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# Microsoft Word 2007

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Mail Merge

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CSULB

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## Using the Mail Merge Wizard

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When used properly, mail merge can be one of the best time-saving tools in Word. Unfortunately, it's also the most misunderstood. Many people get the look of a small mammal caught in the path of a large vehicle when mail merge is mentioned; we're here to change that!

### Mail Merge Basics

Mail merge is when you take a document (such as an e-mail message, a letter, or a label) and merge it with a data source (such as a list of addresses). The finished result is customized to each entry in the data source.

For example, let's say you want to send a Christmas newsletter summing up the events of the year to all the members of your family. You would like to have it personalized for everyone, but you have 50 people on your mailing list! You can use mail merge to create the letter and then merge it with your address list so that each letter is addressed to the recipient.

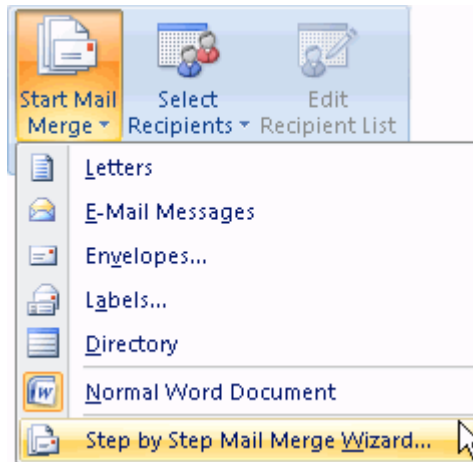
Here's a list of terms you'll hear in relation to a mail merge:

- |                     |                                                                                                                                                                                                                                                        |
|---------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Merge fields</b> | These are the places where Word will insert your data. For example, the <<Address Block>> merge field marks where each person's address will go.                                                                                                       |
| <b>Data Source</b>  | This is the file that contains the personalized information, such as a list of addresses. Data sources can be existing files (such as Access databases), pulled from an application (such as your Outlook contacts), or created during the mail merge. |
| <b>Record</b>       | A record is one set of data in your data source. For example, a record from your Outlook contacts could contain the person's first and last name, mailing address, and e-mail address.                                                                 |

The easiest way to perform a mail merge is by using the Mail Merge wizard, so we're going to devote this whole section to the various options in the wizard.

## Starting the Wizard and Choosing a Document

To start the mail merge wizard, click the Mailings ribbon. Then, click Start Mail Merge and click the Step by Step Mail Merge Wizard command.



You will then see a task pane on the right hand side of your screen, prompting you to choose a document type.

**Mail Merge** ▼ X

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**Select document type**

What type of document are you working on?

- Letters
- E-mail messages
- Envelopes
- Labels
- Directory

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**Letters**

Send letters to a group of people. You can personalize the letter that each person receives.

Click Next to continue.

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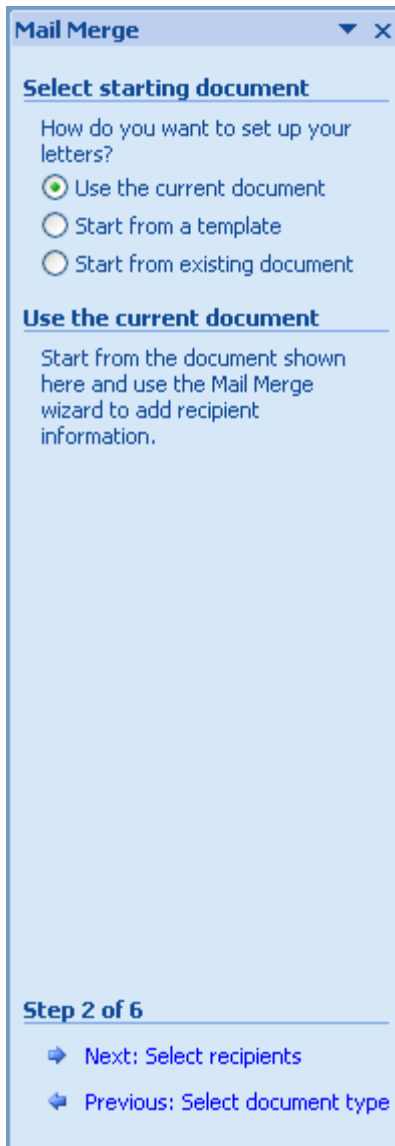
**Step 1 of 6**

➔ [Next: Starting document](#)

For this example, we'll stick with letters. The remaining steps may differ slightly depending on the document you're creating, but the basic concept remains the same.

