

## Microsoft 2008: Mail Merge: Using an Excel Database for Mail Merge

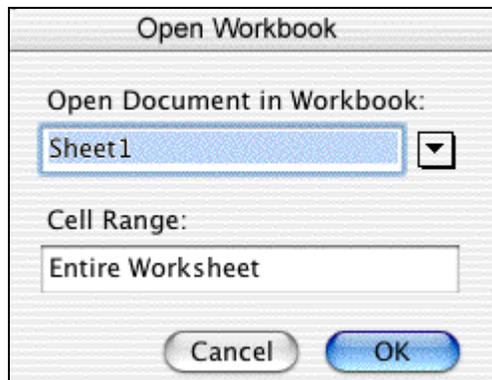
In addition to the features and functions of Excel that make your database useful, you can also use the database to merge information into Word for large mailings. This means that you will not have to duplicate information you already have in your Excel database to perform a mail merge.

These instructions assume that you have an understanding of the Word mail merge process.

**WARNING:** The field names of your Excel database must begin in the upper-left corner of your worksheet, cell A1 (the first row and column).

Navigating to your Excel data document is similar to selecting a Word data document.

1. Open a blank Word document
2. From the *Tools* menu, select **Mail Merge Manager**  
The *Mail Merge Manager* appears.
3. In the *Select Document Type* section, from the *Create New* pull-down menu, select **Form Letters**
4. In the *Select Recipients List* section, from the *Get List* pull-down menu, select **Open Data Source...**  
The *Choose a Data file* dialog box appears.
5. Locate and select the Excel workbook you will use for your list
6. Click **OPEN** The *Open Workbook* dialog box appears.



7. If your Excel workbook has multiple worksheets, from the *Open Document in Workbook* pull-down menu, select the worksheet containing your data
8. Click **OK**
9. If you have not already done so, write your letter
10. To insert merge fields from the *Mail Merge Manager*,
  - a. In the *Insert Placeholders* section, select the **Contacts** tab
  - b. Click and drag a field to the desired location in your document
11. To insert conditional statements from the *Mail Merge Manager*,
  - a. In the *Insert Placeholders* section, select the **More** tab
  - b. Click and drag a field to the desired location in your document

12. To preview your merged document, from the *Mail Merge Manager*, in the *Preview Results* section, click **VIEW MERGED DATA** 

A preview of your first recipient appears.

NOTE: For more information on editing the recipients' information, refer to Working with the Data Source.

13. To print the letters, from the *Mail Merge Manager*, in the *Complete Merge* section,

- a. Click **MERGE TO PRINTER**   
The *Print* dialog box appears.
- b. Make the appropriate selections
- c. Click **PRINT**

14. To save the merged letters as a separate file, from the *Data Merge Manager*, in the *Merge* section,

- a. Click **MERGE TO NEW DOCUMENT**   
NOTES:  
The merged letters appear in a new, unsaved document.  
Each letter is separated by a section break.
- b. Make any desired changes in the new document
- c. Save the new document