

# Mail Merge

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November 16, 2020

Norm Galloway

# Mail Merge

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- Starting with a sample document, create a mass mailing (letters or email) where each document is customized for its recipient

# Mail Merge Process

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- Develop a document in Word or Publisher
- Customize it using data from:
  - An EXCEL spreadsheet
  - OUTLOOK contacts
  - An ACCESS table or query
  - A Word table
- Typical customizations include the Address Block and the Greeting Line.
- Can also create Envelopes, Labels and Name Tags for standard stock

# Plan for This Session

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- Demonstrate a Customized Letter
- Demonstrate an Email
- Demonstrate a Mailing Label and Name Tag

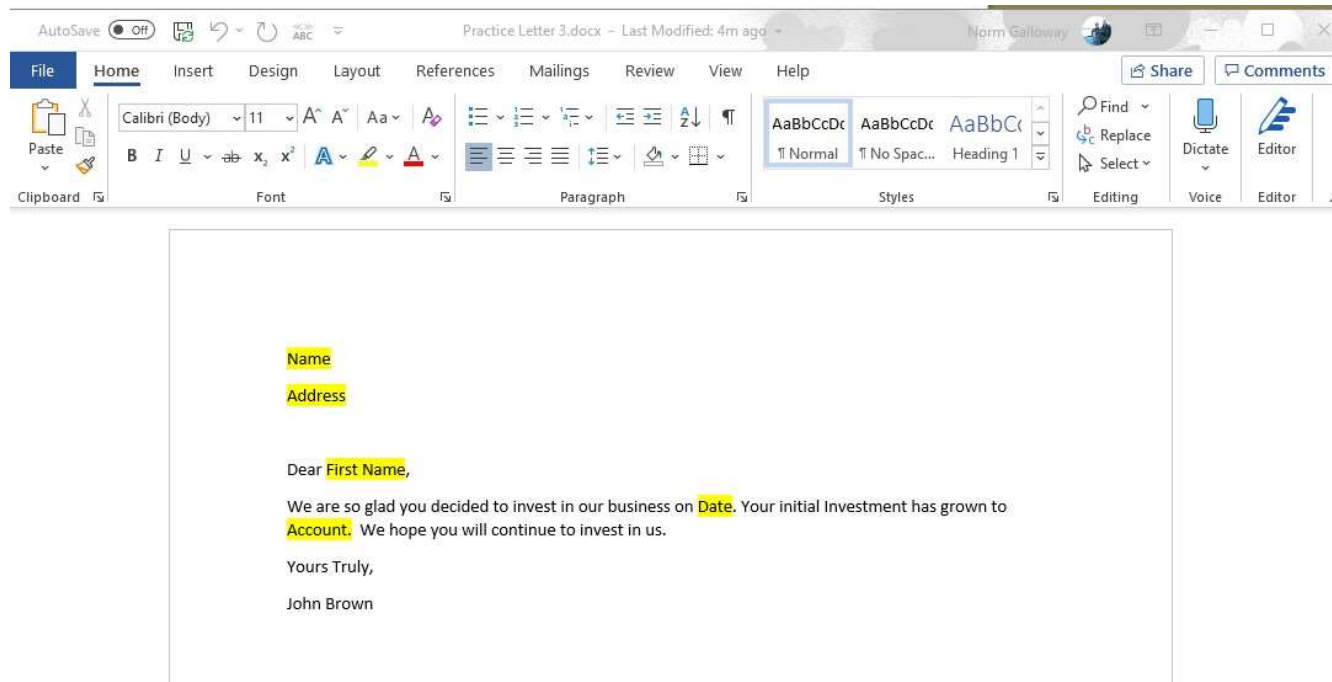
(Practice Word document and Excel Spreadsheet have been sent to you)

We'll use Word and Excel and Outlook for the email

# Mail Merge Step by Step Using Word and Excel

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- 1. Create the prototype WORD document and decide what customization is required
- 2. Create the EXCEL spreadsheet
  - First row is Headings – use standard heading names  
(Name, First Name, email, address 1, address 2,....)
  - One row for each recipient
  - One column for each item of customization data.
- 3. Insert EXCEL links into the WORD document
- 4. Preview
- 5. Merge