## Selecting a Starting Document

Once you finish Step 1 and click Next: Starting Document, you will be able to choose what document you want to use for the mail merge.

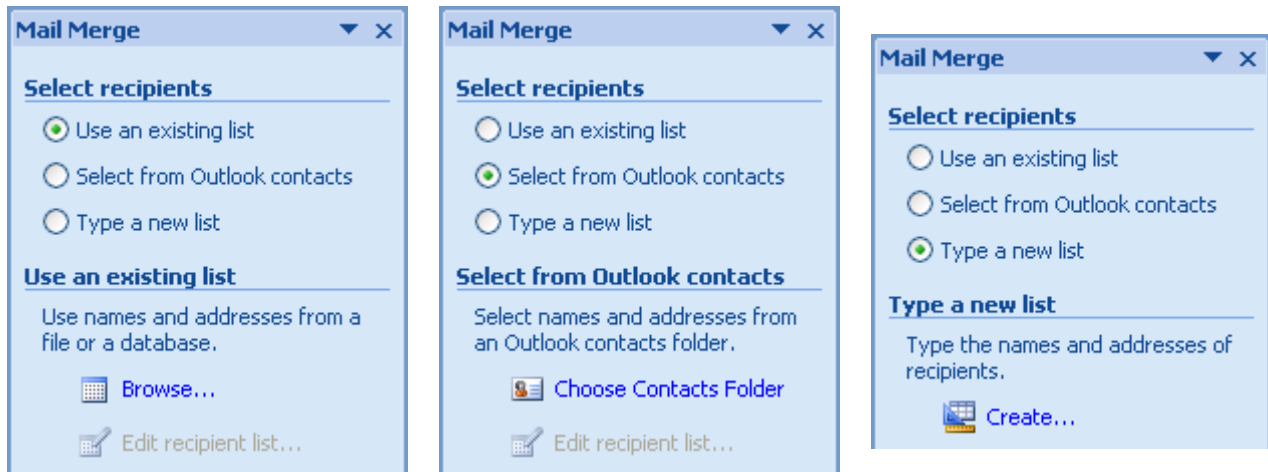


The screenshot shows a dialog box titled "Mail Merge" with a close button (X) in the top right corner. The main heading is "Select starting document". Below this, a question asks "How do you want to set up your letters?". There are three radio button options: "Use the current document" (which is selected), "Start from a template", and "Start from existing document". Below the options is a section titled "Use the current document" with the text: "Start from the document shown here and use the Mail Merge wizard to add recipient information." At the bottom of the dialog, it says "Step 2 of 6" and provides navigation buttons: "Next: Select recipients" and "Previous: Select document type".

