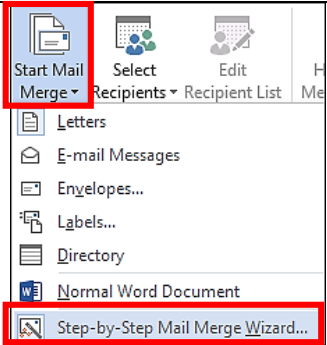
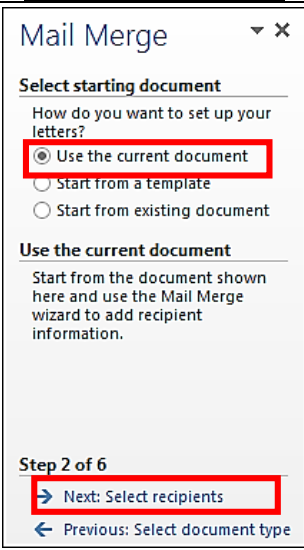


Quick Sheet: Mail Merge Letters Using the Wizard & Pulling Data from Excel

Open or create the letter that will be used & filled in with the data from the Excel file.
Save the Excel file & close it. **Excel Tips:** Create Row Headings, ***NO BLANK ROWS*** & name the work sheet so it is easy to find.

	On the Mailings tab, Start Mail Merge, Step by Step Mail Merge Wizard.
	On the Mail Merge pane that opens, be sure Letters is selected and click on the Next: Starting Document link at bottom of the pane.
	On the wizard pane, under Select starting document, be sure Use the current document is selected and click on Next: Select recipients at the bottom of the pane.

Mail Merge

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...

Step 3 of 6

Next: Write your letter

Previous: Starting document

On the wizard pane, under **Select recipients**, leave **Use an existing list** checked. Click on the **Browse** link to navigate to your saved, **CLOSED** Excel file.

Select Table

Name	Description	Modified	Created
BldgDeptDate\$		7/18/2012 1:00:08 PM	7/18/2012 1:00
BldgDeptDate\$ _xlnm#_FilterDatabase		7/18/2012 1:00:08 PM	7/18/2012 1:00
BldgDeptDate\$ _xlnm#Print_Titles		7/18/2012 1:00:08 PM	7/18/2012 1:00

☒ First row of data contains column headers

OK

Cancel

The **Select Table** dialog box appears. Select the worksheet and click **OK**.

Mail Merge Recipients

This is the list of recipients that will be used in your merge. Use the options below to add to or change your list. Use the checkboxes to add or remove recipients from the merge. When your list is ready, click OK.

Data So...	Building	Department	Delivery Date
PrinterDep...	Library- Low...	Student Copier	7/10/2012
PrinterDep...	Library- Main...	Front Lobby	Vend-unit
PrinterDep...	S. College An...	Information Technology	7/10/2012
PrinterDep...	S. College An...	IT Technical Services	7/10/2012
PrinterDep...	Library- Lowe...	LIS, User Services (Terry)	7/17/2012
PrinterDep...	Library- Main...	Writing Center	7/17/2012
PrinterDep...	Library- Mai...	Tech Services	7/17/2012
PrinterDep...	Library- Main...	Director's Office	7/17/2012
PrinterDep...	Library- Lobb...	Reference - Student Pri...	7/17/2012

Data Source

PrinterDeptBldgDates.xlsx

Refine recipient list

Sort...

Filter...

Find duplicates...

Find recipient...

Validate addresses...

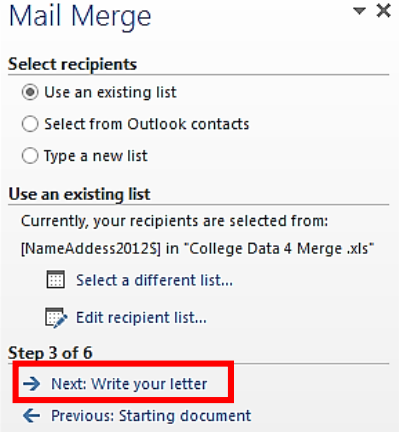
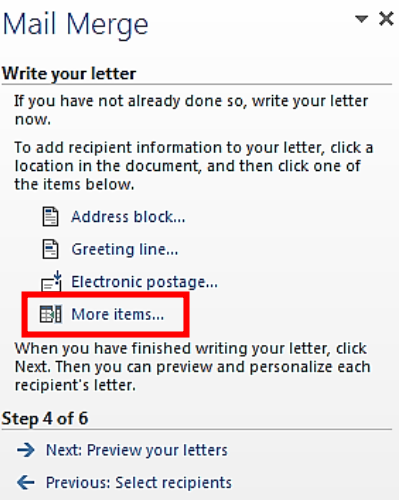
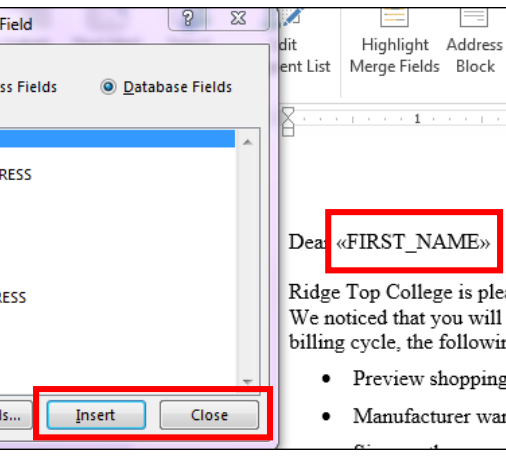
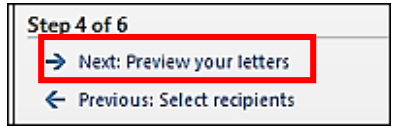
Edit...

