

Microsoft Word 2007 - Mail Merge

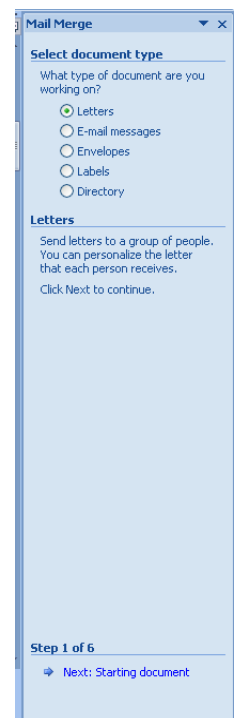
Mail merge is a tool which allows you to create form letters, mailing labels and envelopes by linking a main document to a set of data or data source. It is the process of combining a list of data with a template.

The mail merge process involves the following:

- **The Main Document** – contains the text and graphics that are the same for each version of the merged document.
- **Data Source** – a file that contains the information to be merged into a document. For example, the names and addresses of the recipients of a letter.

Mail Merge – Form Letters

- 1) Open **Microsoft Word**
- 2) Type the letter with all needed text and formatting leaving areas for the data source data blank (ex name, address...)
- 3) Click the **Mailings** tab
- 4) Click **Start Mail Merge**
- 5) Click **Step by Step Mail Merge Wizard**



The **Mail Merge task pane** appears on the right of your screen. Note there are 6 steps.

Step 1

- 1) Click **Letters** for the document type
- 2) Click **Next: Starting document**

Step 2

- 1) Click **Use the current document** under **Select starting document**
- 2) Click **Next: Select recipients**

Step 3

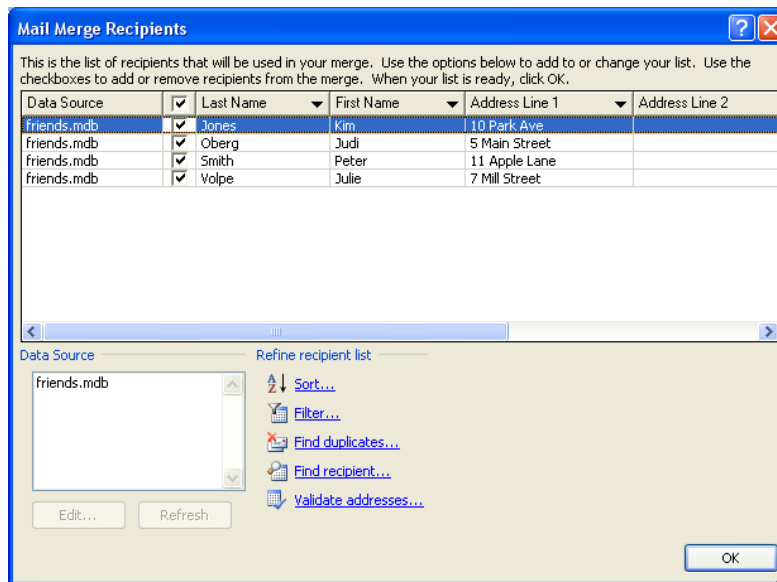
The recipients can come from either an existing Excel file, or Access table or you can create a new list.

If Using an Existing List:

- 1) Click **Use an existing list** under **Select recipients**
- 2) Click **Browse**
- 3) Select the file
- 4) Click **Open**

