

## **How to Create a Mail Merge**

### **Contributors:**

Kim Barchard and Holly Walker (first draft, July 1, 2008)

Kim Barchard (Edited July 16, 2008)

Kim Barchard and Danee Brehman (Edited Sept 15, 2008)

### **Lesson 1: Basic Mail Merge**

#### **Purpose**

The purpose of this workshop is to teach you how to use Mail Merge.

#### **Instructions**

##### **In Excel:**

- 1) Open Excel
- 2) Put the labels in the top row
- 3) Put the entries below them.
- 4) save the file.

##### **In Word:**

- 1) Open Microsoft Word
- 2) Open the document you want to use mail merge on or create a new blank document. If this is a new document, save it.

##### **In Word 2003:**

- 3) Click Tools / Letters and Mailings / Mail Merge.
- 4) In the Mail Merge window on the right, make sure "Select document type" says "Letters". Click Next (on the bottom)
- 5) Use the default option of "Use the current document". Click Next.
- 6) Select "Use an existing list".
- 7) Under "Use an existing list" click "Browse"
- 8) Navigate to the excel file. Click Open.
- 9) Under the "Select Table" window, select the sheet that has the data.
- 10) At the bottom of that window, make sure there is a check mark next to "First row of data contains column headers".
- 11) Click OK.
- 12) On the Mail Merge Recipients window, click OK.
- 13) This will bring you back to the Mail Merge window. Click "Next: Write your letter"
- 14) On your letter, click where you want the database field to be entered.
- 15) On the "Write your letter" window (on the right), click "More items"
- 16) Make sure it says "Database fields", and then select the field you want to enter, then click Insert.
- 17) Repeat this process to add other fields to your letter.
- 18) Click "Next: Preview your letters"
- 19) Under "Preview your letters", you can use the arrows to move between Recipients.
- 20) Click "Next: Complete the merge"

21) At this point, you have two choices. You can simply Print the letters or you can create an electronic file that contains all the letters. If you want to do the latter, click “Edit the letters” and then in the dialog box (that says something like “Records”, select “All”. Click OK.

22) You now have a regular Word document, with all the records inserted in the appropriate places. You can edit this document in any way you like. Word will automatically save this file, using a file name like “Letters1.doc”. It may save this file in some strange place. Be sure to save the file where YOU want it.

**In Word 2007:**

1) Click on the “Mailings” tab

2) Select “Start Mail Merge”

3) From the drop-down menu, select “Letters”

4) Click “Select Recipients”

5) From the drop-down menu, select “Use Existing List”

6) Navigate to the excel file. Click Open.

7) Under the "Select Table" window, select the sheet that has the data.

8) At the bottom of that window, make sure there is a check mark next to "First row of data contains column headers".

9) Click OK.

10) You are now ready to write your document. Type the basic content of your document, planning where you will insert the fields from the Excel file.

11) Method 1:

To insert a field from the excel file, click CTRL-F9. Type the name of the field

Method 2: Move the mouse to where you want to insert a field from the Excel file. Then click “Insert Merge Field”. In the Insert Merge Field window, select the field you want to add. Click Insert. And then click Close.

12) Insert the remaining fields in the same way.

13) Click “Preview Results”. It will show you the completed document for the first record. To see the completed document with the other records, go to the Preview Results section, and click on the “Next Record” button (which looks like a forward arrow).

14) Click “Finish & Merge”.

15) From the drop-down menu, select “Edit Individual Documents”.

16) On the “Merge to New Document” window, tell it you want to merge “All” records. Click OK.

17) Your new document will appear, with all the fields merged in. Save this file with a NEW file name.

## Lesson 2: Merging Pictures into Word

### **Purpose**

The purpose of this workshop is to teach you how to merge pictures into Word. To make this concrete, you will create a document with the names, titles, and pictures of research assistants in our lab.

### **Prerequisites**

Lesson 1: Basic Mail Merge

### **Instructions**

In Illustrator or another program,

- 1) Create the images you want to use.
- 2) Put all of these images into the folder you will be using for the mail merge. It may be best to COPY the files here, rather than MOVE them, in case you somehow mess up the images as you are working.

In Excel, set up your mail merge database.