# 1. Create Prototype Document

AutoSave On Mail Merge Training sample.xlsx - Saving... Search

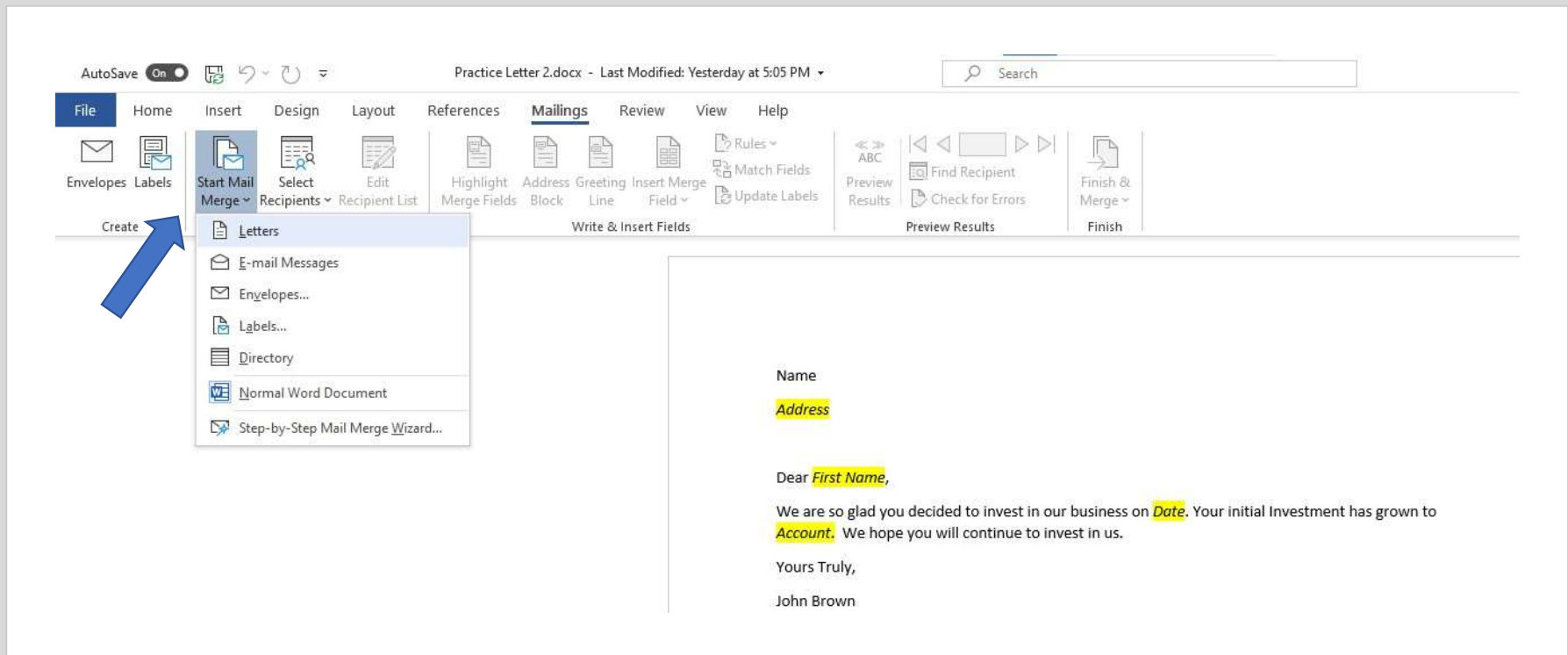
File Home Insert Page Layout Formulas Data Review View Help

Clipboard Font Alignment Number Styles

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	First Name	Last Name	Label	Address1	Address2	City	Region	Postal Code	PrimaryEmail	PhoneNumber	Date Joined	Account	
2	Len	Jones	Len Jones	10 Willow Ct		HILTON HEAD	SC	29926	<a href="mailto:ljones@notyahoo.com">ljones@notyahoo.com</a>	(864) 302-2408	5/2/2019	540	
3	Linda	Jones	Linda Jones	10 Willow Ct		HILTON HEAD	SC	29926	<a href="mailto:ljones@notyahoo.com">ljones@notyahoo.com</a>	(864) 302-2408	5/3/2019	710	
4	Betty	Phillips	Betty Phillips	7 Main St	Post Office Box 22	Hilton Head Island	SC	29928	<a href="mailto:bettybytheocn@notaol.com">bettybytheocn@notaol.com</a>	(843) 785-5580	4/3/2016	350	
5	Susan	Smith	Susan Smith	5 Sterner Mill Rd		Hilton Head Island	SC	29928	<a href="mailto:susan@nothotmail.com">susan@nothotmail.com</a>	(843) 463-4130	2/28/2017	712	
6													
7													
8													
9													
10													