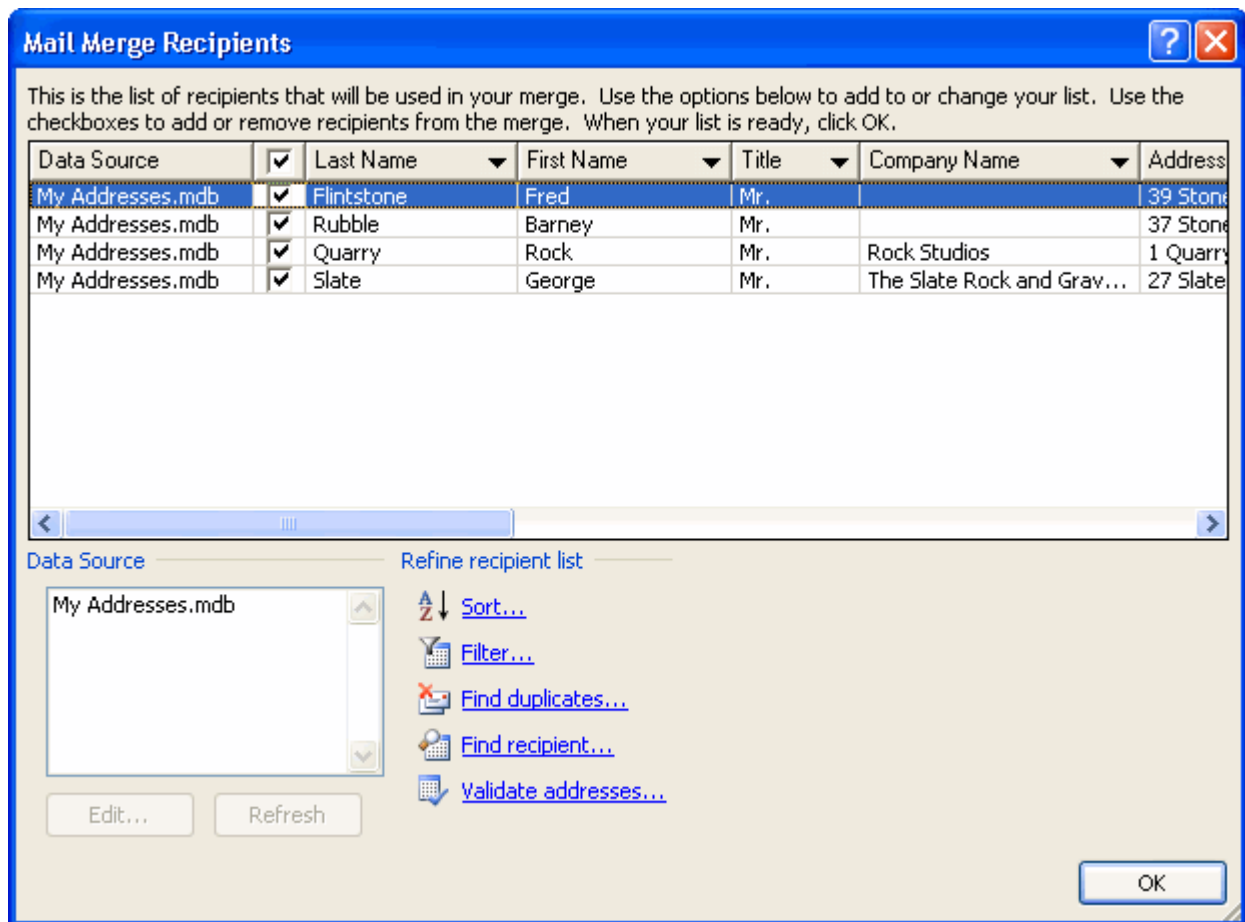
In this case, we've already created a letter, so we'll choose the current document. (Note that you can also use a template or an existing document, meaning a document that you've created but isn't open.) Once you've chosen the document, click Next.

## Selecting Recipients

Step 3 of the Mail Merge Wizard prompts you to choose who the mailings will be sent to. Depending on the option you select, your choices will be different.



Once you pick a source and choose the specific list (or type a new list), you will be prompted to choose the recipients.

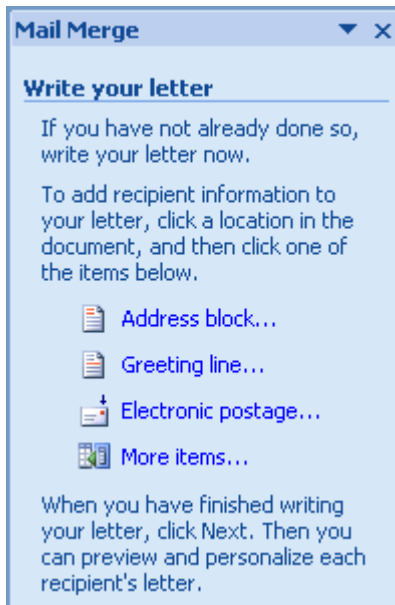


Simply check a contact to include it or uncheck a contact to remove it. Note that there are tools at the bottom of the dialogue that can help you sort, filter, find, and manage your addresses. These tools can be very useful if you have a large list.

