TechCamp Online: Mail Merge 2010 Cheat Sheet

This sheet accompanies TechCamp Online: Create Merged Documents to Reach Donors with Word/Excel 2010 for Windows users. This contains step-by-step instructions for the skills we covered in the online training.

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Prep for a Fundraising Appeal Mail Merge

When approaching a set of data that you're going to use for a multi-step process like a fundraising appeal, there are a number of steps you should always go through:

- Set goals
- ID your audience
- Collect data (ongoing)
- Review & clean your data – how clean is it?
- Look at history – make some reports and visualize data to make decisions
- Segment your data
- Create merged documents for each list

Best Practices of Data Collection

- Accurate first and last
- Nickname or name they go by
- Cell and landline, labeled
- Email
- Preferred method of contact
- Home address

- Any other key info for your work – example: issues interest, reason for giving

Database notes

- A good database would easily be able to make a list of who gave in the past two years.
- We're not going to cover this, but you do need to get your data into Excel. We're going to assume you know how to do this. The single thing I'll say about this is **remember to always include contact ID's** (sometimes called a primary key) when exporting from your database. First and last name by themselves aren't enough to distinguish someone as unique.

Publication 28: Addressing Standards

http://pe.usps.gov/cpim/ftp/pubs/Pub28/pub28.pdf

Shortcuts in Word & Excel

- Ctrl+a = select all
- Ctrl+s = save
- Ctrl+c = copy
- Ctrl+v = paste

Make Sure Your Data's Ready

Ensure your Excel spreadsheet has only one kind of information in each column (i.e. first name is separate from last name, city is separate from state). Refer to the ______ on PTP's Power On Network (http://network.progressivetech.org/trainings/ms-excel/techcamp-online-create-merged-documents-to-reach-donors-windows-nov-15-2012)

What do we mean by clean data?

Data has to be "clean" and accurate to be useful. Clean mostly means consistent.

Taking the accompanying spreadsheet, Practice File for Intermediate Excel, if we want to narrow our data down to get information about everyone in Brooklyn, NY, or everyone with a dues amount of $25, we can only do this if we give Excel consistent, correctly spelled and formatted data to manipulate.

"Dirty" data is missing info, is incorrect, or inconsistent – for example, when there are two spellings of a word, e.g. Bklyn vs. Brooklyn.

Spreadsheets & databases are not intelligent. Excel can't know that Bklyn and Brooklyn refer to the same thing – and they really shouldn't since they're two different words. The data is only as good as the person's attention is who enters it.

Big Picture

- Format a document.
- Connect it to a list of data.
- Produce a bunch of copies of the document for each person in the data.
- Use this anytime you're producing more than 10 copies of something that need to be personalized.

Writing a mass letter

Using Sample Letter.docx, or your own letter, follow these steps to include information from an Excel spreadsheet.

1. First, ensure that the Excel spreadsheet you're using is closed. Make sure to save it in the same folder your letter will be saved.
2. Open a new document in Word 2010, type your letter, and save it.
3. In your letter, click the **Mailings** tab.
4. Go to the **Mailings** tab. Click **Start Mail Merge**.
5. Click **Select recipients**.
6. Select **Use Existing list**.
7. **Browse** to the Navigate to the Excel spreadsheet and click **Open**.
8. If the document has multiple tabs, choose one tab to get data from. Check box **First row of data contains column headers**. Click **Ok**.
9. At this point, you may click Edit Recipient List in the Mailings tab to sort or filter your data, exclude records, and more. Once done, click **Ok**.
10. Write your letter.
11. To include contacts' name and address, click in your document where you'd like it to appear, and click **Address Block**.
12. Decide how names should be displayed, what you want to include in the address, and click **Ok**.
13. At this point, if your columns are not named in a way that reflects their content, you can click **Match Fields** to make sure the Address Block is fully filled out.
14. Click **Greeting Line** to add greeting to your letter.
15. To use any other data in the spreadsheet, click **Insert Merge Field**. Choose the column heading you want to insert into the letter.

If…Then…Else

This type of rule allow you to include text only for some recipients based on criteria. For example, you might want to add an additional paragraph for folks who haven't given in over a year.

In the **Mailings** tab, click **Rules** and select **If…Then…Else.**

Enter this information in the fields below:

- Field Name: Date_of_Most_Recent_Gift
- Comparison – less than
- Compare to: 11/10/2011
- Insert this text: "**You have supported us before. We need you now more than ever**."
- Otherwise insert this text: "**Thanks for giving last year. Your contribution says that we're in this together, and we thank you for being part of the work we take on in our community.** Etc"

How else might you personalize this letter for the recipient? You can insert a special message based on issue interest, age, reason for giving, if they've volunteered, or any other data you have.

16. While composing your letter with merge fields, at any point you can click **Preview Results** in the **Mailings** tab. This will allow you to check your Rules set-up and check it against your Excel document to make sure you've set up the rules correctly.
17. Once done including merge fields, click **Finish & Merge**.
18. Click through using the arrow buttons in the panel to preview how the fields show up when filled with actual data. You can also exclude recipients while previewing. If anything is amiss, you can delete the merge fields and repeat any of the steps to make corrections.
19. Click **Next: Complete the merge**.
20. Click **Finish & Merge** and select **Edit Individual Documents** to generate all the letters that you've created. This is recommended rather than sending to the printer before reviewing.

