How to Mail merge using an Excel spreadsheet

https://support.office.com/en-us/article/mail-merge-using-an-excel-spreadsheet-858c7d7f-5cc0-4ba1-9a7b-0a948fa3d7d3

Word for Office 365 Word 2019 Word 2016 Word 2013 Word 2010

Mail merge is used to create multiple documents at once. These documents have identical layout, formatting, text, and graphics. Only specific sections of each document vary and are personalized. The documents that Word can create with mail merge include bulk labels, letters, envelopes, and emails. There are three documents involved in the mail merge process:

1. Your main document in Word – Example: **Pre-merge Letter.docx** and **Pre-merge Envelope.docx**
2. Your data source in Excel – Example: **Addresses for Mail Merge.xls**
3. Your merged document in Word – **Post-merge Letter.docx** and **Post-merge Envelope.docx**

You can learn more about how to use excel data for mail merge in the following video that is a part of a training course - Take mail merge to next level https://support.office.com/en-us/article/video-take-mail-merge-to-the-next-level-ca30f6af-8ea0-4d20-832b-97bdefdc307b

## Step 1: Prepare data in Excel for mail merge

The most important step in the mail merge process is to set up and prepare your data. You'll use your Excel spreadsheet as the data source for the recipient list.
Here are some tips to prepare your data for a mail merge. Make sure:

1. **Column names** in your spreadsheet match the field names you want to insert in your mail merge. For example, to address readers by their first name in your document, you'll need separate columns for first and last names.
2. All data to be merged is present in the first sheet of your spreadsheet.
3. Data entries with percentages, currencies, and postal codes are correctly formatted in the spreadsheet so that Word can properly read their values.
4. The Excel spreadsheet to be used in the mail merge is stored on your local machine.
5. Changes or additions to your spreadsheet are completed before it's connected to your mail merge document in Word.

Step 2: Start the mail merge

1. In Word, choose **File** > **New** > **Blank document**.
2. For Envelopes, choose **Envelopes** in the **Create** group. Type a Return Address (if desired) and choose **Add to Document.**
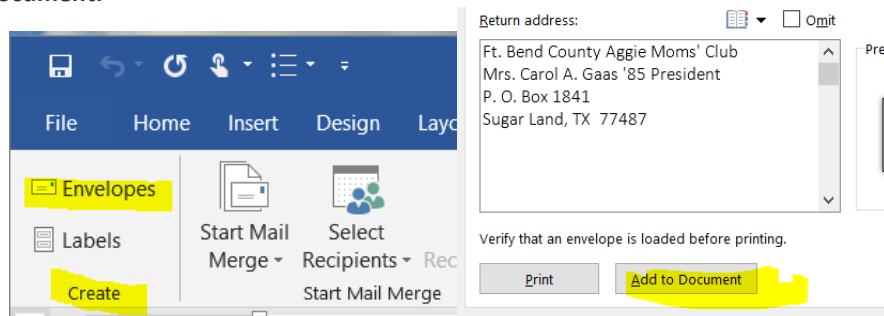
3. On the **Mailings** tab, in the **Start Mail merge** group, choose **Start Mail Merge**, and then choose the kind of merge you want to run. **Select Envelopes** for this example.
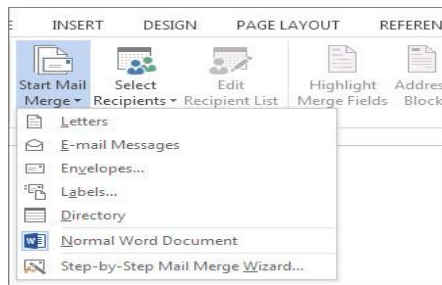
4. Choose **Select Recipients** > **Use an Existing List**. (This will be the Excel spreadsheet you created with addresses.)
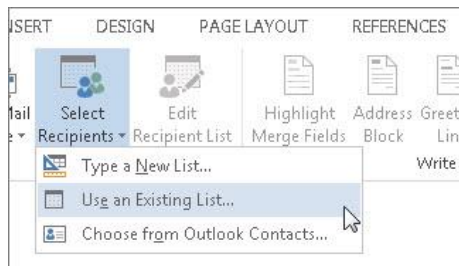
This is what my Excel spreadsheet looks like. (Addresses for Mail Merge.xls)

