Mail Merge in Microsoft Word

Last Updated: Grace Inman, June 2025

**Set up root directory:**

Download the following files and folders into one root directory:

1. PHOTOS folder
2. LocationSketch folder
3. 2025\_Mailing\_Regulator Summary Information.xlsx
4. Mailing\_2024 New Bedford Regulator Specification Sheet.docx

**Update File Paths:**

The mailmerge uses the figure paths listed in the spreadsheet to find the correct images. If the root directory changes, then the file paths need to be updated.

1. Open 2025\_Mailing\_Regulator Summary Information.xlsx
2. Update the file paths in the formulas in columns AF (LocationSketch), AP (Figure1), AQ (Figure 2), AR (Figure 3), and AS (Figure 4).
   1. Example: =CONCAT(*Root\_directory*\PHOTOS\",$D2,"\",AQ$1,".jpg")
3. You can use the **Replace** tool in excel to bulk replace the old directory with the new directory

**Setting up a Mail Merge:**

1. Open Mailing\_2024 New Bedford Regulator Specification Sheet.docx
2. Go to the **“Mailings”** Tab on the Ribbon
3. Click **“Select Recipients”** and choose **“Use an Existing List”**
4. Navigate to the spreadsheet where the data is saved and open it. A new dialog box will open:
   1. Choose the sheet that has the relevant data in it
   2. Make sure “*First row of data contains column headers*” is selected
   3. Click “OK” and the data is now linked to this word document.
5. To see if the fields are formatted and populated as intended, click the **“Preview Results”** button in the “Preview Results” Section under the “Mailings” tab on the ribbon. Clicking this button again will return the merge fields to their original format.
6. Using the **arrows** in the “Preview Results” section, it is easy to navigate through all the rows of data to see how they are being populated using the mail merge.
   1. It is sometimes more helpful to format the document with “Preview Results” turned on. This allows the user to see the changes they are making and how it affects the final outcome in real time.
7. Once finished, Press **“Finish & Merge”**, and then choose the type of export to do.

**Other Helpful Tips:**

1. The “Check for Errors” button will simulate the mail merge and report any errors that may occur, for example, a file path that is incorrect.
2. This feature can be buggy, so make sure to save often and don’t be afraid to close everything and re-open it.