

Mail Merge with Excel Lists

Merging

The **Tools Letters and Mailings** feature in Microsoft Word allows the user to create a form letter and merge with it names and addresses from a data file. This creates many individual letters, labels or lists from one merge document and one data source.

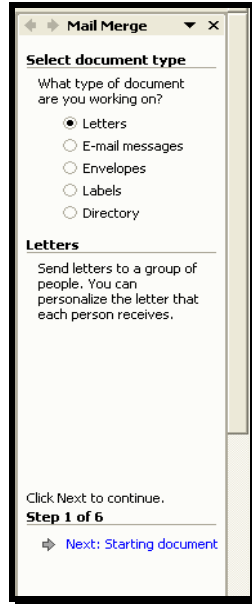
To build a merge application, the user must create two separate files. One is the main document which includes "merge fields" for standard information which will be the same across documents. The second file is the data source. This file contains the variable information that will fill in the merge fields in the finished product. This source file may be an Access data table or an Excel list.

The steps in creating a merge are listed below:

STEP	ACTION
1	Create a main document
2	Select a data source
3	Insert merge fields
4	Preview the merged documents
5	Merge the main document and the data source

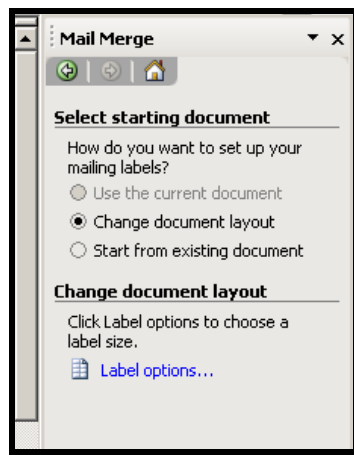
Main Document

1. Open a new document.
2. Select **T**ools from the menu bar.
3. Choose **L**etters and **M**ailings ►
4. From the submenu, select **M**ail Merge **W**izard.
The Mail Merge Task Pane opens to the right of the document window displaying Step 1 of 6.

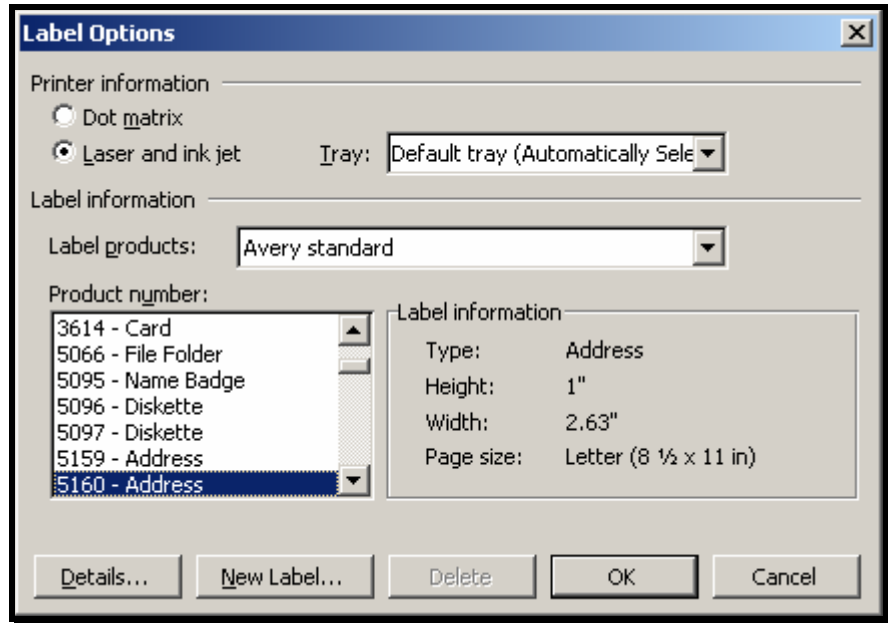


5. Under **Select document type**, select the option **Labels**.
6. Click the blue text link **Next: Starting document** at the bottom of the Task Pane.

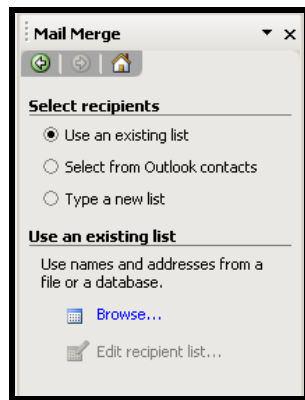
The Mail Merge Task Pane updates to Step 2 of 6.



