

# Mail Merge

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## Mail Merge

Mail Merge is one of the most useful tools in the office suite. It allows you to take a list of addresses (and other data) in Excel, and create mass mailings with just a few clicks.

You need two things for a mail merge: a data source and the document into which that data will be added. The best data source to use is Excel, and if at all possible the excel worksheet should have individual columns for each bit of data.

	A	B	C	D	E	F	G	H
1	Last Name	First Name	Prefix	Address	City	State	Zip	E-mail Address
2	Banner	Bruce	Mr.	375 Radiation Drive	Parsons	WV	24385	Bruce.Banner@secretorg.com
3	Bell	Tinker	Ms.	57 Grapevine Way	Weston	WV	26745	Tinker.Bell@secretorg.com
4	Blake	Henry	Col.	847 Mash Street	Morgantown	WV	26514	Henry.Blake@secretorg.com
5	Bonapart	Napolean	Emperor	894 Champ Elaysis	Paris	WV	82975	Napolean.Bonapart@secretorg.com
6	Book	Shepherd	Fr.	954 Haven Way	Star City	WV	26501	Shepherd.Book@secretorg.com
7	Burns	Frank	Dr.	721 Mash Street	Morgantown	WV	26508	Frank.Burns@secretorg.com
8	Calrisian	Lando	President	36 Democracy Blvd	Cloud City	PA	49756	Lando.Calrisian@secretorg.com
9	Carson	Kit	Mr.	81 Alamo Ave	Morgantown	WV	26505	Kit.Carson@secretorg.com

In this data source, you can see that there are individual columns for first name, last name, street address, city, state, and zip. You can have as many columns as you want in your source data, and use just the columns you want for your mail merge.

The document can be any kind of word document: a letter, mailing labels, and email. You insert field codes into the document to tell the program what bits of the Excel document to enter where.

```
«Prefix» «First_Name» «Last_Name»|  
«Address»  
«City», «State» «Zip»
```

```
Dear «Prefix» «Last_Name»,
```

```
Thank you for your generous donation of $«Donation» to
```

```
We will send your receipt to the address we have listed
```

The field codes are the bits of text surrounded by the pointy brackets: <<First\_Name>>

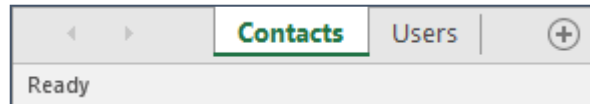
You add field codes wherever you want data from your source to be entered.

