



MAIL MERGE IN WORD



Thomasina Cummings
GCS TRAINING Jubilee Court, Swansea

About Mail Merge

Mail merge is a technique that allows you to create a batch of personalised documents from a template document and data source.

For example, letters addressed to individuals, appointments customised with personal data, certificates tailored to individual students and courses.

A data source can come in many forms, but an **Excel Spreadsheet** is a common format as many workplaces use it.

Preparing a spreadsheet for use in a mail merge

Data that you intend to use in your mail merge should be on the first sheet of an Excel workbook.

The column headings in your spreadsheet will become the **fields** in your mail merge. So, if you want to personalise a document with first name, surname, appointment time, date of appointment, account number, or other details, these will need to be column headings in your data source.

Each row below the column headings (often referred to as a **record**) can be converted into an individual document.

Data such as percentages, currency, postcodes, etc. should be formatted in the spreadsheet exactly as you would like them to appear in the document.

The spreadsheet should be checked for accuracy and saved in an accessible location prior to connecting it to Word to begin the mail merge.

Here is an example of a mail merge data source.

	A	B	C	D	E	F
1	first_name	last_name	company_name	address	city	county
2	Aleshia	Tomkiewicz	Alan D Rosenberg Cpa Pc	14 Taylor St	St. Stephens Ward	Kent
3	Alethea	Mould	Hughlett, Henry T Jr	6305 Elstow St	Castle Ward	West Sussex
4	Annett	Bunselmeyer	Guynes Design Inc	5562 Fairfield St #847	Ryde	Isle of Wight
5	Augustine	Growcock	Lynema, Cliff Cpa	114 Falkland St #8845	Brimpton	Berkshire
6	Charisse	Spinello	Modern Plastics Corp	9165 Primrose St	Darnall Ward	Yorkshire, South
7	Charlesetta	Erm	Cain, John M Esq	5 Hygeia St	Loundsley Green Ward	Derbyshire
8	Ciara	Cobbley	Wmg1 101.7 Fm	7523 Kempton Rd	Cockerton West Ward	Darlington
9	Corrinne	Jaret	Sound Vision Corp	2150 Morley St	Dee Ward	Dumfries and Galloway
10	Craig	Cua	Berry, John M Esq	8388 Bessemer St #5	East Putney Ward	Greater London
11	Dewitt	Julio	Rittenhouse Motor Co	7 Richmond St	Parkham	Devon

Connecting the data source

To begin you can open Word and create a new, blank document or open a template. Templates can be self-created or provided by Office.

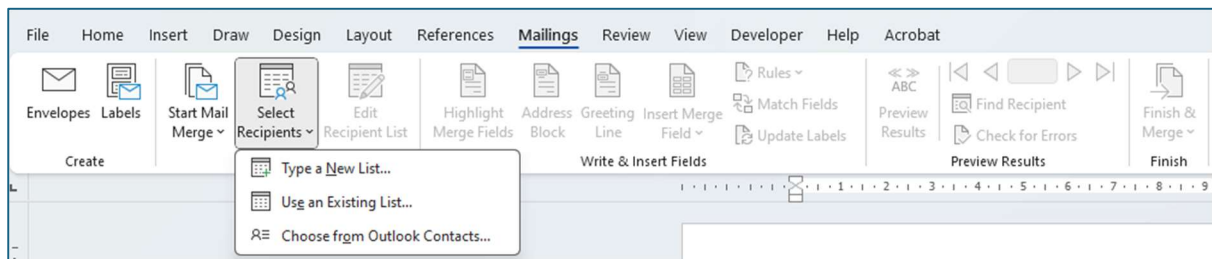
All mail merge operations take place in the **Mailings Tab**.

Features in the Mailings Tab will be greyed out until a source is created.

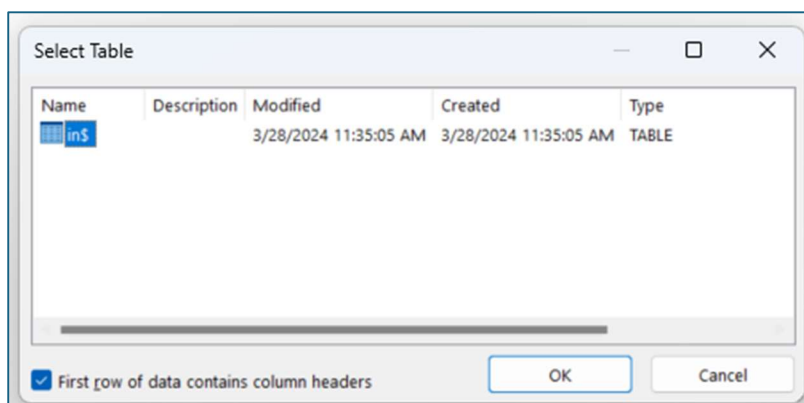
The source can be manually typed 'on the fly' using **Type a New List**.

