

Mail merge for Word Documents

The below instructions are for using the mail merge function of Microsoft Word to create personalized letters (as Word documents).

The instructions/graphics here are specific to Word 2007. If you're system has Office 2007, 2010, 2013, 2016 or "Office 365" these instructions will make sense (the variations are minor).

The instructions here use the presumption there is an Excel spreadsheet with all the information you want included.

***These instructions are a sample based on using this function to create Seminar attendance certificates.**

Open a blank Word document.

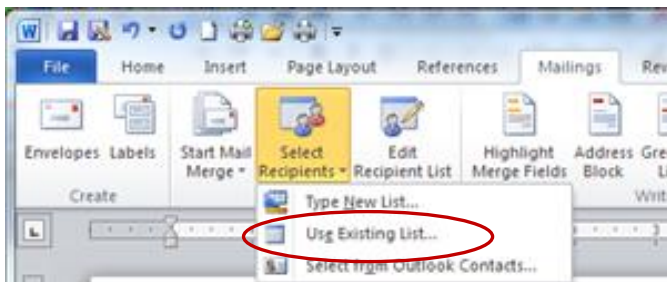
Above the ribbon click on "Mailings".



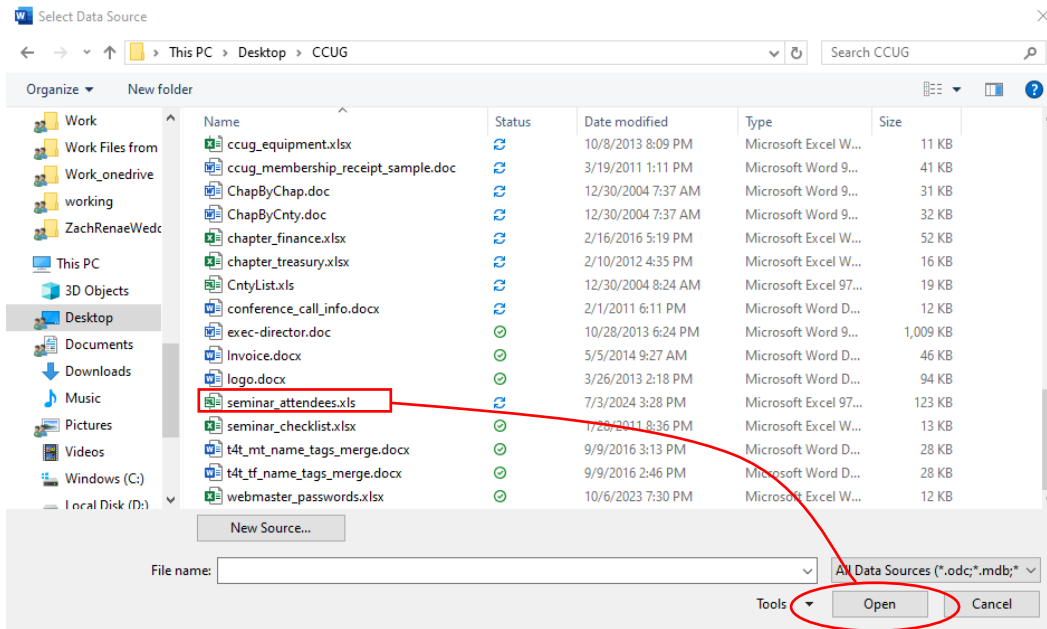
Click on "Select Recipients"



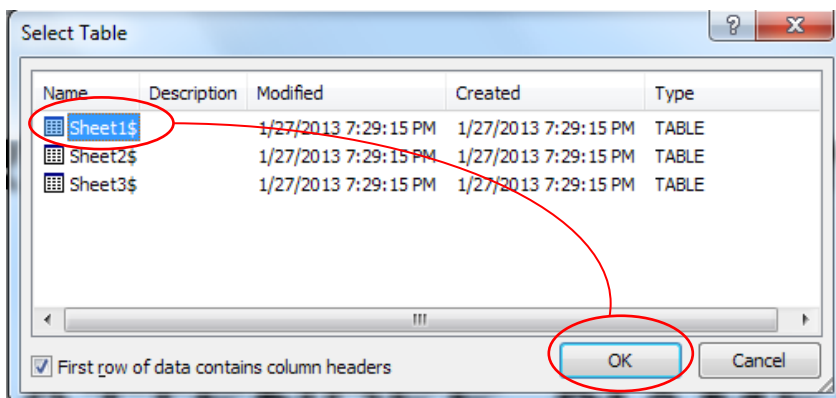
Click on "Use Existing List..."