7. Click on the link **Label Options...**



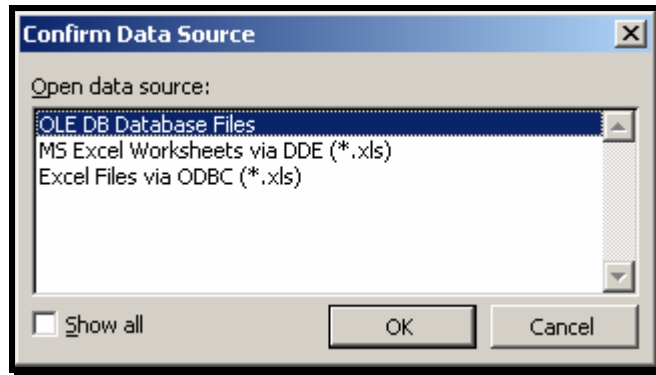
8. Select the **5160 - Address** labels from the **Avery Standard** types.
9. At the bottom of the Task Pane, click on Step 2 of 6, **Next: Select recipients.**
The Task Pane updates to Step 3 of 6.
10. Under **Select recipients**, choose **Use an existing list.**



11. Click the link to **Browse...** in the center of the Task Pane.
Locate the folder where the Excel list is stored and select the Excel file.

12. Click [**Open**].

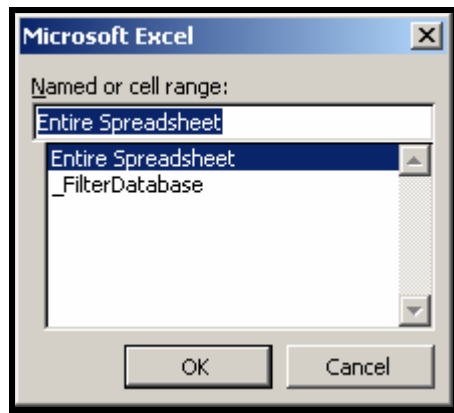
The Confirm Data Source dialog box will appear.



13. Select **MS Excel Worksheets via DDE (*.xls)**.

14. Click [**OK**].

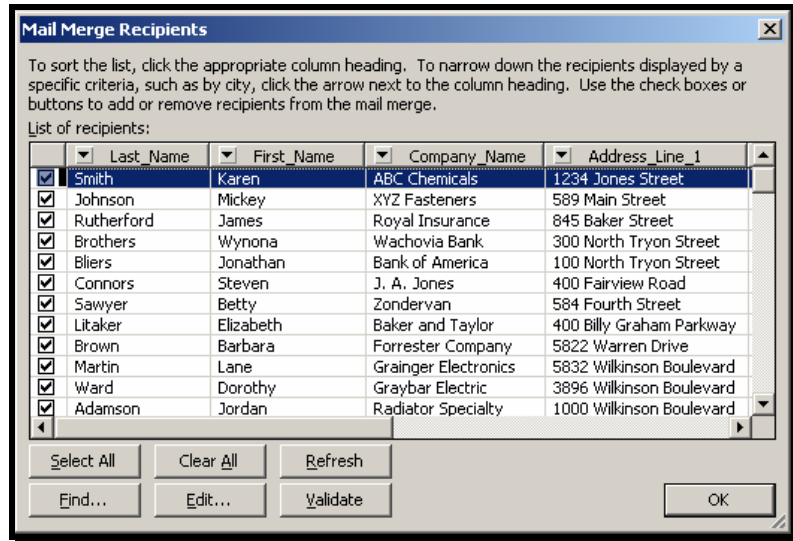
The Microsoft Excel dialog will appear.



15. From the Excel dialog box, select **Entire Spreadsheet**.

16. Click [**OK**].

*The names from the Excel worksheet will appear in the **Mail Merge Recipients** window.*



17. Click **[OK]** to close the window.

Arrange Labels

In Step 4 of the merge, you will add the required fields for each Mail Label. Since the column headings in the Excel file match those in the Word merge feature, you will be able to use the Address Block to insert individual addresses on each label.

The Address Block is a collection of fields which are typically included in an inside address. Since your field names match, you will need to select the name format and exclude unnecessary fields in this dialog box.

