

# MAIL MERGE USING EXCEL

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 varies and is personalized. The documents Word can create with mail merge include bulk [labels](#), [letters](#), [envelopes](#), and [emails](#). There are three documents involved in the mail merge process:

- Your main document
- Your data source
- Your merged document

## STEP 1: PREPARE DATA IN EXCEL FOR MAIL MERGE

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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.

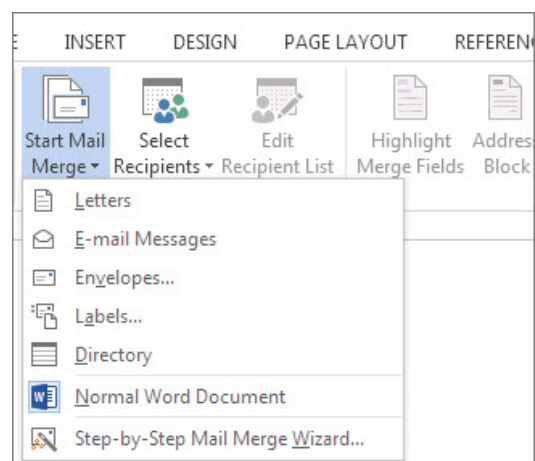
Here are some tips to prepare your data for a mail merge. Make sure:

- 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.
- All data to be merged is present in the first sheet of your spreadsheet.
- Data entries with percentages, currencies, and postal codes are correctly formatted in the spreadsheet so that Word can properly read their values.
- The Excel spreadsheet to be used in the mail merge is stored on your local machine.
- Changes or additions to your spreadsheet are completed before it's connected to your mail merge document in Word.

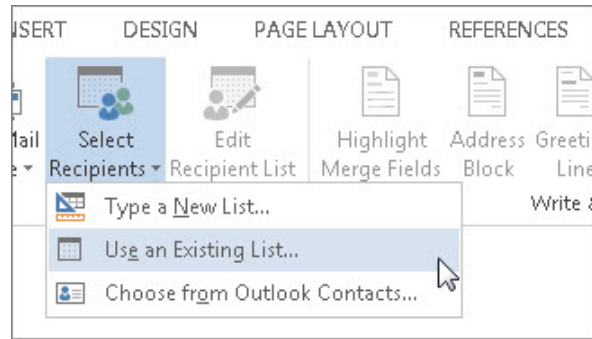
## STEP 2: START THE MAIL MERGE

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1. In Word, Open your master document or choose **File > New > Blank document**.
2. 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.



- Choose **Select Recipients > Use an Existing List**.



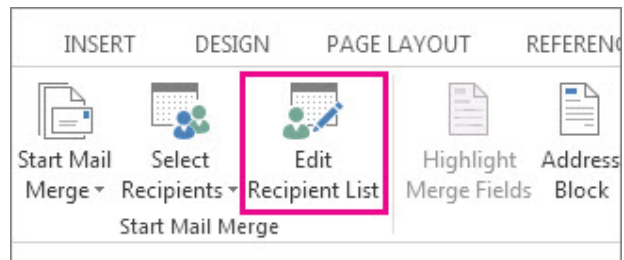
- Browse to your Excel spreadsheet, and then choose **Open**.
- If Word prompts you, choose **Sheet1\$ > OK**.

**Note:** Now the Excel spreadsheet is connected to the mail merge document you're creating in Word.

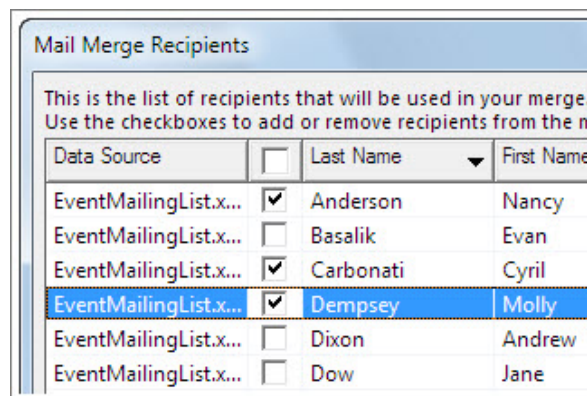
## 2.1 EDIT YOUR MAILING LIST

If required, you can limit who receives your mail.

