

How to Create a Mail Merge Using Microsoft Excel and Word

1. Create an Excel spreadsheet
 - a. The columns in your spreadsheet should match the fields you want to use in the merge (ie. Title, First Name, Last Name, Address, City, State, Zip) – See example below
 - b. Participant Name must be separated into two columns (one column for 'First Name' and one column for 'Last Name' - they cannot be combined)
 - c. Be sure to sort the mailing list in ascending order by row_num (also called Order ID number in earlier documents)
 - d. Assign one Study ID number from the available range of Study ID numbers to each record in the Mailing List, beginning with the smallest Order ID number and proceeding until the full range of Study ID numbers have been assigned

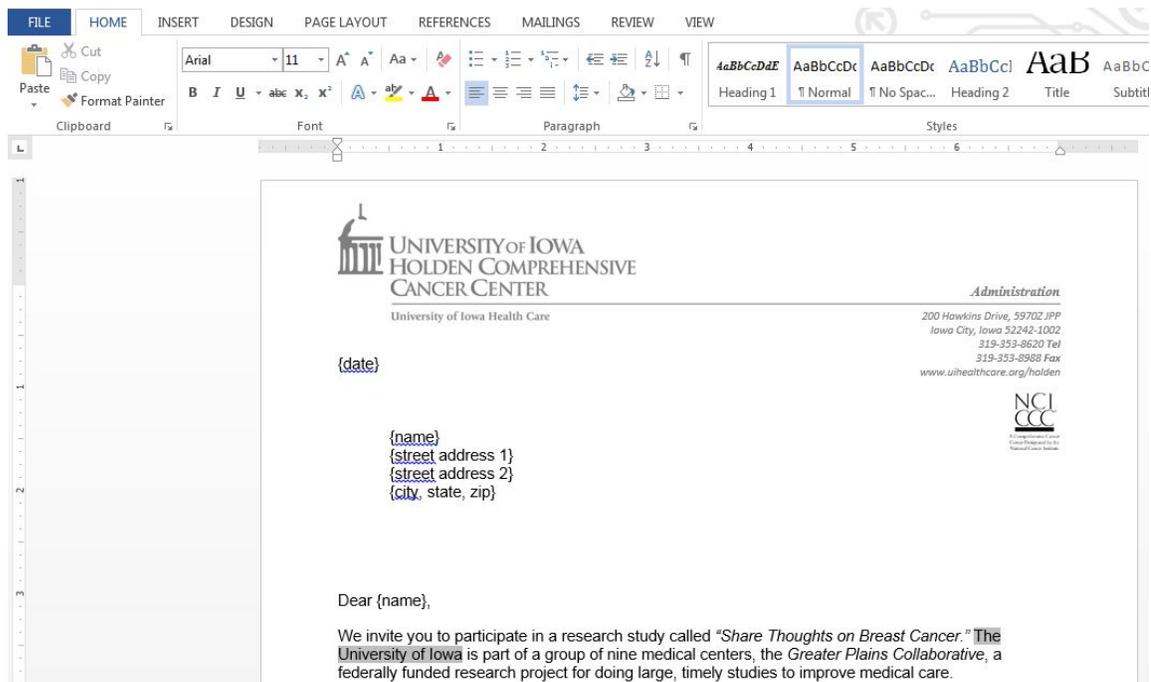
- ❖ All changes will need to be made before connecting the spreadsheet to your mail merge document in Word

The screenshot shows the Microsoft Excel interface with the following data in the spreadsheet:

	A	B	C	D	E	F	G	H	I	J	K	L
1	ID	Title	First Name	Last Name	Address 1	Address 2	City	State	Zip			
2	100001	Ms.	Elizabeth	Del Vecchio	602 Iowa Avenue	Apartment 2B	Iowa City	IA	52240			
3												

