

Don't let a mail merge intimidate you. It's easy once you get the hang of it!

What IS a Mail Merge Anyway?

Simply, a mail merge takes a list (usually in the form of an Excel spreadsheet – you can create a table in Word and use that, but I've found a spreadsheet to work better) and merges it into a Word document to make a personalized letter, envelope, or form.

The columns in the spreadsheet provide variable information for the finished product so they have to “speak” to each other.

How Do I Set Up a Mail Merge?

First, create your spreadsheet. Make the columns (which will be called *Fields* in the merge process) as simple as you can – I like to break out a name into three columns – *First*, *Middle*, and *Last*. Or at the very least include a separate *Last Name* column. Then you can sort or search for the information in the column. For example, if you want to alphabetize your members, you'll want to do that by *Last Name*. If your *Name* column is their full names, you'll find up with an incorrect result:

For example, here are some attendees from our 2015 Chapter retreat:

Full Name	Last Name	Chapter Represented
Bob Kalan	Kalan	Cherry Springs Dark Sky Association
Diane Szwajkowski	Szwajkowski	Friends of Beltzville
Joe Szwajkowski	Szwajkowski	Friends of Beltzville
Jennifer Stinson	Stinson	Friends of Nolde Forest
Mariah Dunsmore	Dunsmore	Friends of Parker Dam

Let's sort them by *Full Name*:

Full Name	Last Name	Chapter Represented
Bob Kalan	Kalan	Cherry Springs Dark Sky Association
Diane Szwajkowski	Szwajkowski	Friends of Beltzville
Jennifer Stinson	Stinson	Friends of Nolde Forest
Joe Szwajkowski	Szwajkowski	Friends of Beltzville
Mariah Dunsmore	Dunsmore	Friends of Parker Dam

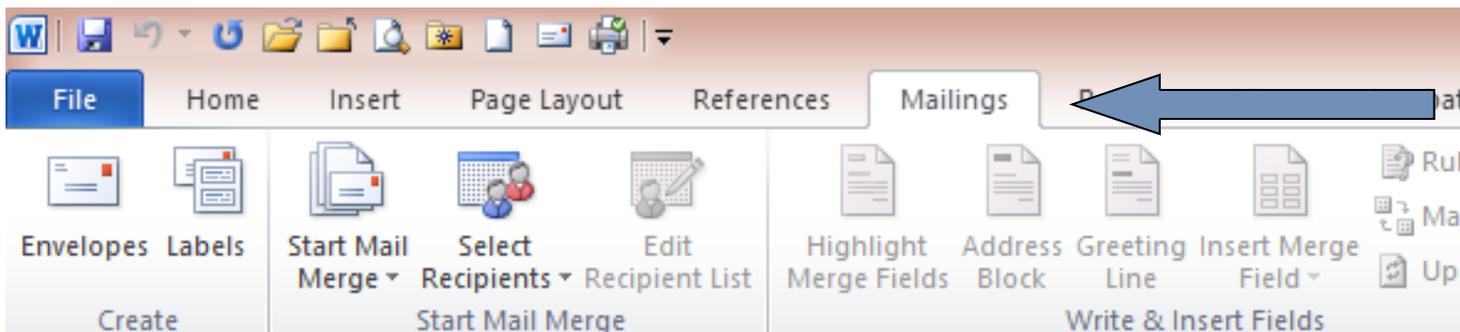
Now let's sort them by *Last Name*:

Full Name	Last Name	Chapter Represented
Mariah Dunsmore	Dunsmore	Friends of Parker Dam
Bob Kalan	Kalan	Cherry Springs Dark Sky Association
Diane Szwajkowski	Szwajkowski	Friends of Beltzville
Joe Szwajkowski	Szwajkowski	Friends of Beltzville
Jennifer Stinson	Stinson	Friends of Nolde Forest

