

Mail Merge Instructions

Permission to sample must be granted by private landowners and land grant leadership before probabilistic sites can be placed in the sampling queue. Mailers with a letter explaining the survey and the location of interest, as well as a post card with pre-paid postage granting or denying SWQB permission should be mailed out to land owners and land grants. An easy way to create a large shipment of mailers with many associated addresses is to use the “mail merge” function in Microsoft Word.

1. Create an Excel .csv file with the list of sampling sites on private land for which permission is desired. A new column should be used for each individual piece of information (e.g. landowner first name should be in a separate column from the landowner’s last name). Column headers that should be included for envelope and postcard addresses are “First Name,” “Last Name,” “Street Address,” “City,” “State,” and “Zip code.” Other information such as Site ID, Stream Name and Latitude and Longitude may also be included in the same .csv file with the landowner names and addresses. This information will be used for mail merge within the stream permission request letter.

Addressing envelopes with Mail Merge

- a. Locate and open the SWQB envelope template in Microsoft Word
- b. To add mailing addresses to the envelope, open up the template in Microsoft Word and select the “Mailings” tab. Select “Start Mail Merge” from the menu ribbon.
- c. Choose the kind of merge you want to run. For envelopes, select “Envelopes...” then “OK.”
- d. In the “Mailings” menu ribbons select “Select Recipients” > “Use an Existing List”.
- e. Find your .csv Excel file, then select “Open,” then “OK”
- f. Select “Finish and Merge.” Select “Edit individual documents” > “All.” All addressed envelopes should appear and can be individually edited and printed as needed.

Return addressing postcards with Mail Merge

- a. Locate and open the SWQB postcard template in Microsoft Word
- b. To add return mailing addresses to the postcard, open up the template in Microsoft Word and select the “Mailings” tab. Select “Start Mail Merge” from the menu ribbon.
- c. Choose the kind of merge you want to run. For envelopes, select “Normal Word Document...” then “OK.”
- d. In the “Mailings” menu ribbons select “Select Recipients” > “Use an Existing List”.
- e. Find your .csv Excel file, then select “Open,” then “OK”
- f. Select “Finish and Merge.” Select “Edit individual documents” > “All.” All return
- g. addressed postcards should appear and can be individually edited and printed as needed.

Addressing Stream Request Letter with Mail Merge

For the Stream Request letters mail merge can be used to address the landowner in the letter header, as well as to include the stream of interest and GPS coordinates.

- a. Select Mailings > Start Mail Merge > Letters
- b. Select “Select Recipients” in the menu ribbon and “use an existing list.” Select the desired file and select “OK”
- c. Select Finish and Merge.

2. Note that column headers in the Excel file must match the fields in the Word document of interest. Fields in the word documents available for mail merge must have underscores in place of spaces. For instance, if the field in the word document specifies «Zip_code» the corresponding column in excel should be “Zip code” not “Zip_code” or “Zip.” If the field in the word document is «GSP
3. Once the Recipients list has been selected, merge fields can be edited, added, and removed by using the “Insert Merge Field” and selected the desired field or by right clicking on the merge field that needs to be edited or removed.