## Checking Your Data Source

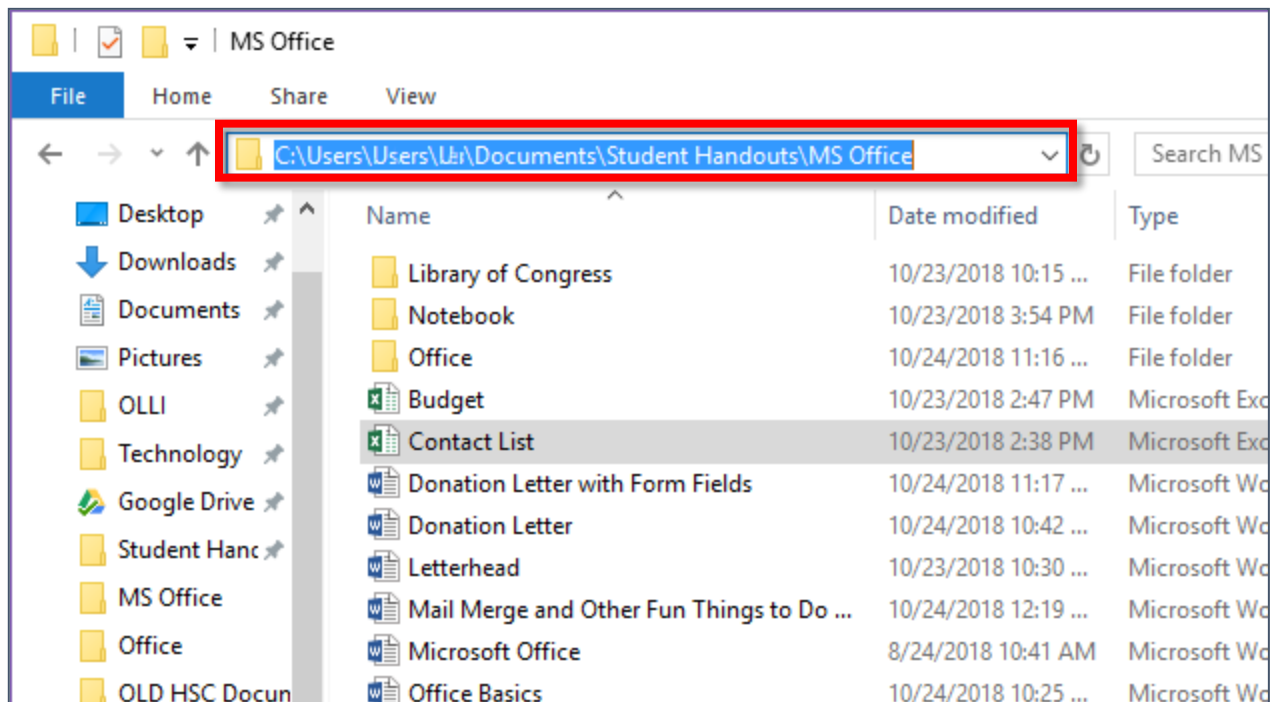
1. Open the data source (Excel file) you are going to use.
2. Your column headers (the fields at the top of each column) will be your field codes. If you don't have column headers for your spreadsheet, create them.

	A	B	C	D	E	F	G
1	Last Name	First Name	Prefix	Address	City	State	Zip

3. Note the name of the worksheet where your data is located—especially if there are multiple worksheets in your workbook.



4. To verify the location of your data source, select the **File** tab, then at the lower right of the Info tab, click **Open File Location**.



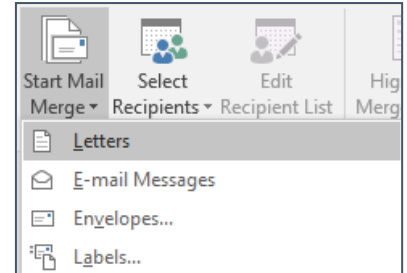
5. In Windows Explorer, the Location Bar displays where the file is. Click into the location bar to see the complete path to the file. You can use the keyboard command **Ctrl + C** to copy the location.

# Letters

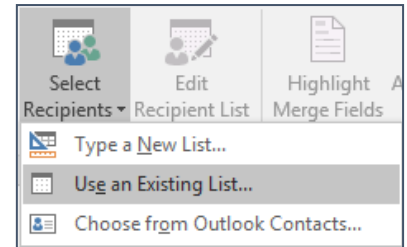
The most basic (and possibly easiest) type of mail merge is a form letter. You compose your letter, inserting field codes where you would like data from your source entered.

## Creating the Letter Source

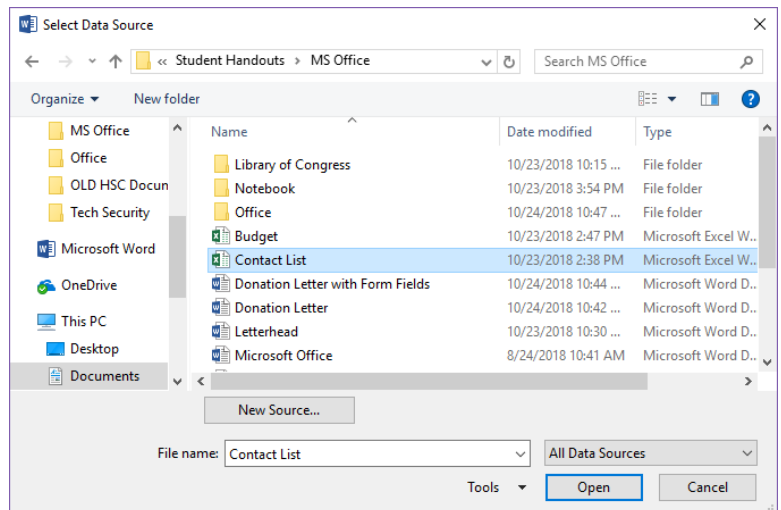
1. Open a new Word document **OR** open an existing letter upon which you want to base your letter.
2. Select the **Mailings** tab.
3. Click the **Start Mail Merge** button and from the menu and select **Letters**.