Making Labels (or Nametags)

1. Open a blank Word document.
2. Click to the **Mailings** tab.
3. Select **Start Mail Merge** and choose **Labels** from the dropdown menu.
4. To choose which label, click **Options**. Select **Avery US Letter** for **Label Vendors**.
5. Scroll to **5160 Easy Peel Address labels** (or the label number that matches whatever paper/labels you'll be printing on). Click **Ok**.
6. This will create a document with the dotted outline of the labels you've chosen.
7. Just as in the letter, click **Select Recipients** and select **Use Existing list**.
8. **Browse** to the Excel spreadsheet and click **Open**.
9. If the document has multiple tabs, choose one tab to get data from. Check box **First row of data contains column headers**. Click **Ok**.
10. Automatically, all but the first label should be filled with what's called a *merge field* that looks like **<<Next Record>>.** If they don't, click **Update Labels** in the **Mailings** tab. **<<Next Record>>** tells the document to get data from the next record (also known as the next row) in the Excel document. If you don't have **Next Record** in a label, you will print two of the same labels in a row. (Keep this in mind if you DO want to print a bunch of the same thing out using mail merge!)
11. At this point, you may click Edit Recipient List in the Mailings tab to sort or filter your data, exclude records, and more. Once done, click **Ok**.

12. To include contacts' name and address, click in the first label where you'd like it to appear, and click **Address Block**. Decide how names should be displayed, what you want to include in the address, and click **Ok**. Make sure the **Address Block** contains everything needed to send a letter.
13. Click **Update Mailings** so that the **Address Block** shows up everywhere **<<Next Record>>** is.
14. While composing your letter with merge fields, at any point you can click **Preview Results** in the **Mailings** tab. This will allow you to check your Rules set-up and check it against your Excel document to make sure you've set up the rules correctly.
15. Once done including merge fields, click **Finish & Merge**.
16. Click through using the arrow buttons in the panel to preview how the fields show up when filled with actual data. You can also exclude recipients while previewing. If anything is amiss, you can delete the merge fields and repeat any of the steps to make corrections.
17. Click **Finish & Merge** and select **Edit Individual Documents** to generate all the letters that you've created. This is recommended rather than sending to the printer before reviewing.
18. Alternately, you can also remove **<<Next Record>>** from the second two labels in each row. This will produce 3 labels for each person. This might be handy for making name tags.
19. If you want to create cheap, personalized address labels (or envelopes) for your organization, you would prepare a spreadsheet with your organization's address info. You would not use **<<Next Record>>** at all – only your organization's data would show up in every label.

Making a Call List (or a document with a table or unusual format)

1. From your formatted Word document (Sample Call List.docx), click to the **Mailings** tab.
2. Select **Start Mail Merge** and choose **Directory** from the dropdown menu.
3. Click **Select Recipients** and select **Use Existing list**.
4. **Browse** to the Excel spreadsheet and click **Open**.
5. Make sure you select **First row of data contains column headers** (to prevent the column headers from getting fed into one of your labels). Click **Ok**.
6. In the **Name** column, insert **first** and **last name**, and even better, **nickname**.
7. Insert **Landline Phone** in the **Phone** column.
8. Insert **Address Block**.
9. Use an **if…then…else** rule to insert the ask amount into the **Sugg. Amt** column.
10. If **Most Recent Gift** is **Less than or Equal** to **35**, ask for **$35**. Otherwise, insert **$60**.
11. Leave **Pledged** and **Updated Contact** Info blank. These are for your callers to insert.
12. In Issues Interest, use another if…then…else rule. If Issues Interest is Equal to Immigration Reform, insert Y. Otherwise, don't do anything. Do the same in each box of Workers Rights, Racial Justice, and Economic Justice. This could potentially connect to a script for the callers to say something about recent work related to their interest when making the ask.
13. Copy and paste all the merge fields into the next three rows.

14. Click **Preview Results** in the **Mailings** tab. This will allow you to check your **Rules** set-up and check it against your Excel document to make sure you've set up the rules correctly.
15. Once done including merge fields, click **Finish & Merge**.
16. Click through using the arrow buttons in the panel to preview how the fields show up when filled with actual data. You can also exclude recipients while previewing. If anything is amiss, you can delete the merge fields and repeat any of the steps to make corrections.
17. Click **Finish & Merge** and select **Edit Individual Documents** to generate all the letters that you've created. This is recommended rather than sending to the printer before reviewing.

A Note About a Directory Mail Merge

Creating a directory for mail merge can be totally open – call list, walk list, attendance sheet, etc. It's a different from the other kinds of data merge documents. In Word, a catalog means a document in which the information from your data source is listed in whatever format you choose. So, a catalog could be used to create a membership roster, a call or walk sheet, a staff directory, or even a true catalog that lists items and their descriptive info.

There's two ways of formatting a directory document in Word. If you just want something like a participant list or other list, then you insert one set of the merge fields that you want to include. So, if you want to include the first name, last name, city and state from each record, you'd just include each of those merge fields once, formatted as you wish. Then, when you merged the documents, Word would include the info for each record, formatted according to your specifications. An important thing to note here is that you must include any spacing and line breaks that you want after each record's info in the main document, or everything will run together in the merged document. So, if you want a line to be skipped after each record, you need to press return twice after the last merge field for that record.

You can also create a catalog with a special layout, like a call sheet that uses a table to divide up information. In this case, you'd need to actually include a set of merge fields for each time you want a record to appear on each page, preceded by a <<Next Record>> field. So, if your call sheet is set up with three rows on each page, each of which include one person's contact info, you'd include three sets of the merge fields for that contact info, and the second two sets would be preceded by a <<Next Record>> field.

Mail Merged: A Living Document

Notice that if you make any changes to the Excel sheet from which your Word document is generating it's content, they will show up automatically next time you open the merged document. Close all of your documents, and update the spreadsheet, and that will auto-update the merge document that's pulling info from the spreadsheet. Next time you open the Word document, the merged content will reflect the new Excel content.