



Software Application Tutorial



Microsoft Word 2007 Mailmerge



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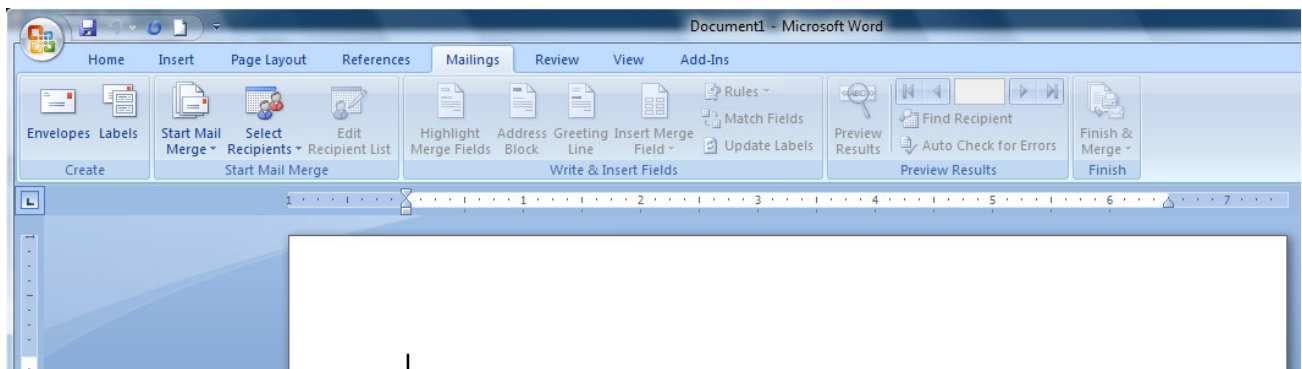
Introduction

The Mail Merge wizard in Microsoft Word 2007 allows you to create a list of mailing addresses in a data source and then merge them into a standard document file (referred to as the main document). Microsoft Word can combine, or merge, lists of variable information in one file with a Word document to individualize form letters and envelopes.

Starting the Mail Merge Wizard

In order to start the Mail Merge Wizard, choose the Mailings Tab on the Ribbon Bar. Under the Start Mail Merge group, select the command Start Mail Merge. From the drop down menu that appears, select the last option: Step by Step Mail Merge Wizard that you are use to from Microsoft Word 2003. This will open up the wizard in a Task Pane on the right side of the screen.

Note: Notice that as you move further along in your Mail Merge, the Ribbon Bar also changes. You can actually perform your Merge from the Task Pane on the right-hand side of the screen OR right on the Ribbon itself.



Please follow along with the steps to this sample mail merge:

Letters

Select Document Type

The first step in the mail merge process is to choose what kind of documents will be produced. Word offers the following document types:

- Letters- Creates personalized letters for mass mailings.
- E-mail messages- Creates personalized e-mail messages for mass e-mailings.
- Envelopes- Print addressed envelopes for a group mailing.
- Labels- Print address labels for a group mailing.
- Directory- Creates a single document containing a catalog or printed list of addresses.

We are going to start out by creating a letter for our mail merge, so select **Letters** and click on **Next: Starting document** to continue onto the next step.

Select Starting Document

The second step in the mail merge process is to select where you want to create your starting document. Word offers the following three options:

- Use the current document- Allows you to start from the document that is already open. (This option is not available for envelopes or labels)
- Start from a template- Allows you to start from a ready-to-use template that can be customized to suit your needs.
- Start from existing document- Allows you to start from a document that has already been created and saved on your computer.
- Change document layout- Allows you to customize envelope and label options. (This option is not available for letters, e-mail messages, and directories)

Please select **Use the current document** and click on **Next: Select recipients** to continue onto the next step of our sample mail merge.

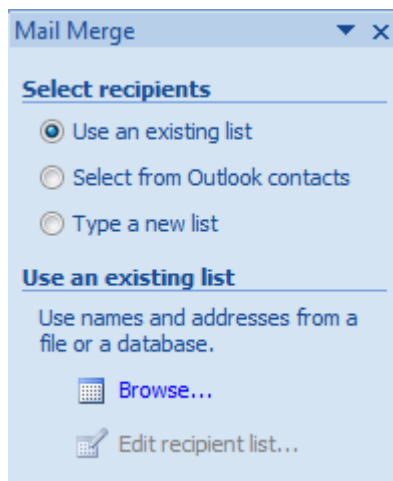
Select Recipients

The third step in the mail merge process is to select a list of recipients. Word offers the following three options:

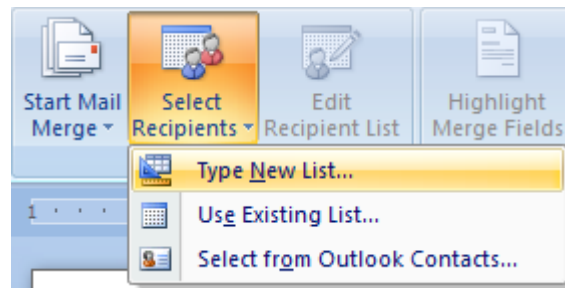
- Use an existing list- Uses names and addresses from a file or a database.
- Select from Outlook contacts- Allows you to select names and addresses from an Outlook contacts folder.
- Type a new list- Allows you to type the names and addresses of the recipients.

Note: You can also select your recipients from the Ribbon Bar. Under the Start Mail Merge Group, select Select Recipients. The same options that appear on the task pane now appear available on your Ribbon Bar as well. The following image is a comparison of both ways you can select your recipients.

