

## Using an Excel Table for Mail Merge

Tables (databases) created in Excel can have many uses, which include allowing you to use it to merge information into Word for large mailings. This ensures that you will not have to duplicate information you already have in your Excel table to perform a mail merge. This document provides an overview of creating a mail merge using information from an existing Excel table.

### NOTES:

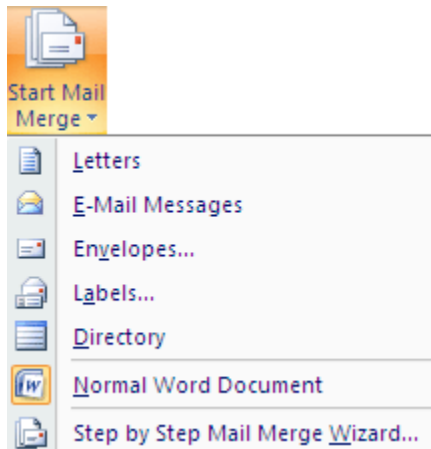
The Excel table must already exist for this option to work.

**WARNING:** In order for the merge to work correctly, the field names of your Excel table must begin in the top left corner of your worksheet, at cell A1.

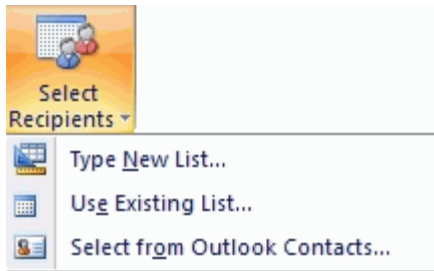
To create a mail merge using data from an Excel table:

1. Open a blank Word document
2. From the *Ribbon*, select the **Mailings** command tab
3. In the *Start Mail Merge* group, click **START MAIL MERGE** » select the desired document type

EXAMPLE: Select **Letters**



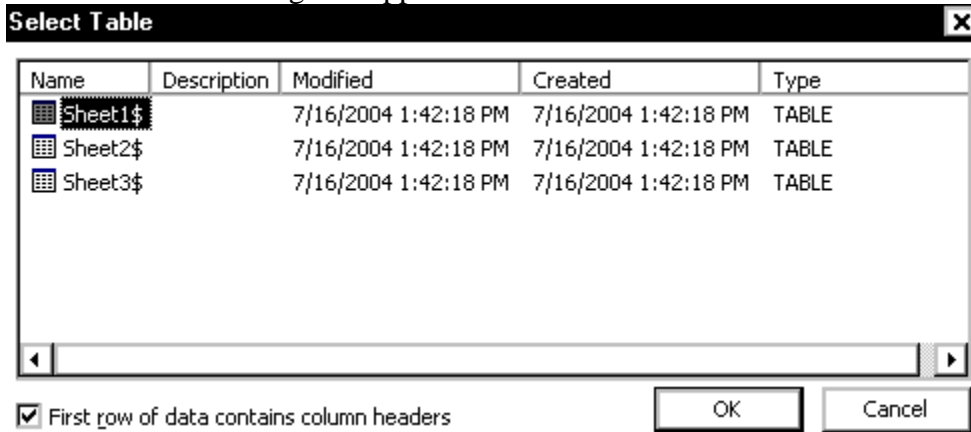
4. In the *Start Mail Merge* group, click **SELECT RECIPIENTS** » select **Use Existing List...**



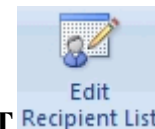
The *Select Data Source* dialog box appears.

5. Using the *Look in* pull-down list, find and select the desired Excel file
6. Click **OPEN**

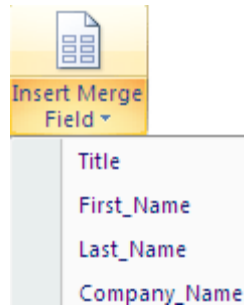
The *Select Table* dialog box appears.



7. If your Excel workbook has multiple worksheets, select the worksheet containing your list of recipients
8. OPTIONAL: If the first row of your worksheet contains headings instead of information to be included in the merge, select *First row of data contains column headers*
9. Click **OK**
10. To select the recipients you want to include in your mail merge



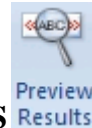
- a. In the *Start Mail Merge* group, click **EDIT RECIPIENT LIST**  
The *Mail Merge Recipients* dialog box appears.
  - b. Select the recipients  
NOTE: A recipient is selected if the checkbox beside their entry is selected.
  - c. Click **OK**  
NOTE: To edit the recipient information, refer to Working with the Recipients List.
11. In your document, type the message, leaving space for information to be added in the mail merge
  12. To insert merge fields
    - a. Position the insertion point where you want to insert the variable information within your document
    - b. In the *Write & Insert Fields* group, click **INSERT MERGE FIELD** » select the desired field



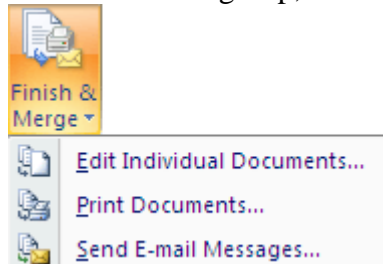
NOTES:

Be sure to click the text of the INSERT MERGE FIELD button below the picture to access the drop-down list.

The fields available to you will be the column headers of your Excel worksheet.



13. When finished, in the *Preview Results* group, click **PREVIEW RESULTS**  
A preview of your first recipient's letter appears.  
NOTE: For more information on editing the recipient information, refer to Working with the Recipients List.
14. OPTIONAL: To preview your document with other recipients' information, in the *Preview Results* group, click the arrows
15. To print the document
  - a. From the *Finish* group, click **FINISH & MERGE** » select *Print Documents...*



The *Merge to Printer* dialog box appears.

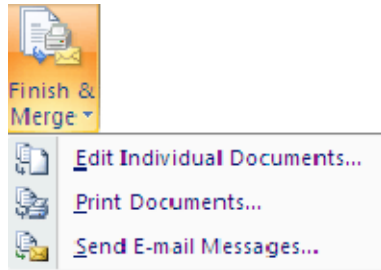


- b. To print documents for all of your records, select *All*  
To print a document for only the record displayed, select *Current record*  
To print documents for only certain records, type a range in the text boxes
- c. Click **OK**  
The *Print* dialog box appears.

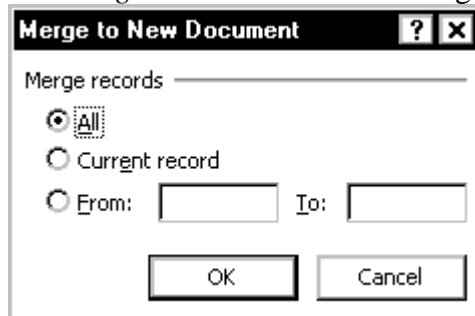
- d. Make any necessary adjustments  
NOTE: Refer to Printing Options for Specific Pages for more information.
- e. Click **OK**

To make changes to the documents

- f. From the *Finish* group, click **FINISH & MERGE** » select *Edit Individual Documents...*



The *Merge to New Document* dialog box appears.



- g. To edit the documents for all of your records, select *All*  
To edit the document for only the record displayed, select *Current record*  
To edit the documents for only certain records, type a range in the text boxes
- h. Click **OK**
- i. Make the appropriate changes in the new document that appears
- j. Save the document