**Microsoft Word:**

**Mail Merge**

*June 19, 2019*

What is Mail Merge?

Mail merge is a way of placing data from a spreadsheet, database, or table into a Microsoft Word document. It is a way of creating personalized form letters or labels very quickly, without having to edit the original letter several times for different personalized information.

Word’s mail merge feature can be used for more than just creating personalized letters. It can be used to create mailing labels, name tags for an event, or file folder labels. In this session participants will learn all about mail merges using data files created in both Word and Excel.

During this webinar participants will learn:

### how to create a data source in Word and Excel

### how to create a form letter and merge with a data source

### how to create labels and merge with a data source

### how to format fields to avoid mail merge format problems with dates and numbers

### how to filter and sort the recipient list and merge only to records that meet specific criteria

### how to set merge conditions so certain text displays for a specific scenario or condition.

1. Create the Data Source
2. Using a Micosoft Word Table

# Organize data neatly into rows and columns using Word’s Table feature. Think of each row as a single record and each column a field that will be inserted into the document. The first row contains labels that identify the data. Later when the data is being merged, the labels will appear as the names of the merge fields.

# Click the **Insert** tab followed by **Table** and drag the mouse over the grid until you highlight the number of columns you want. The number of rows highlighted does not need to be exact as you can easily add rows as you type in the information.

**Note:** You will notice there is only an allotment of 10 columns. If you need more click Insert Table and fill in the desired number of columns. When using Word as a data source the number of fields or columns is limited to 62.

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# Enter the information by typing **File No** in the first cell and then press the **Tab** key to get to the next column. Continue from cell to cell until you get to the end of the first row. Pressing **Tab** should then take you to the next row.

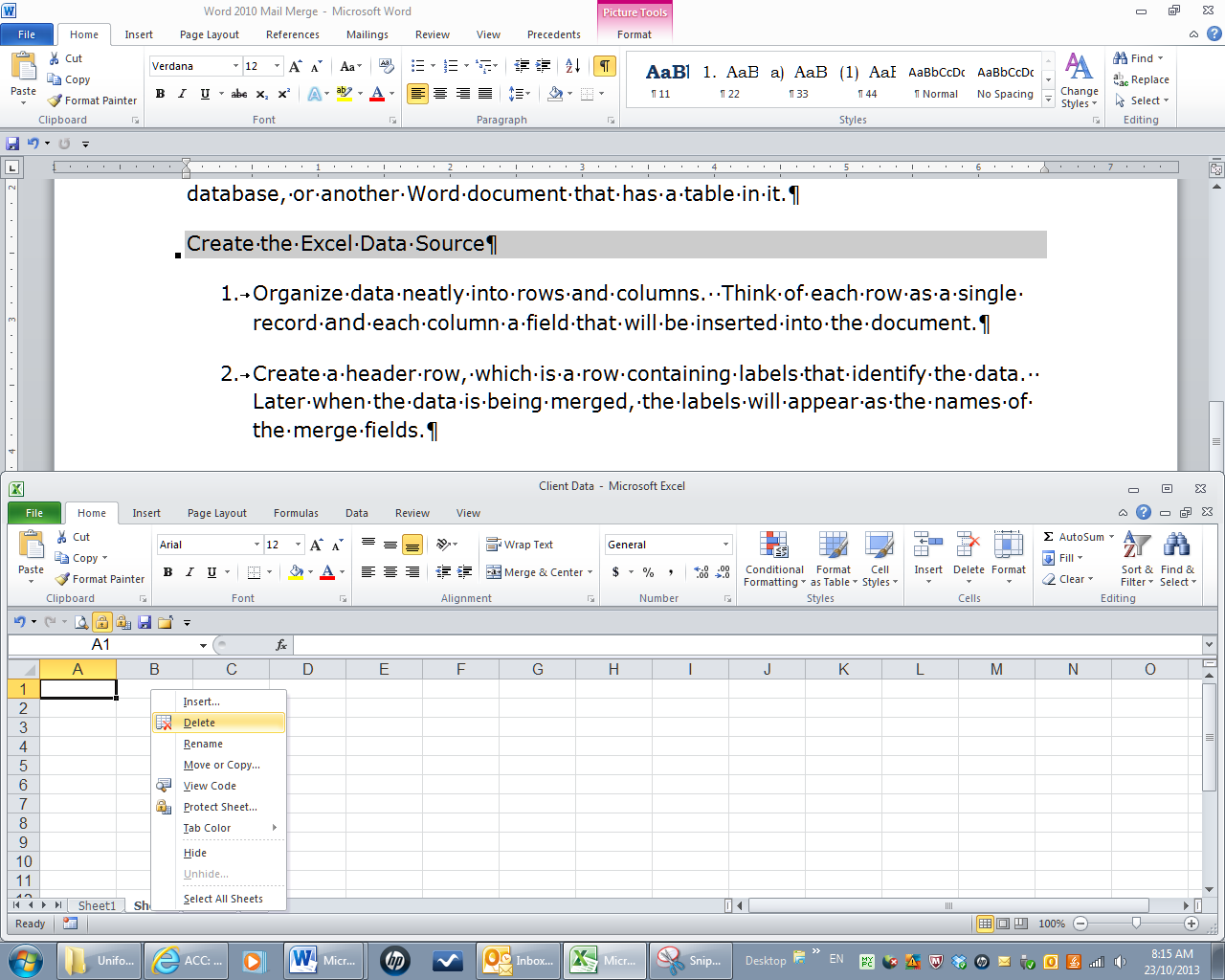
# Adjust the column widths and format as desired. You can also change the page orientation as needed to allow for more room to widen the columns.