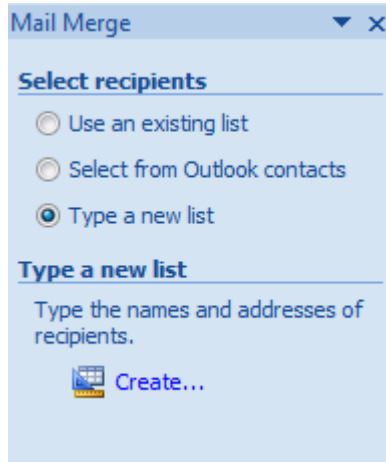
Mail Merge Wizard Task Pane



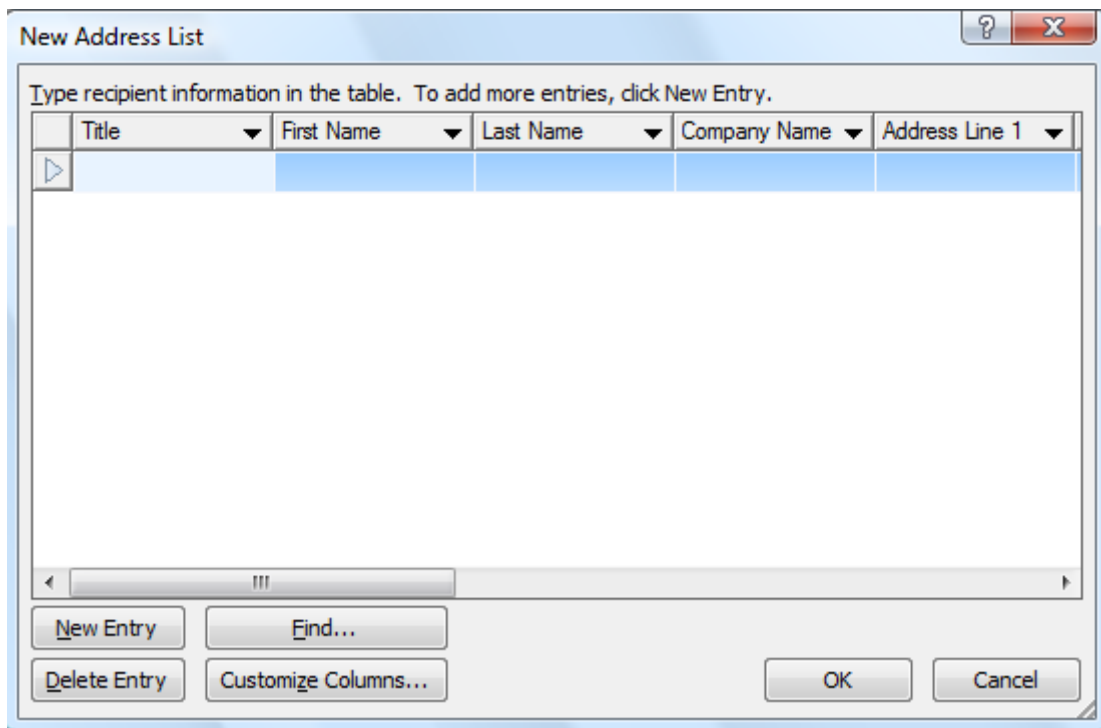
Ribbon Bar



Select **Type a New List** in either of the above examples in your document to insert your recipients into your Mail Merge.



From here, under Type a New List select Create and the following window appears.



This is where you will create your list of recipients.

To create your list, follow the steps below:

1. First you need to customize the address list. Click on the **Customize Columns...** button and delete the following entries:
 - Company Name
 - Address Line 2
 - Home Phone
 - Work Phone
 - E-mail Address
2. Click on **OK**.
3. Enter in the following list one by one. After the first one is entered, click on New Entry to add another entry into the address list.

Baron Lee Majors
989 Fawcett Way
Portland, OR 45703
United States

Swami Chuck Heston
159 Forbidden Road
Primate, NV 64882
United States

Brig Gen Willie Nelson
15 Spur Lane
Luck, TX 38006
United States

Lord Paul Ford
46 York Street
Sydney, NSW 2000
Australia

Duchess Emma Bunton
2367 Spice Court
London, England
United Kingdom

Monsignor Paul Reubens
825 Herman Place
Peekskill, NY 11036
United States

4. Once you have completed the list, click on Close.
5. Now you will be prompted to save you list. Type in the desired name of your recipient list and save it to the desired folder.
6. Then the Mail Merge wizard will show you your list. After you review your list, click on **OK**.

Now select **Next: Write your letter** to continue onto the next step.

Write Your Letter

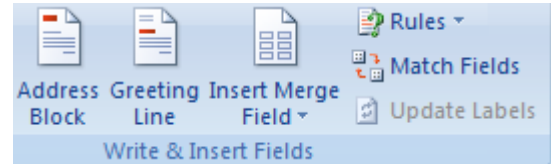
Now is the time to write the letter. Please type the following sample letter in your main document window:

Continued on Next Page...