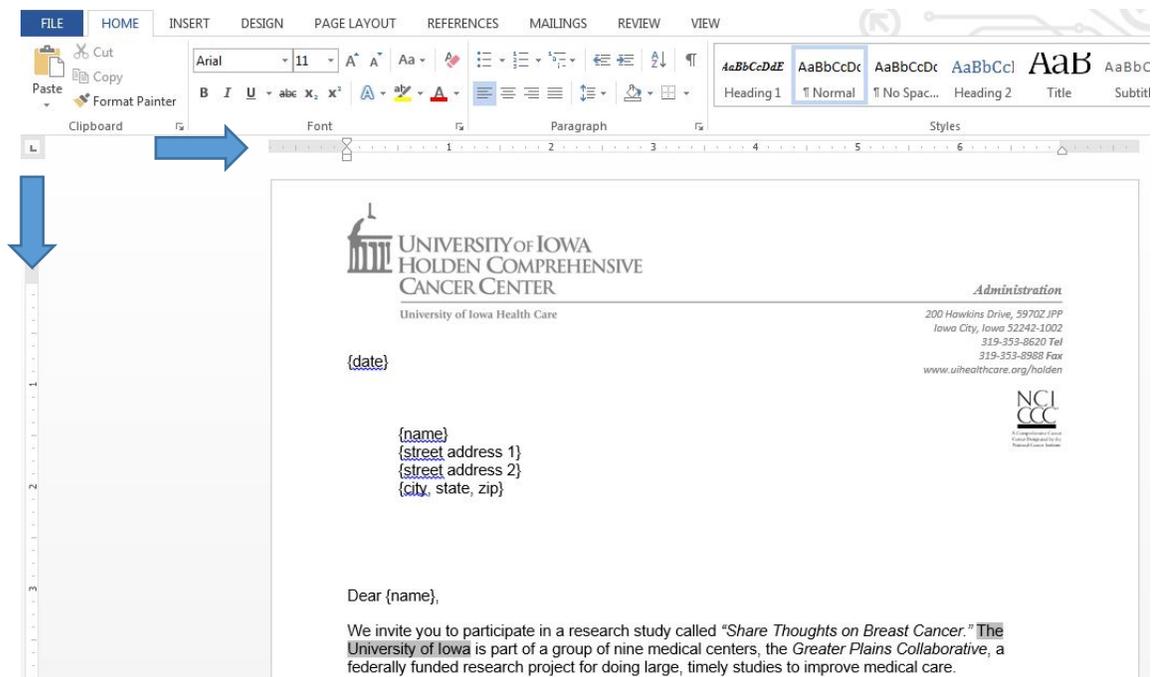
2. Save the Excel spreadsheet

3. In Microsoft Word, open your site's 'Cover Letter' document



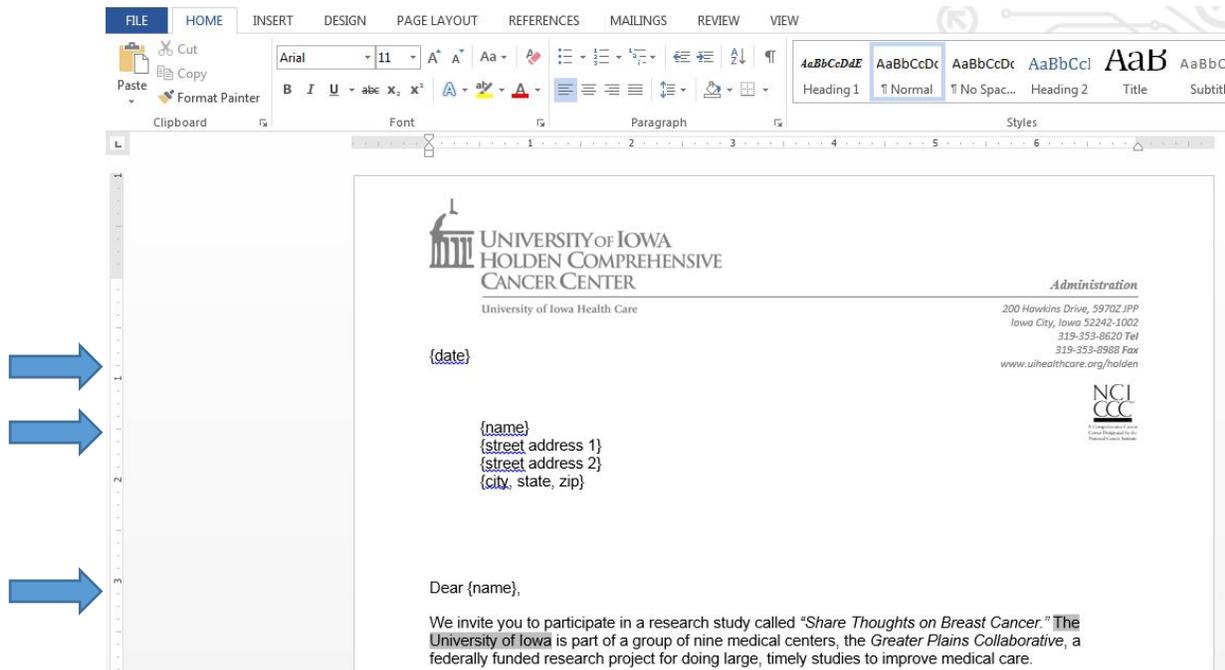
4. On the **Menu** tab, select **VIEW** > check the box next to **Ruler**

❖ This will allow you to see the ruler at the top of the page and to the left of the page