## 2. Create the Spreadsheet

1. Create Prototype Document



### 3. Start Mail Merge Then “Select Recipients”



Envelopes Labels Start Mail Merge Select Recipients Edit Recipient List Highlight Merge Fields Address Block Greeting Line Insert Merge Field Rules Match Fields Update Labels Preview Results Find Recipient Check for Errors Finish & Merge Finish

- Type a New List...
- Use an Existing List...
- Choose from Outlook Contacts...



Name

Address

Dear *First Name*,

We are so glad you decided to invest in our business on *Date*. Your initial Investment has grown to *Account*. We hope you will continue to invest in us.

Yours Truly,

John Brown

Type New List = creates a Word Table  
Use an Existing List = Excel, Access or other tables  
Outlook Contacts = ??? Not straight forward

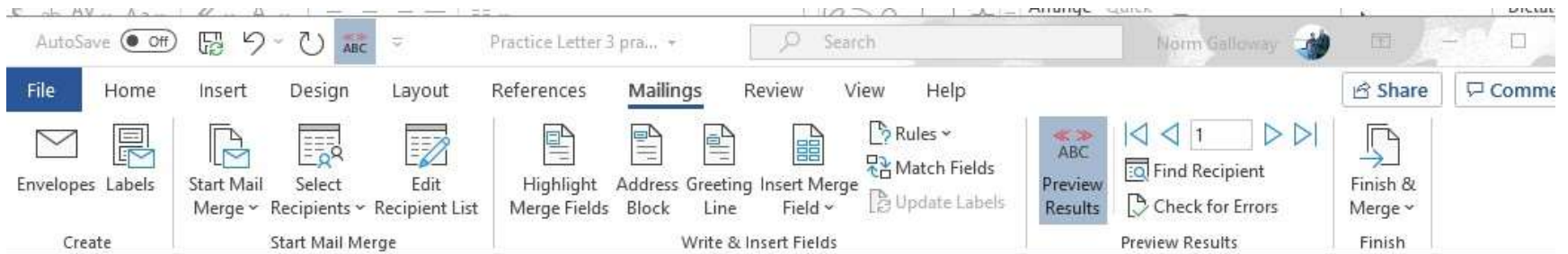
Envelopes Labels Start Mail Merge Select Recipients Edit Recipient List Highlight Merge Fields Address Block Greeting Line Insert Merge Field Rules Match Fields Update Labels Preview Results Find Recipient Check for Errors Finish & Merge Finish

Select Field from Excel



- First\_Name
- Last\_Name
- Label
- Address1
- Address2
- City
- Region
- PostalCode
- PrimaryEmail
- PhoneNumber
- Date\_Joined
- Account

ame  
Address  
ear First Name,  
e are so glad you decided to invest in our business on Date. Your initial Investment has grown to  
ccount. We hope you will continue to invest in us.  
ours Truly,  
John Brown



Len Jones

10 Willow Ct

HILTON HEAD, SC 29926

Dear Len Jones,

We are so glad you decided to invest in our business on 5/2/2019. Your initial investment has grown to 540. We hope you will continue to invest in us.