# Save the file when complete.

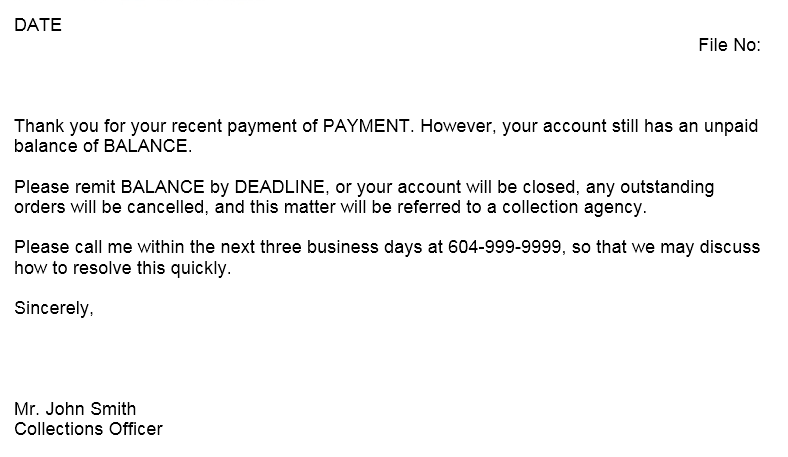
1. Using a Microsoft Excel Spreadsheet

# The data source can also be set up as an Excel spreadsheet. The main advantage of doing this is that Excel will allow for 255 columns compared to 62 in Word.

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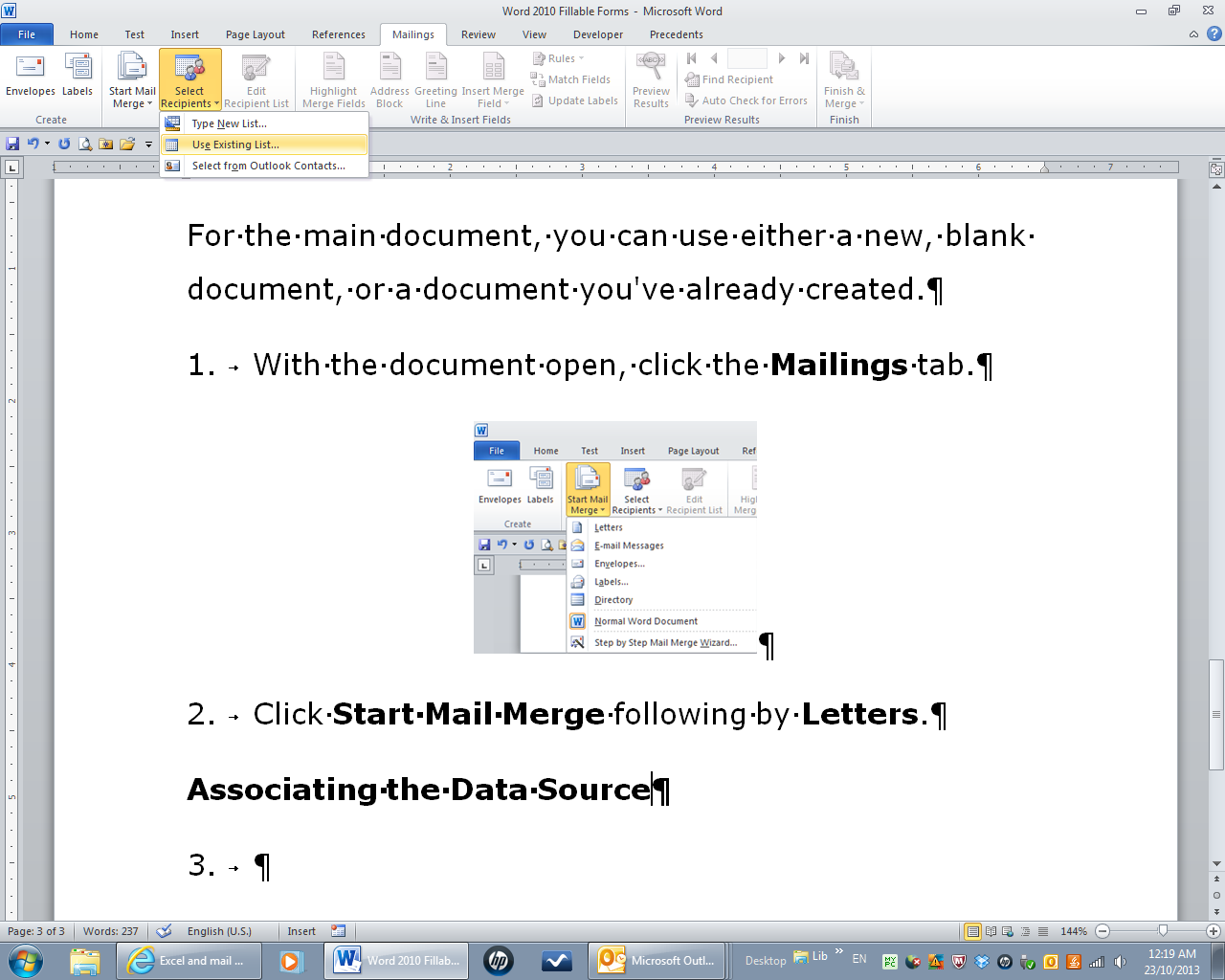
1. To make it easier to identify the data when attaching to Word, rename the worksheet by right-clicking on the name of the sheet (i.e. Sheet 1) and choosing **Rename**.
2. Enter the data in similar fashion to Microsoft Word, adjusting column widths and formatting as desired.
3. Save the file when complete.
4. Delete all other worksheets by right-clicking on the worksheet name and choosing **Delete**.
5. Setup the Main Document

For the main document, you can use either a new, blank document, or a document you've already created.



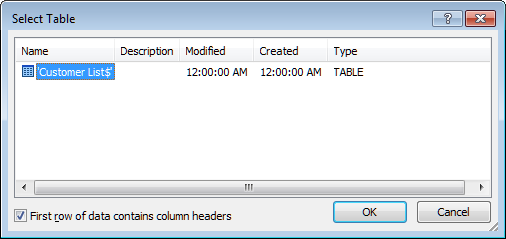
1. With the document open, click the **Mailings** tab.