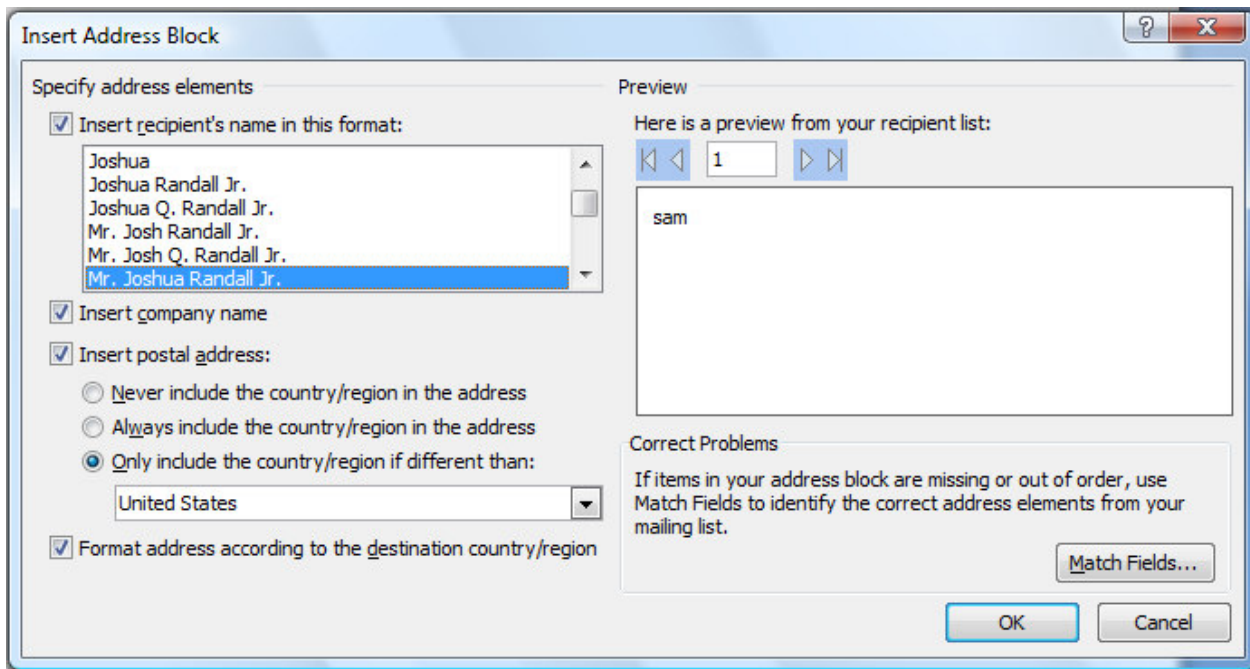
Letters Continued...

***Note:** To enter in the address block and greeting line, select **Address block...** and **Greeting line...** from the mail merge task pane and choose the desired style. For our sample, make sure to uncheck **Insert company name** and select **Always include the country/region in the address**. And to insert the First Name merge field, click on **More items...** from the mail merge task pane, select **First Name** and click on the **Insert** button. Notice that under the Write and Insert Fields Group on the Ribbon Bar that you can insert the Address Block and Greeting Line from there as well.

Ribbon Bar



Formatting the Address Block



««AddressBlock»»

««GreetingLine»»

«First_Name», you are cordially invited to join me for the opportunity of a lifetime. You, along with a select group of others, will be whisked away on a journey beyond your wildest dreams. All you have to do is to RSVP to this letter as soon as possible and your adventure will begin. I hope to hear from you soon.

Sincerely,
I. M. Joking

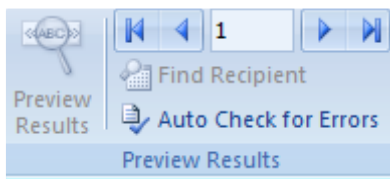
Letters Continued...

Preview Your Letters

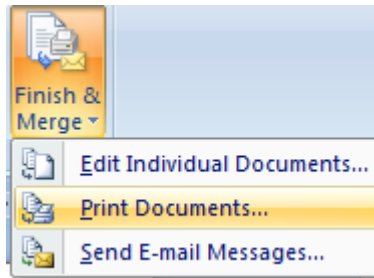
Once you have finished typing your letter, click on **Next: Preview your letters** in the mail merge task pane to get a preview of your letters with the recipients names in the merge fields. You can view the letters one by one. To see a preview of the rest of the recipients, use the arrows seen below to scroll through the remaining recipients.



You can also preview your letters from the Ribbon Bar as well. Under the Preview Results group on the Ribbon Bar, you can easily sort through and preview your letters.



Once you have previewed your letters, click on **Next: Complete the merge** in the task pane to complete the merge. You can also complete the Merge under the **Finish Group** on your Ribbon Bar.



Once you have completed the merge, simply click on **Print...** in the mail merge task pane to print out your letters. You can also edit individual letters by clicking on **Edit individual letters...** in the mail merge task pane. Editing individual letters will open a new window and you can go through your letters one by one.