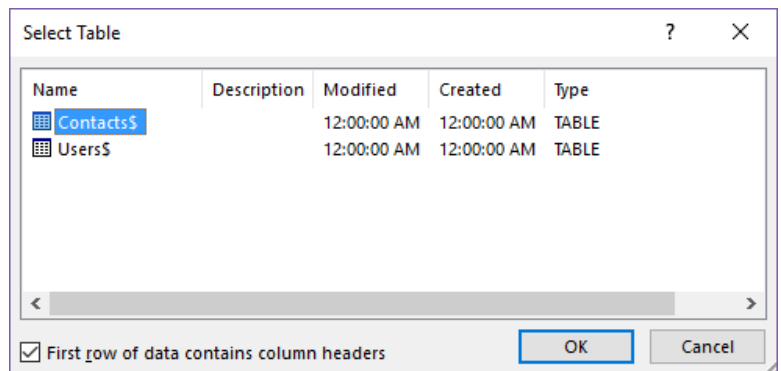
4. Click the Select Recipients button and select Use an Existing List.



5. Browse to the location of your source data.
6. OR
7. If you copied the location previously, paste it into the location bar (**Ctrl + V**) and press **Enter**.
6. Select the Excel file that has your source data.
7. Click **Open**.



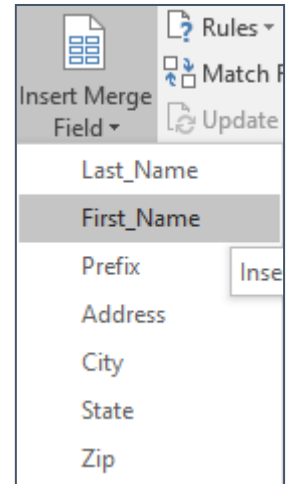
8. In the Select Table dialog box, select the worksheet that contains your source data. Your document is now linked to the selected data source.



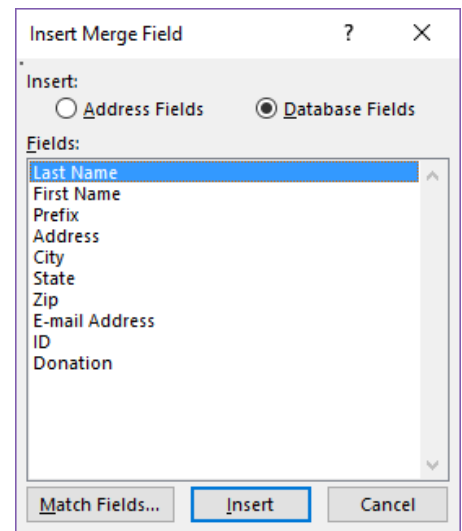
## Adding Merge Fields

1. Place your cursor in the location where the first field code should appear. For example, if you are writing a form letter, you might place your cursor immediately before the comma after **Dear**.
2. On the Mailings tab, click the text of the **Insert Merge Field** button. A menu appears listing all the column headers in your source document.
3. Select the field code you want to enter.
4. Repeat until all field codes have been entered where you want them.
8. OR
- 9.

