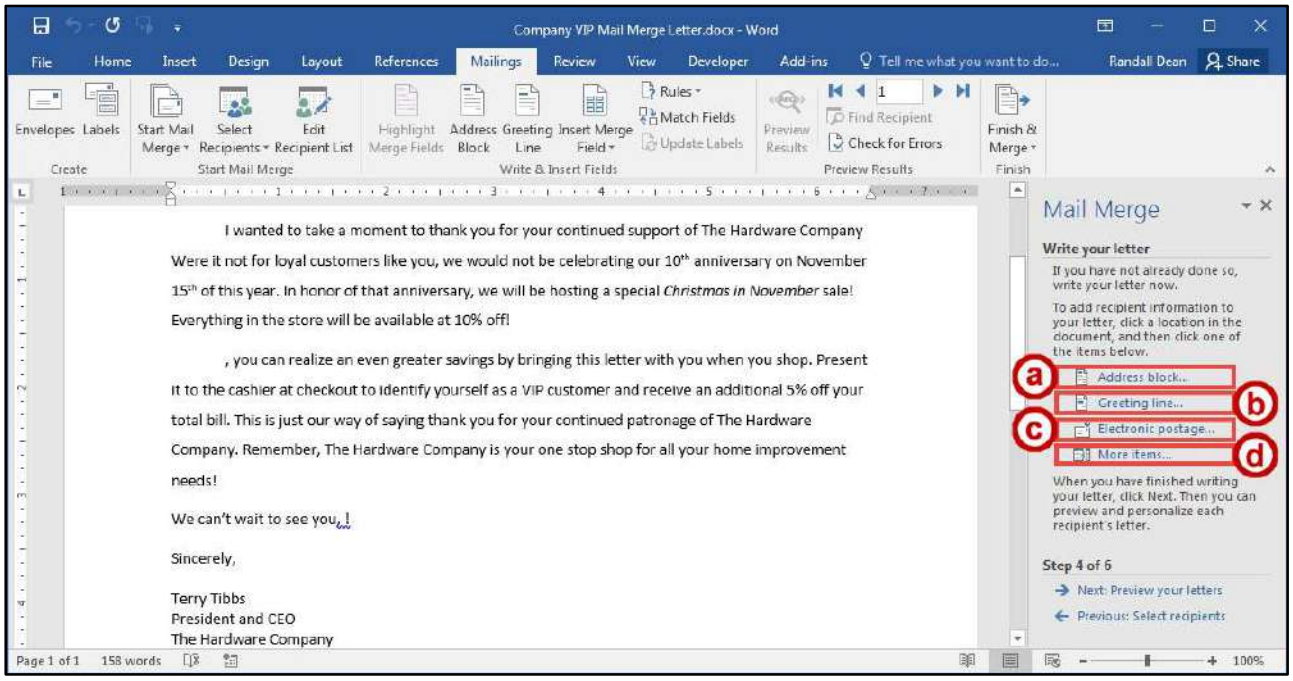

Figure 33 - Mail Merge Step 4 of 6

18. Click **Address block**.
    a. **Insert recipient's name in this format** - Select a format from the drop-down list for how you want the recipient's name to appear (See Figure 34).
    b. **Insert company name, Insert postal address, Format the address according to the destination country/region** - If available you can insert this information (See Figure 34).
    c. **Preview** - Preview how your address will look in your letter. Use the arrow buttons to navigate through your list (See Figure 34).
    d. Click the **OK** button (See Figure 34).

