

Merging an Excel Spreadsheet with a Word letter

Creating an Excel file to contain your merge data, or variables, is an excellent way of managing that data - particularly if you have a long list, as many people find the management of long lists to be easier in Microsoft Excel is much easier. The resultant merge works perfectly if your data is text only and with the proviso is that Row 1 is where you must create your field names, and Column A must contain the first field name.

However, if your Excel file contains values or dates you may not be happy with the results of the merge. Word will not recognise the formatting you have applied in Excel and will automatically reformat your data as follows:-

- **Dates** – if you have formatted your dates to display as 29/06/11 or 29 Jun 11, for example, Word will convert them to the American format, eg 06/22/11 or Jun 29, 11.
- **Currency** – when merged with the Word letter all your Excel formatting is ignored and \$3.50 in Excel will display as 3.5 in Word.

Formatting Currency

When you format currency in Excel, use the Currency format. If you use the Accounting format there will be a gap large between \$ symbol and the value in the merged letter.

How to Solve the Problem

One Merge Run

If you only need to merge once it is extremely simple. Copy the data from Excel to Word, which retains your formatting for dates and currency.

All you need to do is:-

1. Start a new file in Word.
2. Switch to the Excel file containing your data.
3. Highlight your merge data.
4. Choose Copy using your preferred method - right click and choose Copy; click Copy on the Ribbon; press Ctrl + C.
5. Switch back to the new file in Word.
6. Choose Paste using your preferred method - right click and choose Paste; click Paste on the Ribbon; press Ctrl + V.
7. Save the file.

You can now close that file and set up your merge letter as normal.

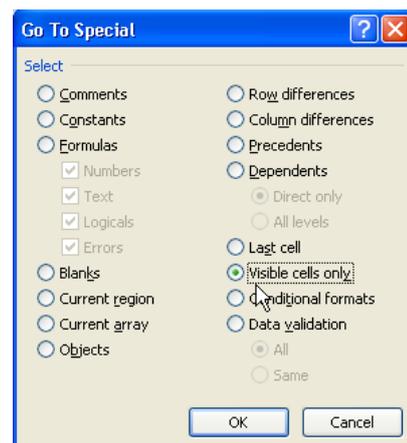
Multi Merge Runs

In this situation you may be constantly adding data to your Excel file. For data management and reporting purposes you will probably be keeping the data on the one sheet. If this is the case, there are a few more steps required, but the resultant merge will still give you your desired results.

Firstly you will need to hide the rows containing the data that has already been merged. When you highlight the data in Excel, you will still be selecting those rows even though they are hidden, so you will need to take a few extra steps to ensure you only copy the visible data, and not every piece of data in the sheet.

The steps to use in this situation are:-

1. Open the Word data file.
2. Delete the **entire** data table.
3. Add your new data to your Excel sheet.
4. Highlight from row 2 down to the last row that has already been merged.
5. Right click on any row number in the highlighted range.
6. Select **Hide** from the menu. Keyboard shortcut Ctrl + 9.
7. Highlight the remaining data in the Excel sheet.
8. Click on **Find & Select** on the Home tab's ribbon.
9. Click on **Go To Special...** in the drop down menu.
10. Click on **Visible cells only**. Keyboard shortcut Alt + ;.
11. Click **OK**.
12. **Copy** the highlighted data using your preferred method.
13. Switch to your Word document.
14. **Paste** the copy into the blank word document.
15. **Save** the document and close.
16. Run the merge as normal.



The reason for suggesting that the “old” data in the Word file is deleted is because the letter in Word has been linked to the data file. Therefore, it is easier to use that file for each merge as you run it.

Unhiding Rows

Once you have completed the merge you will probably need to unhide the rows in Excel.

To do this you:-

- Highlight one row either side of the hidden rows, probably starting at row 1.
- Right click on a row number.
- Select **Unhide** from the menu. Keyboard shortcut Ctrl + Shift + (.
- Save your Excel file again.