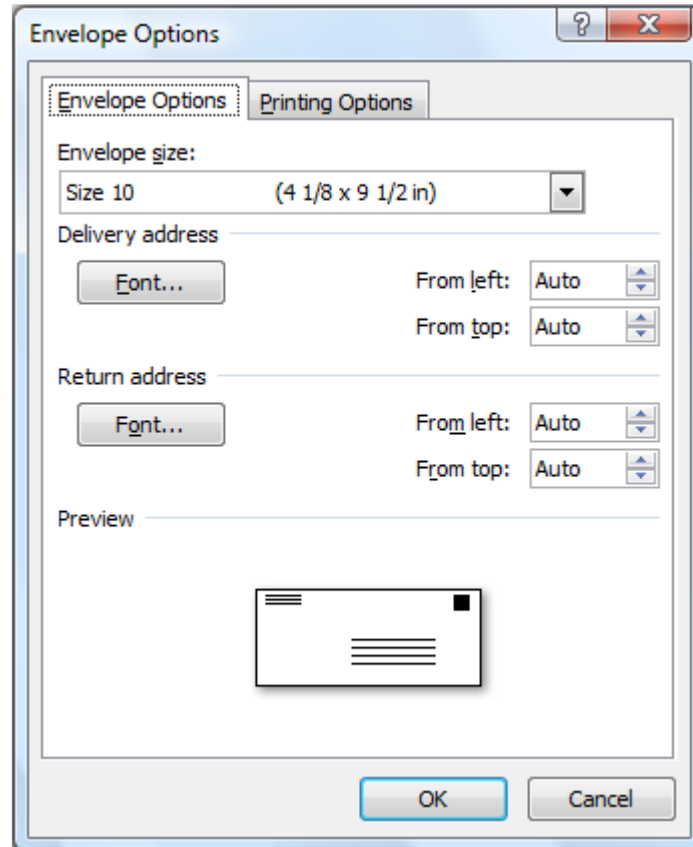
Envelopes

Select Document Type

Like before, the first step in the mail merge process is selecting a document type. Instead of choosing **Letters**, choose **Envelopes** and click **Next: Starting document**.

Select Starting Document

When selecting your starting document, select **Change document layout**, click on **Envelope options...** and the following window will open:

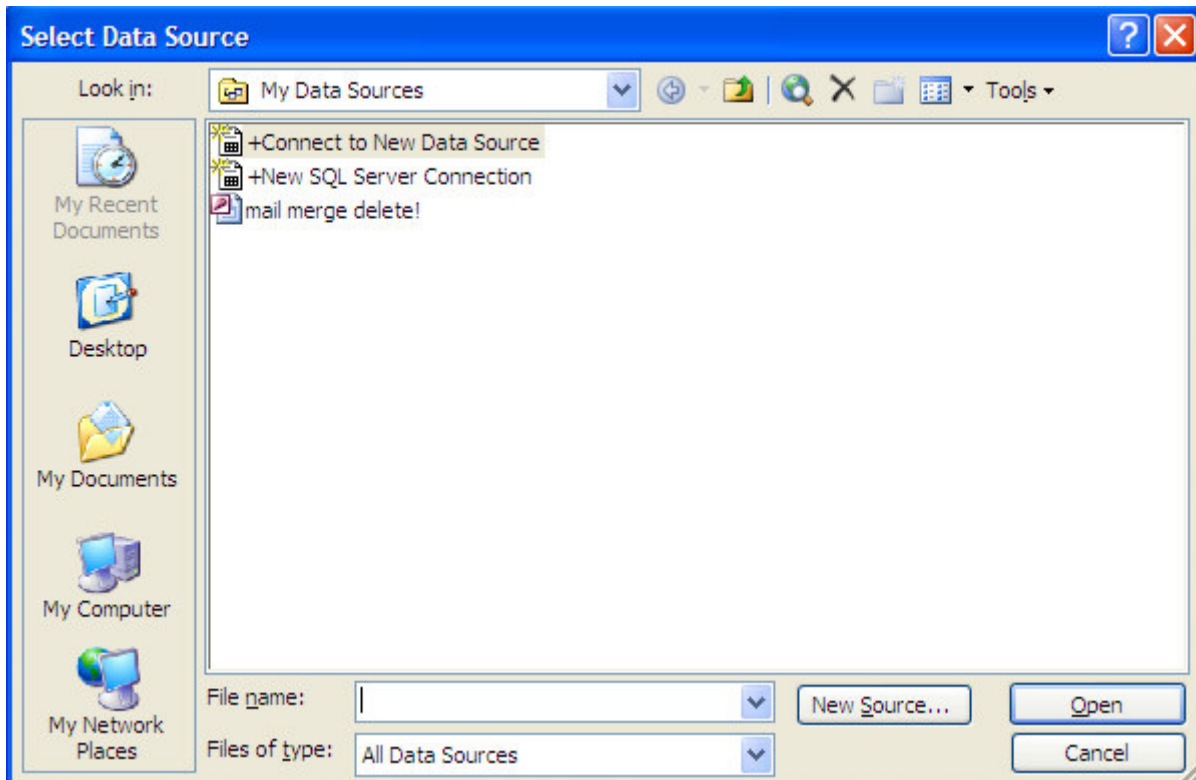


Within the **Envelope Options** window, select the envelope size desired. For our purposes, select: **Size 10 (4 1/8 x 9 1/2 in)**