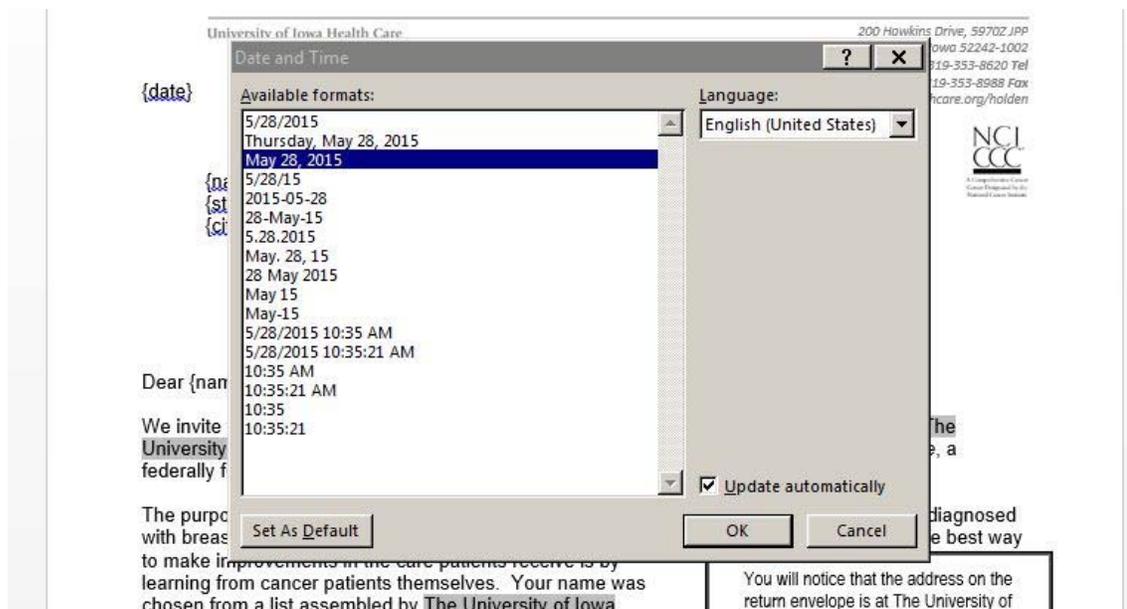


❖ Note that the date is located just above the 1 inch mark, the '{name}{street address}{city, state, zip}' is located 1 1/2 inches down and tabbed to the right, and the 'Dear {name},' is located just

below the 3 inch mark – this spacing will allow only the name and address of the participant to be visible through the outgoing envelope’s window

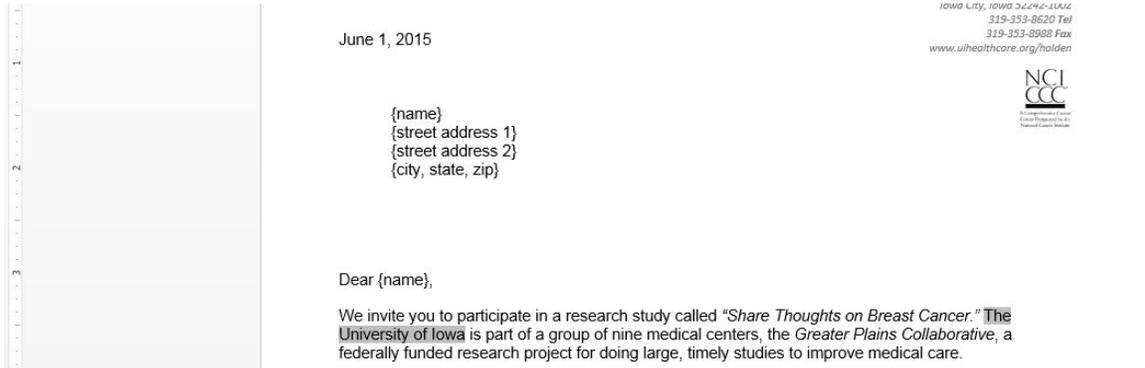


5. To insert date, highlight {date} in the Word document with your cursor
6. In the **Menu bar**, select **INSERT > Date & Time**
7. In the pop-up window, select the available date format highlighted in the image below

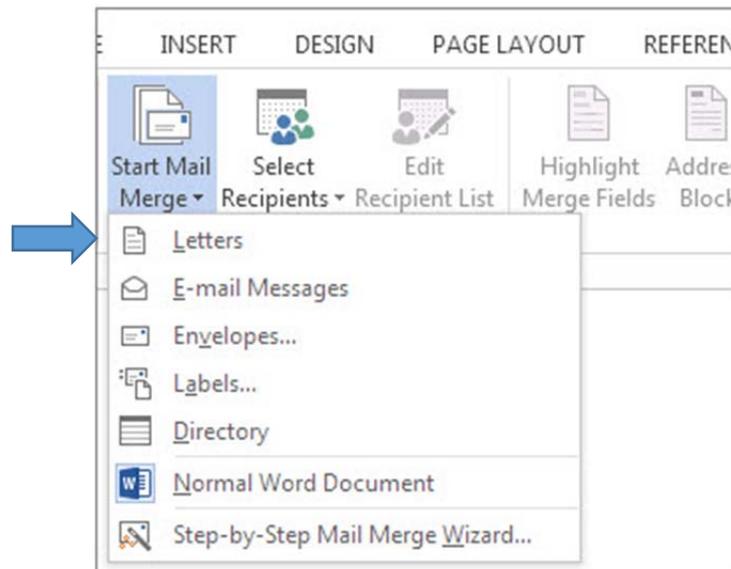


8. Be sure the box is checked next to **Update automatically**
9. Click **OK**

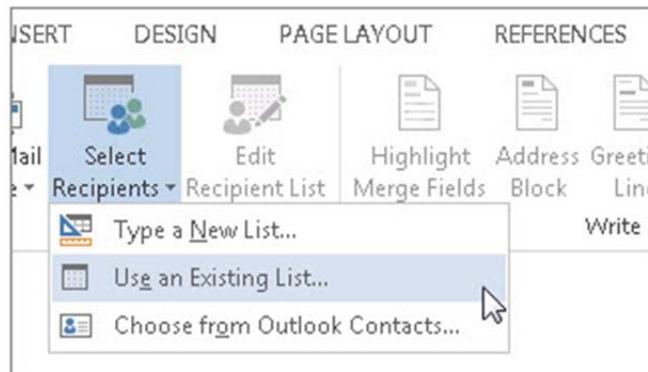
- ❖ Date should now be populated as seen below



