

Mail Merge Using Excel Worksheet Data

Microsoft Word's **Mail Merge** feature allows you to send the same letter or email to multiple recipients. Although the document text will remain the same selected parts such as the salutation or inside address can be personalized for each recipient. In addition, mail merge can be used to create envelopes, labels, or a directory.

Mail merge combines content from a **main document** (text that remains the same) and a **data source** (i.e., a list of variable data to include in the document such as recipient names and addresses)

Creating a Mail Merge Document

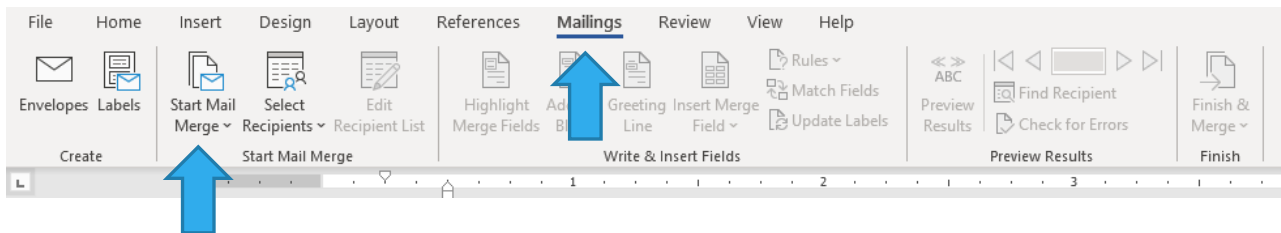
The mail merge process begins with a **main document** containing text that will be sent to **all recipients**.

The mail document also includes **merge fields**, placeholders for variable data that personalizes the document or email. Merge fields may include the recipients' addresses, names, or other specific information.

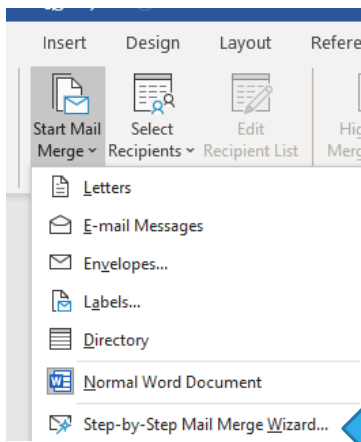
During the mail merge process, a data source containing variable data (e.g., an Excel or Access file, Outlook contacts) is combined with the mail document to create a personalized document or email.

To create a mail merge document:

1. Open a document (the document can be a blank Word document).
2. Click the **Mailings** tab and click **Start Mail Merge** in the Start Mail Merge group.



3. Select the document type that you want to create (i.e., Letters, Email Messages, Envelope, Labels, Directory) or click **Step-by-Step Mail Merge Wizard** which will display step-by-step directions in the **Mail Merge pane** on the right side of the main document.



Note: If you have already created a form letter with the merge fields in the letter, you can begin with the letter open. Otherwise, begin with a blank document.

Also use a blank document when creating envelopes or labels.

For the following example, we will be using the **Step-by-Step Mail Merge Wizard**.

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Select document type

What type of document are you working on?

Letters

E-mail messages

Envelopes

Labels

Directory

4. Select **Letters** as the *document type*.

Select starting document

How do you want to set up your letters?

Use the current document

Start from a template

Start from existing document

5. Select **Use the current document** as the *starting document*.

6. Since we already have the names and addresses of the individuals that we want to mail the letters to in an Excel worksheet (see Figure 1 below), we will select **Use an existing list**.

Select recipients


Use an existing list


Select from Outlook contacts

Type a new list

Use an existing list

Use names and addresses from a file or a database.

 Browse...

 Edit recipient list...

When preparing your Excel worksheet for a Mail Merge, make sure:

- Column names in your Excel worksheet **match** the field names you want to insert in your mail merge.
- All data to be merged appears in the **first worksheet** of your workbook.
- “Data entries with percentages, currencies, and postal codes are **correctly formatted** in the worksheet so that Word can properly read their values.”
- The Excel worksheet to be used in the mail merge is **stored on your local machine**.
- Any changes or additions to your worksheet are completed before it is connected to your mail merge document in Word. (Microsoft, “Mail Merge Using an Excel Spreadsheet”).