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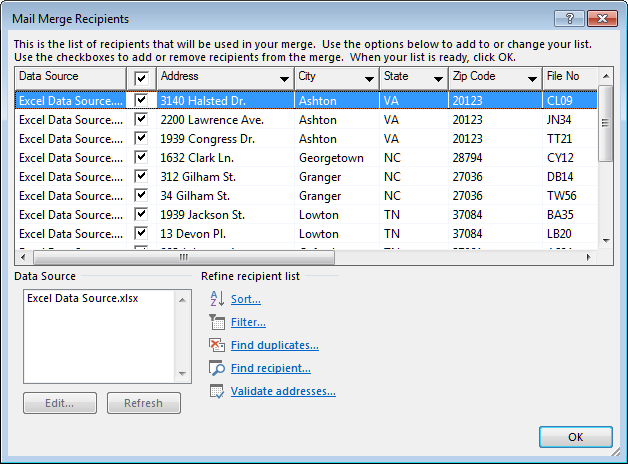
1. Click **Start** **Mail** **Merge** following by **Letters**.
2. Associating the Data Source
3. From the **Mailings** tab, click **Select** **Recipients** followed by **Use** **Existing** **List**.
4. When the **Select Data Source** dialog box appears, navigate to the directory that contains the Word or Excel data file. Click **Open**.

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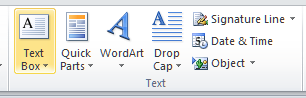
1. The following dialog box will appear if the data file is an Excel spreadsheet. Note the name of the table corresponds to the worksheet tab name.

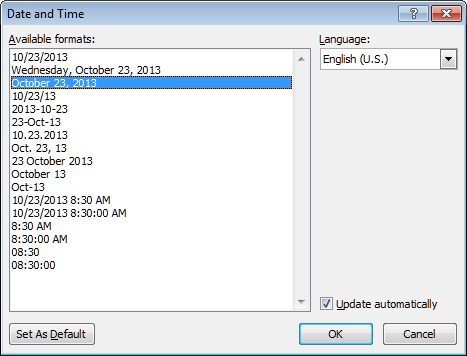


1. Click **OK**.
2. At this point it will not be obvious that the data is “attached” to your Word document.
3. From the **Mailings** tab, click  to view the data. Click **OK** to return to the letter.

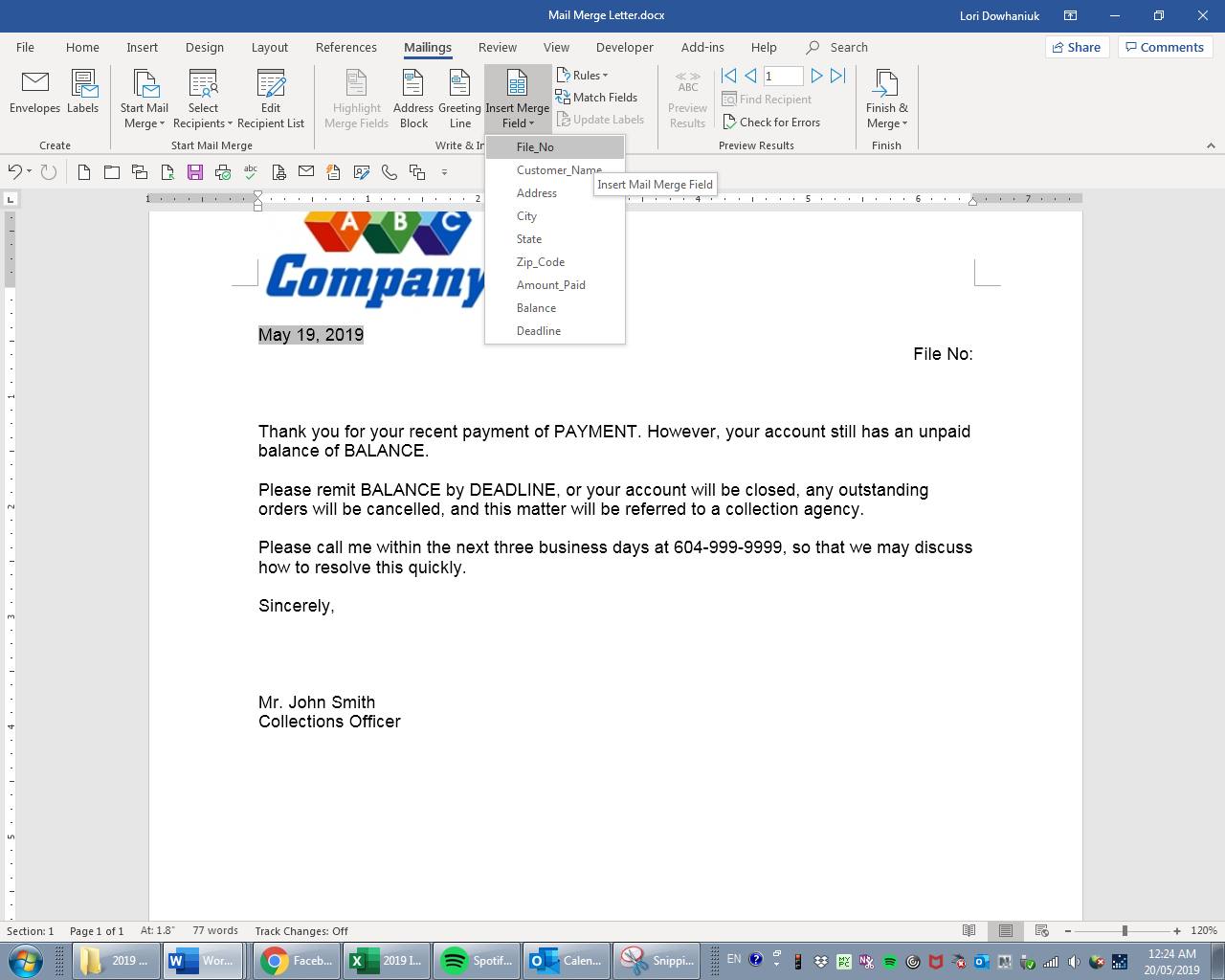


1. Insert Merge Fields
2. The first field to insert in a letter is the date. Position the cursor at the top of the letter where you’d **want** the date, and from the **Insert** tab, in the **Text** group, click **Date & Time**.