Mail Merge Recipients opens showing the names and addresses from your file

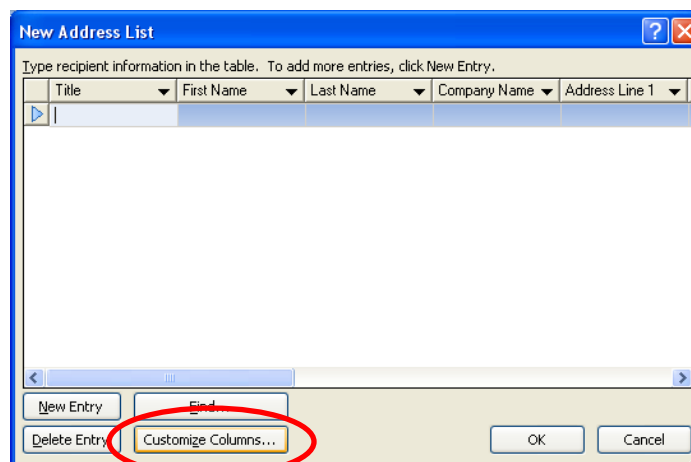
- 5) Click **OK**

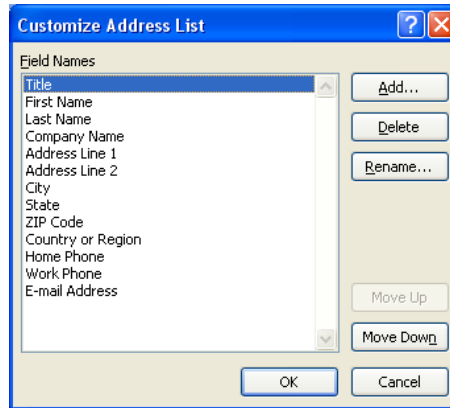


- 6) Click **Next: Write your letter**

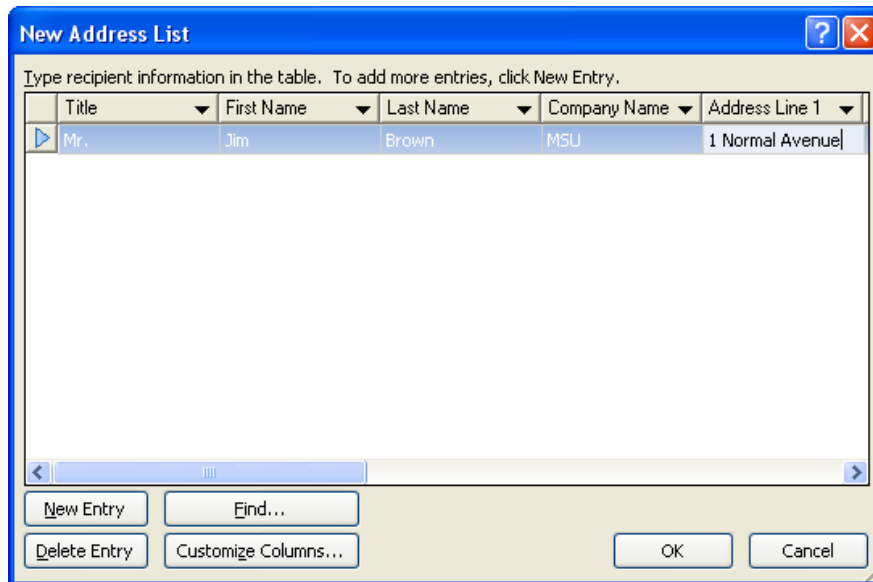
To Type a New List:

- 1) Click **Type a new list** under **Select recipients**
- 2) Click **Create**
- 3) Click **Customize Columns** to modify the list of fields





- 4) Delete any unnecessary field names and/or add new ones
- 5) Click **OK**
- 6) Type records here hitting **TAB** to advance to the next field and to continue adding new records



