HOW TO MAIL MERGE IN MICROSOFT WORD

1. To start you will need your data in Microsoft Excel with clear headers in the first row such as RecipientName, AddressLine1, Postcode etc. These will become your placeholders in your document.
   Tip: Make sure each of your headers are unique with no spaces and identifiable.
2. Your data might need some tidying up or sorting if you are exporting it from a CRM system or database. You might need to split our First Name and Last Name or Combine them depending on your document. It is best to do this prior to mail merging.
3. Once happy with your data and headers save your data in an easy accessible place.
4. Now open your letter in Microsoft Word.
5. Click on mailings tab in the header
6. Then click one select recipients – Use an Existing List...
7. Now find and select your saved Excel data from earlier.
8. A pop up is likely to appear now asking you to select a table. Select the table with your data in most cases there will only be one option unless you have multiple tabs.
9. On this pop up tick First row of data contains column headers.
10. Then click okay. It may look like nothing has changed but you now have more options that where greyed earlier and you can Edit Recipient List.
11. If you do want to Edit your Recipient List you can click on the tab, and then filter out individuals or even by an element of your data such as town or postcode.
12. Highlight your Greeting Line including the comer if you have one, In the mailings tab click on the Greeting Line option found in the Write and Insert Field group.
13. A pop up will open, and here you can really customise your Greeting line. With options of To / Dear Etc as an opening to how the name appears and an option of what appears if there is no data for the name field.
    Tip: Use the preview to see if it is matching up correctly. If for any reason, it's not click on the Match Fields option and correct how Microsoft word has paired your data fields.
14. Now you should have your Greeting line in place you can delete any placeholder Greeting line text that was there before if needed.
15. Now find the next snippet of variable data in your letter such as Recipient Address, Name, Appointment time, Meeting Date etc
16. Highlight where that snippet should appear or on your placeholder text and select Insert Merge Field.
17. A pop up will appear with your headers from the data, select the appropriate field you need and insert into the letter.
18. If you are populating an address, you can use the above method or you can use Address Block found in Write and Insert Field group.
19. With the address block you can preview the samples and have options of including or excluding elements such as recipient name or company address.
    Tip: If the address doesn't look correct in the preview you can match fields to correct this.
20. Once you have finished adding your variable data fields to your letter click on the Preview Results option.
21. Now you can check everything is showing as it should, you may have missed a space between two fields such as First name and Last Name so it's appearing as JohnSmith instead of John Smith. To rectify this simply amend by putting a space in where it should appear and check it has applied by clicking through the preview data records.
22. You can also click on check for errors and use one of the options there as an extra measure if you like.
23. Once happy with your letter and merge fields click Finish and merge.
24. You will now have 3 options:
    - Edit individual documents – this will create an individual editable document per every data record.
    - Print Documents - here you can print direct to a printer or save as a pdf. Please note this is the option you will need in most instances for Hybrid Mail and to save as a pdf from your printer choices.
    - Send email messages – this will open outlook and mail each individual if you have their email address in your data.
    Tip: It is well worth saving your word document at this point so you can always come back to it, have a reference or use it again with different data.