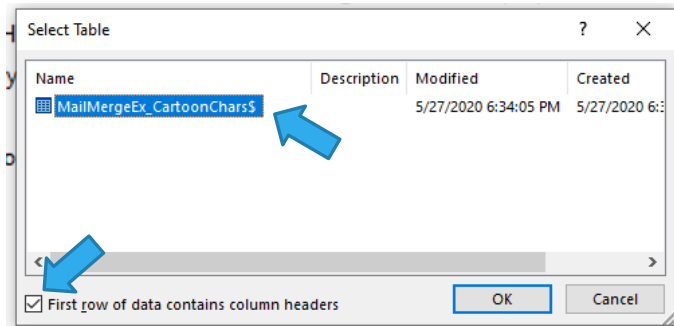
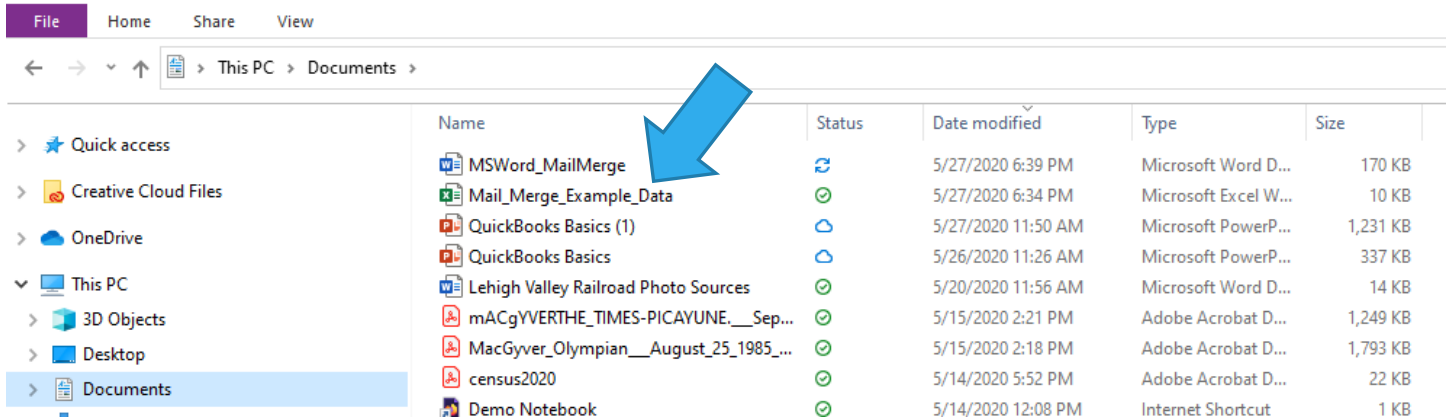
Figure 1. Excel worksheet containing names and addresses of letter recipients

	A	B	C	D	E	F
1	Last Name	First Name	Address	City or Town	State	Zip Code
2	Jetson	Judy	2424 Galaxy Ave.	Orbit City	FL	18423
3	Kravitz	Alice	17 Salem Circle	Boston	MA	18293
4	Flintstone	Pebbles	1729 Bedrock Place	Bedrock	CA	12783
5	Pitstop	Penelope	1281 South Turner St.	Indianapolis	IN	17482
6	Dasterdly	Richard	1280 Ridge Ave.	Reno	NV	12821
7	Do-Right	Dudley	4292 Queen's Way	Toronto	ON	15991

