

Microsoft Word 2007

Mail Merge: Quick Reference

Word 2007 provides easy access to all the commands necessary for creating a mail merge. These commands are available in the *Mailings* command tab on the *Ribbon*. For users unfamiliar with creating mail merges, the commands progress from left to right across the *Ribbon* in the order that they are needed for a successful mail merge.

NOTE: Although Mail Merge can be used for many types of documents, this document uses the example creating a Mail Merge letter.

STEP 1: Set up the main document

The Main Document is the generic Word document that will serve as a template for your customized merged documents. It contains everything that will stay the same for each instance of the merge.

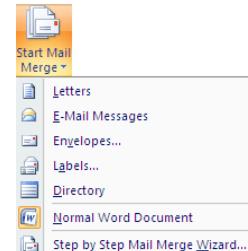
- In Word, open the file you are using for your merge, or create a new, blank document if you are starting from scratch.



- Click **Start Mail Merge** on the Mailings tab in the Start Mail Merge group.
- Choose the type of document you are merging (letter, directory, etc.).

Your options for choosing a document type include the following:

- | | |
|-------------------------|--|
| Letters: | Allows you to tailor one letter to many individuals |
| E-mail messages: | Allows you to personalize generic messages for individual recipients and send them via email |
| Envelopes: | Allows you to print envelopes with different addresses |
| Labels: | Allows you to print labels with different addresses |
| Directory: | Allows you to gather varied but related information into a list. For example, to create a departmental or organizational directory, list the names, office locations, and phone numbers. |



STEP 2: Select the recipients (data source)

Your data source is the table of individual records that will be used to customize your merge. Your data source could be an Excel spreadsheet, a table in Word or Access, or even a comma separated text list.

- A. On the Mailings tab in the Start Mail Merge group, click **Select Recipients > Use Existing List**.
NOTE: Other options include "Type a new list..." (Allows you to create your own list by typing each recipient) and "Select from Outlook Contacts..." (uses your Outlook contacts as recipients).



- B. **Browse** to your data source.
C. If necessary, select the specific spreadsheet or table that contains your data.

STEP 3: Organize your data

In this step, sort your data and if necessary filter out unwanted data.

- A. Click **Edit Recipient List** on the Mailings tab in the Start Mail Merge group.



- B. Arrange data by clicking on the name of the column by which you wish to sort.
Example: If you would like to sort by last name, click on LastName.

STEP 4: Insert Merge Fields

- A. Place the cursor in the document where you would like the data to appear.
B. On the Mailings tab in the Write & Insert Fields group click the bottom half of the **Insert Merge Field** button.
A menu based on the fields in your data source appears.
C. Choose the correct field from the drop-down menu.
D. Repeat until all desired fields are entered.

NOTE: Word has a number of pre-formatted entries along with the fields from your recipient list. Using these fields ensures that the desired information from each entry will be inserted into your document. Frequently used options include the following:

Address block: Allows you to specify the format of your recipients' names, whether to insert the company name and postal address, and the format of the postal



address

Greeting Line: Allows you to format how the greeting line will appear (e.g., Dear Mr. Randall,) and choose which format to use for unknown names (e.g., Dear Sir or Madam,)

Insert Merge Field: Allows you to insert fields for a variety of common options (such as the first or last name, phone number, or state of each recipient)

STEP 5: Use rules if desired

- A. Rules are located on the Mailings tab in the Write & Insert Fields group.
- B. Select the desired rule:
 - If you would like to customize the content of your merge for certain groups, use the If...Then...Else... rule.
 - If you would like to exclude an entire group, use the Skip Record If... rule.

STEP 6: Preview your documents

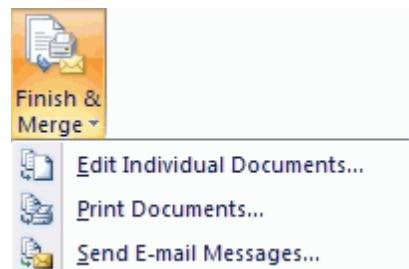
At this point, you are almost ready to merge. Before you do so, it is a good idea to preview your documents.

- A. Click **Preview Results** in the Preview Results group.
The document addressed to the first recipient is previewed.
- B. Browse through the documents for the other entries by clicking the **Previous** and **Next** buttons.

STEP 7: Finish and create your merged document

- A. On the Mailings tab in the Finish group click **Finish & Merge** > **Edit Individual Documents...**

Look over your merged document carefully, and if adjustment is necessary, close it without saving and return to your Main Document. If your merged document is beautiful, save and print as desired.



Reusing Main Documents

Main Documents can be saved to use for future merges. Just make sure everything is set up properly – your records are sorted correctly, and the correct recipients are selected – before performing a new merge.

Turn on Field Code Highlighting (do this once)

When you are merging, you use fields to specify the spots in a document where customized information will occur. It can be confusing to see these fields mixed in with normal text. It is a good idea to turn on field shading. To do this:

1. Click the Office Button.
2. Click **Word Options**.
3. Click **Advanced**.
4. Scroll to the **Show document content** section.
5. From the Field shading: drop-down menu choose **Always**.
6. Click **OK**.

Resource: <http://www.uwec.edu/help/Word07/MM-wizard.htm>

See also: <http://www.msoffice-tutorial-training.com/word-2007-mail-merge.html>