- 1) In the first row, list the column headings. In this example, column A will be "Name", column B will be "Title", and column C will be "Image Path".
- 2) Each row is one record in your database. For example, if you have six records for six different research assistants, you will have six rows after the headings.
- 3) In column A, give the name of the first research assistant. In column B, give the title of the research assistant. For example, they might be the Lab Manager, or the Supervisor of the Data Entry Study, or a Research Assistant. In column C, give the file name for the picture of the research assistant. For example, the picture might be called "laurie.emf". [Note: To make this more concrete, have students merge a list of research assistant names with the photos of the research assistants. Create the EMF files needed, and put them in a subfolder within this folder. Have students copy the files before they start playing with these files.]
- 4) Add the names, titles, and pictures for the remaining research assistants.
- 5) Save this Excel file in the same folder as the image files, and then close this file.

### **In Word 2003:**

In Word, set up the basic template for one record.

- 1) Create a table with two rows and two columns. Use Table, Insert, Table; Number of columns =2; Number of rows = 2; OK.
- 2) Then merge the two cells in the second column together. Select the two cells, and then click Table, Merge Cells.
- 3) Your final table will look like this:


In Word, add the mail merge functions

- 1) Use the Mail Merge Wizard to go through the various steps of setting up your mail merge.
- 2) Put the person's name in the top right cell of your table.
- 3) Put the person's title in the bottom right cell of your table.
- 4) Put the Image Path in the merged cell on the left of your table. To insert a picture, you need to do a couple of extra steps.
  - a) Click somewhere inside the cell where you want to insert the picture
  - b) Type CTRL-F9, to insert a field. Word will add { } into the cell
  - c) Type the words "INCLUDEPICTURE ". Note that there is NO space between "INCLUDE" and "PICTURE" but there IS a space after the word "PICTURE". This is critically important.
  - d) Insert the field for the picture in the usual way.
- 5) Your template will now look like this:

{MERGEDFIELD "Name" }	{INCLUDEPICTURE {MERGEDFIELD
{MERGEDFIELD "Title" }	"Image Path" } }

[Note: once we've created the real images, and actually tried this lab, replace this with what it REALLY looks like]

- 6) Just before you "Merge to New Document", save your template.
- 7) Now "Merge to New Document"
- 8) Your images will not show up immediately. That's okay; we're not done yet.
- 9) Type Control-A to select the entire document. Type Alt-F9 get show the field results rather than the field names. Type F9 to get it to show the pictures; this last step should take a few seconds, as Word imports the pictures from all the files.
- 10) Save your merged document with a new file name.

**In Word 2007:**

In Word, set up the basic template for one record.

- 1) Create a table with two rows and two columns. Use Insert, Table. Then use the mouse to indicate that your table is 2 rows by 2 columns. Click OK.
- 2) Then merge the two cells in the second column together. Select the two cells, and then right click to get the drop-down menu. Select Merge Cells.
- 3) Your final table will look like this:


In Word, add the mail merge functions

- 1) Use the Mail Merge tab to go through the various steps of setting up your mail merge.
- 2) Put the person's name in the top right cell of your table.
- 3) Put the person's title in the bottom right cell of your table.
- 4) Put the Image Path in the merged cell on the left of your table. To insert a picture, you need to do a couple of extra steps.
  - a) Click somewhere inside the cell where you want to insert the picture
  - b) Type CTRL-F9, to insert a field. Word will add { } into the cell

c) Type the words “INCLUDEPICTURE “. Note that there is NO space between “INCLUDE” and “PICTURE” but there IS a space after the word “PICTURE”. This is critically important.

d) Insert the field for the picture in the usual way.

5) Your template will now look like this:

<< Name>>	{INCLUDEPICTURE Image Path }
<<Title>>	

However, Word might well use the name of your first image, rather than the word “Image Path”.

6) Save your template.

7) Now click “Preview Results”

8) Your images will not show up immediately. That’s okay; we’re not done yet.

9) Type Control-A to select the entire document.

10) If your document is currently showing the names of the fields, then type Alt-F9 get show the field results rather than the field names. If your document is already showing the results, then you don’t have to type anything; or you can use Alt-F9 to toggle back and forth.

11) Type F9 to get it to show the pictures; this last step might take a few seconds, as Word imports the pictures from all the files.

12) Save your merged document with a new file name.

### **Lesson 3: Creating Data Sheets for the Data Entry Study**

#### **Prerequisites**

Mail Merge Instructions Lesson 1: Basic Mail Merge

Mail Merge Instructions Lesson 2: Merging Pictures into Word

How to Create Images in Illustrator (currently stored in BarchardsLab\data entry study  
2\How to create data sheets)

#### **Instructions**

Create template for data sheets

Create raw data

Create images

Create look-up table for paths to images

Merge image paths into data sheets