Mail Merge

So, what is mail merge exactly? Quite simply, it is a way of placing content from a spreadsheet, database, or table into a Microsoft Word document. Mail merge is ideal for creating personalized form letters or labels instead of editing the original letter several times to input different personalized information. As you can imagine, this can save a lot of time as well as worry about not changing all of the information for the new recipient.

In order to create a mail merge, two documents are needed: a Word document and a file with the data or records. This file can take many forms, such as an Excel spreadsheet, a database, or even another Word document that has a table in it. In this tutorial I will be using an Excel spreadsheet.

Objectives

At the end of this tutorial, you should be able to:

1. Create a new mail merge from a document and a data source using the PC Mail Merge Sidebar Wizard.

2. Edit an existing merged document using the Mail Merge Toolbar.

3. Get a taste for creating and editing mail merge on a Mac.

This tutorial assumes a basic proficiency with Word and Excel.

Part I: Creating Mail Merge on a PC using the Mail Merge Sidebar Wizard

Before creating a mail merge, it is important to already have your data source ready. Although it is not necessary, I have found that it is easiest to have your Word document set up beforehand as well. Therefore, I have already created a form letter in Microsoft Word and entered my data into a Microsoft Excel spreadsheet.

Here is what my spreadsheet looks like. I used the first row to name my fields and entered the appropriate data in the rows below. As you will see later, naming your rows is very important when it comes to using mail merge.

Also, notice how there two worksheets in my spreadsheet; this will also be important later.

	A	B	C	D	E	F	G	H	I
1	First Name	Last Name	Address1	Address2	City	State	Zip	Donation amt	# of Tickets
2	Lee	Adama	9887 Gemenon St		Galactica	BS	45125	$ 550.00	1
3	Kaylee	Frye	607 Airlock St	Apt 4	Serenity	FF	01111	$ 100.00	2
4	Sora	Heart	522 Kairi Blvd		Disney	WD	99999	$ 100.00	1
5	Tidus	Jecht	74 Yuna St	Apt 22	Square	FF	02200	$ 100.00	1
6	Mickey & Minnie	Mouse	1 Disney St		Disney	WD	99999	$ 5,000.00	4
7	Mal	Renyolds	607 Airlock St	Apt 1	Serenity	FF	01111	$ 250.75	1
8	Luke	Skywalker	23 Hoth Way		Dagoba	SW	76767	$ 1,000.00	1
9	Leia	Skywalker	25 Hoth Way		Dagoba	SW	76767	$ 1,250.00	3
10	Cara	Thrace	368 Caprica Ave	Apt 435	Galactica	BS	45125	$ 200.50	2
11	Simon	Tam	607 Airlock St	Apt 8	Serenity	FF	01111	$ 2,000.00	2

⊨ ⊨ ⊨ ⊨ ⊨ \donors 2006 \ Sheet2 /

This is my Word document. As you can see, when I created the letter, I used < > to mark where I want variable content to be placed and even entered what the content is supposed to be (i.e.: <Last Name>, <Zip Code>).

Notice how the variable content corresponds to the fields in the spreadsheet above. It is okay that the wording is not exactly the same, for example "Address1" and "Address Line 1."

Giant Corporation
332 Something Circle
Somewhere, ST 55555

February 2, 2007

<First Name> <Last Name>
<Address Line 1>
<Address Line 2>
<City>, <State> <Zip Code>

Dear <First Name> <Last Name>,

We would like to thank you for your donation of $<money> to our Giant Corporation. It is donations from generous people, such as yourself, that help to keep our business running.

We will be holding our Annual Giant Corporation Gala at The Really Nice Hotel in Somewhere, State on April 28, 2007 and would love for you to join us there. Per your request on our donation form, we have enclosed <number> ticket(s) to the event. If you need more tickets or have any other questions, please do not hesitate to give our office a call at 1-800-555-4252.

Once again, we thank you for your donation and we look forward to seeing you in April.

Sincerely,

Allison King
VP of People Giving Us Money
Giant Corporation

Starting the Mail Merge Process

**Opening the Mail Merge Sidebar Wizard**

If you are using **Word 2003**, open your letter in Word and then bring up the Mail Merge Sidebar Wizard by going to Tools > Letters and Mailings > Mail Merge.