|	A	B	C	D	E	F	G	H	I
1	OrganizationName	AccountNumber	Address1	Address2	Address3	City	State	ZipCode	Salutation
2	Aggie Guide-Dogs and Service-Dogs	942110	Texas A&M University	Department of Student A	125 John J Koldus Bu	College Station	TX	77843-1236	Ms. Bilicek
3	BUILD Command Team	950980	Texas A&M University	Attention: Mr. Zach Mille	BUILD-961 SOFC	College Station	TX	77843-1237	Sir/Madame
4	Corps of Cadets, E-2 Mascot Company	953750	Texas A&M Foundation	401 George Bush Drive	1234 TAMU	College Station	TX	77843-1238	Mr. Jennings
5	MSC SCONA	05-57091	Texas A&M University	Department of Student A	1237 TAMU	College Station	TX	77843-1239	Sir/Madame
6	MSC Fish in Serving and Hosting	300460-60081	Texas A&M University	Department of Student A	125 John J. Koldus B	College Station	TX	77843-1240	Ms. Cantu
7	Galveston Yell Leaders	509310	Texas A&M University at Galves	c/o the Development Offi	P.O. Box 1675	Galveston	TX	77843-1241	Sir
8	Texas A&M University Career Closet	942740	Texas A&M University	Department of Student A	1233 TAMU	College Station	TX	77843-1242	Ms. Hilda Sebesta
9	CARPOOL	956550	Texas A&M University	Department of Student A	125 John J. Koldus B	College Station	TX	77843-1243	Sir/Madame
10	Family Weekend Committee	959800	Texas A&M University	Department of Student A	125 John J. Koldus B	College Station	TX	77843-1244	Sir/Madame
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5. Browse to your Excel spreadsheet, and then choose **Open**.
6. If Word prompts you, choose **Sheet1$** > **OK**. Click **OK** again if necessary. Word is establishing a connection to your Excel spreadsheet at this time.
7. Position cursor over to the area on your envelope where the **Address Block** should appear on the envelope and
< **Rt. click**> the mouse. It should appear within a rectangle on the envelope image. If you fail to position your


cursor on the Address Block area of your envelope the merged addresses will appear wherever your cursor happens to be at the moment. Word is a little bit persnickety.

Edit your mailing list (You can limit who receives your mail by excluding them on the Mail Merge Recipient List.)

1. Choose **Edit Recipient List**.
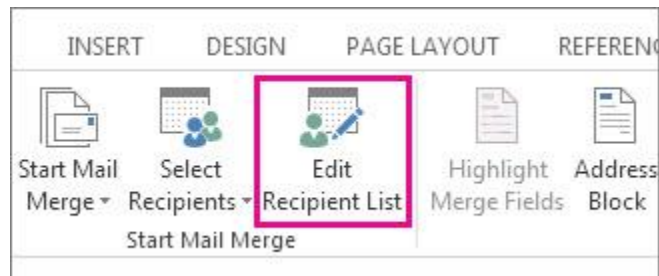
2. In the **Mail Merge Recipients** dialog box, **uncheck** the check box next to the name of any person who you **don't** want to receive your mailing. These records will not be included in the final merged document.
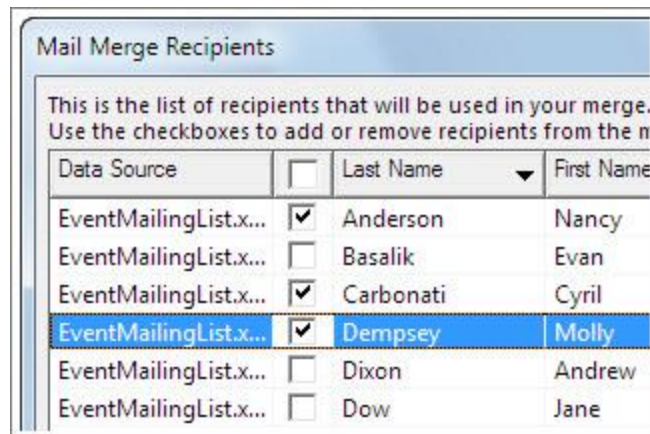

Step 3: Insert a merged field (You can insert one or more mail merge fields that pull the information from your spreadsheet into your document.)