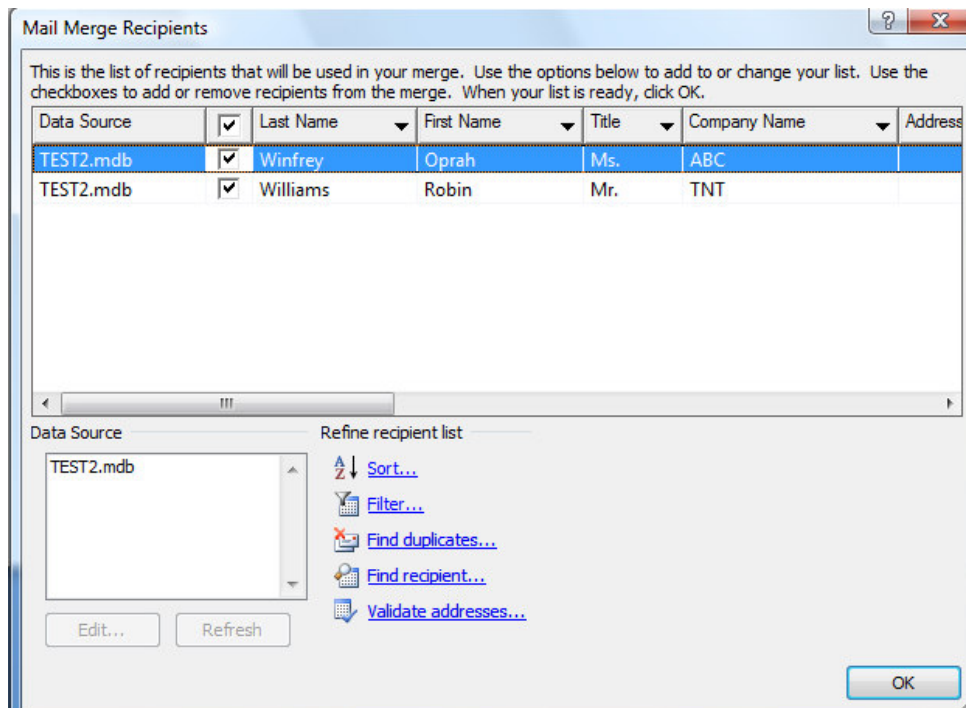
Select Recipients

Since we created and saved a recipient list before, select **Use an existing list**. To find your list, click on **Browse...** and the following window will open.

Picture on Next Page...



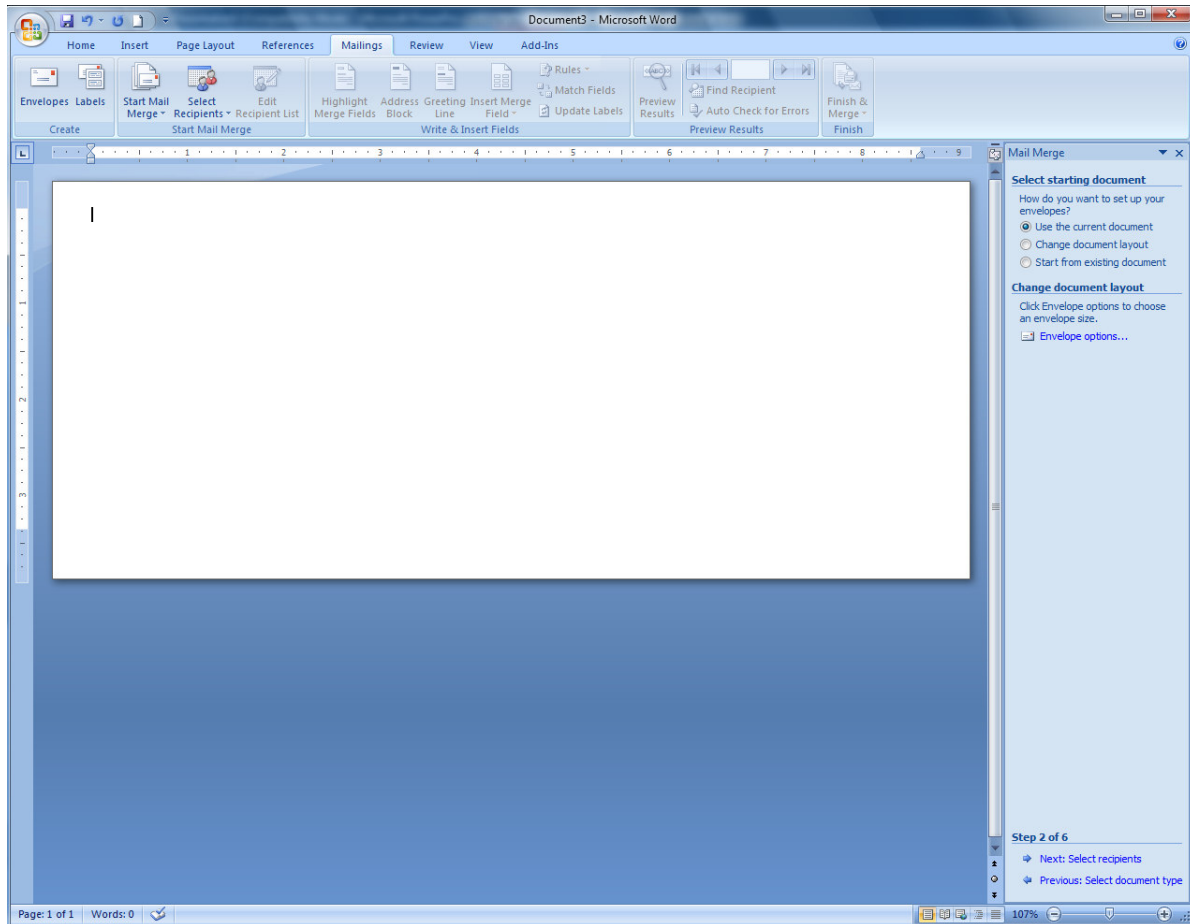
Find your recipient list and click on the **Open** button. Remember, you can also perform this action by looking to your Ribbon Bar for the step by step Mail Merge process. Once you click on **Open**, the following window will open so you can confirm and edit your list of recipients.



Click on **OK** once you are satisfied with your recipient list. Then click on **Next: Arrange your envelope** in the mail merge task pane.

Arrange Your Envelope

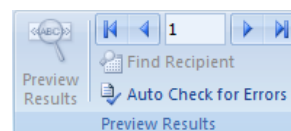
This is when you lay out your envelope. To add recipient information to your envelope, click the desired location in the document. For our sample merge, insert the address block.



