

Microsoft Excel 2013: Setting up the Excel Data File

Before you proceed with setting up an Excel file or using the Mail Merge Wizard, make sure that your Excel worksheet is well structured for this purpose. These are useful tips for setting up any Excel file.

Note the following requirements for the data table & examples below:

- The first row should contain field names for each column. For example, Title, Salutation, First Name, Middle Name, Last Name, Address1, and Address2.
- Each field name must be unique.
- Each row must provide information about a particular item. In a mailing list, for example, each row may include information about a particular recipient.
- The table must not have blank rows.
- Remove all empty worksheets and rename each worksheets to suit your data

	A	B	C	D
1	FirstName	LastName	Hub Box #	Email
2	Jeanette	Gribble	115	gribble@dickinson.edu
3	Sally	Smith	114	smiths@aol.com
4	Tom	Jones	113	training2@dickinson.edu

	A	B	C	D	E	F	G
1	First Name	Last Name	Type	Date	City	State	Email
2	Sally	Jones	Microsoft Word	09/24/08	Mechanicsburg	Pa	training2@dickinson.edu
3	Stephanie	Walters	Microsoft Excel	10/01/08	Carlisle	Pa	ikswater@aol.com
4	Jeanette	Gribble	Dreamweaver	08/08/07	Mt Holly	Pa	gribble@dickinson.edu

	A	B	C	D	E	F	G	H	I
1	Salutation	FirstName	LastName	Address	Address 2	City	State	Zip	Email
2	Mrs	Christine	Jensen	301 S. York Rd.		Warminster	PA	18991	jensen@aolx.com
3	Mr	Bruce	Wiley	1409 Monroe St.		Glenville	PA	18990	wiley@aolx.com
4	Mr	William	Dunston	5353 Joliet Way		Toms River	NJ	80990	dunston@aolx.com
5	Mrs	Fran	Zkis	856 Dunbar St.	Apt. 312	Warminster	PA	18991	zkis@aolx.com
6	Dr.	Elyse	Sanchez	792 E. Van Dorn		Warminster	PA	18991	sanchez@aolx.com
7	Ms	Jeanette	Gribble	123 Street Lane		Carlisle	PA	17013	gribble@dickinson.edu
8	Mr	Tim	McLaughlin	77 Sayre St.		Toms River	NJ	80990	mclaughlin@aolx.com
9	Dr.	Elliot	Levinson	1412 Pemberton St.	Apt. 122	Glenville	PA	18990	levinson@aolx.com
10	President	Kerry	Thayer	925 Rosegarden Way		Warminster	PA	18991	thayer@aolx.com

When renaming worksheets be sure to not use special characters.

The underscore can be used for spaces between words.

Lynda	User_Usage	UsageSummary	Sheet1	
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