Mail Merge

Favorite links:

http://bit.ly/MMExcel1 learn basics of Mail Merge using Excel as input file.

https://www.gcflearnfree.org/word2016/mail-merge/1/
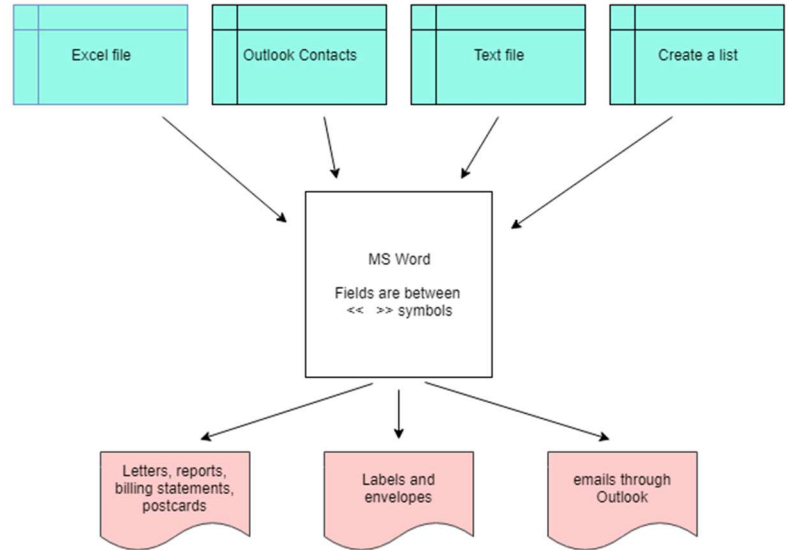
1. There are two ways to point Word to Excel: the Mail Merge Wizard or Mailings > Select Recipients > Use an Existing List, then find the correct Excel file, and then the desired worksheet. Note: the default is for Word to "see" the first sheet in a workbook. If it can't pick up anything else, you may have do a "SaveAs" in Excel to create another copy of the file, then point Word to the new file. Now it should be able to "see" all tabs. Goofy? Yes!

2. The headers must be in row 1. Headers should have useful names. If Word doesn't "see" the proper fields, use Mailings > Match Fields to hook up your field names to what Word uses for the Address Block, etc.

3. Identify how you want numbers and dates to be formatted. See Formatting Dates in another Word document. You may prefer to use the TEXT and CONCATENATE formulas in helper columns to format numbers, dates, and text in Excel.

4. Be familiar with Line and Paragraph Spacing in Word to make your Address Blocks (et. al) look how you want them to.

5. Printers in the Classroom and Computer Commons can only print 8.5" x 11" paper. The Copy Center can print 8.5" x 11", 8.5" x 14, and 11" x 17". No machine in the Library can print on labels nor envelopes. Save your output as a .PDF file and find another print shop (or at home or work)to address labels or envelopes.

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Formatting dates, time, and money in a Mail Merge.

This document works with MailMergeBookTwo.xls

Field	Straight from Excel	Using Text function in Excel first	Using Merge fields in Word.
Date	2/19/2018	Feb 19, 2018	February 19,2018
Money	45.99	$ 45.99	$45.99
Zip Code	6074	06074	06074

MS Office 2016 does not consistently import formatting applied in Excel. There are a few work-arounds.

Field	Straight from Excel	Using Text function in Excel first	Using Merge fields in Word.
Date	«StatementDate»	«TextSDate»	{ MERGEFIELD StatementDate \@ "MMMM dd,YYYY" }
Money	«Balance»	«TextBalance»	{ MERGEFIELD Balance \# $0.00 }
Zip Code	«Zip»	«TextZip»	{ MERGEFIELD Zip \# 00000}

When dates and numbers are merged from an Excel file, formatting can be stripped off.

Fix #1 – use the TEXT formula in Excel to create a column of text data already showing correct formatting.

Fix #2 – use Mergefield codes in Word to format numbers and dates.
- Insert a Merge Field into a Word document.
- Select field and press **<Shift + F9>**
- After the field name, enter a **\#** plus the numeric format, or **\@** plus the date format in quotes. The # is called a numeric switch.
- See http://techhelptoday.com/3-ways-to-fix-mail-merge-number-formatting-in-microsoft-word/ form more information.

Fix #3 – Use a DDE link, which no long works in Excel 2016.

Code	Sample Result
00.00	01.10
#,##0.##	1.1
D or d	1
DD or dd	01
DDD or ddd	Tue
DDDD or dddd	Tuesday
M	1
MM	01
MMM	Jan
MMMM	January
YY or yy	99
YYYY or yyyy	1999
H or h	1
HH or hh	01
M	1
Mm	01
S or s	1
SS or ss	01
H	23
h am/pm	11 PM