****Note:** For our sample merge, be sure to follow the same steps as before in entering the **Address Block**.*

Preview Your Envelopes

Once you have finished setting up your envelope, click on **Next: Preview your envelopes** in the mail merge task pane to get a preview of your envelopes with the recipient's names in the merge fields. You can view the envelopes one by one. To see a preview of the rest of the recipients, use the arrows seen below to scroll through the remaining recipients. Remember, you can also preview your envelopes from the Ribbon Bar as well.



Once you have previewed your envelopes, click on **Next: Complete the merge** to complete the merge. Once you have completed the merge, simply click on **Print...** in the mail merge task pane to print out your envelopes. To print your envelopes, you will have to manually feed them into your printer. You can also edit individual envelopes by clicking on **Edit individual envelopes...** in the mail merge task pane. Editing individual envelopes will open a new window and you can go through your envelopes one by one.

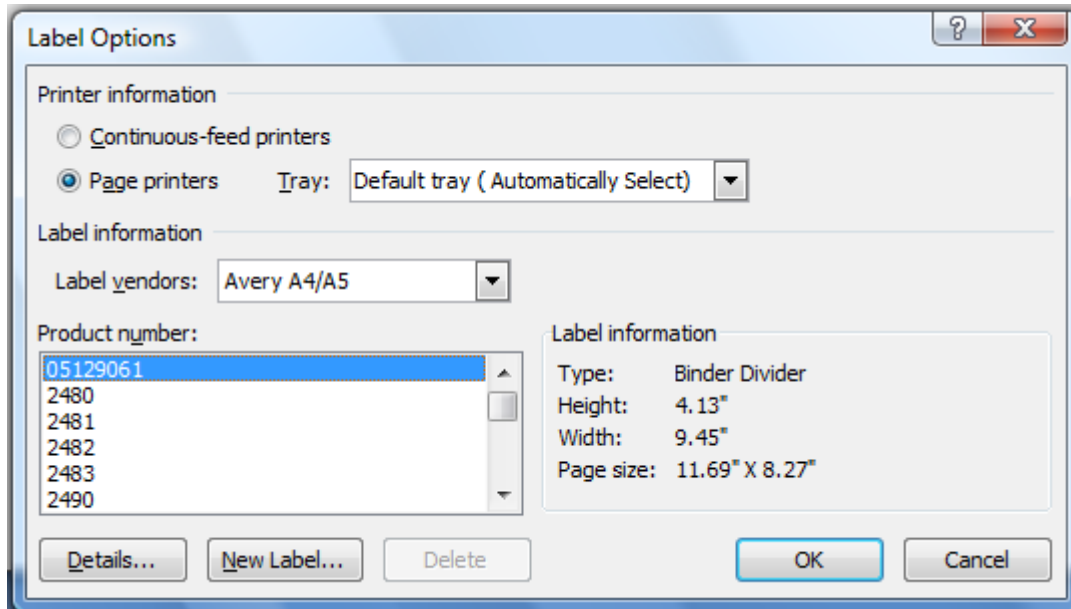
Labels

Select Document Type

Like before, the first step in the mail merge process is selecting a document type. Instead of choosing **Envelopes**, choose **Labels** and click **Next: Starting document**.

Select Starting Document

When selecting your starting document, select **Change document layout**, click on **Label options...** and the following window will open:



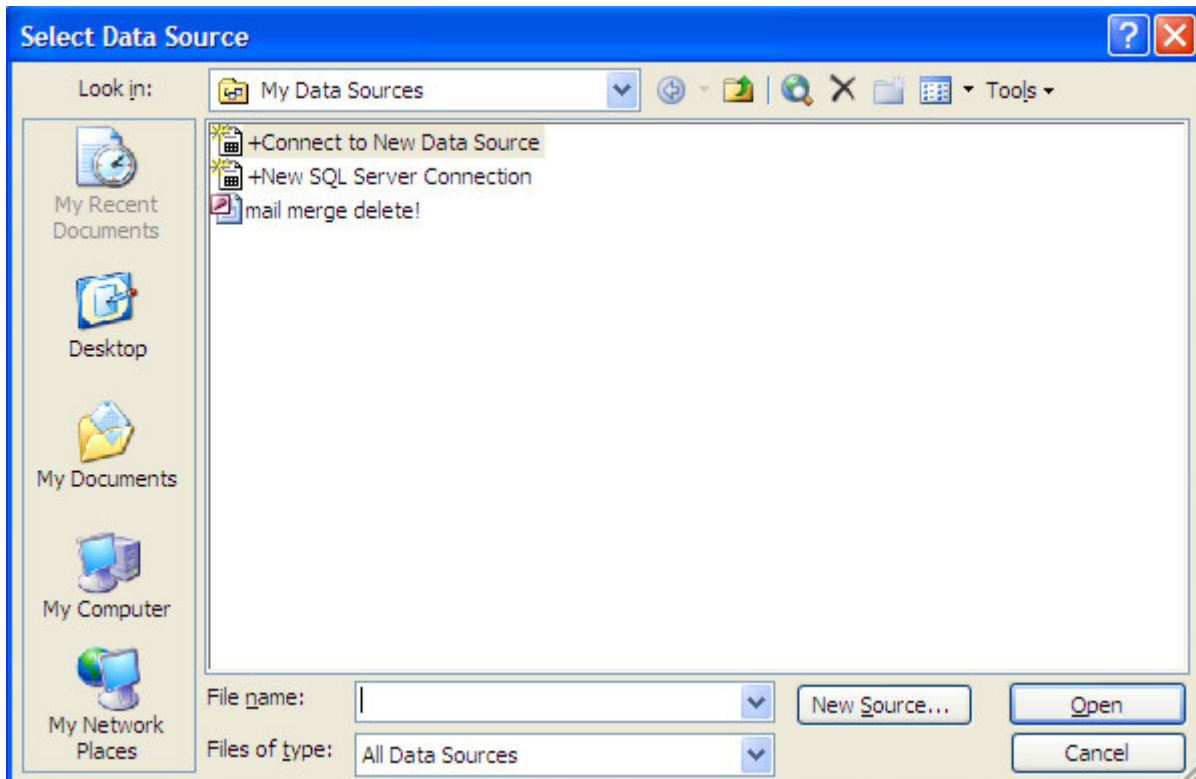
Within the **Label Options** window, select the desired size of your labels. For our purposes, select the style shown above [**Type: Sticker; Height: 2.5\"**].

