

Mail Merge - Set up

This guide is intended to assist you with the setting up of information using Microsoft Excel for use in a Mail Merge process.

The essential thing to understand is the set up of the column headers in Excel which will become the merge fields in the software to be used. Each merge field corresponds to a piece of the address to be printed i.e. recipients names, address lines of the location the mail is to be sent. The software used will extract the information in the columns and format into the correct layout for use.

The column header in the Excel file supplied should have clear identifiers as to the data in each column contents. Below is a example of the layout required which includes Title, First Name, Surname, Address 1, Address 2, Address 3, Town (which must be in CAPITAL letters), County and Post Code (in CAPITAL letters with a space between the two part in the correct position).

Title	First Name	Last Name	Address Line 1	Address Line 2	Address Line 3	CITY	Postcode
Mr	Alan	Other	44 The Crescent	Sussex Road	Weeke	WINCHESTER	SO88 9ZZ
Mrs	Ann	Smythe	22 Flower Street	Fairoak		SOUTHAMPTON	SO33 0TT

Set up your address list so that each column represents the smallest possible piece of information i.e. use separate columns for First name and Surname and do not combined these in one column and this should be the same for the address details. Adopting this approach gives the flexibility in the formatting of your information required. By using this method you can use the mail merge to create letter address recipients by their first name in a letter, without having to reset an additional column or data set for the letter/document and envelope/label.

The data should be consistent and always entered in its relevant column. For example if the address only has two line, do not shift the Town over as this will impact on the formatting. The software will remove blank line as required.

Provision of correctly formatted data in an Excel file will make processing the set up easier and more cost effective for you .

Below is and example of a correctly formatted address that meets the mail teams requirements. Using the correct labels it is easy to understand and ensure the correct format layout of the address information even without and of the working data showing.

```
«Title» «First_Name» «Surname»
«Address_1»
«Address_2»
«Address_3»
«CITY»
«Post_Code»

Dear «Title» «Surname»
```

```
Mr Alan Other
44 The Crescent
Sussex Road
Weeke
WINCHESTER
SO88 9ZZ

Dear Mr Other
```

```
Mrs Ann Smythe
22 Flower Street
Fairoak
SOUTHAMPTON
SO33 0TT

Dear Mrs Smythe
```

Preparing for dispatch

Please review the information supplied via the link provided below.

[A Guide to Sending out a Dispatch \(sharepoint.com\)](#)

Second class is the County Council's default choice as part of the continued cost savings. The delivery time for second class mail is two to three days. If there is a strong business case for the mail to be sent first class, then the delivery is one to two days. With Covid, the Royal Mail will attempt to deliver as published, but this is subject to staff availability.

The only guaranteed next day service is Special Delivery, which attracts additional charges when used, so should only be used when needed. Please refer to the following FM pages for more information on the postal services

[Facilities Management Post room Winchester \(sharepoint.com\)](#)