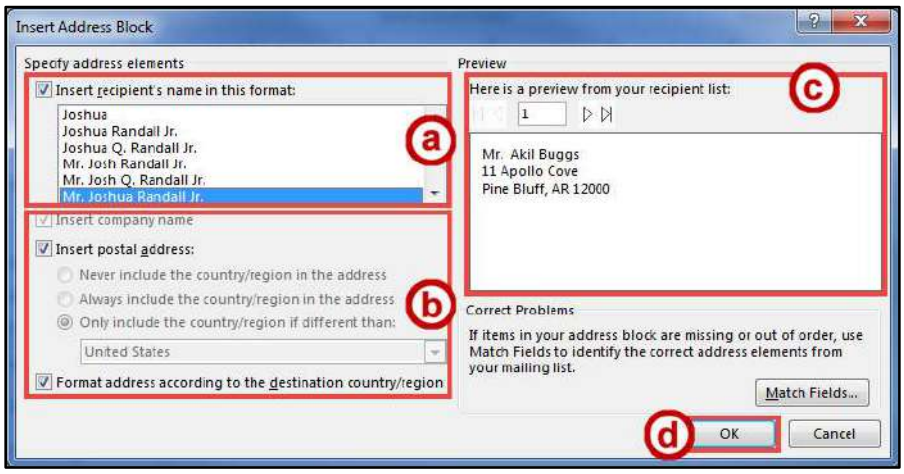

Figure 34 - Insert Address Block

19. Click **Greeting Line**.
    a. **Greeting line format** - Create the greeting line for your letter (See Figure 35).
    b. **Greeting line for invalid recipient names** - Set a generic greeting that will display when Word cannot find a name for an entry (See Figure 35).
    c. **Preview** - See how your selections will look in the final mail merge. Use the arrows to navigate between records (See Figure 35).
    d. Click the **OK** button (See Figure 35).

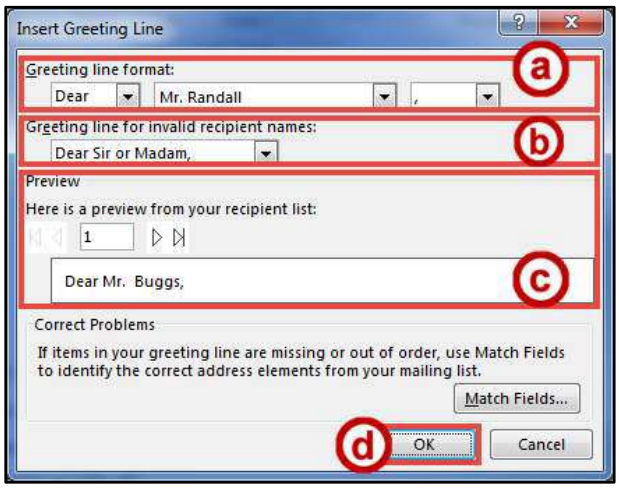

Figure 35 - Insert Greeting Line

20. Click **More items**.
    a. **Fields** - Insert specific fields into your letter, one field at a time (See Figure 36).
    b. **Insert** - Insert the selected field (See Figure 36).
    c. Click the **Close** button (See Figure 36).

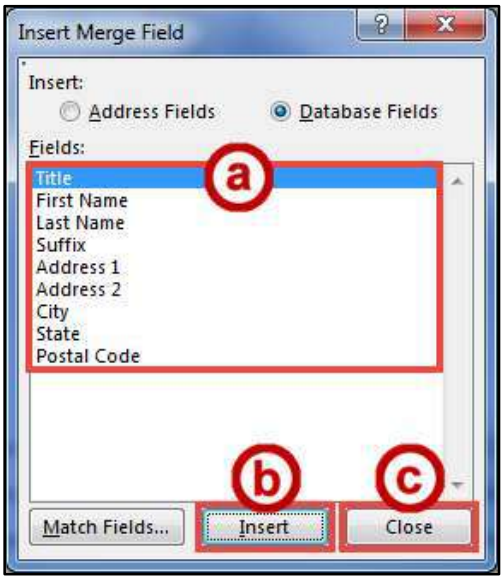

Figure 36 - Insert Merge Field

21. In the *Mail Merge* pane, click **Next: Preview your letters**.
22. In the *Mail Merge* pane under *Preview your letters*, you can **preview** all letters before completing your mail merge (See Figure 37).
23. Click **Next: Complete the merge** (See Figure 37).