10. To create the mail merge, in the **Menu bar**, select **MAILINGS > Start Mail Merge > Letters**



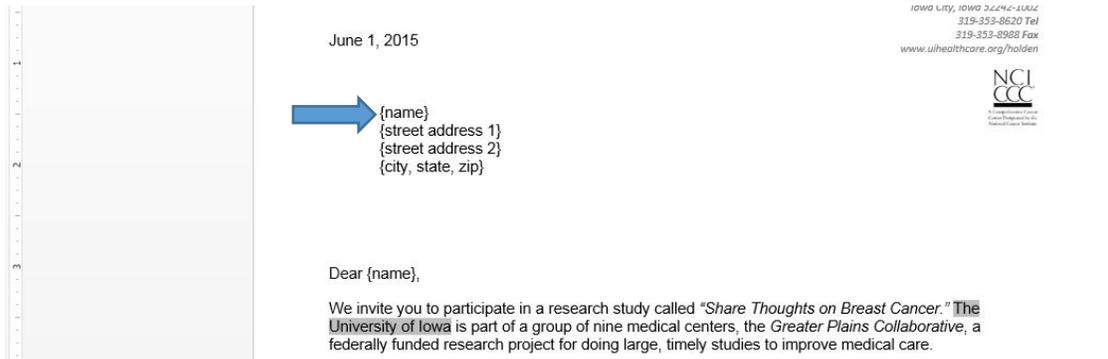
11. Click **Select Recipients > Use an Existing List...**



12. Browse to your Excel spreadsheet created in steps 1 and 2, and then click **Open**

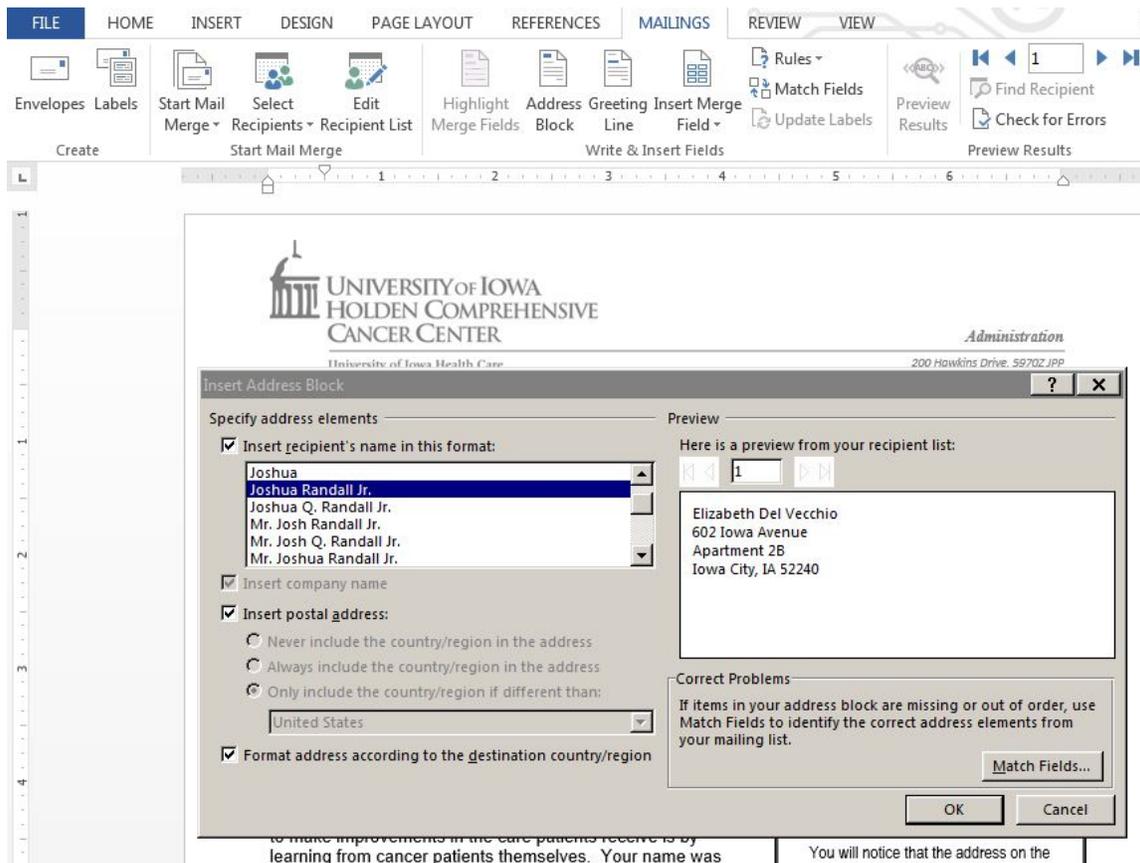
13. If Word prompts you, select **Sheet1\$** and click **Ok**