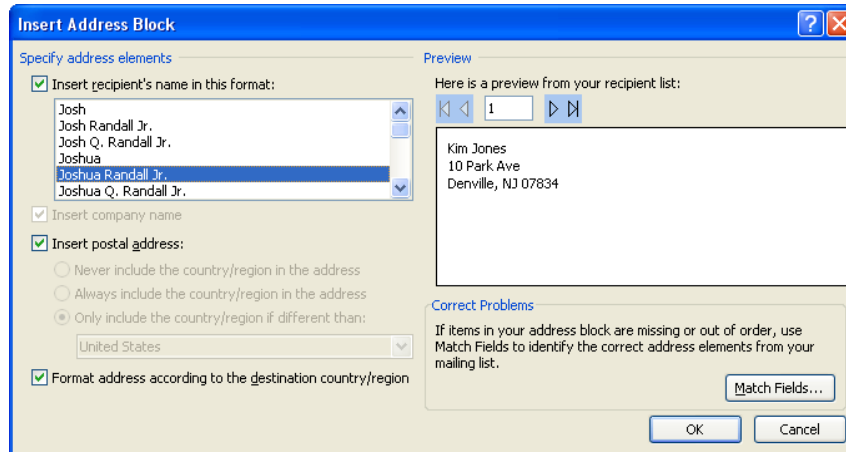
- 7) Click **OK**
- 8) Click **Save**

The recipients list will be saved as a separate file as a Microsoft Access file type. It is saved in the **My Data Sources** folder. It is recommended to save the file in this folder.

- 9) Click **Next: Write your letter**

Step 4

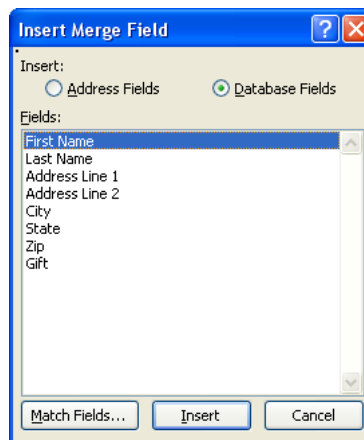
- 1) Click the location in your document where the data from the mail merge fields need to be inserted
- 2) Click **Address block...**
- 3) Select the address elements you want included
- 4) Click **OK**



The field name will look like this: <<**AddressBlock**>>

The Address block will insert the following fields including any necessary punctuation: First Name, Last Name, Company, Address 1, Address 2, City, State, Postal Code.

If your fields do not match the ones listed above or you have additional fields, click **More items...**



- 5) Click on the field from the list
- 6) Click **Insert**
- 7) Click **Close**

The field name will look like this - «**First_Name**»

- 8) Repeat this step until all fields have been inserted. Remember to put spaces and punctuation where needed.
- 9) Click **Next: Preview your letters**

Step 5

Here is where you can preview the first page with the fields filled in.

Click **Next: Complete the merge**

Step 6

To Complete the Merge:

- 1) Click **Print** to send directly to the printer
- 2) Click **Edit individual letters** to create a new file

Remember to save your document as you go. The next time you open your document and click on **Step by Step Mail Merge**, the data file will be attached.

Mail Merge – Labels

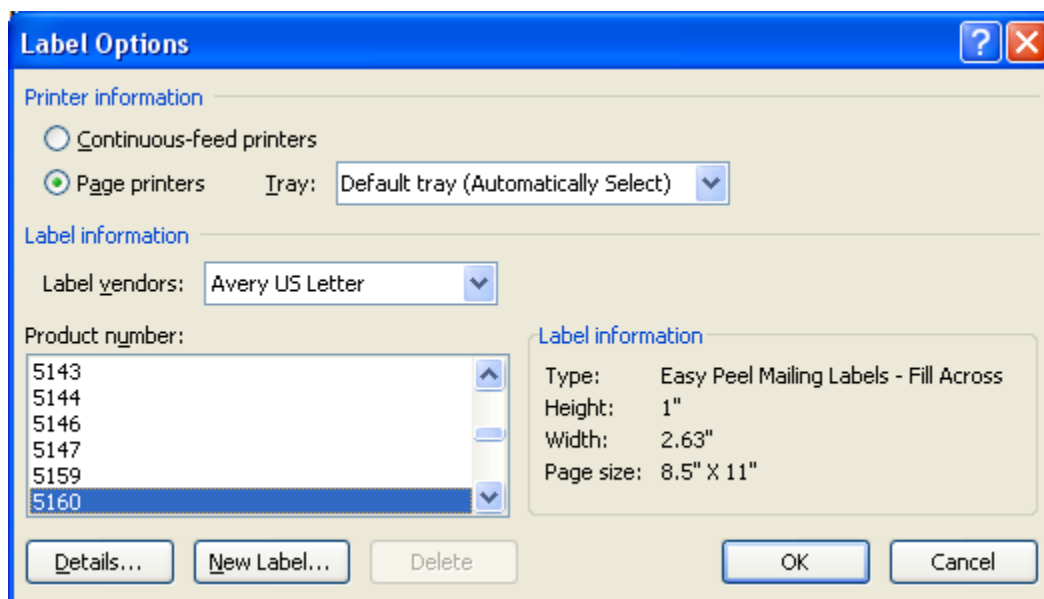
- 1) Open a new blank document
- 2) Click the **Mailings** tab
- 3) Click **Start Mail Merge**
- 4) Click **Step by Step Mail Merge Wizard**