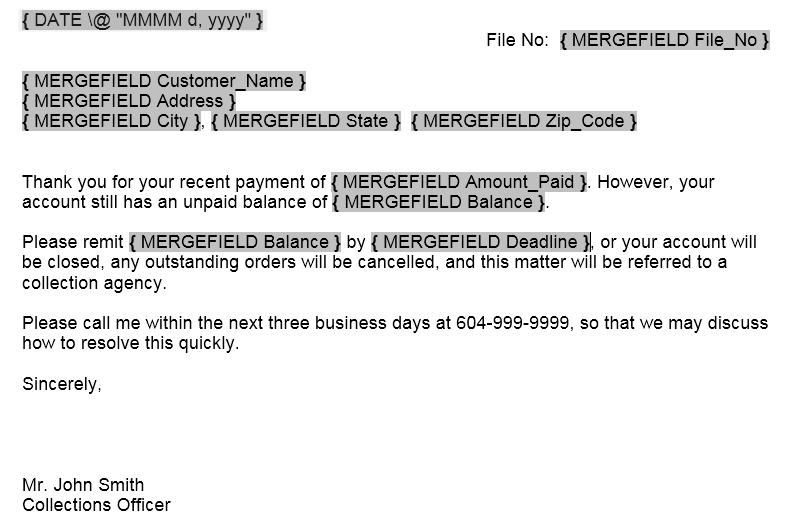


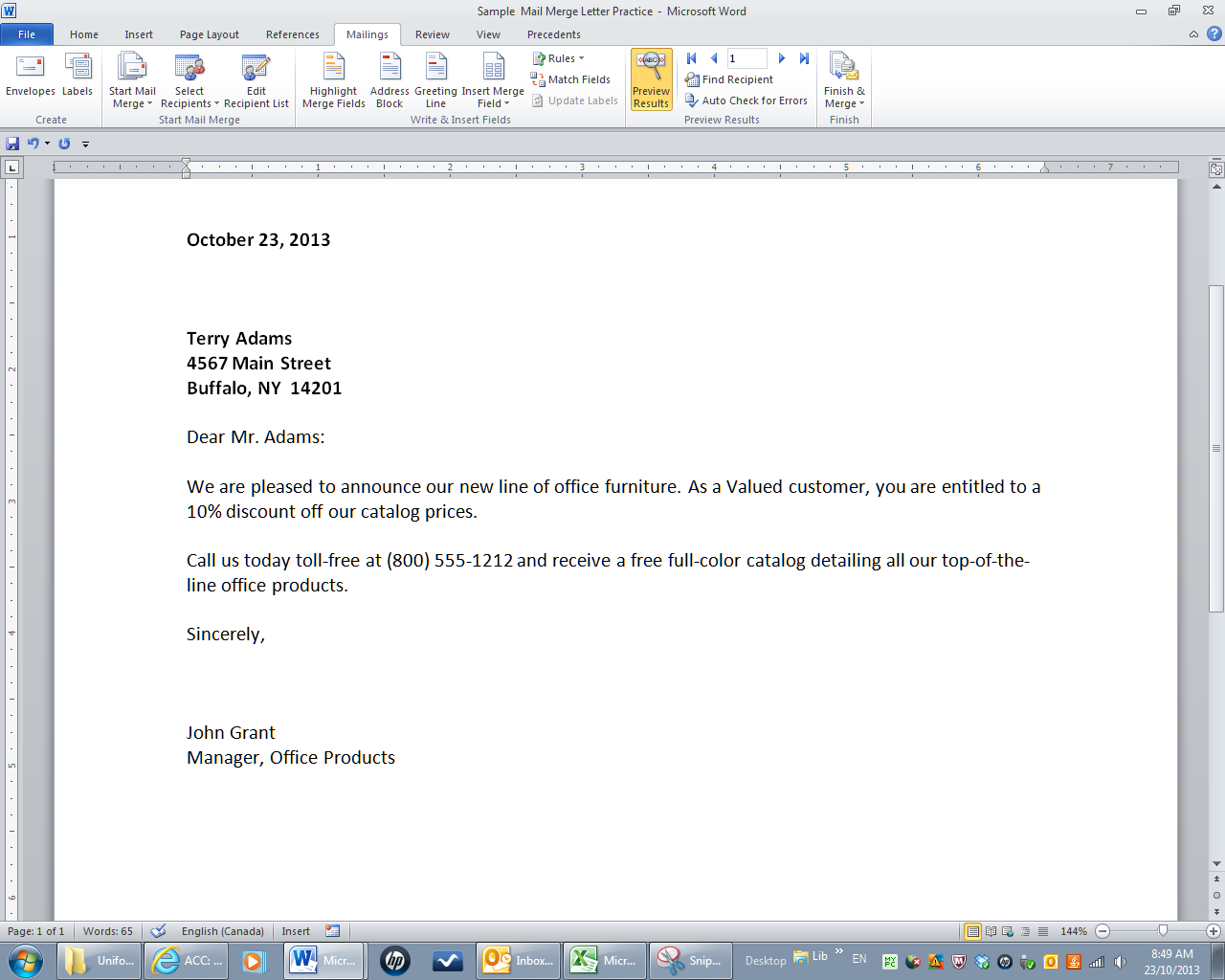


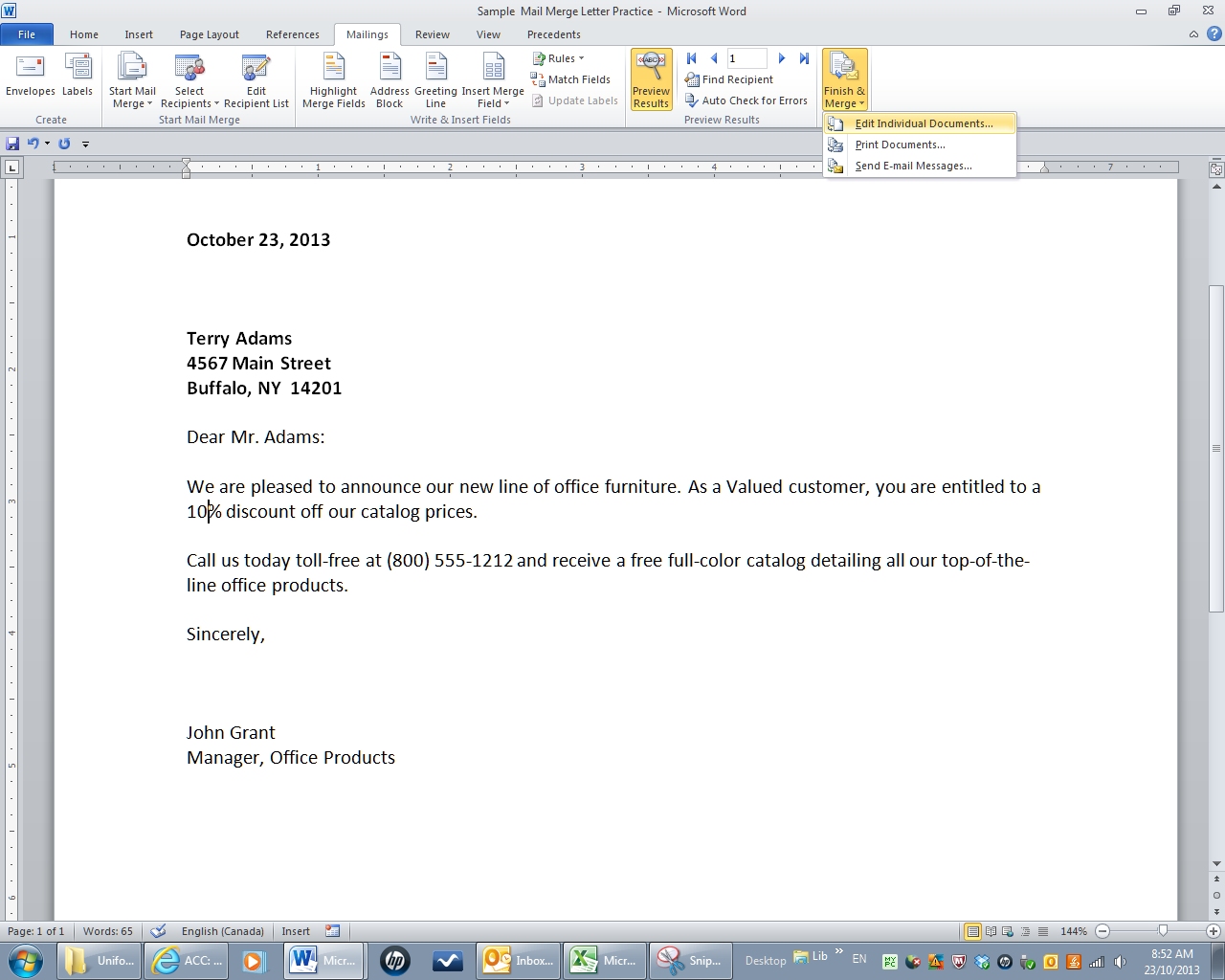
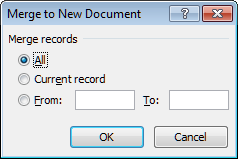
1. Ensure **Update automatically** is checked.
2. To insert the merge fields, position the cursor in the desired position in the letter, and from the **Mailings** tab click the bottom portion of the **Insert** **Merge** **Field** split button. Choose the desired field. Repeat until the fields are inserted in the appropriate locations.



1. Another way of viewing the document to clearly see where the codes are is to press **Alt+F9**. This is a toggle keystroke that will turn the codes off or on.



1. You can preview the results before merging by clicking the **Preview** **Results** button on the toolbar and navigating through the records by clicking the arrows.
2. To complete the merge, from the **Mailings** tab, click **Finish** **&** **Merge**, and choose **Edit** **Individual** **Documents**. This will allow you to review the letters before printing. Click **OK** to complete the merge.