Select Recipients

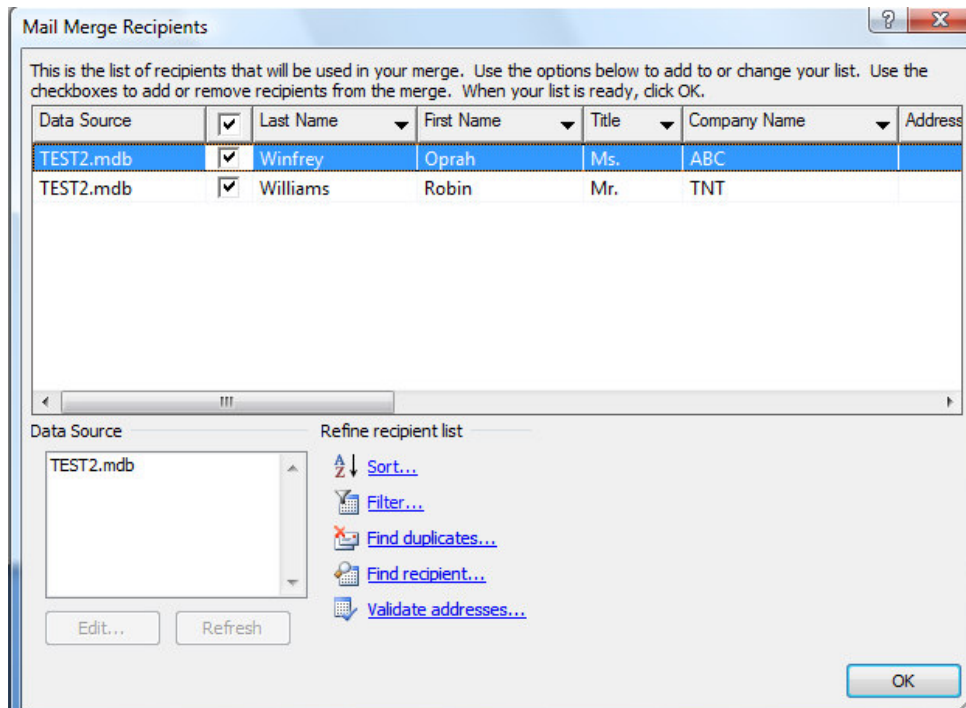
Since we created and saved a recipient list before, select **Use an existing list**. To find your list, click on **Browse...** and the following window will open.

Picture on Next Page...

Picture from Previous Page...



Find your recipient list and click on the **Open** button. Once you click on **Open**, the following window will open so you can confirm and edit your list of recipients.



