

Mail Merge – Preparing your name and addresses in Excel

This short guide is intended to assist you with the setting up of a Microsoft Excel file that is intended to be used as part of a mail merge document when used in conjunction with Microsoft Word.

The key thing to understand is that your column headers, or categories, in Excel will become **merge fields** (placeholders) in Word. Each merge field corresponds to a piece of the address on the label such as the recipient's name or town of residence. Word pulls out the information in your Excel columns and plugs it into the corresponding merge fields.

The column headers in the Excel file should clearly identify the type of data that each column contains. In the example below we have used column headers **Title, First Name, Surname, Address 1, Address 2, Town, County** and **Post Code** instead of **Column 1, Column 2, Column 3** etc.

	A	B	C	D	E	F	G	H
1	Title	First Name	Surname	Address 1	Address 2	Town	County	Post Code
2	Mr	Paul	Atkinson	26 Minstead Road		Southampton	Hampshire	SO12 6JK
3	Mr	Steve	Jones	9 Lower Street		New Milton	Hampshire	BH25 1LM
4	Mr	Peter	Lowe	4 Aldershot Close	Titchfield Common	Fareham	Hampshire	PO14 2DZ
5	Mrs	Deborah	Rogers	62 Pelican Meadow	Hightown	Ringwood	Hampshire	BH24 7YT

Set up your address list so that each column represents the smallest possible piece of information. For example, use separate columns for **First Name** and **Surname** rather than just a **Name** column. This practice gives you more flexibility in the presentation of your information. For example, if you store **Title, First Name** and **Surname** in separate columns, you can also use the mail merge to create letters that address each recipient by their first name or by their title and surname.

Data should be consistent and always entered in its relevant column. For example, if there is no town name, do not shift the data within **County** and **Post Code** across to avoid a blank entry. The Word template can identify empty fields, and close up the space where necessary.

Providing a well formatted Excel file makes it easier to set up fields in the Word template. Below is a sample letter. Because we have used intuitive labels it is easy to understand the layout of the address even without any of the data showing.

<Title> <First Name> <Surname>
<Address1>
<Address2>
<Town>
<County>
<Post Code>

Dear **<Title> <Surname>**

Hopefully this guide has demonstrated the benefits of investing a small amount of time at the beginning of the mail merge process to produce a well formatted Excel file, which will save considerable time and effort to create accurate letters for mailing out.