1. Mailing Labels

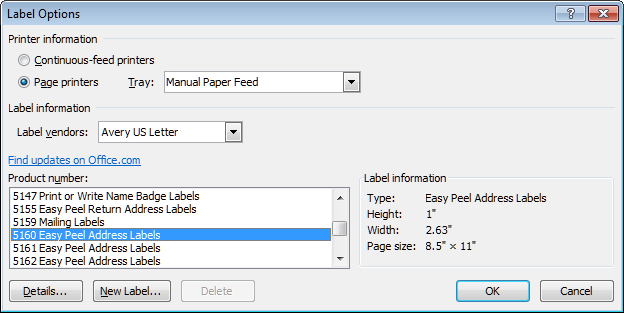
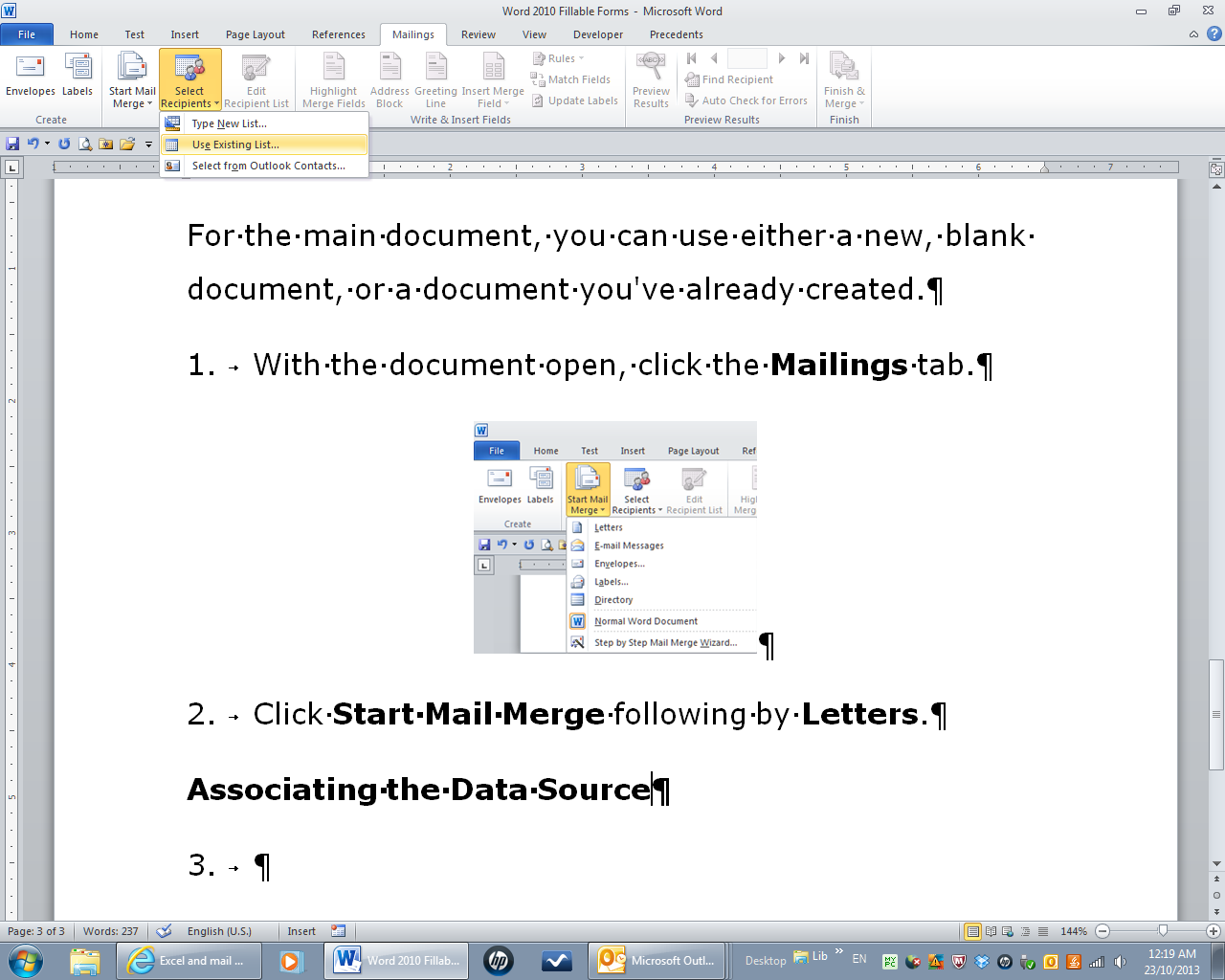
Mailing labels can easily be created from a data source as well.

1. With a blank document open, click the **Mailings** tab.

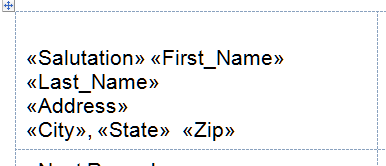
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1. Click **Start** **Mail** **Merge** following by **Labels**.

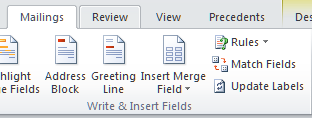
Choose a desired product as shown below and click **OK**.