Dear,



3. Press the picture portion of the **Insert Merge Field** button. A dialog box appears, displaying the column headers in your source document. Select the field code you want to add and then click the **Insert** button.
10. OR
11. Double click on the field code you want to insert.
4. Insert the rest of the desired field codes, then close the dialog box.



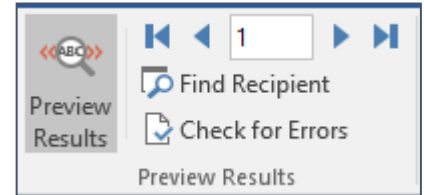
5. The field codes are now displayed in your document. Add spacing and punctuation and hard returns as needed. It is often helpful to use **Show/Hide** codes here, to make sure you have the correct number of spaces between your codes. If you are having difficulty seeing codes, use the page zoom to make everything larger.

«Prefix» «First\_Name» «Last\_Name»  
 «Address»  
 «City», «State» «Zip»

¶  
 «Prefix»·«First\_Name»·«Last\_Name»¶  
 «Address»¶  
 «City»,·«State»·«Zip»¶  
 ¶

## Checking Your Document

1. Once you have inserted the field codes into your document, you need to check to make sure that everything will display properly once you complete the merge. You check this using the button.
2. The Preview Results button toggles between displaying the field codes and displaying how the final document will look.
3. You can use the arrow keys to scroll through the individual letters in your merge.



## Document with Field Codes

Mad Scientists Inc  
1000000 Mercury Ave  
Potassium, WV 12345

«Prefix» «First\_Name» «Last\_Name»  
«Address»  
«City», «State» «Zip»

Dear «Prefix» «Last\_Name»,

Thank you for your generous donation of \$«Donation» to the Mad Scientists Inc fund.

We will send your receipt to the address we have listed.

Thank you again for helping to keep us in crucibles and test tubes!

Beaker,  
Founder of Mad Scientists Inc

## Document with Preview Results

Mad Scientists Inc  
1000000 Mercury Ave  
Potassium, WV 12345

Mr. Bruce Banner  
375 Radiation Drive  
Parsons, WV 24385

Dear Mr. Banner,

Thank you for your generous donation of \$1200 to the Mad Scientists Inc fund.

We will send your receipt to the address we have listed.

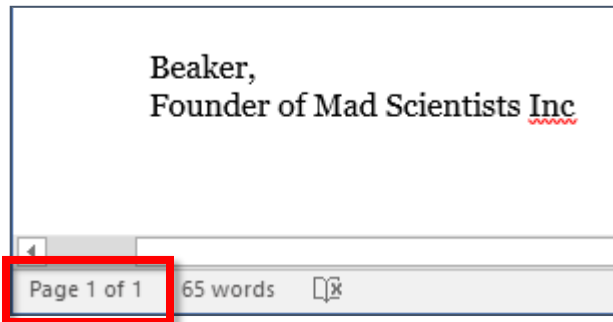
Thank you again for helping to keep us in crucibles and test tubes!

Beaker,  
Founder of Mad Scientists Inc

## Finishing the Merge

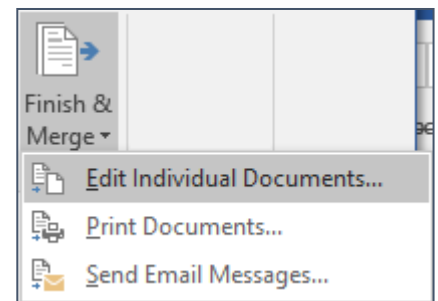
Once you have checked your document, you are ready to complete the merge. This is the step most people forget, so if you have only a single letter, you have not actually finished your merge.

You can quickly tell whether you completed the merge by checking the number of pages in your document.

