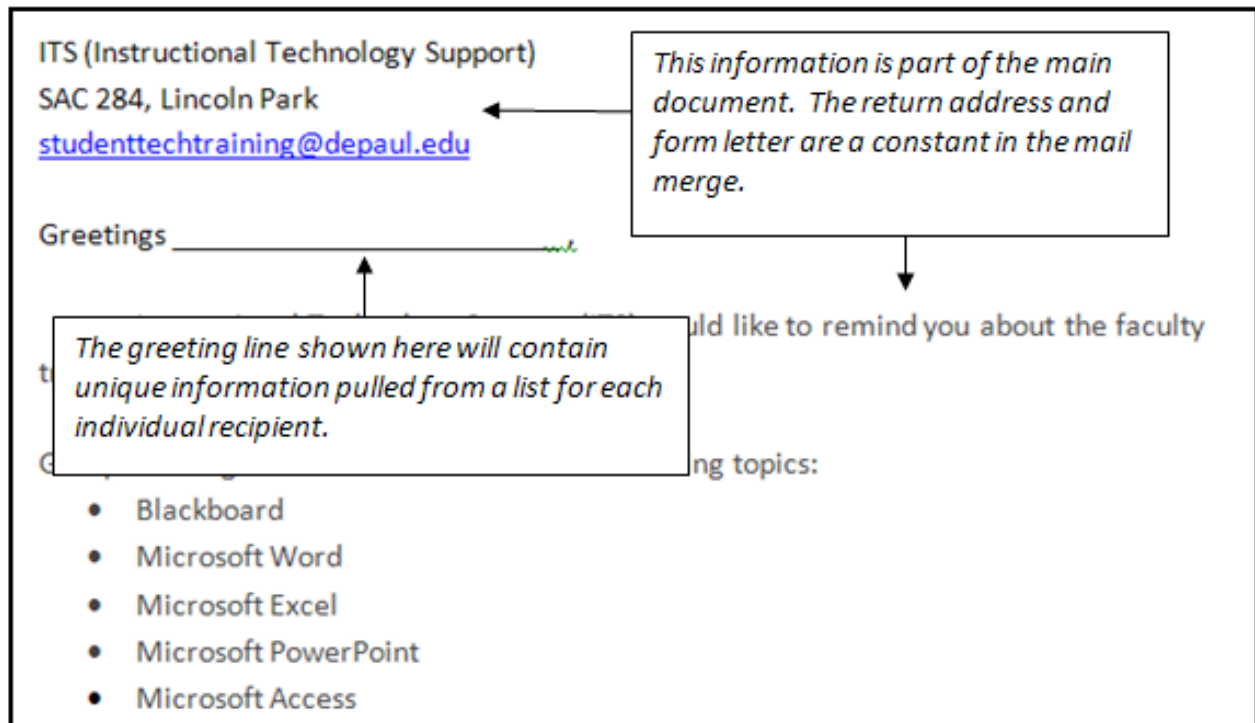


Advanced Microsoft Word 2007 Quickguide

Performing a Mail Merge

Mail Merge Overview

- The mail merge process allows for merging information such as contact names or addresses to a main document such as an envelope, fax, letter, or email. Thus, it allows for mass mailings that merge unique information such as a recipient names or addresses to one main document.
- Only two things are needed for a mail merge. These two things are a recipient list with contact information and a main document such as a letter or an envelope.
- An example of a finished mail merge document can be seen below demonstrating both types of information:



Creating a Recipient List

- Again, the recipient information in a mail merge is what will be unique in the merged copies that are created. This information may be in the form of addresses on envelopes or names in a greeting line of a letter.
- This information must come from a list or data source. For a mail merge, you will want this information to come from an Excel Spreadsheet, Access Table, Outlook contact list, or even a table in Word.
- Hopefully, before performing a needed mail merge, you will already have a contact list that has been created. However, one thing to keep in mind is that all of these data sources will be organized in columns and rows. The columns will become fields in the mail merge and the rows will be individual records for each recipient.
- One thing to keep in mind is that to provide the greatest flexibility and control with the merge, it is a good idea to create as many fields as needed. For example, make sure to create a First and Last Name field instead of just a Name field as shown below:

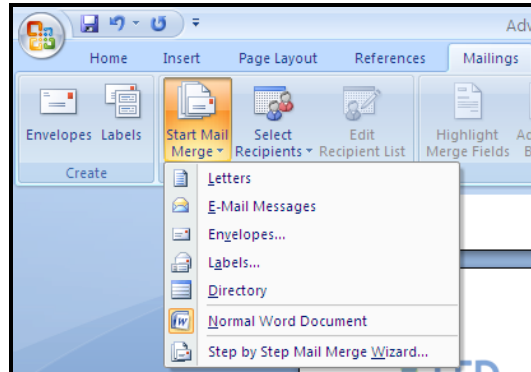


	A	B	C	D	E	F
1	First Name	Last Name	Address	City	State	Postal Code
2	Nancy	George	1234 Kenmore	Chicago	IL	60647
3	Joe	Healy	4321 Fullerton	Chicago	IL	60653
4	Hank	Lee	901 Jackson	Chicago	IL	60613
5	Erin	Smith	5643 Madison	Chicago	IL	60614
6	Will	Johnson	123 Webster	Chicago	IL	60657
7	Ted	Tallman	2314 Racine	Chicago	IL	60647
8	Ken	Zep	4356 Sheffield	Chicago	IL	60614
9	Mike	Leafer	3214 Fullerton	Chicago	IL	60613

Performing a Mail Merge Using the Mail Merge Wizard

- Make sure that you do have a recipient list created
- Open a document in Word if you are going to be merging a letter. Otherwise, if you are merging and creating something such as an envelope, just open a blank document.

- Once you have a blank document or a document open go to the **Mailings** menu tab. Click **Start Mail Merge** and you will see the available categories for creating a Mail Merge. This is shown below:

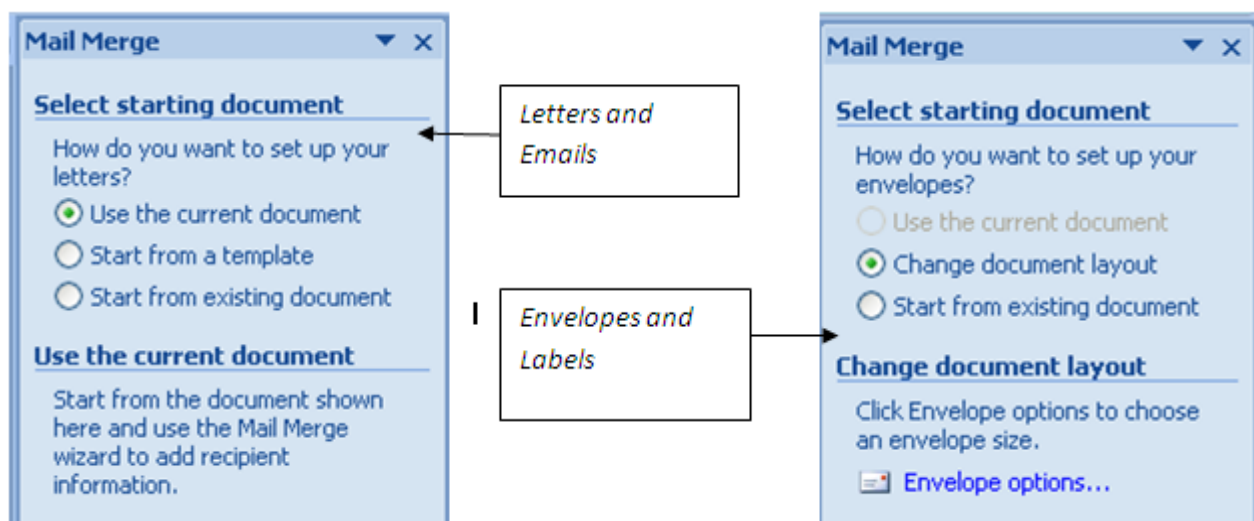


- Click on **Step by Step Mail Merge Wizard**

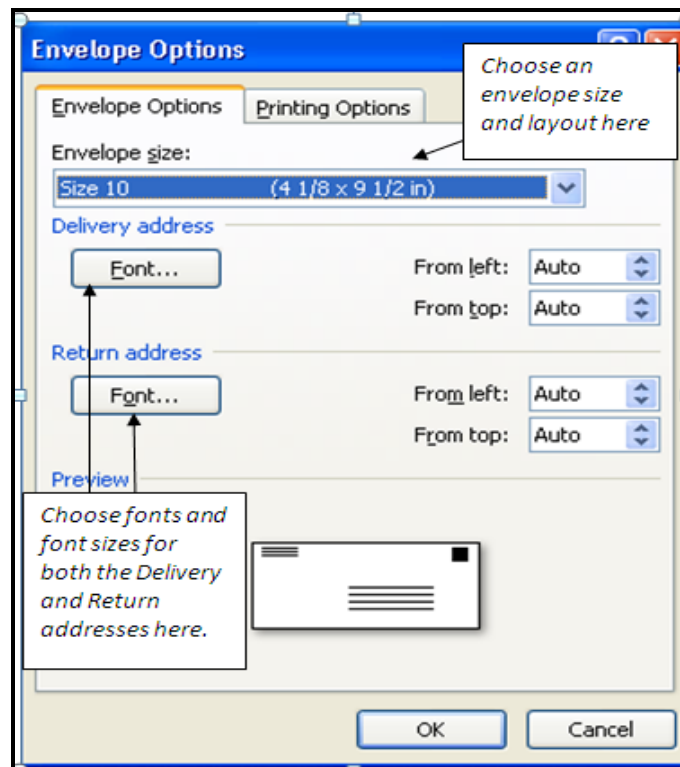
-The Mail Merge Wizard Task Pane will open on the right side of the screen displaying the document types to choose from for the first step of the Wizard.

-**The First Step of the Wizard:** Choose the document type that you want to merge from the task pane and then click **Next** from the bottom of the task pane.

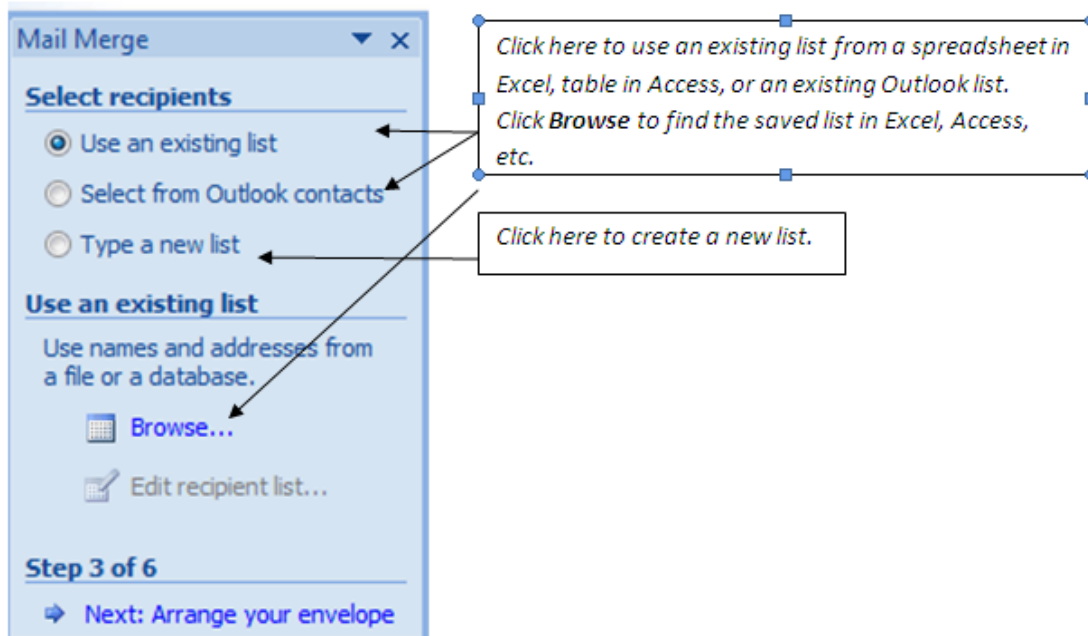
-**The Second Step of the Wizard:** This step will vary depending on what type of document is being merged. However, in this step if you have chosen to merge a letter, email, or fax. Your options are shown below to the left. If you have chosen Envelopes or labels, these options are shown to the right.