It can also be provided from **Outlook Contacts**, if this is the software you use for emails.

The option that we will use is **Use an Existing List**. This list will be the Excel **Data Source** file provided by the tutor.

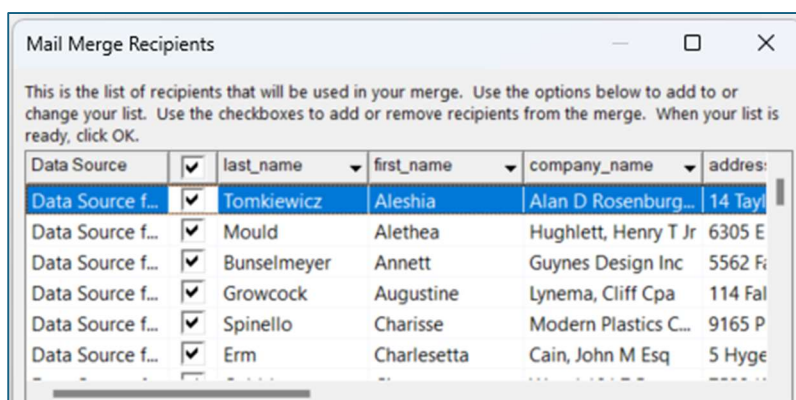


Upon selecting this option, you will be prompted to navigate to the Data Source file. Your sheet will be listed as a table, and you should ensure that the **First row of data contains column headers** option is ticked before clicking OK.

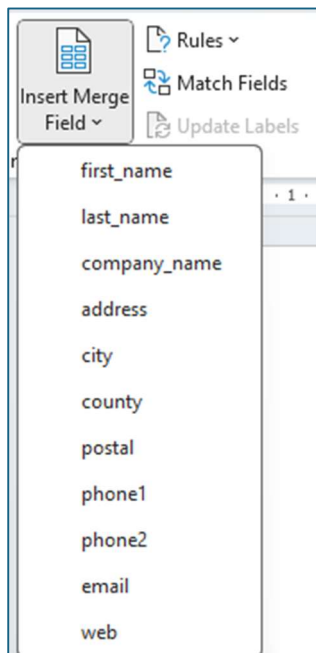


Once connected, the options in the Mailings Tab will no longer be greyed out.

You can now use the Edit Recipient List to check your source has been loaded and filter out any records that you do not want to include.



Column headings from your data source will be added to the **Insert Merge Field** dropdown for use in your document.

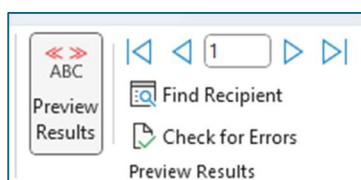


These generic fields should be used in the document in place of the actual data from the record.

Try typing the following message using the **Insert Merge Fields** option to add the generic fields. Take care with punctuation and layout, as they are easier to fix while writing than retrospectively.

My name is «first_name» and I live at «address», «city», «county», «postal». My telephone number is «phone1» and my email address is «email». Details of my organisation, «company_name», can be found at «web».

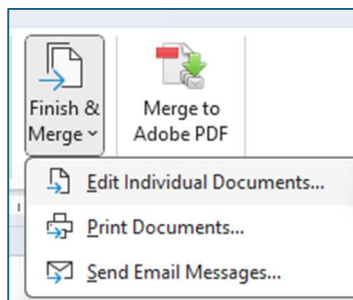
Once the sentence is prepared you can preview the merge using the **Preview Results** option.



The first record will be loaded, and the arrows can be used to view next (and previous) records to check for errors.

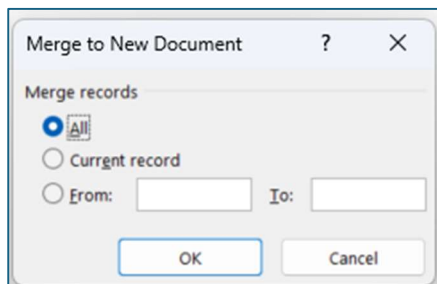
My name is Dewitt and I live at 7 Richmond St, Parkham, Devon, EX39 5DJ. My telephone number is 01253-528327 and my email address is dewitt.julio@hotmail.com. Details of my organisation, Rittenhouse Motor Co, can be found at <http://www.maxvideo.co.uk>.