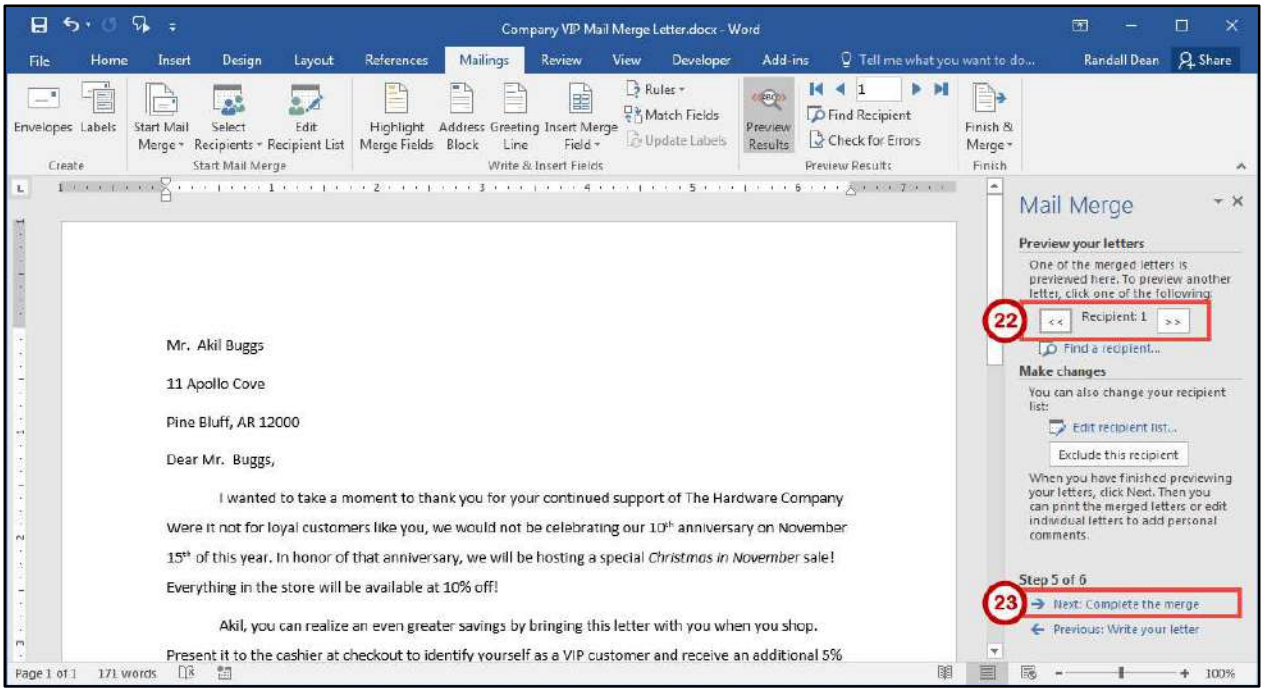

Figure 37 - Mail Merge Step 5 of 6

24. In the *Mail Merge* pane under *Merge*, click **Print**.

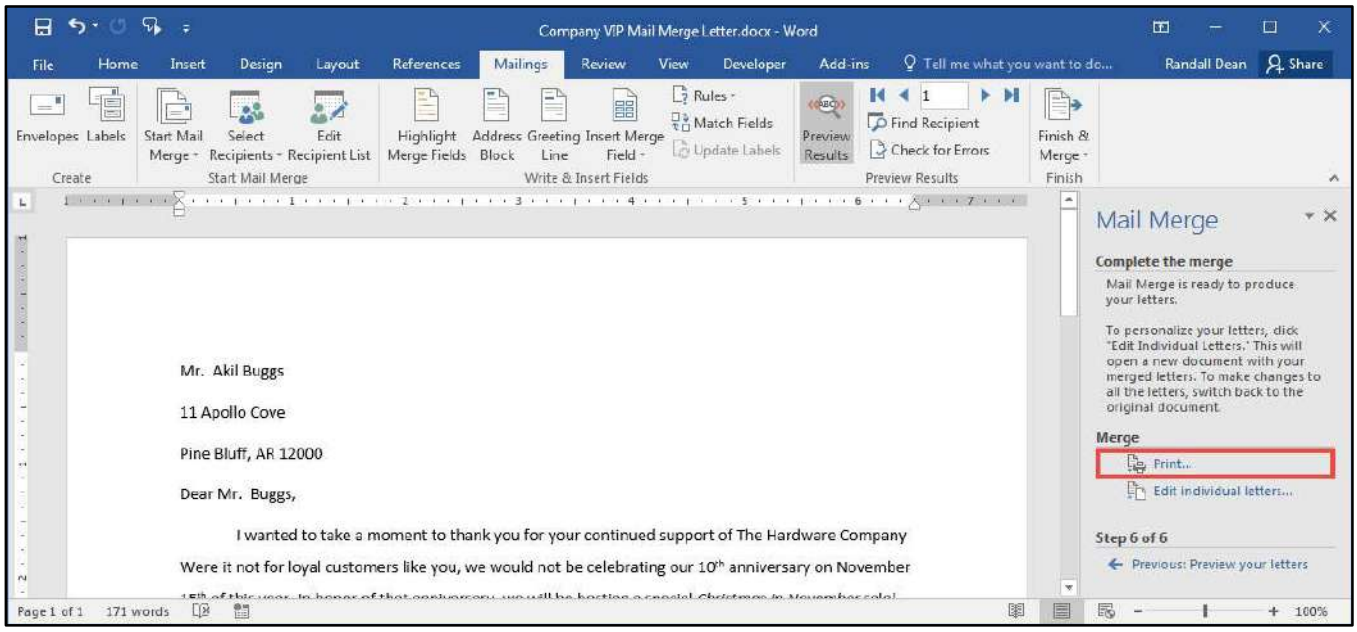

Figure 38 - Mail Merge Step 6 of 6

25. In the *Merge to Printer* dialog box, select your option to **Print Records** (See Figure 39).
26. Click the **OK** button (See Figure 39).

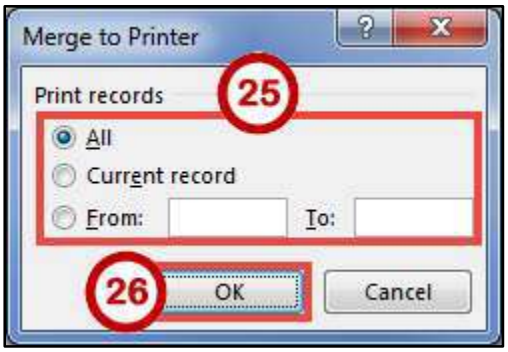

Figure 39 - Merge to Printer

27. 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. Click **Type a new list** (See Figure 40).
2. Click **Create** (See Figure 40).