- Choose **Edit Recipient List**.



- In the **Mail Merge Recipients** dialog box, clear the check box next to the name of any person who you don't want to receive your mailing.



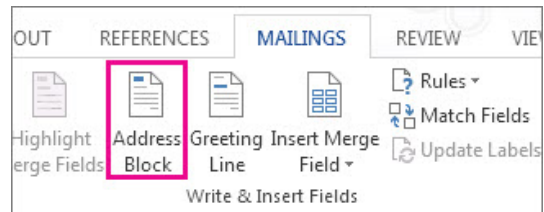
**Note:** You also can sort or filter the list to make it easier to find names and addresses. For more information about sorting and filtering items, see [Sort and filter the data for a mail merge](#).

## STEP 3: INSERT A MERGE 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**.



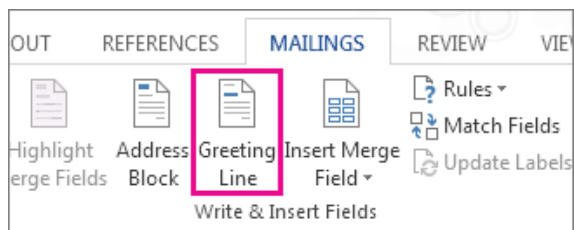
2. In the **Insert Address Block** dialog box, choose a format for the recipient's name as it will appear on the envelope.



3. Choose **OK**.
4. Choose **File > Save**.

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**.

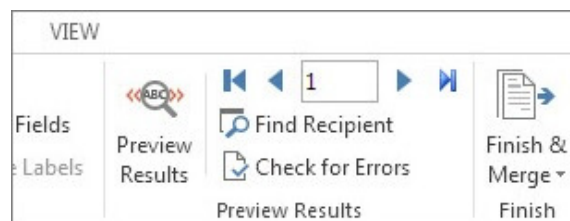
**To insert data from your spreadsheet in an email message or a letter:**

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**.

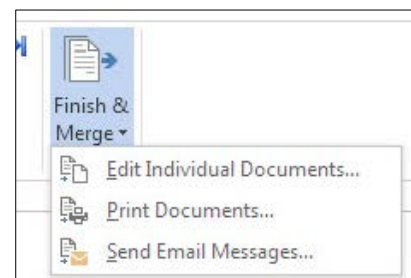
## STEP 4: PREVIEW AND FINISH THE MAIL MERGE

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.

1. On the **Mailings** tab, choose **Preview Results**.
2. 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.

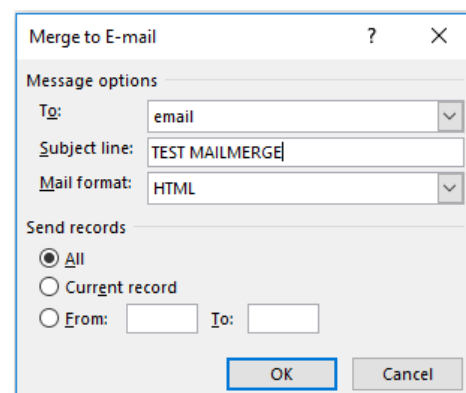


3. In the **Finish** group, choose **Finish & Merge**, and choose **Send E-mail Messages** or **Print Documents**.



**For email messages:**

4. Enter a Subject line
5. Leave the Mail format as the default **HTML** type
6. Click on **OK**



## STEP 5: SAVE YOUR MAIL MERGE

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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.

- Open the mail merge document and choose **Yes** when Word prompts you to keep the connection.