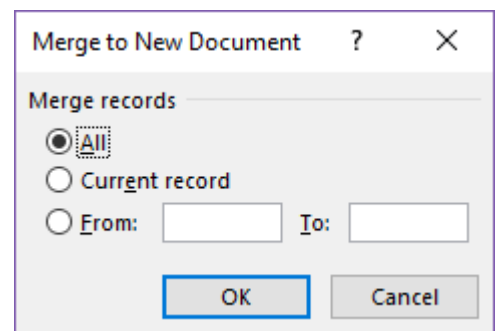


## Completing the Mail Merge

1. Check your preview to make sure your letters are as expected.
2. On the Mailings tab, click the **Finish & Merge** button.
3. From the drop down menu, select **Edit Individual Documents**.



4. A dialog box appears. Select **All** and click **OK**.



5. A new document opens, with all your letters in a single document, ready to be printed.

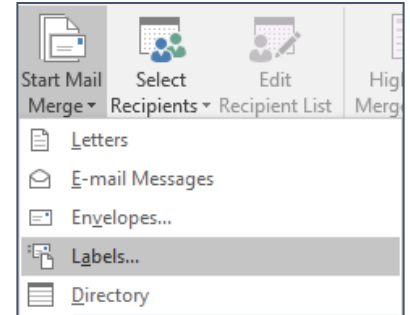
## Mailing Labels

Instead of having to type individual addresses onto a sheet of labels, a Mail Merge allows you to create mailing labels directly from an address list.

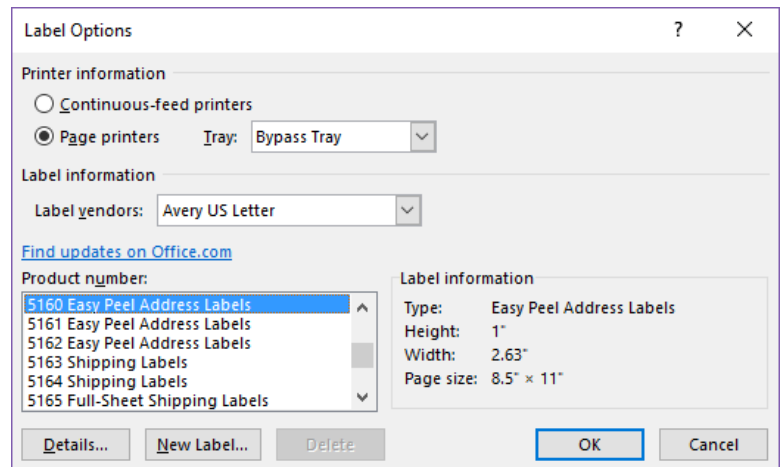
The two steps people most frequently miss are Updating their labels and

### Creating the Label Source

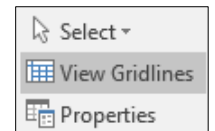
1. Check your source data. (See page 3)
2. Find the label number on your box of labels. Most common is Avery 5160.
3. Open a new Word document.
4. On the Mailings tab, click the **Start Mail Merge** button then select **Labels**.



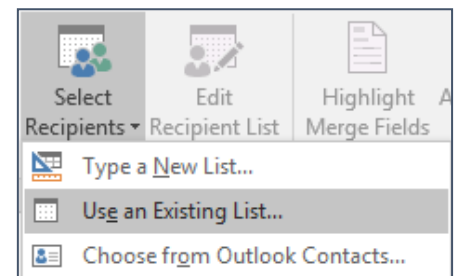
5. You are prompted to select the label type. The most common labels are:
  - **Label vendors:** Avery US Letter
  - **Product number:** 5160 Easy Peel Address Labels



6. The document is formatted for labels. By default, newer versions of Word do not always display the outlines of the labels, which is super confusing. To display the label outlines, select the **Table Tools Layout** tab, and then click **View Gridlines** to make the label outlines visible.