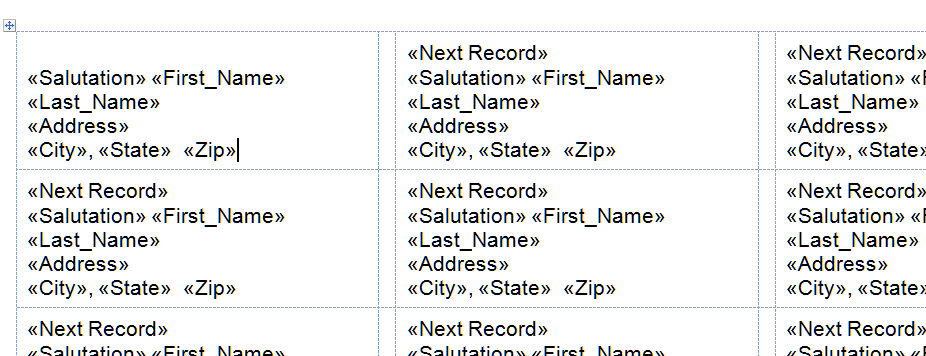


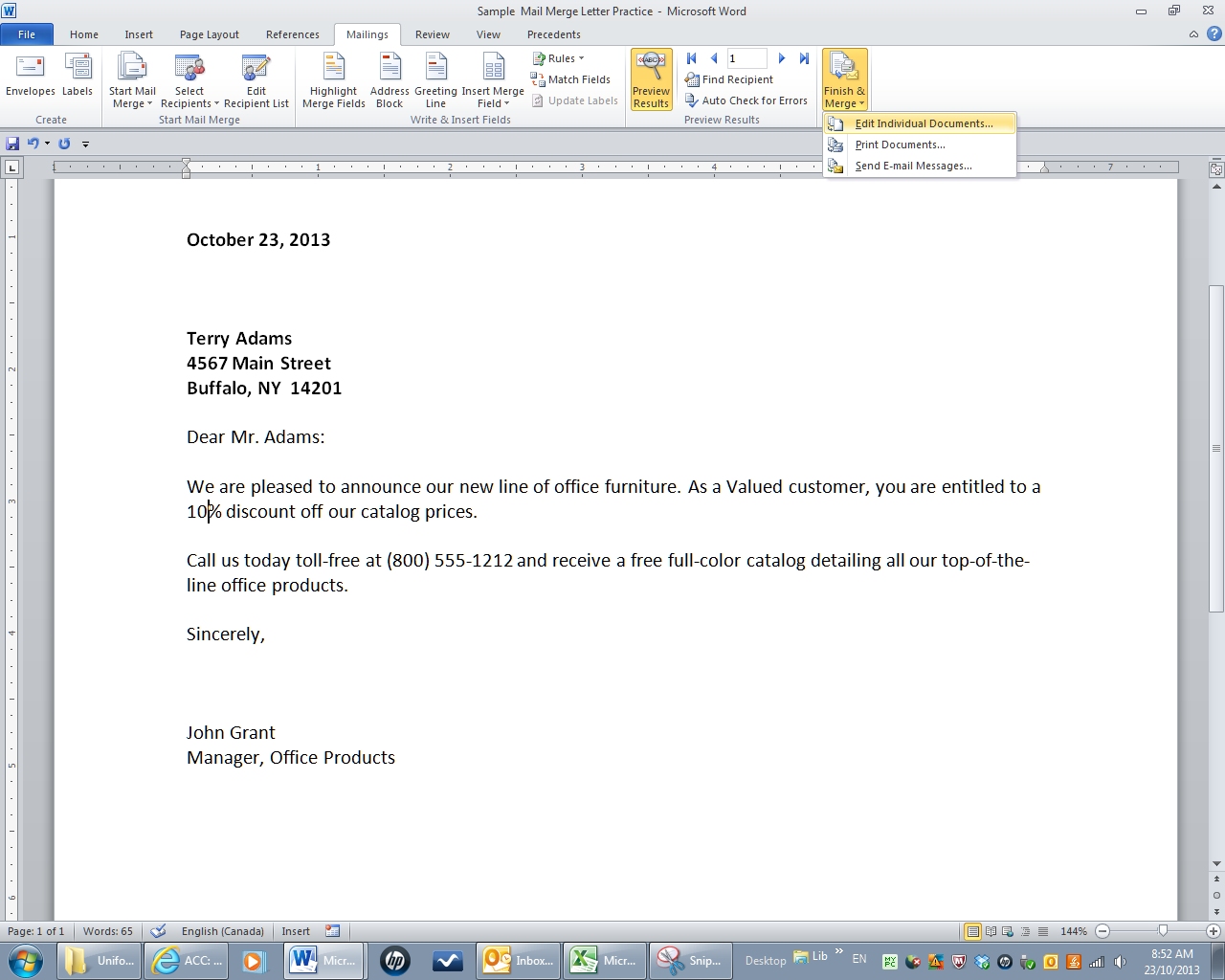
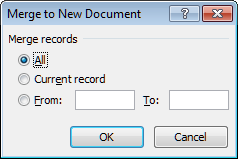
1. As in the previous letter example, click **Select** **Recipients** followed by **Use** **Existing** **List**.
2. When the **Select Data Source** dialog box appears, navigate to the directory that contains the data file. Click **Open**.
3. Insert the fields in the first label, using the same method as in the previous letter example so the fields appear as follows.



1. Click the **Update Labels** button in the **Write & Insert** Fields group to duplicate the information on all the other labels.





1. To complete the merge click **Finish** **& Merge** and choose **Edit** **Individual** **Documents**. This will allow you to review the labels before printing. Click **OK** to complete the merge.
2. Format (\\*) field switches

A field switch can be added to a field to control the formatted result. For example {MERGEFIELD File\_No \\* Upper} would result in the field being displayed in uppercase letters, in case there was an error in data entry and some had not been typed using all caps.

For Amount Paid the field could be edited to {MERGEFIELD Amount\_Paid \# $###,##0.00 to display with a dollar sign and two decimals. This is necessary when merging to an Excel spreadsheet.

The deadline date format can be controlled with \@ “MMMM d, yyyy”.

|  |  |
| --- | --- |
| Operator | Description |
| \\* Caps | The first letter of each word would be capitalized |
| \\* FirstCap | The first letter of the first word |
| \\* Upper | All letters uppercase |
| \\* Lower | All letter lowercase |
| \# $###,##0.00 | Displays a number with a dollar sign and comma separator if 1,000 or greater, and two decimal places. |
| \@ “MMMM d, yyyy” | Displays a date as January 1, 2019 |

For a complete list of field switches refer to the following Microsoft website:

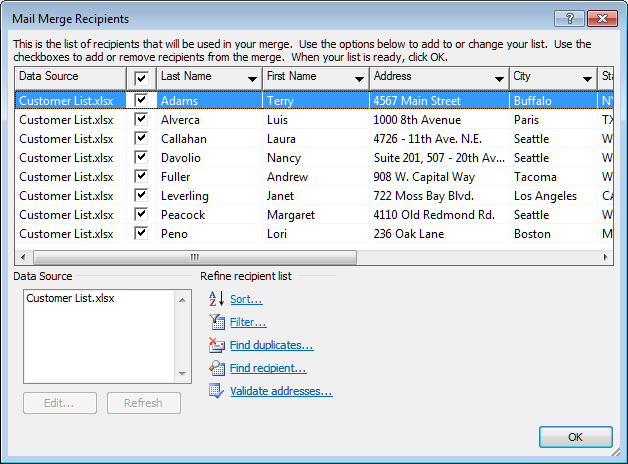
<https://support.office.com/en-us/article/format-field-results-baa61f5a-5636-4f11-ab4f-6c36ae43508c>

1. Filtering Data Source

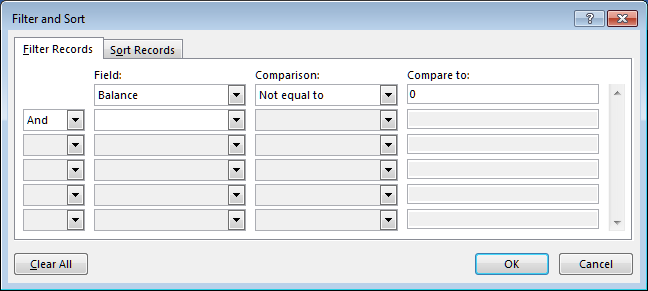
You may wish to mail only records that meet certain criteria.

1. To “filter” your date source list before merging click the **Edit Recipient List** button.

The following dialog box will appear. Click **Filter**.