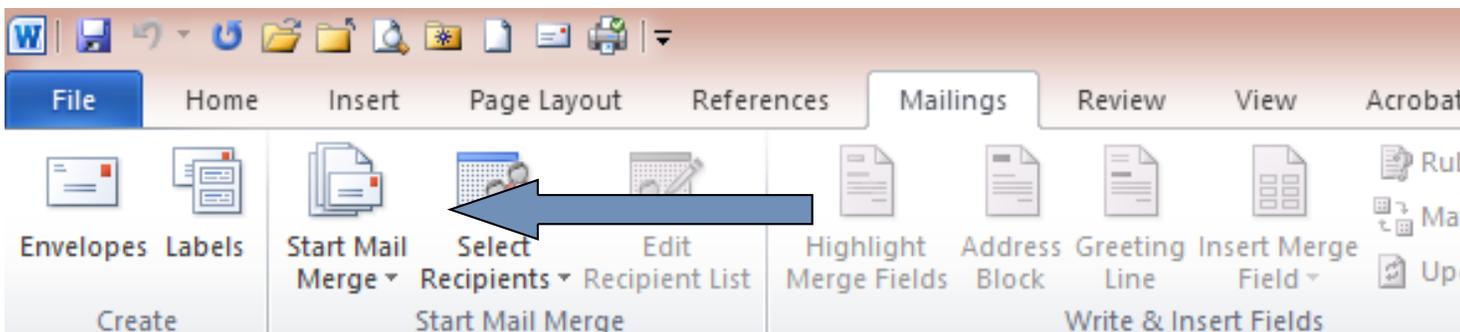
You see you achieve a very different result.

After you create a spreadsheet (with as many columns as you need for your finished product – e.g., for a merged letter, you’ll want names, addresses, a “salutation” (Dear Whomever) – then you create your form letter. Begin just as you would with any blank Word document, then follow this step-by-step guide. Please note that this guide refers to documents created using Word 2010 – where you find these steps in other versions of Word are VERY different.

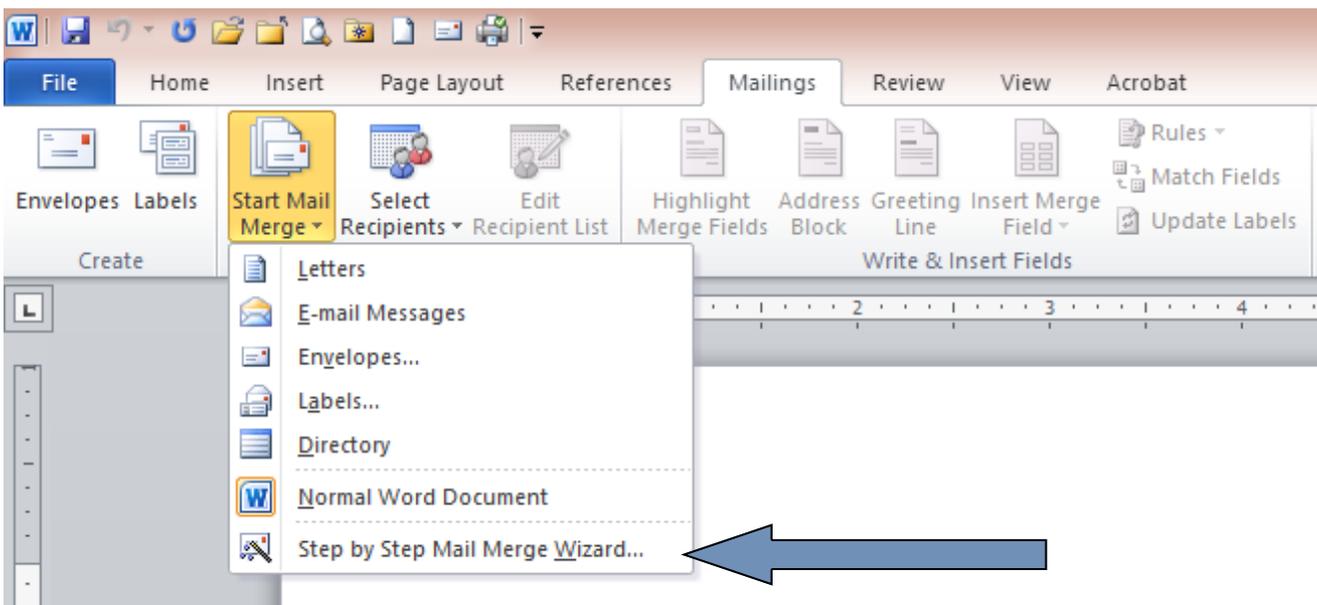
Click *Mailings*:



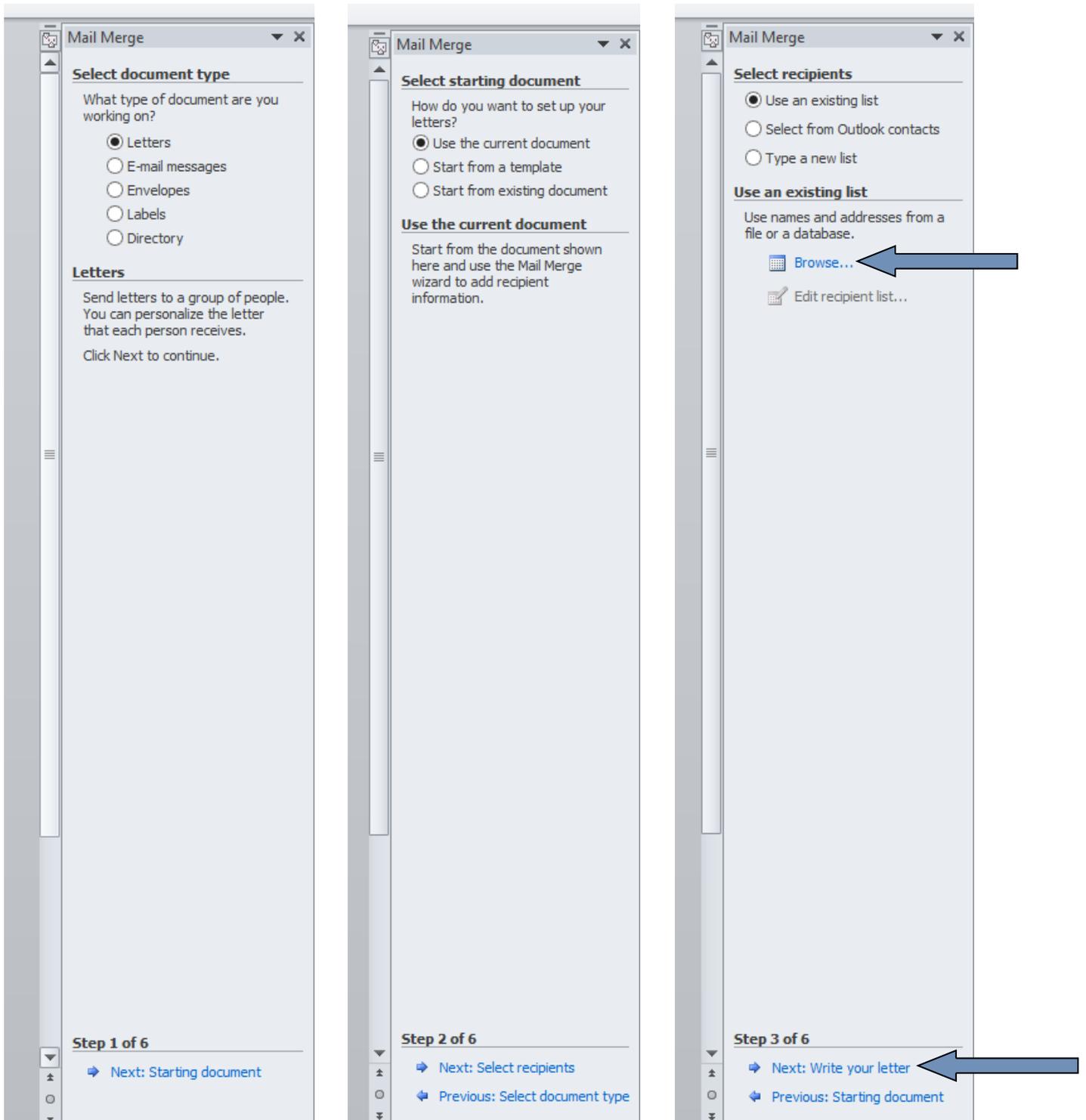
Click *Start Mail Merge*:



As a beginner, click *Step by Step Mail Merge Wizard*:

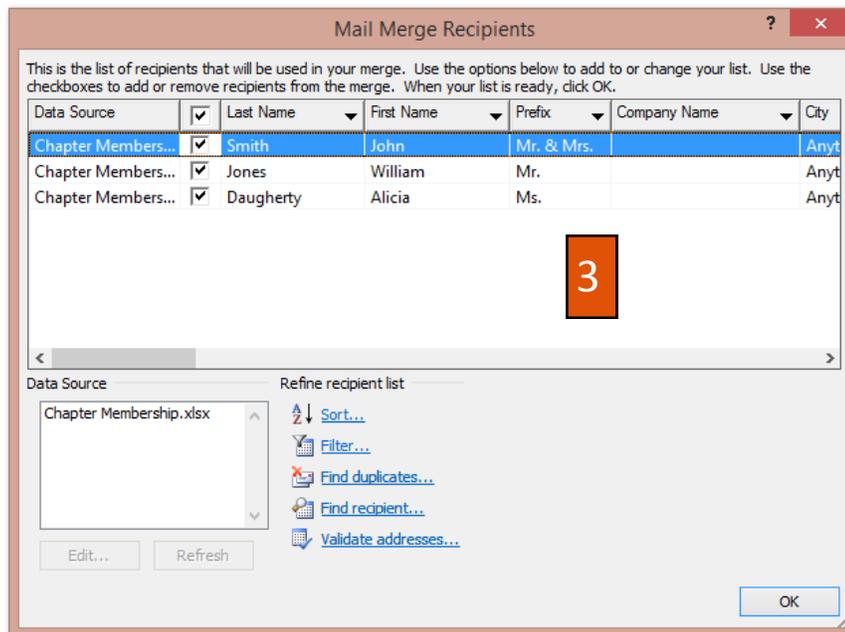
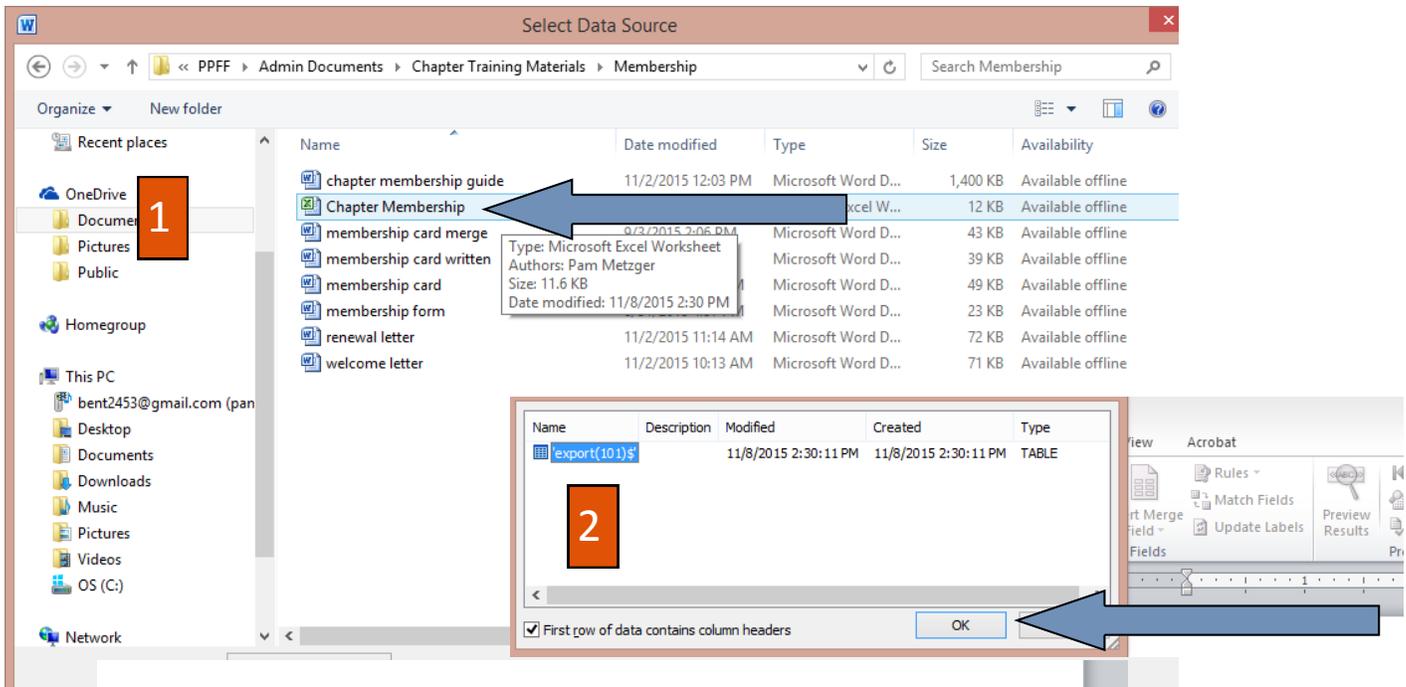