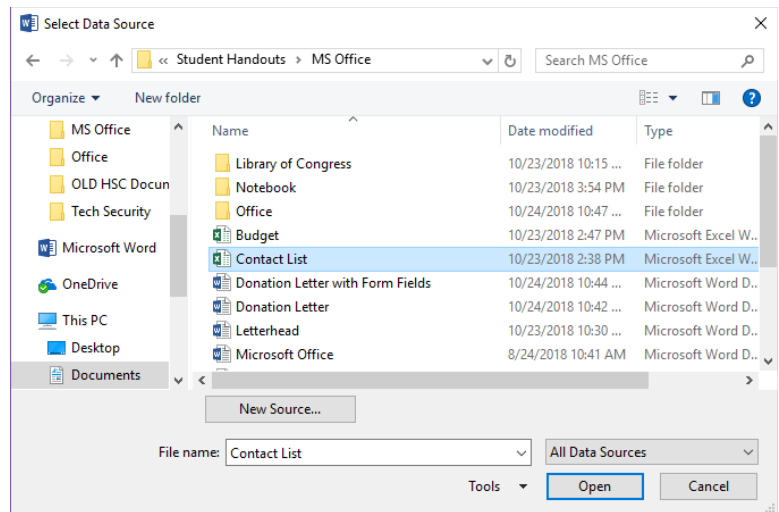


7. Click the **Select Recipients** button. From the drop down menu select **Use an Existing List**.

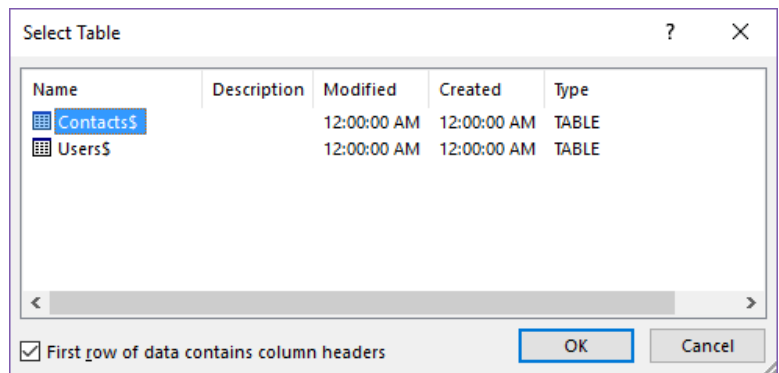




8. Browse to the location of your source data, or if you copied the location previously, paste it into the location bar and press **Enter**.
9. Select the Excel file that has your source data.
10. Click **Open**.



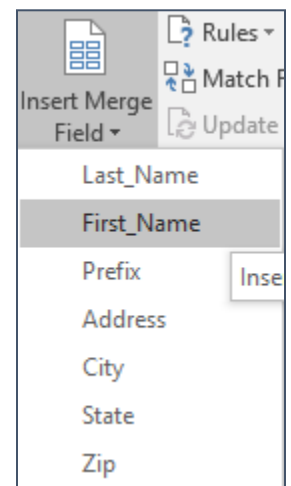
11. In the Select Table dialog box, select the worksheet that contains your source data. Your document is now linked to the selected data source.



## Adding Merge Fields

1. Place your cursor in the location where the first field code should appear.
2. On the Mailings tab, click the text of the **Insert Merge Field** button. A menu appears listing all the column headers in your source document.
3. Select the field code you want to enter.
4. Repeat until all field codes have been entered where you want them.

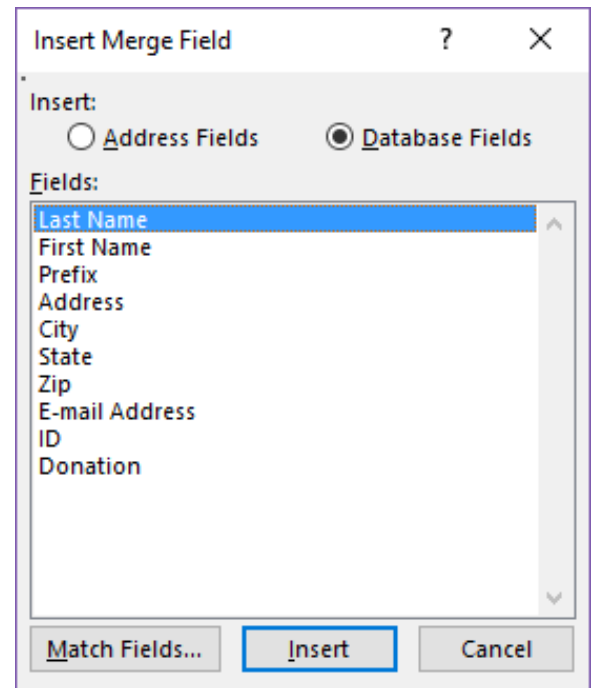
12. OR
- 13.