- For letters and emails, this step allows for merging the document that is currently open, creating and merging a document based on a template, or opening a saved document to merge
- For envelopes and labels, this step allows for **starting from an existing document** if you previously have saved an envelope design and you want to replace the blank document with the saved design and information.
- To create a new envelope, go to the **Change document layout** area of the wizard and then click on **Envelope options....** . The following window will open:



- The Third Step of the Wizard:** Here is where you will connect your merge to a pre-existing list or you will create a new list. Most likely you will find existing lists stored in a folder called **My Data Sources** that is stored within your **My Documents** folder. The Merge window for Step 3 is shown below:



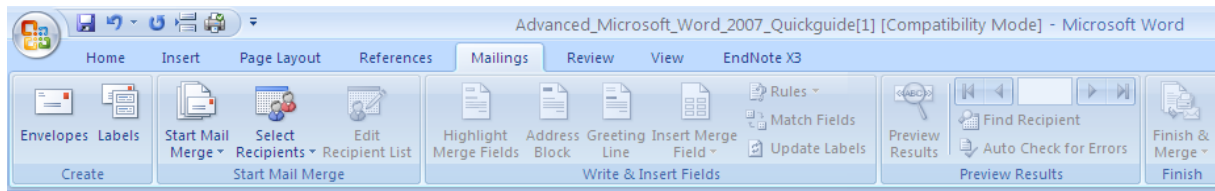
-The Fourth Step of the Wizard: Once the recipient list is selected then you can choose which recipients from that list to include in the mailing. All recipients are included, but have a checkmark next to them. Remove the checkmark to clear that contact from the mailing. You can sometimes do this more quickly by using the **Sort and Filter** features of the mail merge process depending on the fields you have established (for example, if only contacts in a certain city should be used for the mailing). You can also use the **Find Duplicates** feature to quickly make sure that a contact is not included multiple times in a mailing.

-The Fifth Step of the Wizard: Now that a recipient list is ready, you need to create the main document. Placeholders will provide the fields for the recipient information. For envelopes, this is easiest. Click on the document where you want to put a placeholder. For example, with an envelope you would click in the middle of the envelope to create a placeholder for the delivery address. Then click **Address block** in the wizard and you will see that it adds an already created <<AddressBlock>> field to the envelope.

-Preview the Merge: At the bottom of the wizard, click **Preview your envelopes**. Recipient information should now be shown instead of the field on the main document. If something is incorrect, click **Edit recipient list** to modify the fields or any information that may be incorrect.

-Finish the Merge: If the preview looks good then click **Print** to open the **Merge to Printer** dialog box.

Performing a Mail Merge Using the Ribbon



-To begin a merge by solely using the ribbon, you can see that all of the necessary steps from the wizard can be identified by the groups within the **Mailings** menu tab shown above.

-**The Start Mail Merge Group**- This group allows for picking the type of document you want to merge.

Click **Start Mail Merge** to choose from letters, labels, documents, envelopes and emails.
Click **Select Recipients** to create or connect to a list of recipients for the merge.

-**The Write & Insert Fields** group allow for inserting the necessary fields for the document and from the recipient list

-**The Preview Results** group allows you to preview the merge just as you did in the wizard.