In order to complete the merge, you can click the **Finish and Merge** option.



Edit individual documents is the most common option, as this allows for proofreading and 'tweaking' of any documents that might have errors that weren't spotted when preparing the data source.

Since you have already filtered the source using the **Edit Recipients List** option, you can merge **All**.



It is also possible to print just the current record or a range of records but, this is only necessary if you didn't carry out the earlier step of selecting recipients.

A new document will load containing the batch of individual documents with the generic fields replaced by the records from the data source.

You have now completed your first mail merge and can try the following tasks.

Task 1

Open a new, blank Word document and link the data source file using the **Select Recipients** option.

Choose any 5 recipients using the **Edit Recipient List** option.

Create the following letter and carry out the merge.

Note: to type on the line below without a space between lines, use SHIFT + ENTER instead of just ENTER. Items in bold should be replaced with your details.

	Your Name
	Your Address
	Today's Date
«first_name» «last_name»	
«company_name»	
«address»	
«city»	
«county»	
«postal»	
RE: «web»	
Dear «first_name» «last_name»	
It has come to our attention that the domain you purchased through us is due to expire. Please contact the customer service team on 01972 455 655 before the expiry date 05/06/2024.	
Yours sincerely	
Your Name	

Task 2

Create a new document based on the Confetti Thank You template. If this template is not available, you can select any similar alternative.

Link the data source file using the **Select Recipients** option.

Choose any 5 recipients using the **Edit Recipient List** option.

Edit the template as per the outline below.

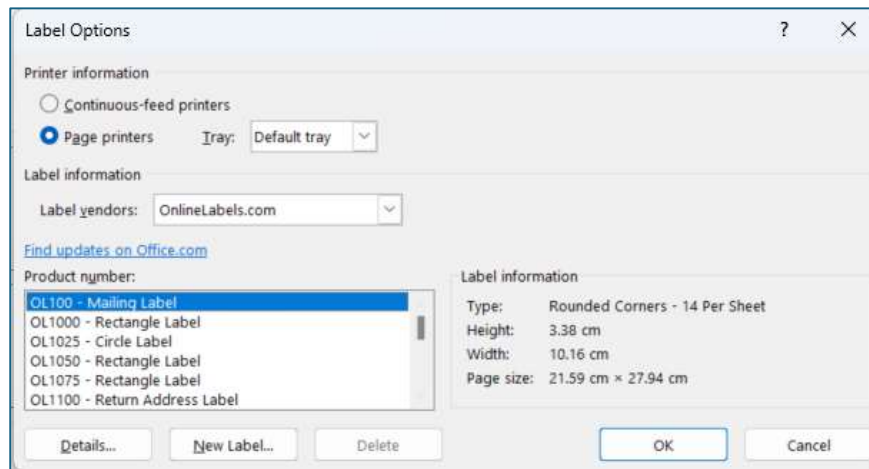


You can click the Design Tab and change the theme if you want to choose an alternative colour scheme.

Check your preview, make any necessary corrections, and carry out the merge.

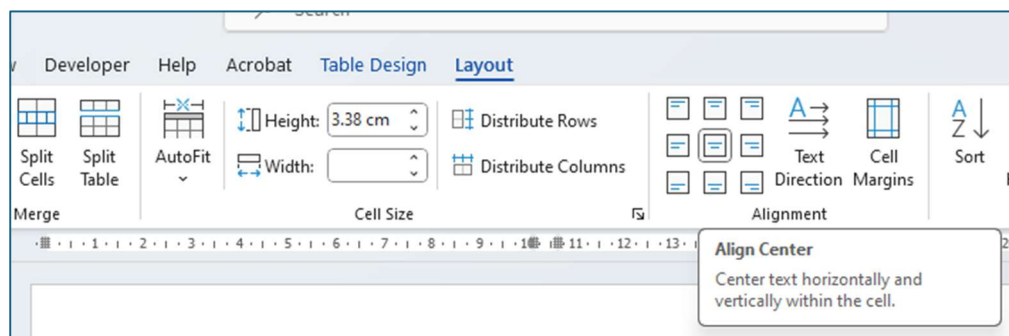
Task 3

Create a new document using the **Labels** option on the Mailings Tab.



If this label template is not available, you can select any similar alternative.