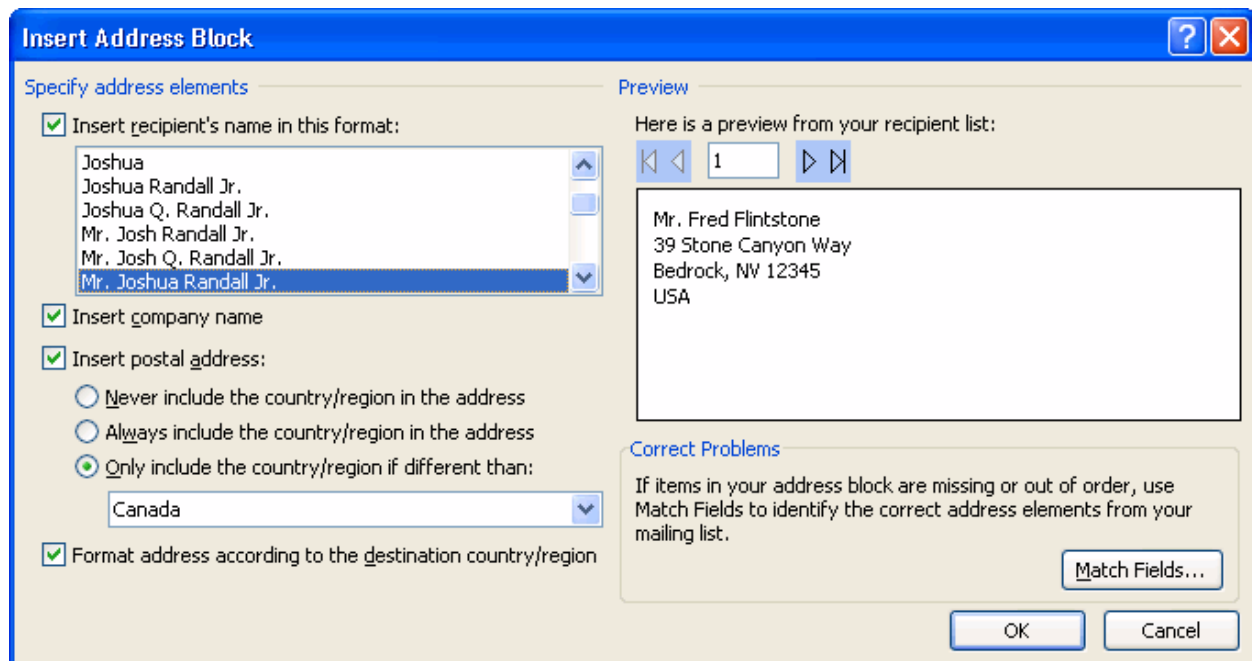
Once you click OK, you can click Next in the task pane to proceed to the next step.

## Creating Your Document

In the fourth step, you can create your letter.



If you haven't already done so, you can type the text that will be the same for each document. You can also click inside the document and then click each link to specify more information about the field. For example, if we click Address Block, we will be prompted to format the address block:



These fields will then appear in your document with angle brackets around them. They will be customized for each recipient when you perform the merge.

[Pick the date]

Sue Smith

[Type the sender company name]

[Type the sender company address]

«AddressBlock»

«GreetingLine»

Once your fields are in place, click Next.

## Previewing Your Document

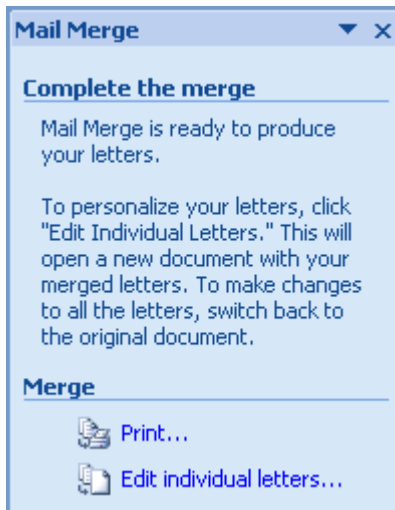
Step 5 will show you a preview of your document. You can use the arrows in the task pane to scroll through the recipients.

The screenshot displays the Microsoft Word interface during a mail merge preview. The main document area shows a letter template with several fields: a date field "[Pick the date]", sender information "Sue Smith" with fields for "[Type the sender company name]" and "[Type the sender company address]", a recipient address block for "Fred Flintstone" at "39 Stone Canyon Way, Bedrock, NV 12345", and a greeting line "Dear Fred,". The right-hand task pane, titled "Mail Merge", indicates "Step 5 of 6" and provides navigation options: "Next: Complete the merge" and "Previous: Write your letter". The task pane also includes instructions for previewing letters and making changes to the recipient list.

If you need to make any changes to the recipients, click Edit Recipient List in the task pane. You can also click the Previous link in the task pane to go back to any step. If you're all set, click Next to proceed to Step 6.

## Completing the Merge

In Step 6, the merge will actually be performed.



These options will vary depending on the document type that you're creating. In this case, we can edit the individual letters or we can simply choose to print them. In either case, the merge will be performed to a new document so that you can still make changes to the original letter and re-merge them.