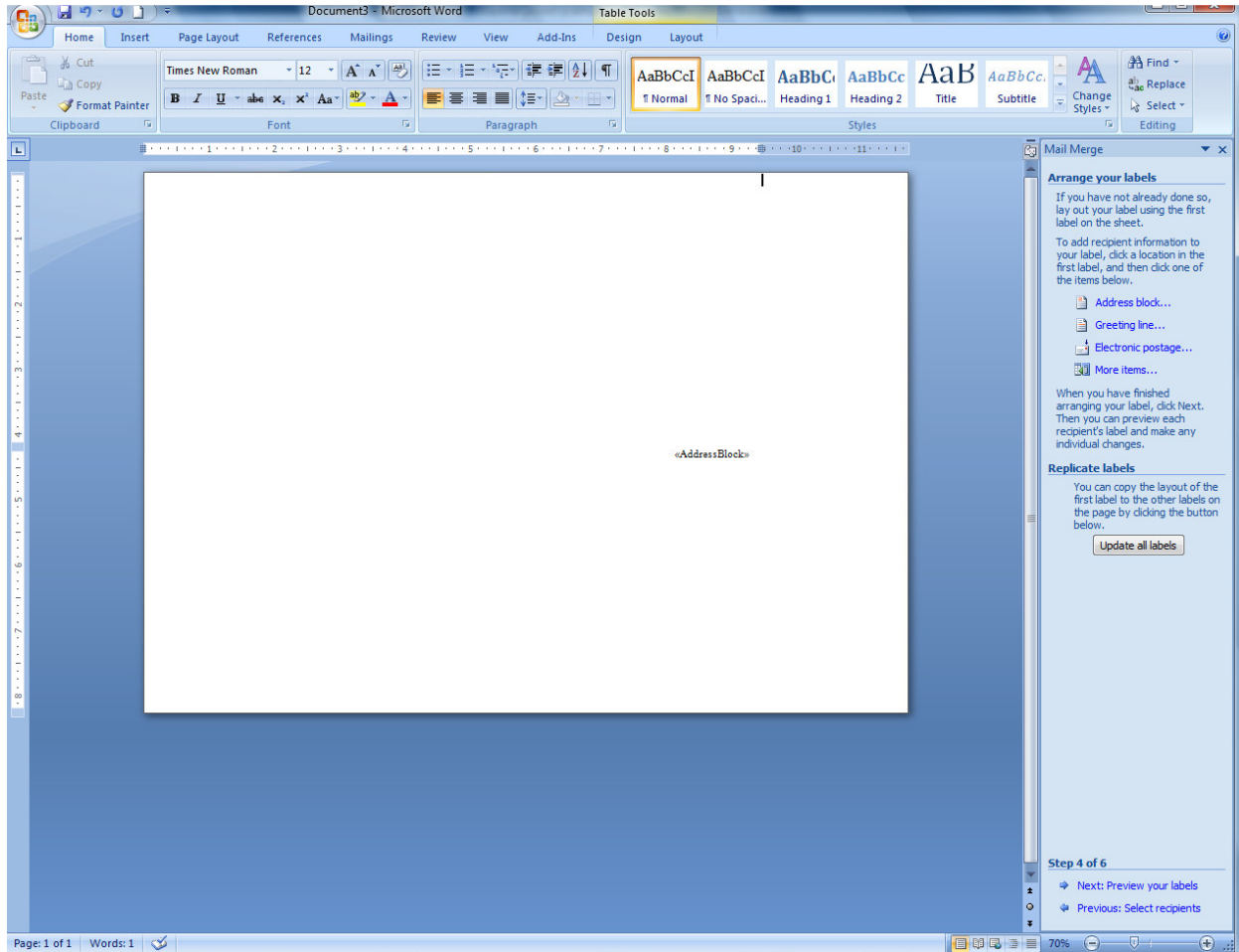
Continued on Next Page...

Labels Continued...

Click on **OK** once you are satisfied with your recipient list. Then click on **Next: Arrange your labels** in the mail merge task pane.

Arrange Your Labels

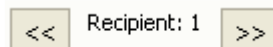
This is when you lay out your labels. To add recipient information to your label, click the desired location in the document. For our sample merge, insert the address block as seen below:



Once you have set-up your first label, click on **Update all labels** (underneath Replicate labels on your mail merge task pane) to give all of your labels the same layout.

Preview Your Labels

Once you have finished setting up your label, click on **Next: Preview your labels** in the mail merge task pane to get a preview of your labels with the recipient's names in the merge fields. You can view the labels one by one. To see a preview of the rest of the recipients, use the arrows seen below to scroll through the remaining recipients.

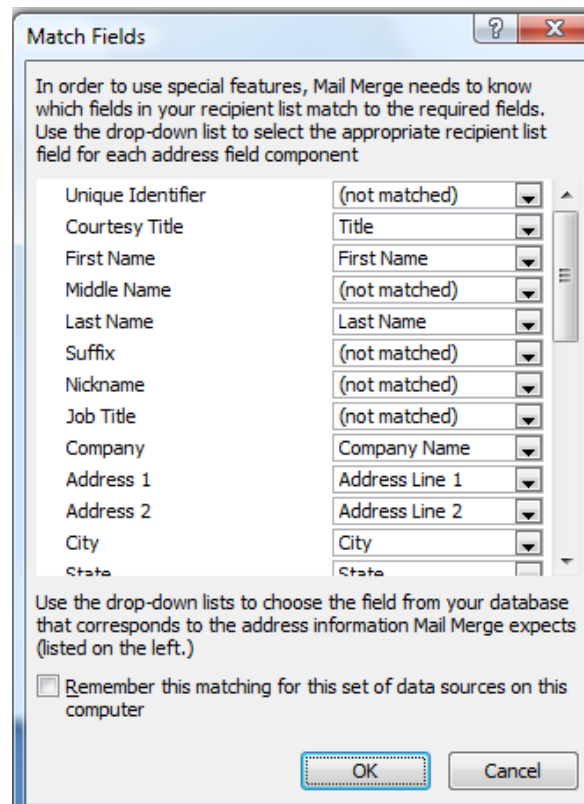


Once you have previewed your labels, click on **Next: Complete the merge** to complete the merge. Once you have completed the merge, simply click on **Print...** in the mail merge task pane to print out your labels. You can also edit individual labels by clicking on **Edit individual labels...** in the mail merge task pane. Editing individual labels will open a new window and you can go through your labels one by one.

Tips from the Training Staff

1. To make your Merge easier for you to manage and work with, we recommend creating your list of recipients in an Excel spreadsheet. By doing this, you will always have access to certain spreadsheets containing specific recipients. You can also save these spreadsheets according to the population of recipients that you are working with. Also, it makes it easier for you to actually go into the spreadsheet while working on a Mail Merge, make changes to your recipients and save your spreadsheet with the updated information.

2. After you have selected the recipient list you plan on using in your Mail Merge, it is essential that you use the Match Fields button on the Ribbon Bar to make sure that all your fields in your recipient data source (excel spreadsheet) are appropriately matched with the fields in your Mail Merge document. Matching your fields involves you looking through all the fields you decided to include in your recipient data source and compare/match them to the fields in your Mail Merge document. Match Fields looks like this:



If a field is not matched, simply match it by selecting the same field in the drop down menu as the one listed in the left-hand column.