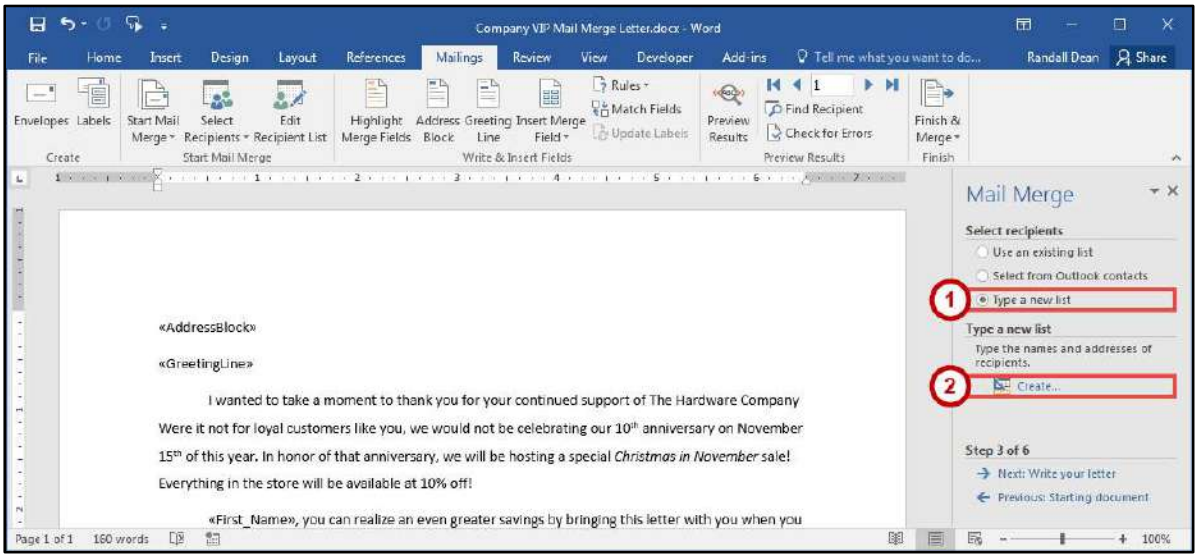

Figure 40 - Type a new list

3. In the *New Address List* dialog box, you can do the following to create a recipient list.
   a. **Enter Recipient** - Type you recipient information into the table provided, filing in the fields as needed (See Figure 41).
   b. **New Entry** - Create a new entry in the table for additional recipients (See Figure 41).
   c. **Delete Entry** - Delete an entry from the table (See Figure 41).
   d. **Customize Columns** - Add, delete, or rename fields for the table (See Figure 41).
4. Click the **OK** button (See Figure 41).