Yours Truly,

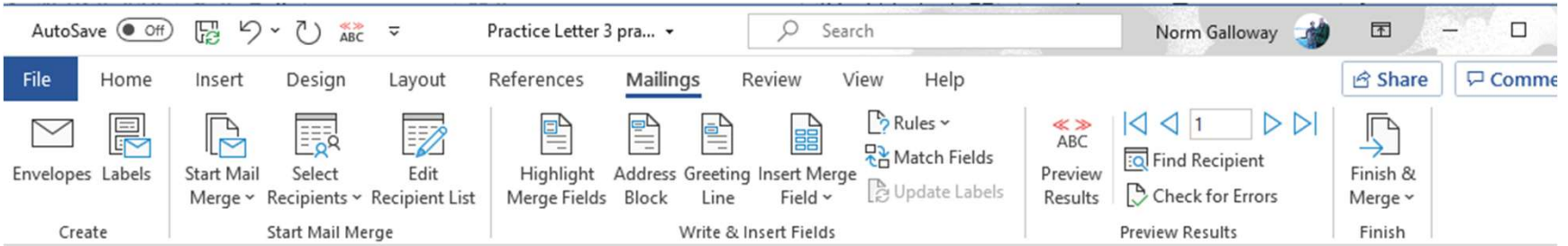
John Brown

Numeric Fields will not carry over formatting. Must add it in MailMerge process

## Options for the Excel Mail Merge Field Numeric Picture Switch

The \# \$,0.00 in the field is a type of numeric picture switch. Other options for formatting Excel numeric fields in a mail merge include:

Excel Data	Field Code	Word Result	Displayed Result
1000	{ MERGEFIELD Amount \# ,0 }	Rounded whole numbers, thousands separator	1,000
1000.25	{ MERGEFIELD Amount \# \$,0 }	Rounded whole numbers, currency, thousands separator	\$1,000
1234.5	{ MERGEFIELD Amount \# ,0.00 }	2 decimal places, thousands separator	1,234.50
1234.5	{ MERGEFIELD Amount \# \$,0.00 }	2 decimal places, currency, thousands separator *	\$1,234.50
1234.5	{ MERGEFIELD Amount \# \$#,##0.00 }	Same as above *	\$1,234.50
-1234.5	{ MERGEFIELD Amount \# "\$,0.00;(\$,0.00);'-' }	Currency, with brackets around negative numbers and a hyphen for 0 values	(\$1,234.50)
5	{ MERGEFIELD Amount \# 0.00 }	2 decimal places	5.00
0.45	{ MERGEFIELD Amount \# 0.## }	2 decimal places, leading zero	0.45
0.4	{ MERGEFIELD Amount \# #.## }	2 decimal places only if values	.4
1234	{ MERGEFIELD ZipCode \# 00000 }	5 numeric positions, zip code or other number	01234

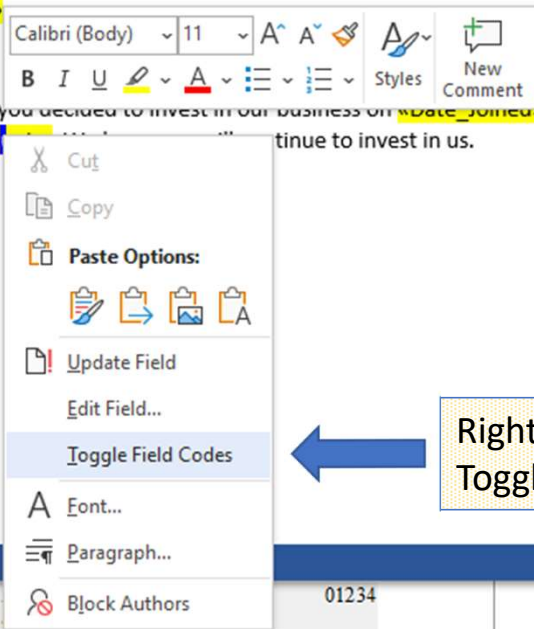


«AddressBlock»

«GreetingLine»

We are so glad you decided to invest in our business on «DateJoined». Your initial Investment has grown to «AccountBalance». We hope you will continue to invest in us.

Yours Truly,  
John Brown



Right click and Toggle Field Codes



## Options for the Excel Mail Merge Field Numeric Picture Switch

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1000.25	{ MERGEFIELD Amount \# \$,0 }	Rounded whole numbers, currency, thousands separator	\$1,000
1234.5	{ MERGEFIELD Amount \# ,00 }	2 decimal places, thousands separator	1,234.50
1234.5	{ MERGEFIELD Amount \# \$,0.00 }	2 decimal places, currency, thousands separator *	\$1,234.50
1234.5	{ MERGEFIELD Amount \# \$#,##0.00 }	Same as above *	\$1,234.50
-1234.5	{ MERGEFIELD Amount \# "\$,0.00;(\$,0.00);"- "" }	Currency, with brackets around negative numbers and a hyphen for 0 values	(\$1,234.50)
5	{ MERGEFIELD Amount \# 0.00 }	2 decimal places	5.00
0.45	{ MERGEFIELD Amount \# 0.## }	2 decimal places, leading zero	0.45
0.4	{ MERGEFIELD Amount \# #.## }	2 decimal places only if values	.4
1234	{ MERGEFIELD ZipCode \# 00000 }	5 numeric positions, zip code or other number	01234