Step 1: Selecting Document Type

The sidebar to the right will appear on the right side of the window, next to your document.

Since I am working on a letter, I will leave the 'Letters' option checked and click on 'Next: Starting document' at the bottom of the sidebar.

As you can see, there are other options such as 'Envelopes' and 'Labels', which will give you slightly different options as you walk through the steps. No matter which option you choose, the basic concept is still the same
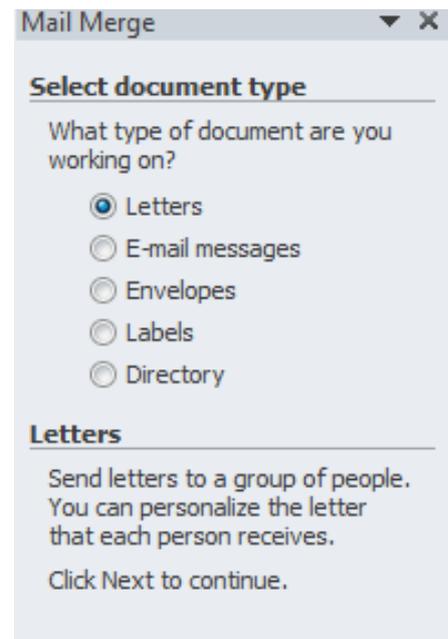
Step 2: Selecting Starting Document

At this step nothing needs to be done, because I already have the document that I want to use open. Leave the 'Use the current document' checked and click on 'Next: Select recipients' to move on.

If you have not created your letter already, use this step to do so by selecting either of the other two options shown.

If, instead of a letter, you were merging to labels or envelopes, this step would give you the option to select the type and size of labels or envelopes, such as Avery 5160 labels.

©Gayaza High School Computer Science Department
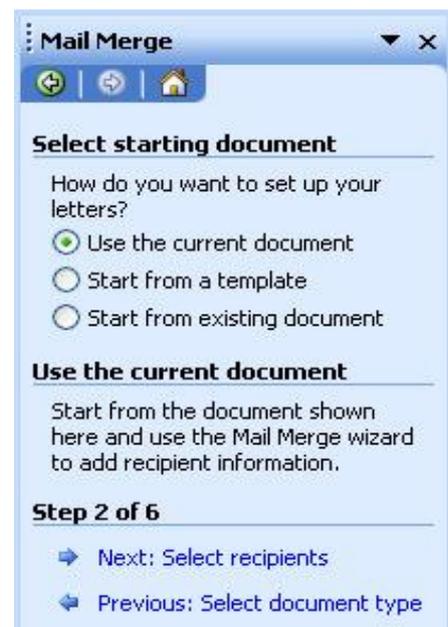
Step 3: Linking to the Data Source

This is the step in which the data source is linked into the Word document.

As you can see there are three options for this: Use an existing source, Use Outlook contacts, and Type a new list.

I would caution against using the 'Type a new list' option as the list it creates can often be difficult to manage.To use the Outlook contacts, you must already be using a Microsoft Outlook address book, so if you do not already use Outlook for your e-mail, then this option will not work for you.
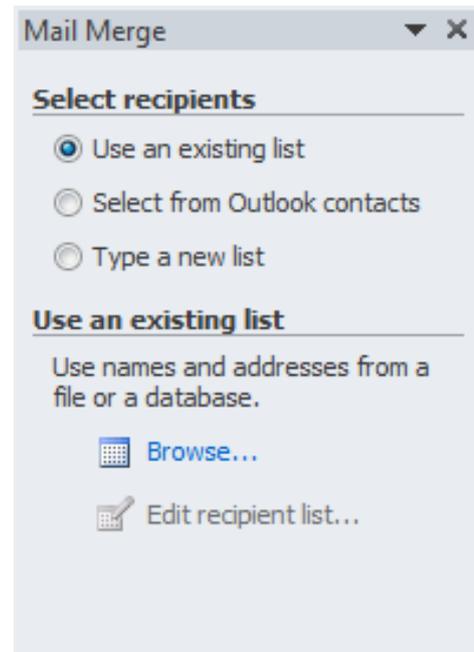
This leaves the first option, using an existing list. This is why I'd already entered the data I wanted to use into a spreadsheet before I started the mail merge process.