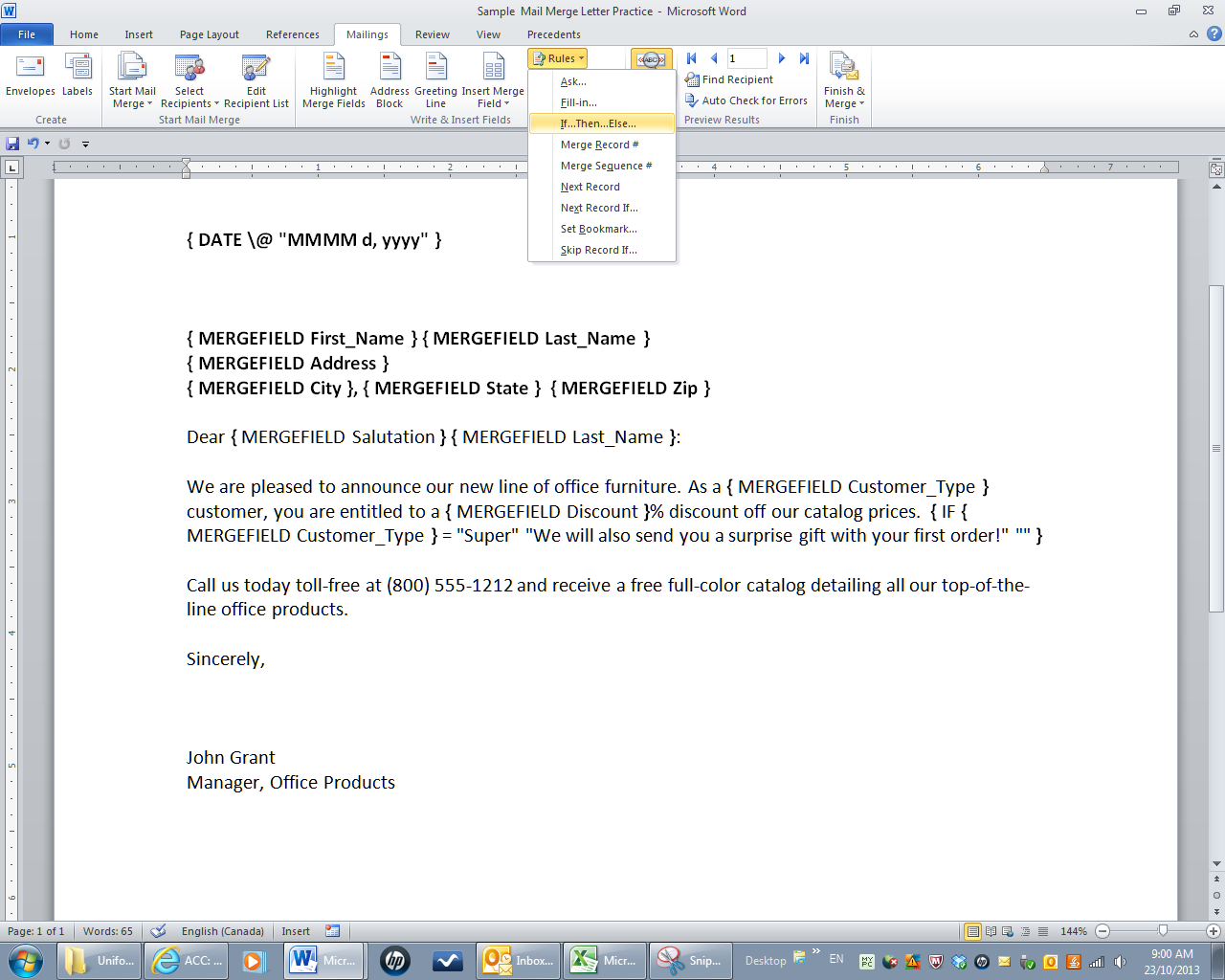


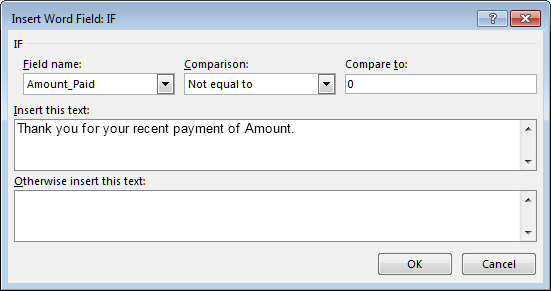
1. Select the desired field to filter on in the field drop down, followed by your choice of comparison and what you are comparing to. The following example would provide you with only the records where the Balance is not 0. When you click OK, and then merge, the result would only be letters only for those customers that have a balance.



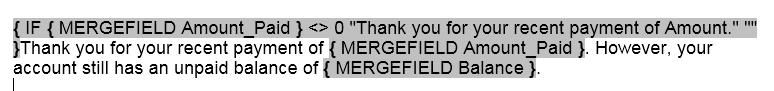
**Note:** It is important to go back to the Filter and clear before attempting to merge to the complete list again.

1. Using If…Then…Else

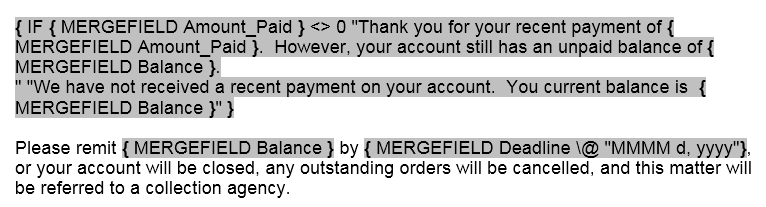
“If…Then…Else” statements are a great way to further personalize a letter by creating a “condition” in which to insert certain text.

1. From the Mailings tab, click **Rules**, followed by **If…Then…Else.**

The field result will be as follows:



1. Edit the field as follows by replacing the word Amount with the Amount Paid field and then moving the following sentence so it is within the quotes.



If the condition is true (i.e. Amount Paid is not equal to zero) the text will display. Otherwise, the text that follows in the second set of quotations will display.