1. Click **Next: Arrange your labels.**
The Task Pane will update to display fields.
2. Select the link **Address Block...**

Insert Address Block

Specify address elements

Insert recipient's name in this format:

Joshua
Joshua Q. Randall Jr.
Mr. Josh Randall Jr.
Mr. Josh Q. Randall Jr.
Mr. Joshua Randall Jr.

Insert company name

Insert postal address:

Never include the country/region in the address
 Always include the country/region in the address
 Only include the country/region if different than:

United States

Format address according to the destination country/region

Preview

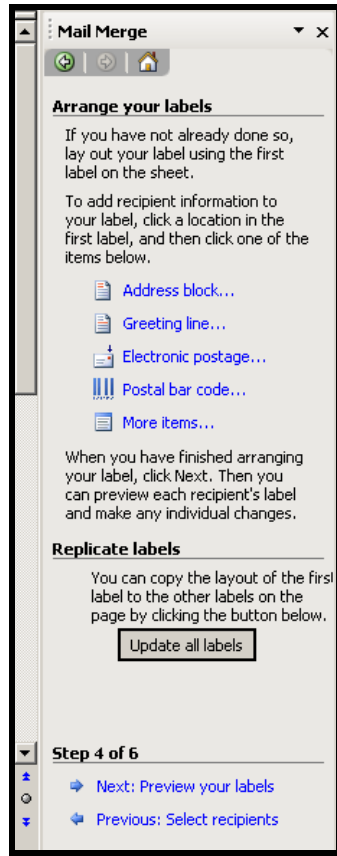
Joshua Randall Jr.
Blue Sky Airlines
1 Airport Way
Kitty Hawk, NC 27700

Match Fields... OK Cancel

3. Select the name format for your data.
4. If all recipients are in-country, select the option **Never include the country/region in the address**.
5. Confirm that the **Preview** address is the form you would like to see on your labels.
6. Click **[OK]**.

The Address Block field will appear on the first label.

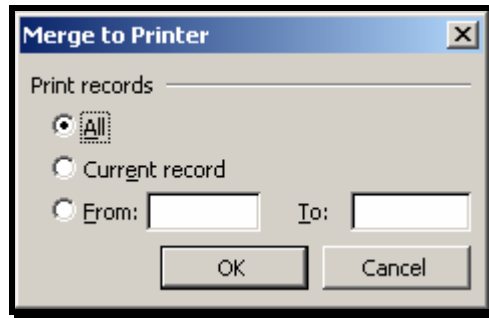
- Click the **[Update All Labels]** button.
The Address Block will be duplicated to all labels on the page.



- Click **Next: Preview your labels**.



9. Click **Next: Complete the merge**.
10. Click **Print...**



11. Select **All** and click [**OK**].
The labels will be sent to the printer.

Merge Fields in Word

A list of the default fields with Microsoft Word merge is shown below. To make your Excel list compatible with Microsoft Word, you will need to “match fields” or change the field names in your Excel list to match the Word fields.

It is acceptable to skip some Word merge fields in your Excel list. If you do not use the Title field in your Excel file, you will delete the field from the Merge in Microsoft Word.

The screenshot shows the 'New Address List' dialog box. The title bar is blue with a question mark icon and a close button. The main area is titled 'Enter Address information' and contains several text input fields: Title, First Name, Last Name, Company Name, Address Line 1, Address Line 2, City, and State. Below these fields are five buttons: 'New Entry', 'Delete Entry', 'Find Entry ...', 'Filter and Sort...', and 'Customize...'. At the bottom, there is a 'View Entries' section with 'First', 'Previous', 'Next', and 'Last' buttons, and a 'Total entries in list' field showing '1'. A 'Cancel' button is located at the bottom right.

Update your Excel List

The first step in updating the Excel file is to rename the column headings to match the merge fields. Open the Excel list and change the column headers to match the field names in the Merge feature in Microsoft Word. Do not leave a blank row between the column headings and the names and addresses.