14. Place your cursor in front of {name}



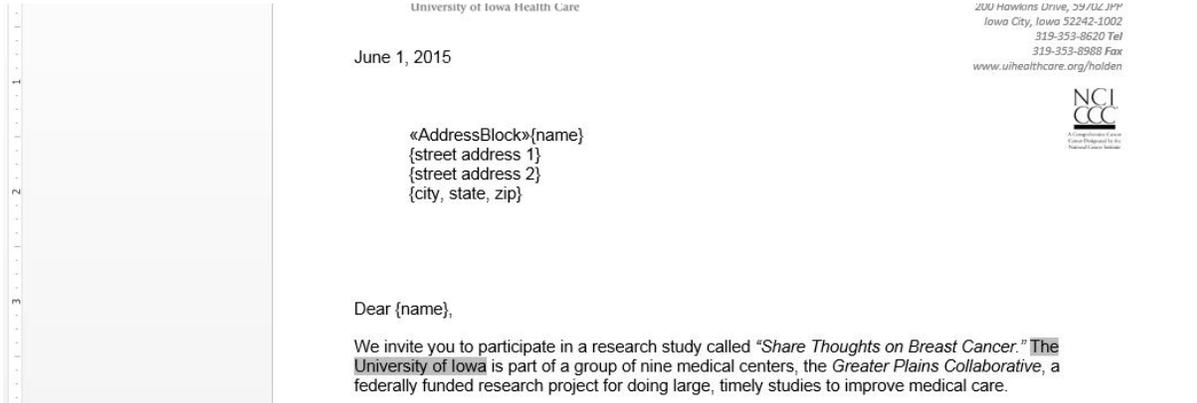
15. In the Menu bar, select MAILINGS > Address Block