Select the table and use the **Layout Tab** to adjust the alignment of your labels to **Align Centre**.



Link the data source file using the **Select Recipients** option.

Edit the template as per the outline below.

Note: If you do not want a page full of the same label, you can use the **Next Record** entry from the **Rules** dropdown.

«first_name» «last_name» «address» «county» «postal»	«Next Record» «first_name» «last_name» «address» «county» «postal»
«Next Record» «first_name» «last_name» «address» «county» «postal»	«Next Record» «first_name» «last_name» «address» «county» «postal»
«Next Record» «first_name» «last_name»	«Next Record» «first_name» «last_name»

Fill the page quickly using copy and paste.

When you finish and merge, the result should be 4 pages of individual labels.

If you want to experiment, you can also add colour, images, borders and other elements to your labels.

Task 4

Create a Letter Data Source with the following column headers:

- Name
- Gender
- Achievement
- Family Members

Complete with some dummy data.

	A	B	C	D
1	Name	Gender	Achievement	Family Members
2	Sally	girl	playing violin	brother and sister
3	Kerry	girl	playing football	two rabbits
4	Tom	boy	reading stories	sister and three hamsters
5	David	boy	doing homework	cat and dog
6	Michael	boy	helping daddy	brother, Tom,
7				

Be careful with formatting so that it makes sense when added to the letter.

You can add as many as you want.

Link the data source file using the **Select Recipients** option.

Type a letter as follows – your formatting can be different.

For reference this one uses a combination of Bradley Hand ITC size 22, Copperplate Gothic size 24, Aptos Display in superscript caps size 16 and a green 3D border above and below the letter.

FROM THE DESK OF Santa Claus

Hello «Name»

Ho, Ho, Ho! Merry Christmas. This is Santa here at the North Pole. The elves are very busy getting everything together for the big day.

Santa knows that you have been a very good «Gender» this year. I have especially noticed how good you have got at «Achievement». I am very proud of you and all of your accomplishments this year. Keep up the good work!

I will make sure to leave something special for you under the tree. Keep taking good care of your «Family_Members» and I look forward to dropping off your gifts.

Merry Christmas!

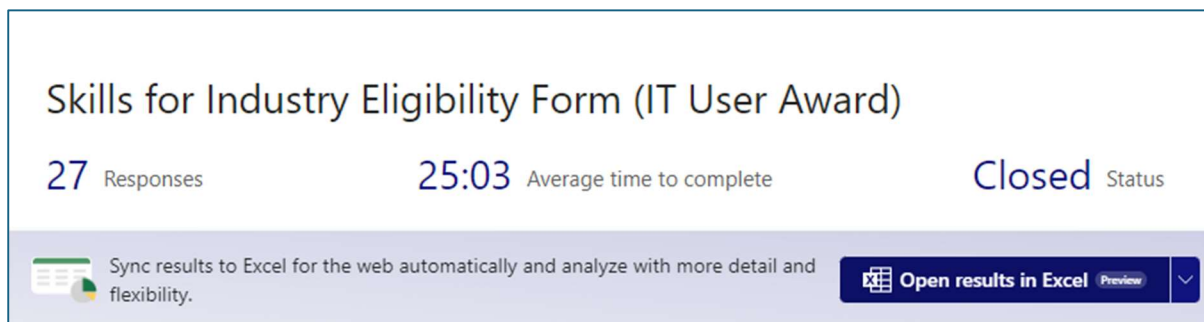
SANTA CLAUS

CHECKED TWICE AND SIGNED BY



Extra Information

Software like Microsoft Forms will allow you to export form data in Excel format.

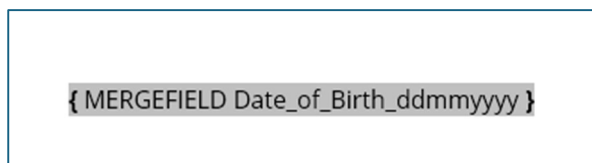


The screenshot shows the top section of a Microsoft Forms results page. The title is 'Skills for Industry Eligibility Form (IT User Award)'. Below the title, it displays '27 Responses', '25:03 Average time to complete', and 'Closed Status'. At the bottom, there is a purple bar with a sync icon and text 'Sync results to Excel for the web automatically and analyze with more detail and flexibility.' On the right side of this bar is a button that says 'Open results in Excel' with a 'Preview' link and a dropdown arrow.

Once you have this data, it can be saved as a data source and used to populate other forms in Word. Data can be cleaned up to remove Id, Start time, Completion time and other information that isn't required. You can also use the Table Design Tab to remove duplicates.