To insert an address block for an envelope, a label, an email message, or a letter

1. On the **Mailings** tab, in the **Write & Insert Fields** group, choose **Address Block**.
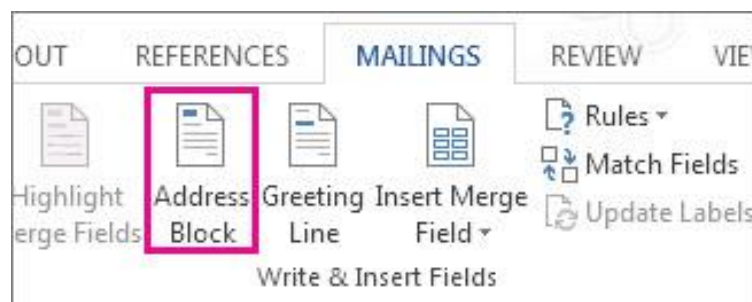
2. In the **Insert Address Block** dialog box, choose a format for the recipient's name as it will appear on the envelope. Joshua Randall Jr. is in the example for this document.
3. Preview the address on the right of this screen to verify that all fields are in the correct position in the Address Block. Select **Match Fields** to make changes to this format.
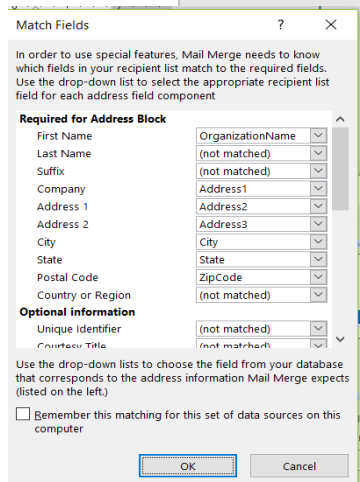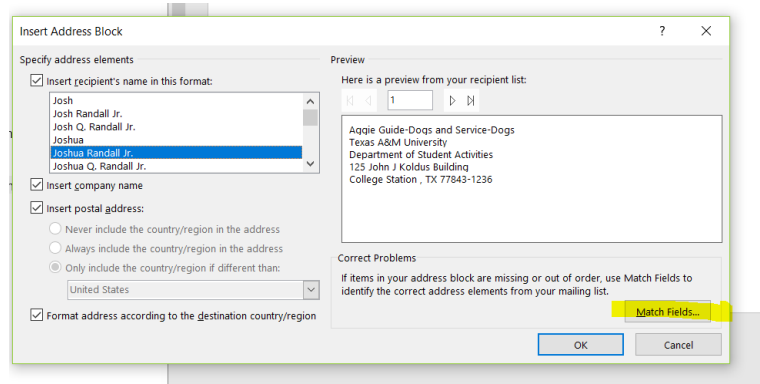
In this example, OrganizationName is the first line of the Address. Last Name and Suffix are not matched. If you had matched Last Name to a field it would have been added to the end of the First Name field which in our case is Organization Name.

Company is actually used for Address 1. Address 1 is selected for Address 2, Address 2 is selected for Address 3.

To insert a greeting line in an email message or a letter

1. On the **Mailings** tab, in the **Write & Insert Fields** group, choose **Greeting Line**.
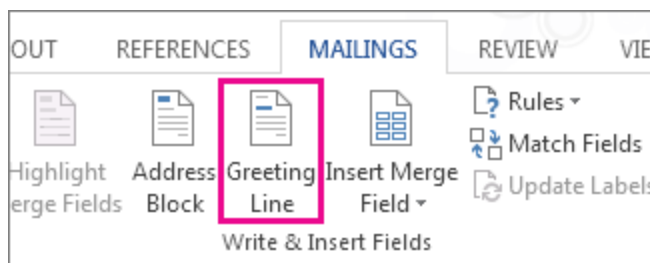
2. In the **Insert Greeting Line** dialog box, do the following:
   Under **Greeting line** format, change the salutation if necessary by choosing the greeting (**Dear** is the default), the format for the recipient name, and the ending punctuation (a comma is the default).
   And Under **Greeting line for invalid recipient names**, choose an option in the salutation list.
3. Choose **OK**.
4. Choose **File** > **Save**.

**To insert data from your spreadsheet in an email message or a letter**

1. On the **Mailings** tab, in the **Write & Insert Fields** group, choose **Insert Merge Field**.
2. In the **Insert Merge Field** dialog box, under **Fields**, choose a field name (column name in your spreadsheet), and then choose **Insert**.
3. Repeat step 2 as needed, and choose **Close** when done.
4. Choose **File** > **Save**.