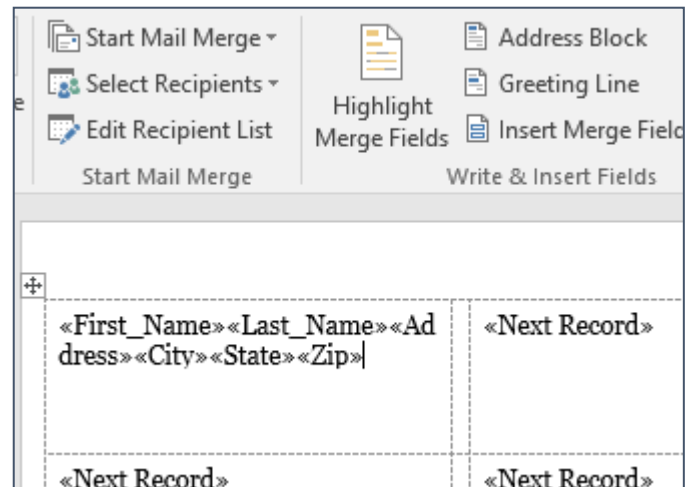
Press the picture portion of the **Insert Merge Field** button. A dialog box appears, displaying the column headers in your source document. Select the field code you want to add and then click the **Insert** button.

14. OR

15. Double click on the field code you want to insert. Insert the rest of the desired field codes, then close the dialog box.



5. Your first label is displayed with the field codes you just entered. All additional labels contain the field code <<**Next Record**>>. This does NOT print, but is simply a command for the merge process.

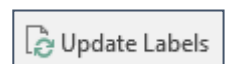


6. The field codes are now displayed in your document. Add spacing and punctuation as needed. It is often helpful to use **Show/Hide** codes here, to make sure you have the correct number of spaces between your codes. If you are having difficulty seeing the marks for spaces, use page zoom to make everything larger.

«Prefix» «First\_Name» «Last\_Name»  
 «Address»  
 «City», «State» «Zip»

¶  
 «Prefix»·«First\_Name»·«Last\_Name»¶  
 «Address»¶  
 «City»,·«State»·«Zip»¶  
 ¶

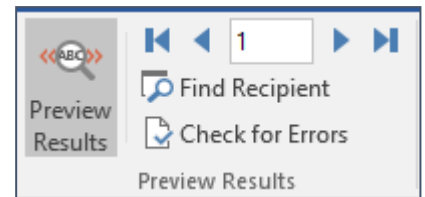
7. Click the **Update Labels** button.



8. The document is updated, placing the field codes and formatting from the first label into all subsequent labels. The text MAY look wonky and out of line. It is NOT—the <<Next Record>> field does not contain characters to be printed.

«First_Name» «Last_Name» «Address» «City», «State» «Zip»	«Next Record»«First_Name» «Last_Name» «Address» «City», «State» «Zip»	«N «L «A «C
«Next Record»«First_Name» «Last_Name» «Address» «City», «State» «Zip»	«Next Record»«First_Name» «Last_Name» «Address» «City», «State» «Zip»	«N «L «A «C
«Next Record»«First_Name»	«Next Record»«First_Name»	«N

9. Click the **Preview Results** button. The labels are now displayed as they will print.



10. Look through the document to make sure all the labels are looking as expected.

Bruce Banner  375 Radiation Drive Parsons, WV 24385	Tinker Bell 57 Grapevine Way Weston, WV 26745	H 8 M
Napolean Bonapart 894 Champ Elaysis Paris, WV 82975	Shepherd Book 954 Haven Way Star City, WV 26501	Fr 7 M
Lando Calrisian 26 Democracy Blvd	Kit Carson 81 Alamo Ave	C 17

## Completing the Merge

Once you have checked your document, you are ready to complete the merge. This is the step most people forget, so if you have only a single sheet of labels, you likely have NOT finished your merge.