16. Be sure that the pop-up window looks the same as the example below



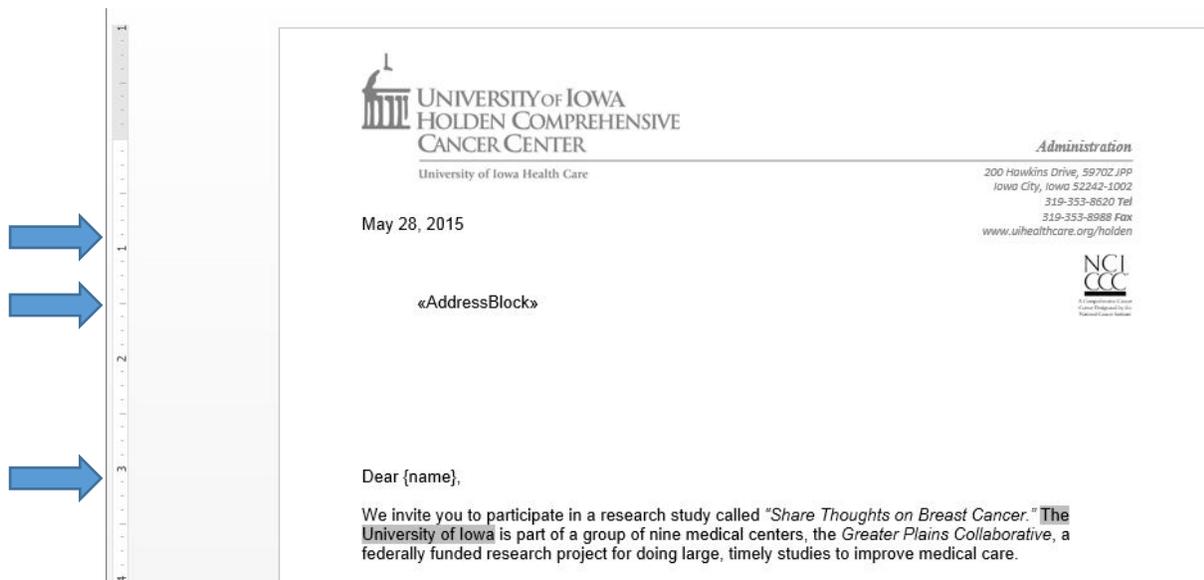
17. Click Ok

- ❖ Your Word document should look similar to the image below

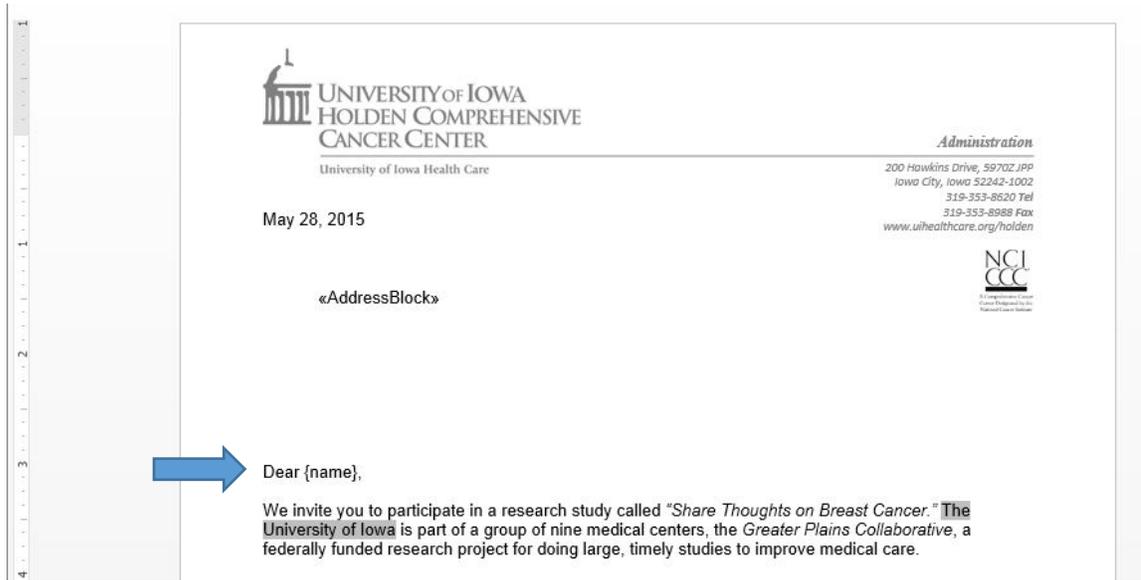


18. You may now delete {name}{street address}{city, state, zip} – only keep <<AddressBlock>>

- ❖ You may need to reposition ‘Dear {name},’ so that it is located just below the 3 inch mark