	A	B	C	D	E	F	G	H	I
1	Last Name	First Name	Company Name	Address Line 1	Address Line 2	City	State	Zip Code	
2	Smith	Karen	ABC Chemicals	1234 Jones Street		Winston-Salem	NC	27401	
3	Johnson	Mickey	XYZ Fasteners	589 Main Street		Marion	NC	28625	
4	Rutherford	James	Royal Insurance	845 Baker Street		Charlotte	NC	28227	
5	Brothers	Wynona	Wachovia Bank	300 North Tryon Street		Charlotte	NC	28201	
6	Bliers	Jonathan	Bank of America	100 North Tryon Street		Charlotte	NC	28201	
7	Connors	Steven	J. A. Jones	400 Fairview Road		Charlotte	NC	28211	
8	Sawyer	Betty	Zondervan	584 Fourth Street		New York City	NY	01589	
9	Litaker	Elizabeth	Baker and Taylor	400 Billy Graham Parkway		Charlotte	NC	28216	
10	Brown	Barbara	Forrester Company	5822 Warren Drive		Asheville	NC	28695	
11	Martin	Lane	Grainger Electronics	5832 Wilkinson Boulevard		Charlotte	NC	28208	
12	Ward	Dorothy	Graybar Electric	3896 Wilkinson Boulevard		Charlotte	NC	28208	
13	Adamson	Jordan	Radiator Specialty	1000 Wilkinson Boulevard		Charlotte	NC	28208	
14	James	Charles	Springs Industries	458 Main Street		Fort Mill	SC	29652	
15	Litaker	Barney	Springs Farms	258 Hollifield Road		Fort Mill	SC	29652	
16	Miller	Jason	Original Mattress Co	5236 South Boulevard		Charlotte	NC	28250	
17	Jacobson	Brian	Original Mattress Co	1258 Independence Blvd.		Charlotte	NC	28205	
18	Blythe	Ronald	Barnes & Noble	408 Herrod Boulevard		Dayton	NJ	02589	
19	Rodriguez	Jose	Baker and Taylor	528 Virginia Road		Rena	NV	85214	
20	Moore	Luther	Amazon.com	456 West Hill Street		Lexington	KY	48512	
21									

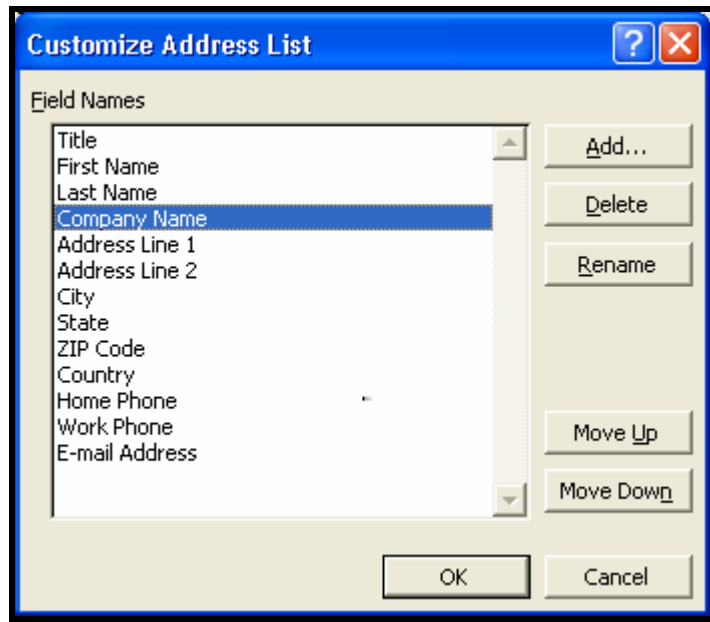
Microsoft Word versions 2002 and 2003 display a list of “default” or preset fields when you first create the data source. The fields will be displayed in an input form which makes it easy for you to add or edit names and addresses. For the labels exercise, the following fields will be required:

- First Name
- Last Name
- Company Name
- Address Line 1
- City
- State
- Zip Code

Delete Fields

The first field in the default list that is not needed for your mailing is **Title**. In the following exercise, you will delete the fields which are not required for your letter.

1. Click on the [**Customize...**] button in the **New Address List** window.
*A **Customize Address List** dialog box appears.*
2. Click on the field name **Title** to select.



3. Click the [**Delete**] button.
A prompt asks if you are sure you want to delete the field.
4. Click [**Yes**].
*The field **Title** is removed from the list.*
5. Repeat the same steps to remove the fields **Home Phone**, **WorkPhone** and **E-mail Address**.
6. Click [**OK**].
*The **Field Names** list has been customized for your data file.*

NOTE: Field names must be unique and can contain up to 32 characters. Letters, numbers, spaces and underline characters are acceptable. The first character in a field name must be a letter. These same requirements apply to the column headings in an Excel list.