In order to tell Word where the data source is, click 'Browse.' Navigate to the folder where your data source is located and double click on its name to select it.

At this point, instead of **'Browse'**, the Mail Merge Sidebar now tells me the tab name and data source where Word will be getting the merge information. If you accidentally select the wrong source, or if you want to change sources at a later date, you can click 'Select a different list' and browse to it in the same way you chose the first source.

Clicking 'Edit recipient list' will bring up the Mail Merge Recipients window from above. This will allow you to remove a specific record or just double check that you selected the correct set of data for your merge.
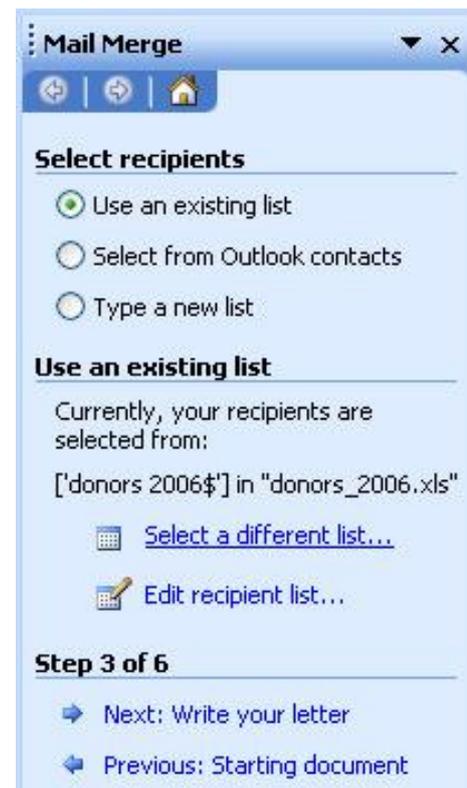
Once you are sure that you have selected the correct data source, then click on 'Next: Write your letter' to go to the next step.

Giant Corporation
332 Something Circle
Somewhere, ST 55555

February 2, 2007

<First Name> <Last Name>
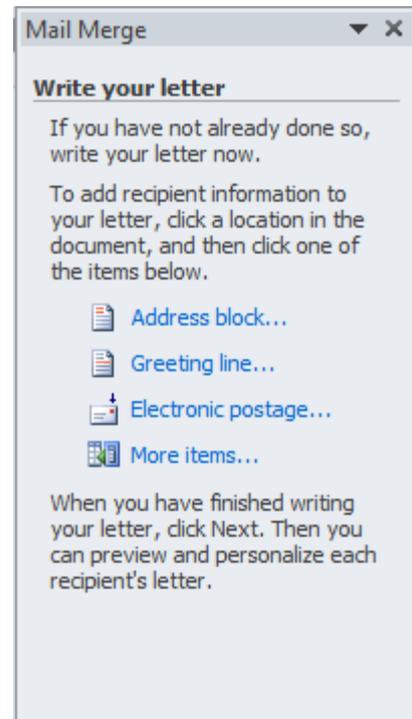<Address Line 1>
<Address Line 2>
<City>, <State> <Zip Code>

Dear <First Name> <Last Name>,

We would like to thank you for your donation of $<money> to our Giant Corporation. It is donations from generous people, such as yourself, that help to keep our business running.

We will be holding our Annual Giant Corporation Gala at The Really Nice Hotel in Somewhere, State on April 28, 2007 and would love for you to join us there. Per your request on our donation form, we have enclosed <number> ticket(s) to the event. If you need more tickets or have any other questions, please do not hesitate to give our office a call at 1-800-555-4252.

Once again, we thank you for your donation and we look forward to seeing you in April.

Sincerely,

Allison King
VP of People Giving Us Money
Giant Corporation

Mail Merge

Write your letter

If you have not already done so, write your letter now.

To add recipient information to your letter, click a location in the document, and then click one of the items below.

- Address block...
- Greeting line...
- Electronic postage...
- More items...

When you have finished writing your letter, click Next. Then you can preview and personalize each recipient's letter.

At this point you should have successfully created your mail merge document. Preview the letters using the navigation buttons on the mail merge sidebar.

Click Next: Complete the merge.

Mail Merge

Preview your letters

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

[<<] Recipient: 1 [>>]

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.