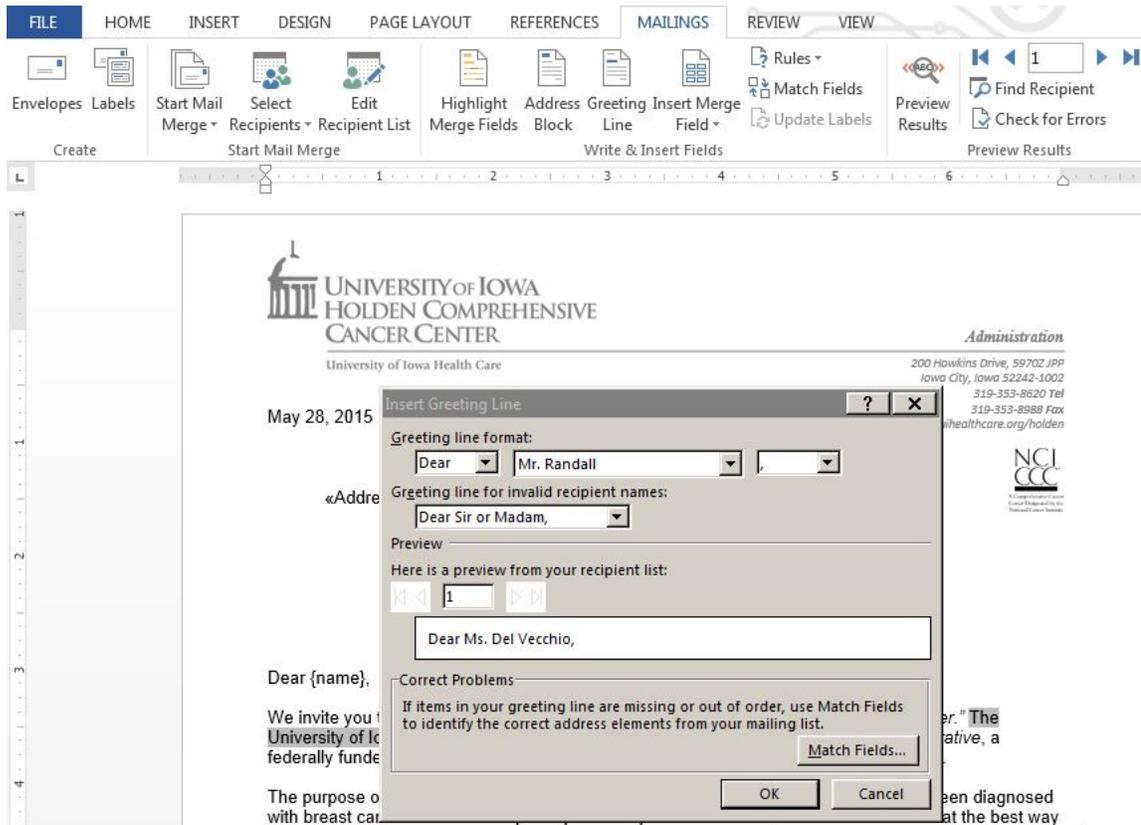


19. Place your cursor in front of **Dear {name}**,



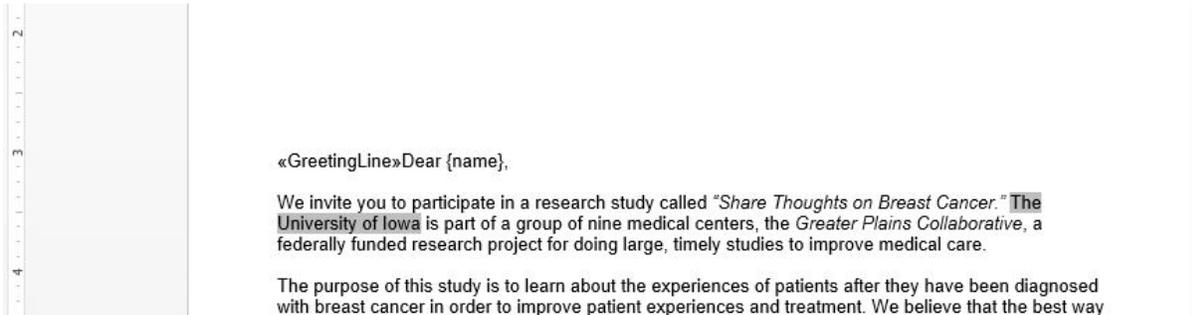
20. In the **Menu bar**, select **MAILINGS > Greeting Line**