The screenshot shows the Microsoft Word interface with the Mailings tab active. The ribbon contains the following groups and options:

- Create:** Envelopes, Labels
- Start Mail Merge:** Start Mail Merge, Select Recipients, Edit Recipient List
- Write & Insert Fields:** Highlight Merge Fields, Address Block, Greeting Line, Insert Merge Field
- Preview Results:** Preview Results, Find Recipient, Check for Errors
- Finish:** Finish & Merge

The preview area displays a letter template with the following content:

«AddressBlock»

«GreetingLine»

We are so glad you decided to invest in our business on «Date\_Joined». Your initial investment has grown to { MERGEFIELD "Account" \# \$,0.00 }. We hope you will continue to invest in us.

Yours Truly,

John Brown

The status bar at the bottom indicates "Page 1 of 1" and "35 words".

1. Create the prototype WORD document
2. Create the EXCEL spreadsheet
3. Link EXCEL columns to “placeholders”
4. Preview
5. Merge

The screenshot shows the Microsoft Word interface with the Mailings tab active. The ribbon includes options for Envelopes, Labels, Start Mail Merge, Select Recipients, Edit Recipient List, Highlight Merge Fields, Write & Insert Fields (Address Block, Greeting Line, Insert Merge Field), Preview Results, Find Recipient, Check for Errors, and Finish & Merge. The document content contains several placeholders: «AddressBlock», «GreetingLine», «Date\_Joined», and { MERGEFIELD "Account" \# \$,0.00}. A callout box with a blue arrow points to the 'Finish & Merge' button, containing the text: 'Chose Actions' (sic) and 'Edit Individual Document - Creates a new Word document with each customized letter on a separate page (or pages)'. The status bar at the bottom indicates 'Page 1 of 1' and '35 words'.

Chose Actions

«AddressBlock»

«GreetingLine»

We are so glad you decided to invest in our business on «Date\_Joined». Your initial investment has grown to { MERGEFIELD "Account" \# \$,0.00}. We hope you will continue to invest in us.

Yours Truly,

John Brown

Edit Individual Document - Creates a new Word document with each customized letter on a separate page (or pages).

Page 1 of 1 35 words

# Other Things to Look At

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- Edit Recipient List
- Match Fields

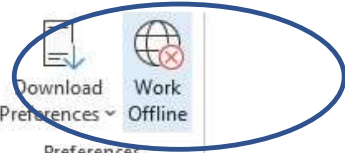


# Email

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- Create an Excel Spreadsheet with a column named “email”
- Create the email you want to send using “xxx” to have spaces for merged info
- Begin Mailings
  - Start Mail Merge
  - Select Recipients - Browse to spreadsheet
  - Add Data
  - Preview
  - Finish and Merge
    - Add Subject line
    - **Open Outlook and set it to run offline to check emails in outbox before you let it go**
    - Mail

Microsoft Outlook interface showing the 'Send / Receive' ribbon tab. The 'Work Offline' button is circled in blue. The main pane displays an email titled 'Hardship and heroism throughout history' from BritBox. The email content is partially obscured by a large black box with the text 'Britain at War' and several error messages: 'Outlook is working offline and cannot download pictures for...' and 'Outlook is working offline and cannot download...'. The left sidebar shows the 'Outbox' folder circled in blue. The bottom status bar indicates 'Items: 50 398 Unread: 6 196' and 'This folder was last updated at 4:49 PM Working Offline'.



**Britain at War**

Filled with stories of heroism and hardship, these shows pay homage to veterans around the world and throughout history.

A true story starring Daniel Radcliffe about the relationship between Rudyard Kipling

Sean Bean stars as a British fighting in the Napoleonic

Outlook is working offline and cannot download pictures for...

Outlook is working offline and cannot download...

# Produce labels or envelopes

- Select Label stock
- Select spreadsheet or Outlook Contacts
- Add the Address info you want (Avery 5395)



- Update Labels
- Merge & Print

Questions?

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