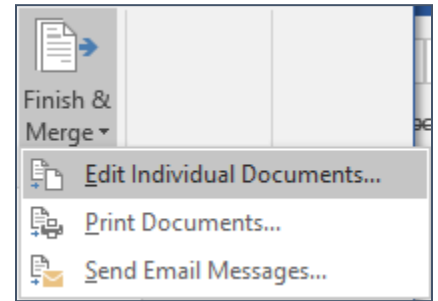
You can often quickly tell whether you completed the merge by checking the number of pages in your document.

Galapagos, WV 26784	Tattoo
Donald Duck 100 Walt Disney Drive Logan, PA 15136	Michael 25 Santa Fairmont
Page 1 of 1 247 words	

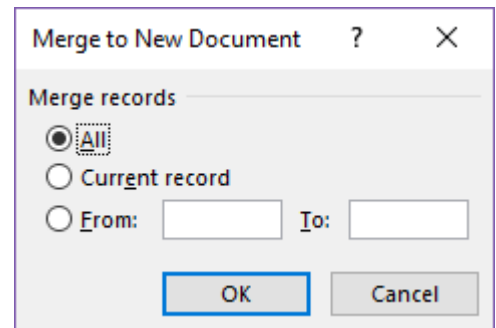
Galapagos, WV 26784	Tattoine
Donald Duck 100 Walt Disney Drive Logan, PA 15136	Michael 25 Santa Fairmont
Page 1 of 3 559 words	

## Completing the Merge

1. Check your preview to make sure your labels are as expected.
2. On the Mailings tab, click the **Finish & Merge** button.
3. From the drop down menu, select **Edit Individual Documents**.



4. A dialog box appears. Select **All** and click **OK**.



5. A new document opens, with all your labels in a single document, ready to be printed.

## Reusing a Merge Document

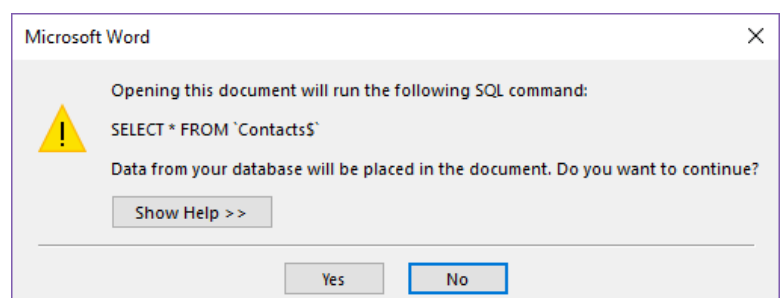
Once you have created a source document for mailing labels or letters, you can save the document with the field codes to use again.

### Saving a Source Document

1. In the source document—the one with the field codes—save the document as you normally would, but give it a name that designates it as a mail merge source. Something like “Fundraising Letter MM”.

## Reusing a Merge Document

1. Open the mail merge you previously saved.
2. A scary warning dialog box appears. It's just telling you that it wants to link to the source document you used last time. It's OK to say **Yes**. If you have moved your source document since the last time you did a mail merge, there might be issues. It's okay.



3. Your letter (or labels) open, displaying your field codes.
4. Go ahead and relink the documents. If you get an error message or if you are using a different source document, click the **Select Recipients** button and choose your spreadsheet. (See page 4)
5. Complete the merge as you would normally.

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