

Mail Merge Training Manual: Word and Excel (2013 - Present)

Introduction

Mail Merge is a powerful tool in Microsoft Word that allows you to send personalised letters, emails, or other documents to a large number of recipients by combining data from an external source like Excel. This guide will walk you through the steps of performing a mail merge in Word and Excel, including differences between versions from 2013 to the present Office 365.

1. Setting Up Your Excel Data Source

Step 1: Create Your Excel Spreadsheet

To begin a mail merge, you first need an Excel spreadsheet that contains the data for the recipients. Here's how to prepare your data.

1. Open Excel and create a new spreadsheet.
2. In the first row, label your columns with descriptive headers (e.g., First Name, Last Name, Address, Postcode, Email Address).
3. Enter the relevant data under each header. Ensure that each record is in a new row.

Example:

First Name	Last Name	Address	Postcode	Email Address
John	Smith	10 High Street	AB1 2CD	john.smith@email.com
Jane	Doe	15 Elm Road	CD3 4EF	jane.doe@email.com

2. Starting the Mail Merge in Microsoft Word

Step 2: Open Microsoft Word

1. Open Word and create a new blank document.
2. Go to the Mailings tab on the Ribbon.

Step 3: Choose Mail Merge Type

1. Click on Start Mail Merge in the Mailings tab.
2. Choose the type of document you want to create. You can select from:
 - Letters (for personalised letters)
 - Envelopes (for envelope printing)
 - Labels (for printing labels)
 - Email Messages (for email merges)

3. Connecting to Your Excel Data Source

Step 4: Select Recipients

1. Click Select Recipients in the Mailings tab.
2. Choose Use an Existing List and browse to the Excel file you created earlier.
3. Select the file and click Open.
4. Word will ask you to select the worksheet if there are multiple sheets; choose the appropriate one (e.g., Sheet1).

4. Inserting Merge Fields

Step 5: Insert Merge Fields

1. Click where you want to insert the data from Excel.
2. In the Mailings tab, click Insert Merge Field. A dropdown will show the column headers from your Excel file.
3. Select the relevant field, such as First Name, Last Name, Address, etc.
4. Repeat for all the fields you want to insert into the document (e.g., greeting, address).

Example: Your document might look like this:

Dear <<First Name>> <<Last Name>>,

We are pleased to inform you that your order will be shipped to:

<<Address>>

Kind regards,
The Company

5. Previewing and Finishing the Mail Merge

Step 6: Preview the Document

1. Click on Preview Results in the Mailings tab to see how the merged data will look.
2. Use the Next Record and Previous Record buttons to navigate through different records and check the formatting.

Step 7: Finish and Merge

1. When you're happy with the preview, click Finish & Merge.
2. You have several options:
 - Print Documents: To print all the letters directly.
 - Create New Document: To generate a new Word document with the merged data.
 - Send E-mail Messages: To send the documents via email (you will need an email field in your data).

6. Differences Between Versions: Office 2013 - Office 365

Office 2013:

- Data Source: In Office 2013, Excel files are connected as static data sources, meaning the connection must be re-established if the source file is moved.
- Mail Merge Types: Limited to Letters, Envelopes, and Labels. There is

no direct integration with Email for Mail Merge; this requires additional configurations.

Office 2016:

- Email Merge: Office 2016 introduced the ability to directly merge into Outlook for sending emails. The Send E-mail Messages option is now available for connecting with Outlook for email merges.
- New Features: Excel data sources can now be sorted within Word before merging.

Office 2019:

- Improved Integration: Word 2019 introduced better integration with other Office apps, including a more seamless connection between Word and Outlook for sending emails.
- Field Insertion: Office 2019 enhanced the Insert Merge Fields interface, with the ability to search for fields directly.

Office 365 (Now Microsoft 365):

- Cloud Support: Office 365 supports cloud-based data sources, such as OneDrive and SharePoint, allowing real-time access to the data source even when files are moved or edited by multiple users.
- Email Merge Integration: You can directly merge to Outlook with advanced email customisation options.
- Data Validation: Excel in Office 365 now allows for better handling of dynamic data (such as when pulling data from online sources), which can be directly integrated into your mail merge.

7. Troubleshooting Common Issues

Common Issues and Solutions:

- Mismatched Fields: Ensure that your field names in Excel match exactly with the merge fields in Word.
- Excel File Open: Always close the Excel file before performing the merge to avoid conflicts.
- Email Not Sending: If you are sending via email, ensure Outlook is

properly configured, and check that the email field is correctly linked to the Email Address column in Excel.

8. Final Notes

Ensure your data is clean before performing a mail merge. Double-check that there are no blank rows or columns, as these can interfere with the merge process.

Use Excel's Find and Replace tool to quickly fix common data errors before starting the merge.

Exercises:

1. Exercise 1: Create a Mail Merge Document

Create a personalised letter for a group of customers using an Excel data source. Use the fields: First Name, Last Name, and Address.

2. Exercise 2: Perform an Email Merge

If you're using Office 365, perform an email merge with a personalised subject and body to a list of email addresses from Excel.