21. Be sure that the pop-up window looks the same as the example below



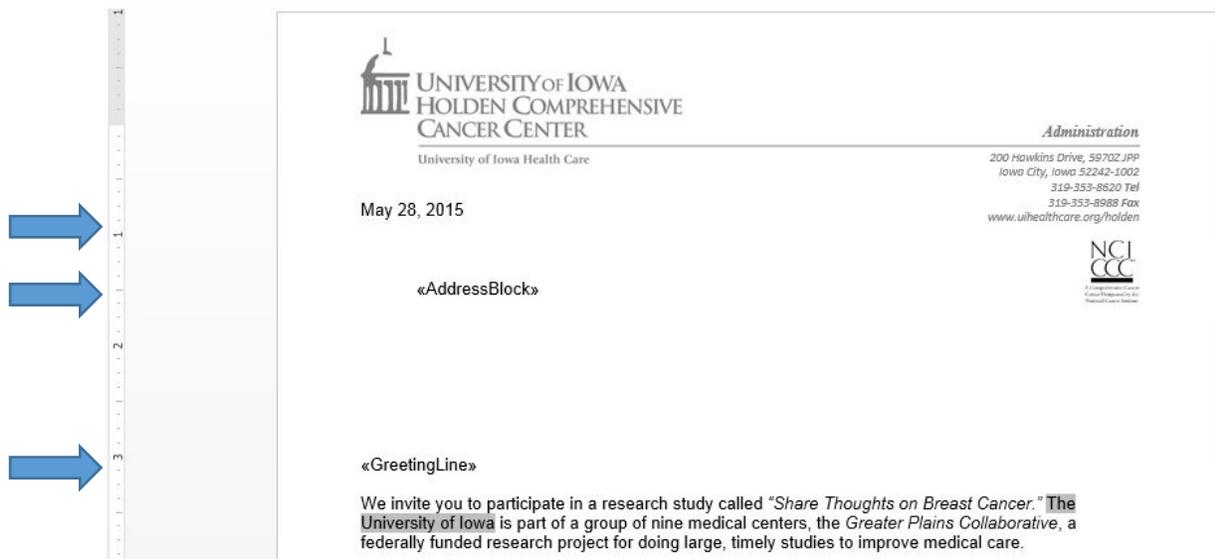
22. Click **Ok**

- ❖ Your Word document should look similar to the image below

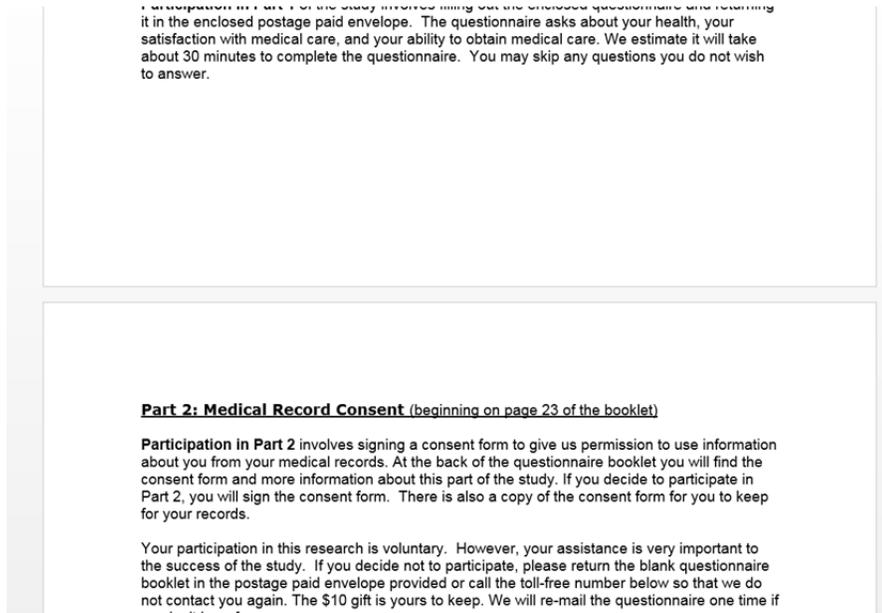


23. You may now delete **Dear {name}**, – only keep <<GreetingLine>>

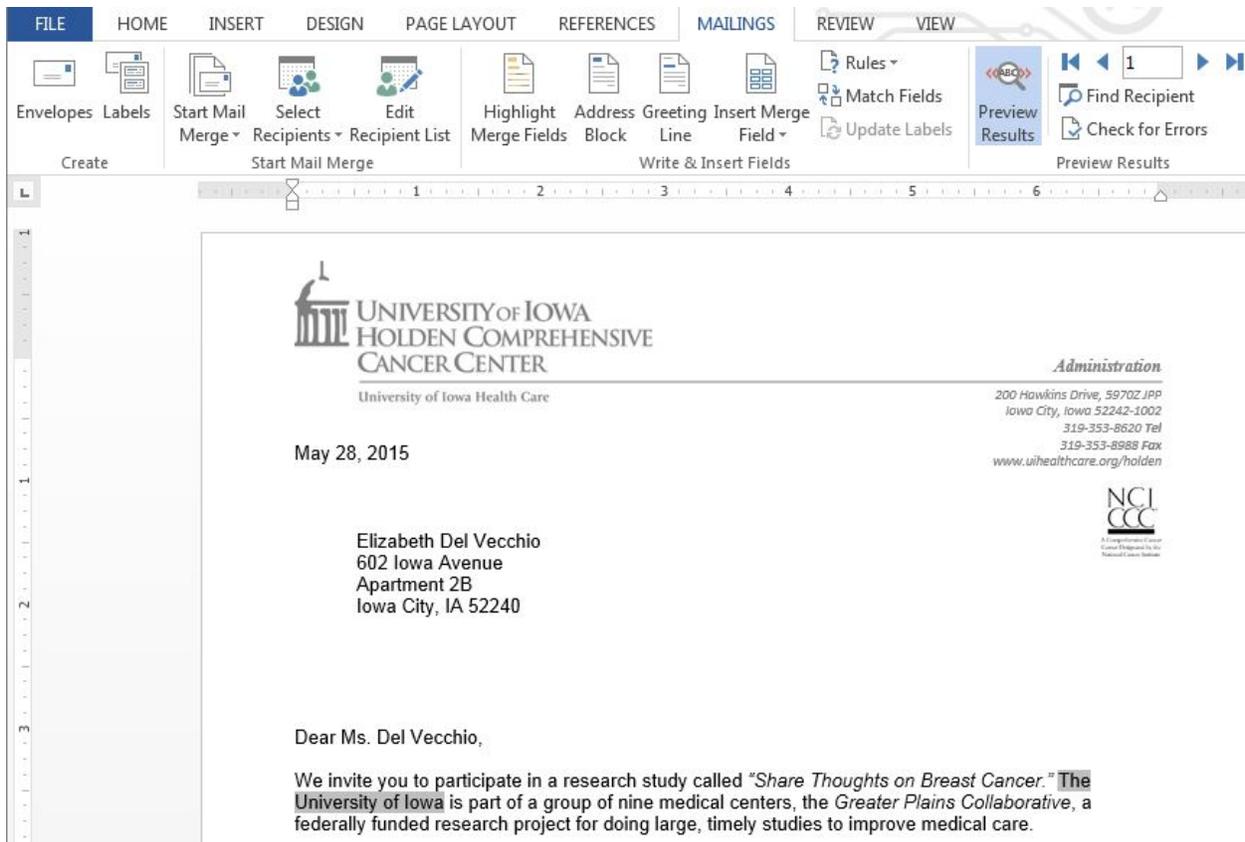
- ❖ Once again, be sure that the date, <<AddressBlock>>, and <<GreetingLine>> are located at the appropriate positions (just above the 1 inch mark, at 1 ½ inches, and just below the 3 inch mark, respectively)



24. Be sure the section **Part 2: Medical Record Consent (beginning on page 23 of the booklet)** is located on the second page



25. To preview your merged cover letter, select **MAILINGS > Preview Results**



- ❖ You may need to adjust the spacing of the date, address block and greeting line (once again) to be sure the date is located just above the 1 inch mark, the address block is located 1 ½ inches down and the greeting line is located just below the 3 inch mark. Also, double check that the section 'Part 2: Medical Record Consent (beginning on page 23 of the booklet)' is still located on the second page.

26. Once your cover letter is complete, select **MAILINGS > Finish & Merge > Edit Individual Documents...**

- ❖ This option will open each participant's letter within ONE Word document. You should scroll through each letter to be sure the spacing of the date, address block and greeting line is accurate. Also, be sure that the section 'Part 2: Medical Record Consent (beginning on page 23 of the booklet)' is still located on the second page.
- ❖ Once all of the letters have been checked, you may print the document.
- ❖ When printing, please print double-sided so that the 2-page cover letter is on ONE piece of paper (front and back).