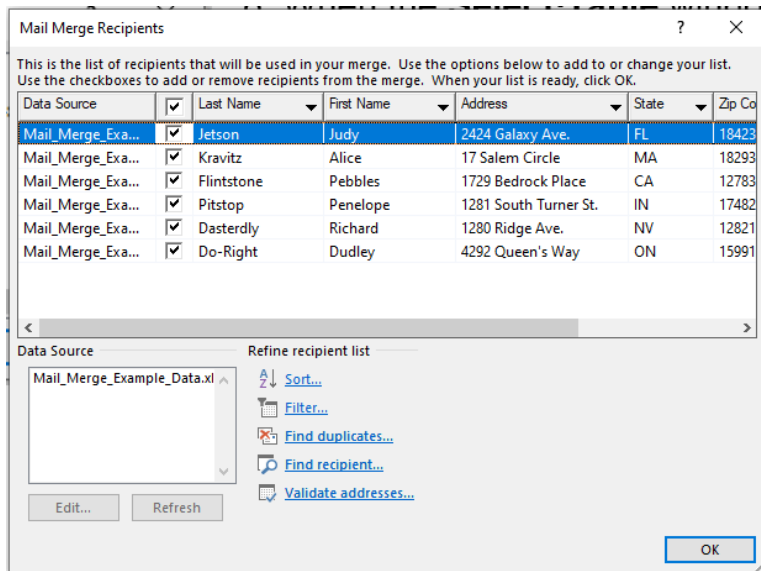
Microsoft Word

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7. Click **Browse**. Navigate to the Excel workbook containing the data (e.g., names and addresses) and double-click the file. The Excel file we are using for the example is named **Mail_Merge_Example_Data**



8. When the **Select Table** window appears, make sure the correct worksheet is selected. In our example, the correct worksheet (*MailMergeEx_CartoonChars\$*) is displayed. Since the first row of data in the worksheet contains column headers, the **First row of data contains column headers** box should be checked. Click **OK**.



9. The **Mail Merge Recipients** dialog box should appear. You can use the dialog box options to add to or change your list of recipients. You can also:

- Sort the list by field (e.g., Last name, state, zip code)
- Add or remove recipients from the merge.
- Find duplicate records.
- Find a specific recipient.
- Validate email addresses

After you review and make any desired changes to the list, click **OK**.

Microsoft Word

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10. Since we have not written our letter yet, we need to do it now. We are going to insert recipient information in the letter.

Click the arrows to see additional previews.

The names, addresses, etc. you select appear in the Preview pane.

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.

The names, addresses, and other information added to the letter or email are known as **Merge fields**. Merge fields display in the main document (letter or email) within angle brackets (e.g., <<AdressBlock>>, <<FirstName>>). When the document is merged with a data source (i.e., the names and addresses of individuals included in the Excel worksheet), data from the data source (i.e., Excel worksheet) will be placed in the position of the merge field. As a result, <<AddressBlock>> will not appear in the merged document; instead, a specific recipient's mailing address will appear, followed by the same letter address to another recipient in the data source.

If information in your address block is missing or out of order, use **Match Fields** to identify the correct address elements from your mailing list.

Click **OK** when you have finished matching fields.

Finish typing your letter. The letter we typed for our example is below.

Microsoft Word

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Judy Jetson
2424 Galaxy Ave.
, FL 18423

Dear Judy Jetson,

The American Association of Animated Characters would like to invite you to our annual conference to be held on November 30, 2020 in Hollywood, California.

We hope you can join us!

