

# HOW TO MAIL MERGE IN INDESIGN

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 as a .csv delimited file or .txt delimited with tabulation in an easy accessible place.
4. Now open your letter in InDesign
5. Click on the Data Merge Panel. If you can't readily see this, go to the window tab in the header, then utilities and data merge.
6. Once the data merge panel is opened, click on the burger menu and click on select data source.
7. Now select your saved .csv or .txt file from earlier and click open.
8. This will now populate your data merge panel with your data headers.
9. In your letter highlight where you would like a specific data field to be and click on the corresponding header in the data merge panel.
10. Repeat this step until all you are happy you have entered all the variable elements to your document.
11. Tick the Preview option found in the bottom left of the data merge panel and click through to check you are happy with how the document will look when merged.  
*Tip: Now is a great way to check you have spaces between fields and they have enough space.*
12. Untick the preview and click on the burger menu again and click export to PDF.
13. You will now have a pop up for create merged document, here you can select which records or all records. Include margins if not included in the document setup and in options it is always a good idea to tick remove blank lines for empty fields. Once you are happy with you selections click ok.
14. Now you will be presented with Adobe PDF export options which you might be more familiar with. Here click on your preset, marks and bleeds etc.
15. Now click export and choose your chosen file destination for your pdfs.
16. Once generated InDesign will notify you if there was any overset text when merging. If there is, you will need to amend the document. It will identify the records and where the overset text is, you can see the issue in preview and amend accordingly and repeat exporting the PDF steps.
17. After exporting it is worthwhile saving your InDesign file as reference or encase you want to use the same letter with new data again in the future.