Step 1

- 1) Click **Labels** for the document type
- 2) Click **Next: Starting document**

Step 2

- 1) Click **Label** options under **Change document layout**
- 2) Choose the label style you are using
- 3) Click **OK**



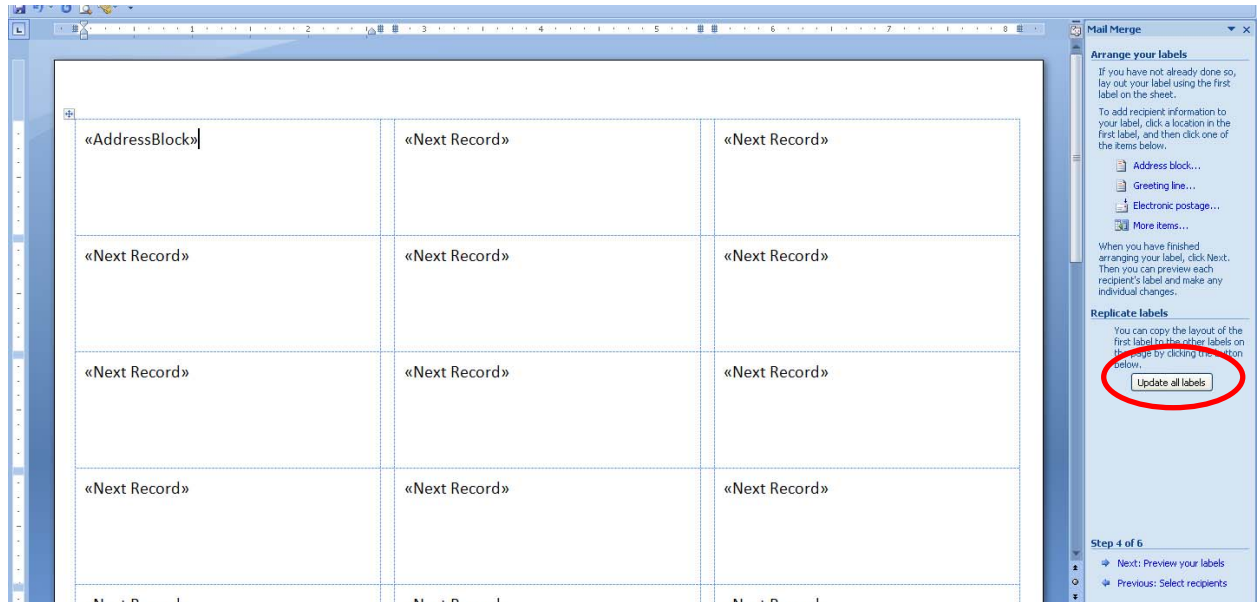
- 4) Click **Next: Select recipients**

Step 3

- 1) Click **Use an existing list** under **Select recipients**
- 2) Click **Browse**
- 3) Select the file that contains the names and addresses
- 4) Click **OK**
- 5) Click **Next: Arrange your labels**

Step 4

- 1) Click in the first label box and click on either **Address block** or **More items** to insert the data fields



- 2) Click **Update all labels** to include the fields on all labels
- 3) Click **Next: Preview your labels**

Step 5

Here is where you can preview the labels.
Click **Next: Complete the merge**

Step 6

Click **Print to send directly to the printer**
OR
Click **Edit individual labels** to create a new file