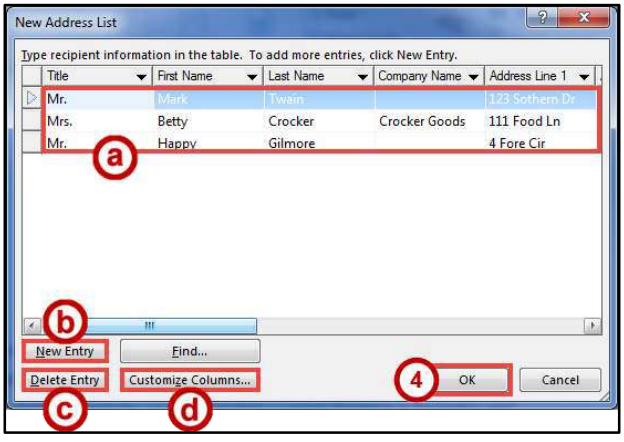

Figure 41 - New Address List

5. Click the **OK** button.

Note: You will be prompted to save your list to your computer. Once saved, the *Mail Merge Wizard* will take you the *Mail Merge Recipients* window to continue the mail merge process.

Matching Fields

If some of the information you imported into Word is not properly matching up with the correct fields, you can assign the information to the proper field by using the *Match Fields* tool. Before using the Match Fields tool, you will have to import a file/database for your recipients, or have created one using Word. The following explains how to match fields:

1. Click the **Mailings** tab (See Figure 42).
2. Click **Match Fields** (See Figure 42).

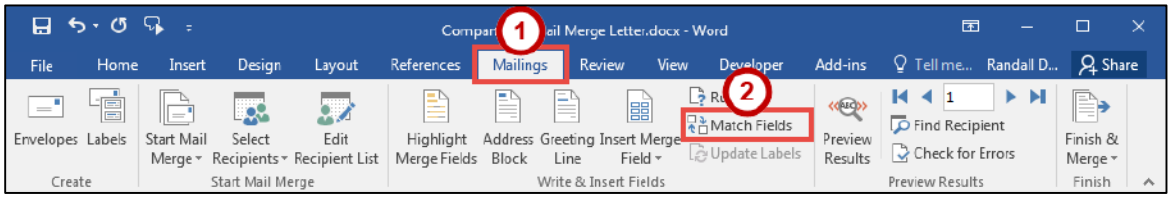

Figure 42 - Match Fields

3. In the *Match Fields* dialog box next to the *field* you wish to match, click on a **drop-down** list (See Figure 43).
4. Select the **header** that is the closest match to the existing field from your imported file/database (See Figure 43).
5. Click the **OK** button (See Figure 43).

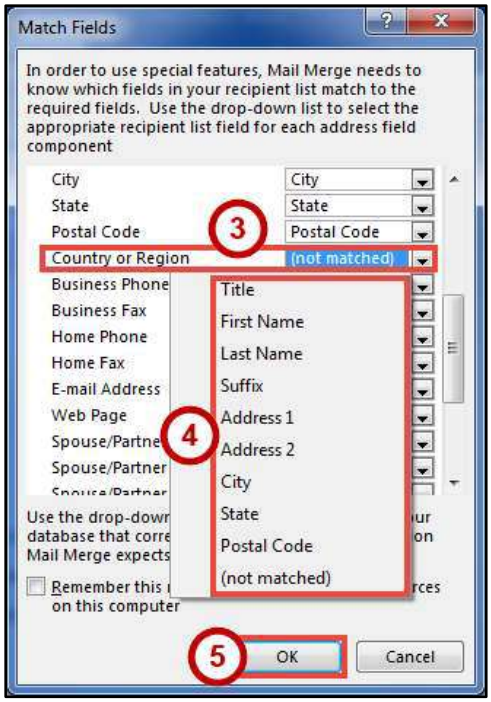

Figure 43 - Matching a Field

Additional Help

For additional support, please contact the KSU Service Desk:

KSU Service Desk for Faculty & Staff

- Phone: 470-578-6999
- Email: service@kennesaw.edu
- Website: http://uits.kennesaw.edu

KSU Student Helpdesk

- Phone: 470-578-3555
- Email: studenthelpdesk@kennesaw.edu
- Website: http://uits.kennesaw.edu