The wizard will walk you through the steps you need to create the finished product with simple screens along the right side of your page:



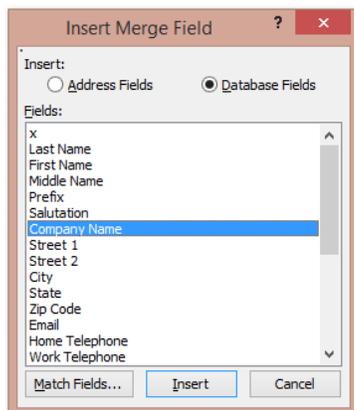
Then, at the bottom of our third illustration above, click through Step 3 to *Write your letter*.

For the purposes of this demonstration, I have selected the Chapter Membership spreadsheet created as an example in the training materials in a series of three clicks:



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Indeed, it's time to write the letter, adding variable information in precisely the place you would wish it to appear in the finished product. Note that Microsoft nicely gives you the option of adding an *Address Block*, *Greeting Line*, *Electronic Postage* or *More Items*. I have NEVER had any success using the built-in address blocks or greeting lines but instead click *More Items* to add my own fields to the letter.

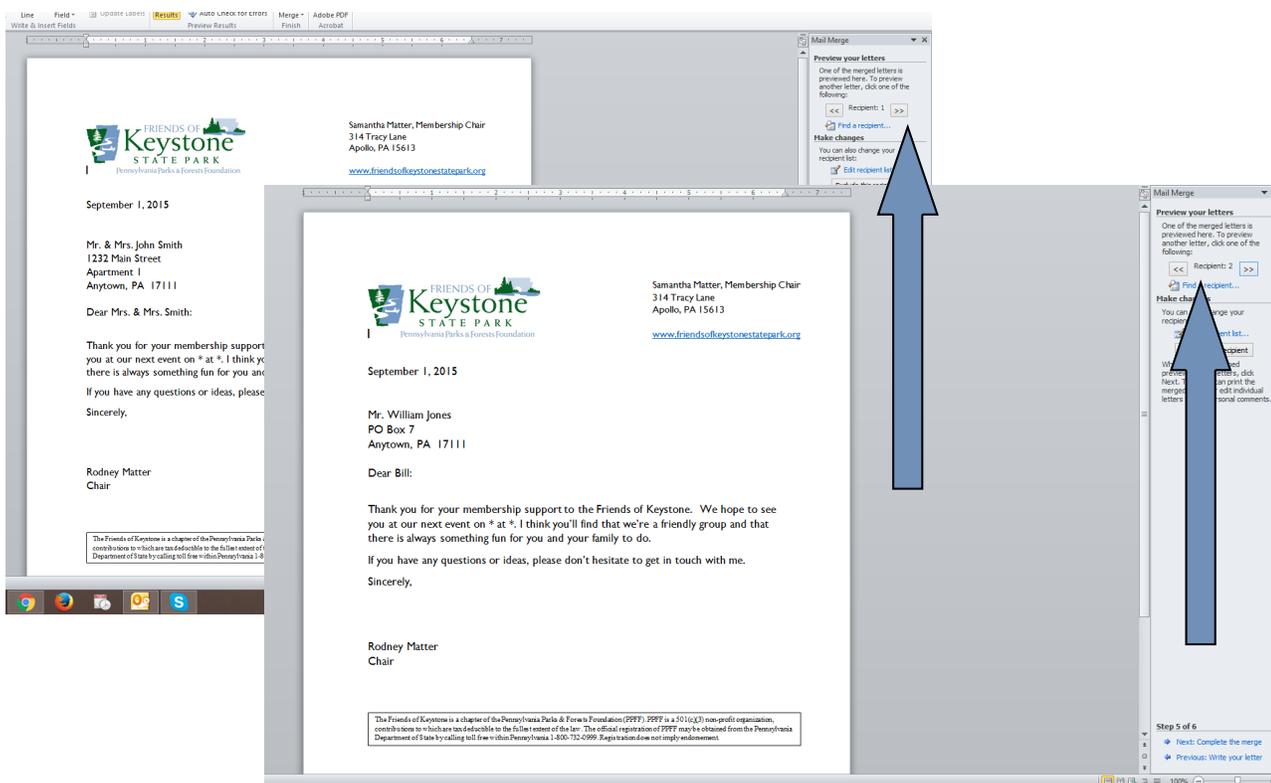


Select a field either by double-clicking it or highlighting it with your cursor and clicking Insert. Either works.

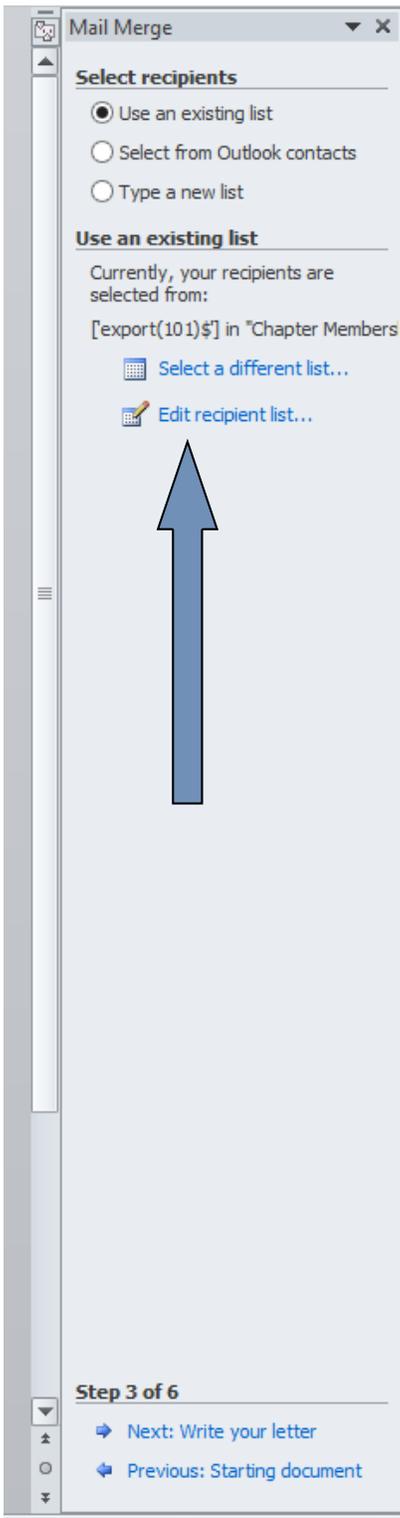
Be sure to include a space between *First* and *Last Name*, and all punctuation where it needs to be, etc..