Date Formats

Sometimes, date fields will present in a different format to the one required. To fix this, right click on the date and select toggle field codes or use SHIFT + F9.



The screenshot shows a text box containing the field code '{ MERGEFIELD Date_of_Birth_ddmmyyyy }'.

The current field code can be edited to show dates in a different format by adding **date codes**. Here are some examples of date codes.

DD – a two-digit date like 01, 02, or 31

DDD – short form days like Mon, Tue, or Fri

DDDD – long form days like Monday, Tuesday, or Sunday

MM – a two-digit month like 01, 06, or 12

MMM – a short form month like Jan, Feb, or Aug

MMMM – a long form month like January, February, or December

YY – a two-digit year like 20, 22, or 24

YYYY – a four-digit year like 2020, 2022 or 2024.

Combinations of these, with symbols and words can be added before the final curly brace using the following syntax \@"DATE CODE"

```
{ MERGEFIELD Date_of_Birth_ddmmyyyy \@ "DDDD DD MMMM YYYY" }
```

Shows as follows:

Sunday 01 August 1982

```
{ MERGEFIELD Date_of_Birth_ddmmyyyy \@ "DDD, DD of MMM YYYY" }
```

Shows as follows:

Sun, 01 of Aug 1982

Match Fields

Sometimes your data source will have column headings that Word doesn't interpret or match correctly. If this happens, you can use **Match Fields** to tell the system which ones you want it to use.

Match Fields

In order to use special features, Mail Merge needs to know which fields in your recipient list match to the required fields. Use the drop-down list to select the appropriate recipient list field for each address field component

Unique Identifier	(not matched)
Courtesy Title	Title
First Name	(not matched)
Middle Name	(not matched)
Last Name	Surname
Suffix	(not matched)
Nickname	(not matched)
Job Title	(not matched)
Company	(not matched)
Address 1	(not matched)
Address 2	(not matched)
City	(not matched)
State	(not matched)

Use the drop-down lists to choose the field from your database that corresponds to the address information Mail Merge expects (listed on the left.)

☐ Remember this matching for this set of data sources on this computer

OK Cancel

Building Blocks

You may have also noticed that the Mailings Tab also has some built in options for Address Block and Greeting Line.

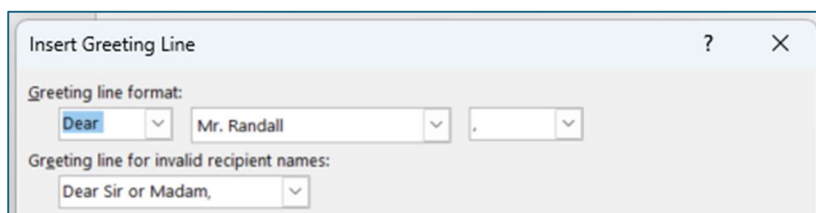
Address Block will gather all address lines together (although take care as it might not always format them in the way you want them to).



56
Mulberry Avenue
Swansea
SA3 5HA

Manually adding fields is a more reliable option in this situation.

The Greeting Line will add **Dear** or **To** before the recipient's name.



Insert Greeting Line

Greeting line format:
Dear Mr. Randall .

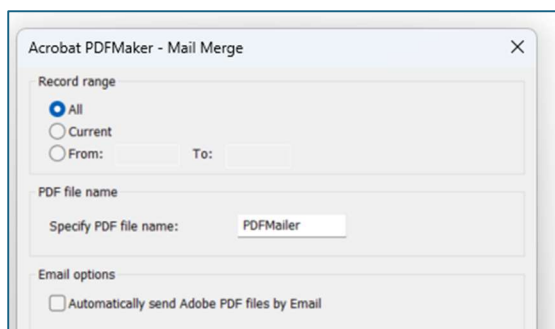
Greeting line for invalid recipient names:
Dear Sir or Madam,

It also has a neat 'fall back' in cases where the name is blank and can instead write **Dear Sir or Madam** or **To whom it may concern**.

Addons

If you have Adobe Acrobat installed, you may also find you can **Merge to Adobe PDF**. PDFs can be prefixed with a filename and can be sent automatically by email.

Please test all features thoroughly with dummy data before using for 'live' clients.



Acrobat PDFMaker - Mail Merge

Record range
☒ All
☐ Current
☐ From: To:

PDF file name
Specify PDF file name: PDFMailer

Email options
☐ Automatically send Adobe PDF files by Email