The Select Data Source dialog box will open...track down the Excel file with the information you need (in this case "seminar_attendees"). Select it and click "Open".



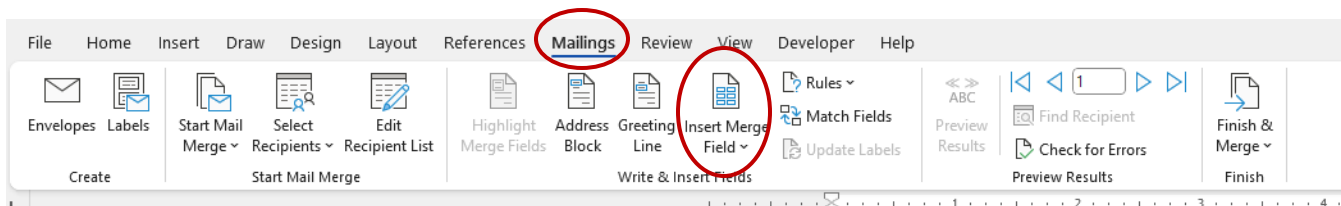
Once you click "open" you should get a "Select Table" dialog box...select Sheet1\$ (or whichever sheet has the information you need) and click "OK".



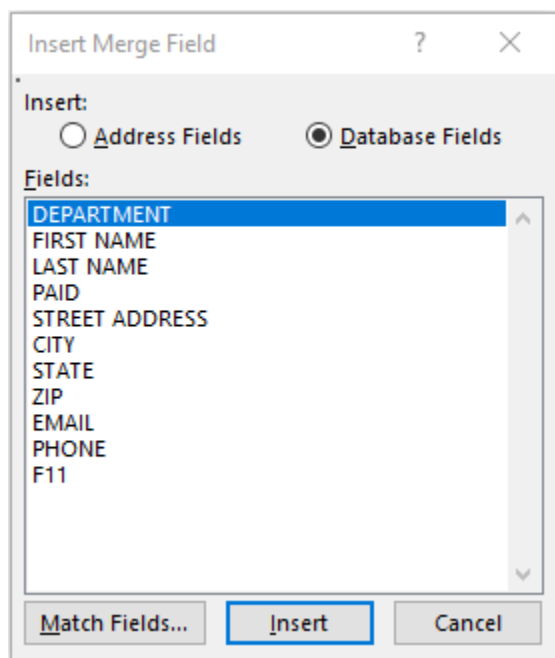
From this point you'll be taken back to your original document and it won't be clear you've done any of the above steps (if that happens you're doing it right).

Once back to the original document (thus far it's probably blank) enter the information you want shown. For example, you may want the (in this case) certificate to say "(persons name) has attended the (year) CCUG Training & Technology Seminar". Enter that on your document where you want it to appear (where you want the persons name to go, leave that blank).

Once this information is entered, put your cursor where the persons name should be entered and go back to "Mailings" and "Insert Merge Field".



This will bring you to a list of all the column headers (this is presuming the column headers are listed on the sheet).



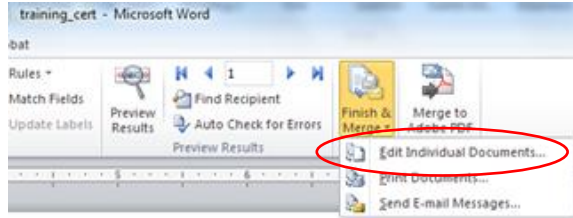
Select the field you want to include and click "Insert". Repeat this for all fields that are to be entered together. Once all desired fields are selected, click "Close" (Cancel in the above image changes to Close when fields are inserted).

Note that if multiple fields are selected at the same time, they will be without spaces in a line – you can add spaces and change lines (enter space after the last character) after the fields have been entered.

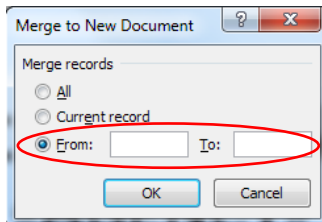
Once the document appears as you would like (you'll see <<[column header]>> where your information will be on your document), click on "Finish & Merge"



When you click Finish & Merge it will provide a dropdown box. Select “Edit Individual Documents”



You should get a “Merge to New Document” dialog box. Select the “From” option and enter the record numbers you want (“All” for all records, or the rows you want to include if not all the records listed). Click “OK”.



This will open a new Word document that should be the Certificate with the information from the Excel file included in the proper places.