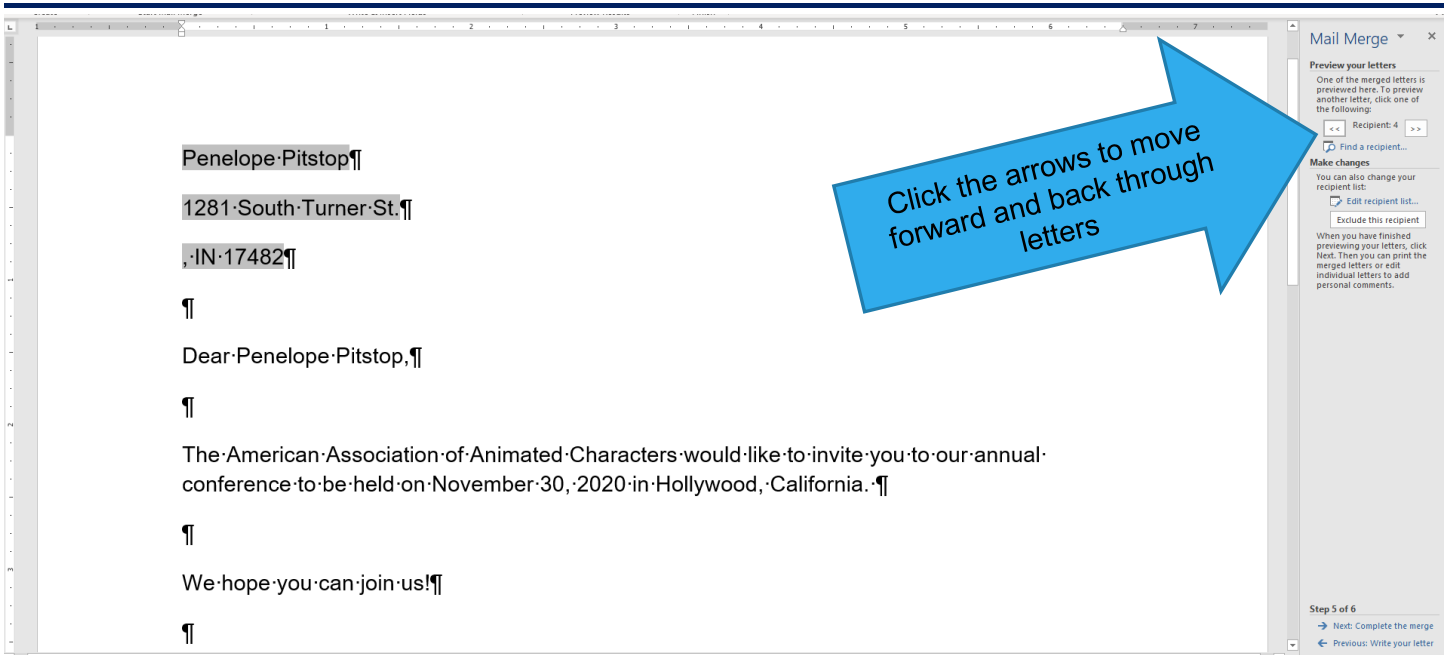
Jessica Rabbit

11. After your letter is typed and formatted, click **Next: Preview your letters** in the lower right corner of the **Mail Merge** pane.

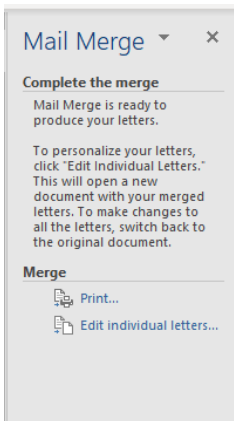
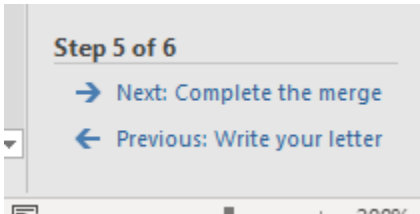
The screenshot shows the Mail Merge pane in Microsoft Word. The main area displays a letter template with the following text: «AddressBlock»¶, ¶, «GreetingLine»¶, ¶, The American Association of Animated Characters would like to invite you to our annual conference to be held on November 30, 2020 in Hollywood, California. ¶, ¶, We hope you can join us!¶, ¶, Jessica Rabbit.¶. The right-hand pane is titled 'Mail Merge' and contains the following text: '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.', a list of options: 'Address block...', 'Greeting line...', 'Electronic postage...', and 'More items...', and 'When you have finished writing your letter, click Next. Then you can preview and personalize each recipient's letter.' At the bottom of the pane, it says 'Step 4 of 6' and has two buttons: 'Next: Preview your letters' (indicated by a blue arrow) and 'Previous: Select recipients'.

Microsoft Word

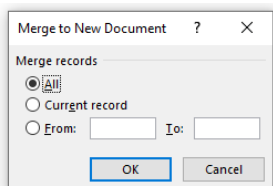
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12. If everything looks okay, click **Next: Complete the merge** in the lower right corner of the **Mail Merge** pane.



13. You can print your merged letters or select **Edit individual letters** to personalize letters.



If you choose **Edit individual letters**, the **Merge to New Document** window will appear. Click **OK** if you want to personalize your letters. To make changes to all the letters, go back to the original document.

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Sources

Microsoft Corp. "Mail Merge Using an Excel Spreadsheet." In *Word Help*.

Poatsy, Mary Anne, Keith Mulbery, Cynthia Krebs, Lynn Hogan, Eric Cameron, Jason Davidson, Linda K. Lau, Rebecca Lawson, and Jerri Williams. *Microsoft Office 2016 Volume 1. Exploring Series*, series editor Mary Anne Poatsy. Boston, MA: Pearson, 2017.

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