Step 4: Preview and finish the mail merge

1. After you insert the merge fields you want, preview the results to confirm that the content is okay. and then you're ready to complete the merge process.
2. On the **Mailings** tab, choose **Preview Results**.

   i.
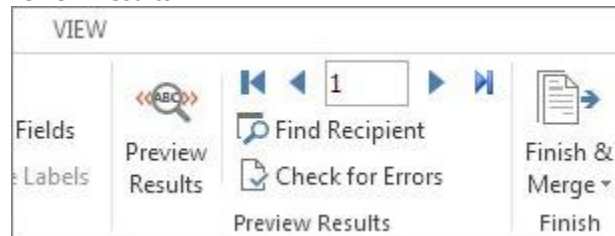
3. Choose the **Next** ▶ or **Previous** ◀ record button to move through records in your data source and view how the records will appear in the document.

4. In the Finish group, choose Finish & Merge, and choose Print Documents or Send E-mail Messages.
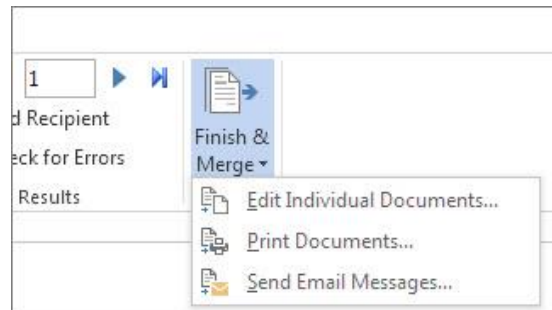
Step 5: Save your mail merge

When you save the mail merge document, it stays connected to your data source. You can reuse the mail merge document for your next bulk mailing. *Hint: Name it something that indicates it is a 'Merged' document.*

When you need to use the merged document again, simply open the mail merge document and choose **Yes** when Word prompts you to keep the connection.

Thanks!

Call or email me with questions.

Carol A. Gaas '85   832 746-7739
cagaas99@swbell.net
ftbaggiemoms@gmail.com

Pre-Merge Letter.doc

«AddressBlock»

Dear «OrganizationName»:

Account Number: «AccountNumber»

We are pleased to inform your organization that we are sending a contribution of $400 for the 2018 – 2019 academic year in support of your activities. This payment was sent to Mr. Tyson Voelkel at the Texas A&M Foundation. A copy of the letter sent to Mr. Voelkel notifying him of our donation is enclosed.

Please let us know that you have received our contribution and keep us updated about your ongoing activities.

Sincerely,

Carol A. Gaas '85, President
Fort Bend Aggie Mom's Club
P. O. Box 1841
Sugar Land, TX 77487
ftbaggiemoms@gmail.com

Enclosure

Addresses for Mail Merge.xls

	A	B	C	D	E	F	G	H	I
1	OrganizationName	AccountNumber	Address1	Address2	Address3	City	State	ZipCode	Salutation
2	Aggie Guide-Dogs and Service-Dogs	942110	Texas A&M University	Department of Student A	125 John J Koldus Bu	College Station	TX	77843-1236	Ms. Bilicek
3	BUILD Command Team	950980	Texas A&M University	Attention: Mr. Zach Mille	BUILD-961 SOFC	College Station	TX	77843-1237	Sir/Madame
4	Corps of Cadets, E-2 Mascot Company	953750	Texas A&M Foundation	401 George Bush Drive	1234 TAMU	College Station	TX	77843-1238	Mr. Jennings
5	MSC SCONA	05-57091	Texas A&M University	Department of Student A	1237 TAMU	College Station	TX	77843-1239	Sir/Madame
6	MSC Fish in Serving and Hosting	300460-60081	Texas A&M University	Department of Student A	125 John J. Koldus B	College Station	TX	77843-1240	Ms. Cantu
7	Galveston Yell Leaders	509310	Texas A&M University at Galves	c/o the Development Offi	P.O. Box 1675	Galveston	TX	77843-1241	Sir
8	Texas A&M University Career Closet	942740	Texas A&M University	Department of Student A	1233 TAMU	College Station	TX	77843-1242	Ms. Hilda Sebesta
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Pre-Merge Envelope.doc (I had previously saved it with a return address. It retrieves it this way).

Fort Bend Aggie Mom's Club
Carol A. Gaas '85, President
P. O. Box 1841
Sugar Land, TX 77487