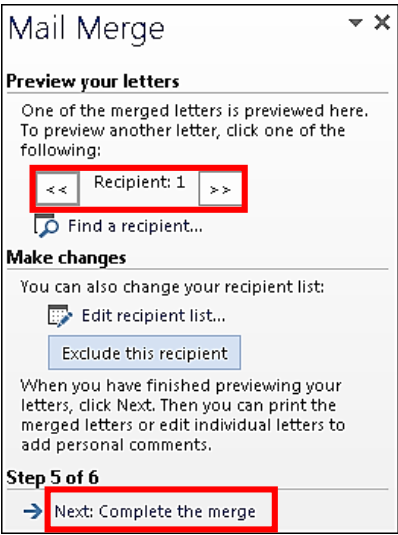
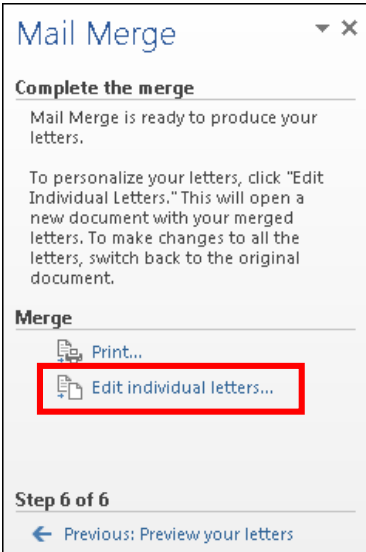
Refresh

OK

A **Mail Merge Recipients** dialog box appears to show the entire list of data in the worksheet. Notice you can uncheck any rows or **Edit recipient list**. Click **OK**.

2

	 Mail Merge Select recipients ☒ Use an existing list ☐ Select from Outlook contacts ☐ Type a new list Use an existing list Currently, your recipients are selected from: [NameAddress20125] in "College Data 4 Merge .xls" Select a different list... Edit recipient list... Step 3 of 6 → Next: Write your letter ← Previous: Starting document	Now on the wizard pane click on Next: Write your letter. This is where you when you will add details to make each letter personalized with the data from Excel.
	 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. Step 4 of 6 → Next: Preview your letters ← Previous: Select recipients	Notice the convenient Address block which will pull over the name & entire address. Have your cursor at the place on the document/letter, exactly where you want the data to appear. To add each piece of field data by clicking on the More items. Once the piece of data has been Inserted you must close the dialog box. The Excel row headings appear as the list of Fields.
	 Insert Merge Field Insert: ☐ Address Fields ☒ Database Fields Fields: FIRST NAME LAST NAME STREET ADDRESS CITY STATE ZIP HUB BOX CLASS YEAR \$\$ EARNED EMAIL ADDRESS Match Fields... Insert Close	On the Wizard pane click on More Items, an Insert Merge Field dialog box opens, click on Insert, then Close. Once inserted the Field words will have two arrows beginning and at the end of the word. Example: <<First_Name>> This must be done for each field of data that you want to appear in the letter. Position your cursor each place, then More items, Insert then Close
	 Step 4 of 6 → Next: Preview your letters ← Previous: Select recipients	Now that you have inserted all the places for the data to appear you are ready to Preview them. On the wizard pane, click on Preview you letters.

	Notice under Preview your letters you can navigate to each letter, Exclude this recipient is also available to do. If you noticed that spacing or anything else needs adjusted, click on Previous: Write your letter. Make any adjustments & click on Next. When you are satisfied click on Next: Complete the merge.
	At the Complete the merge pane I recommend clicking on Edit individuals letters. At this point then you can save the file for future reference if needed and you can scroll down to review the letters. You can then print your letters. You have finished the Merge! You did it, you can now close the Mail Merge pane.