Remember, the final letter will contain your merged fields precisely the way you've inserted them into the form.

With Step 4, you're able to *Preview* the finished letter and click through each Recipient in your spreadsheet. This allows you to see precisely how each letter will look as a finished product and you may exclude a particular Recipient from the final merge as you review the letters.

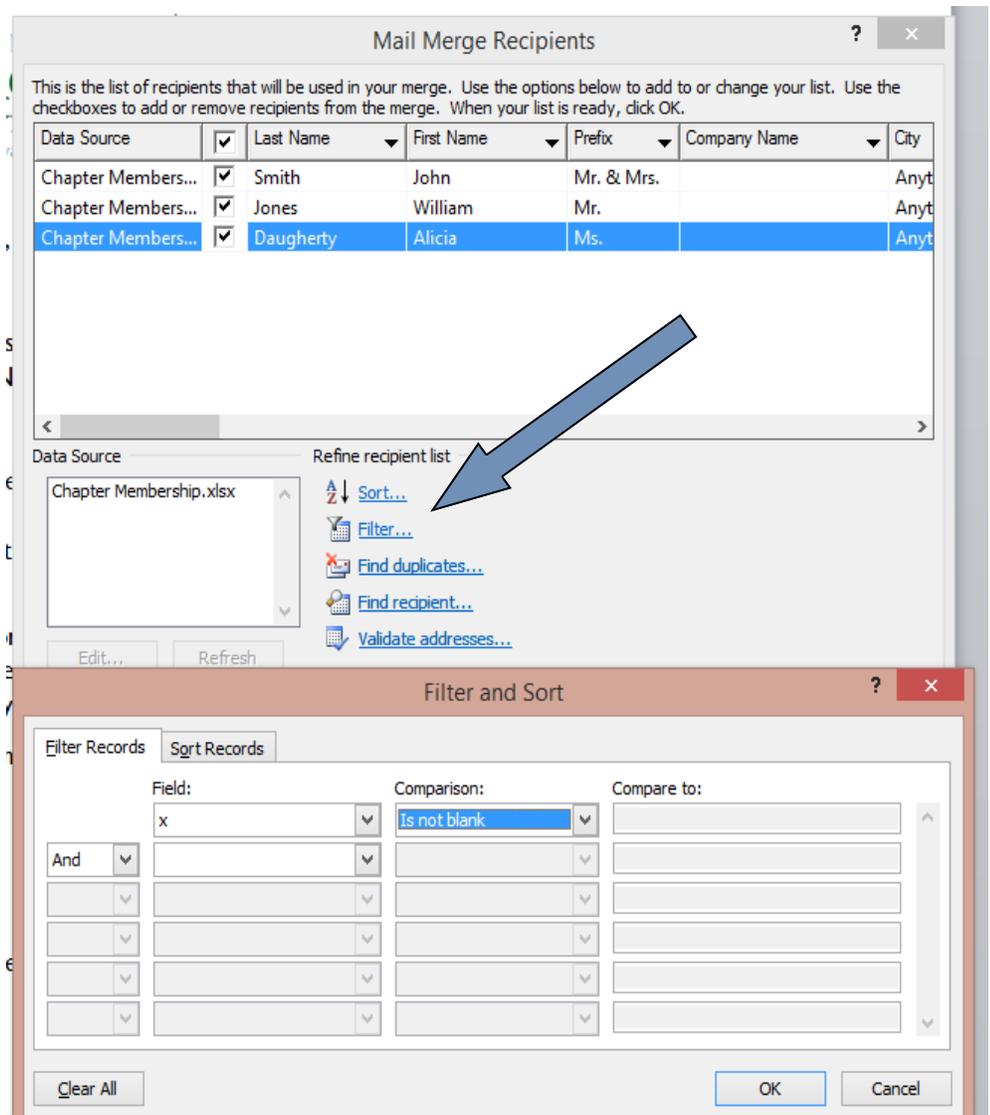


You can also *Edit recipient list* at this step and exclude people who are not to receive a particular mailing. You can refine the list with a sort or by filtering on one of the fields (a membership expiration date for example). I have included a column labeled "x" in the spreadsheet format so that you can manipulate the data in Excel before you perform the merge to pre-select the people who should get a mailing. Place an "x" in that column and when you reach Step 4, "filter" the results



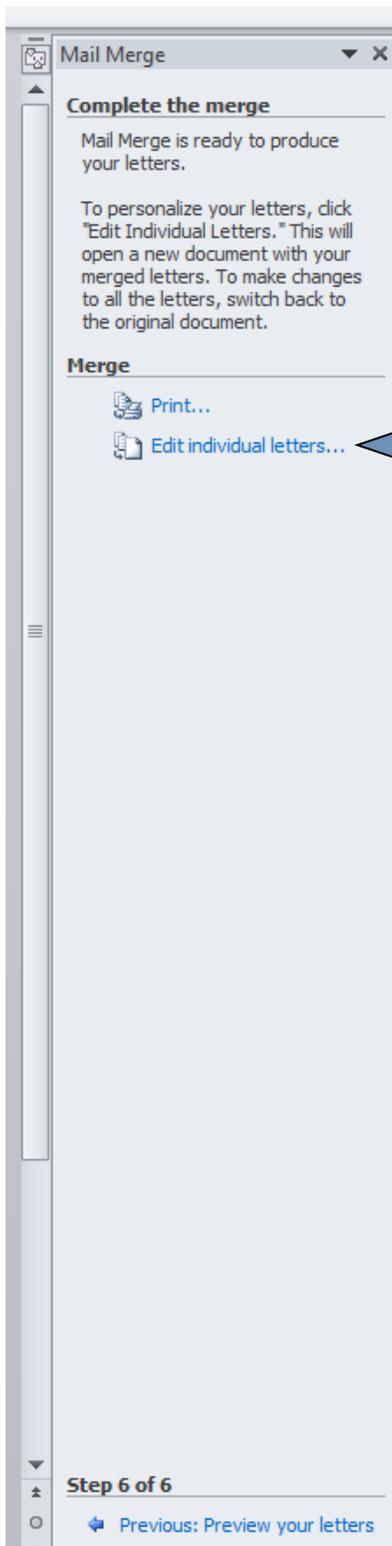
You can also *Edit recipient list* at this step and exclude people who are not to receive a particular mailing. You can refine the list with a sort or by filtering on one of the fields (a membership expiration date for example).

I have included a column labeled “x” in the spreadsheet format so that you can manipulate the data in Excel before you perform the merge to pre-select the people who should get a mailing. Place an “x” in that column and when you reach Step 4, “filter” the results so that the field “x” is *not blank*.



Note also the column with a check mark. This check mark indicates which Recipients are getting your mailing. Uncheck the box if you want to exclude a person.

When you're satisfied that the letter reads and looks as you want it, go to Step 5 and *Complete the Merge*. Most of the time I will *Edit individual letters* and produce a complete document of all merged letters. This resulting document can then be saved as a Word document on its own and you'll have a record of who received their annual renewal letter, for example.



Don't be surprised if you perform a merge, glance through it and find a weird problem, exit from the merged letters, fix the weird thing, re-merge, re-examine, exit, fix, re-merge ... It can be a quirky process, but I guarantee that in the end you'll be expert AND amazed!

Until you do become a Merging Expert, feel free to be in touch with me!

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