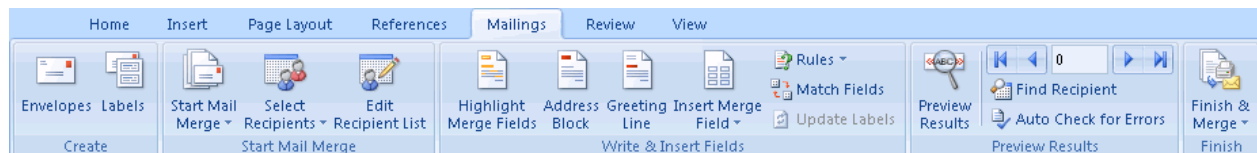
## Lesson 5.3: Performing a Manual Mail Merge

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Although the mail merge wizard is great for creating basic documents, once you become comfortable with the process you may find the wizard too cumbersome and time-consuming. If that's the case, you may want to use the mail merge tools independently of the wizard. (You can also use the Mailings ribbon to enhance a wizard-created merge.) In this lesson, we'll talk about how to manually insert fields into your document and perform a mail merge without the wizard.

### Using the Mailings Ribbon

Microsoft Office Word 2007 has far too many mail merge features for us to cover them all in depth. However, we will take a look at the Mailings ribbon, which does contain all the features you will need.

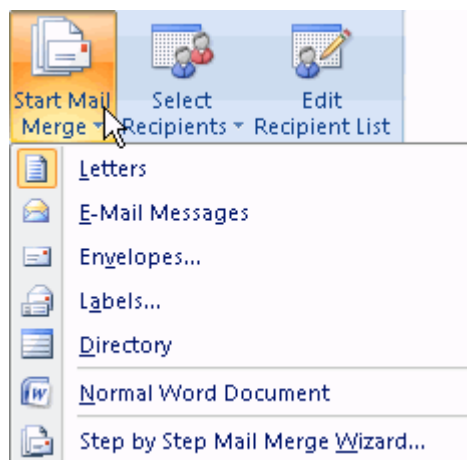


<b>Create</b>	Envelopes	Click this button to open a special dialogue that will allow you to create envelopes.
	Labels	Click this button to open a special dialogue that will allow you to create labels.
<b>Start Mail Merge</b>	Start Mail Merge	Choose what kind of mail merge you want to start.
	Select Recipients	Choose the source for your recipient list.
	Edit Recipient List	Make changes to your recipient list.
<b>Write and Insert Fields</b>	Highlight Merge Fields	Highlight fields that will be merged to each record.
	Address Block	Create and insert an address block merge field.
	Greeting Line	Create and insert a greeting line merge field.

	Insert Merge Field	Insert other types of merge fields.
	Rules	Create rules for an advanced merge. (We'll look at these options in detail in a moment.)
	Match Fields	Match fields in your recipient list to merge fields.
	Update Labels	If you are creating labels and have made any changes, click this button to update them.
<b>Preview Results</b>	Preview Results	Preview your merge.
		Navigate through merged records.
	Find Recipient	Find a particular recipient.
	Auto Check for Errors	Check your mail merge for problems.
<b>Finish</b>	Finish and Merge	Complete the merge.

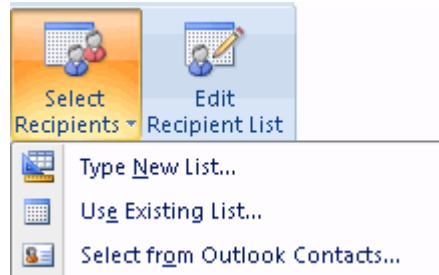
## Selecting a Starting Document

If you're performing a mail merge on your own, you should choose a starting document so that Word gives you the appropriate options. Simply click the Start Mail Merge button and choose the document type.



## Selecting and Editing Recipients

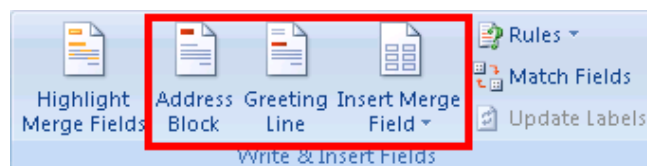
To choose your recipients, click the Select Recipients button on the Mailings ribbon and then choose a source for your recipient list.



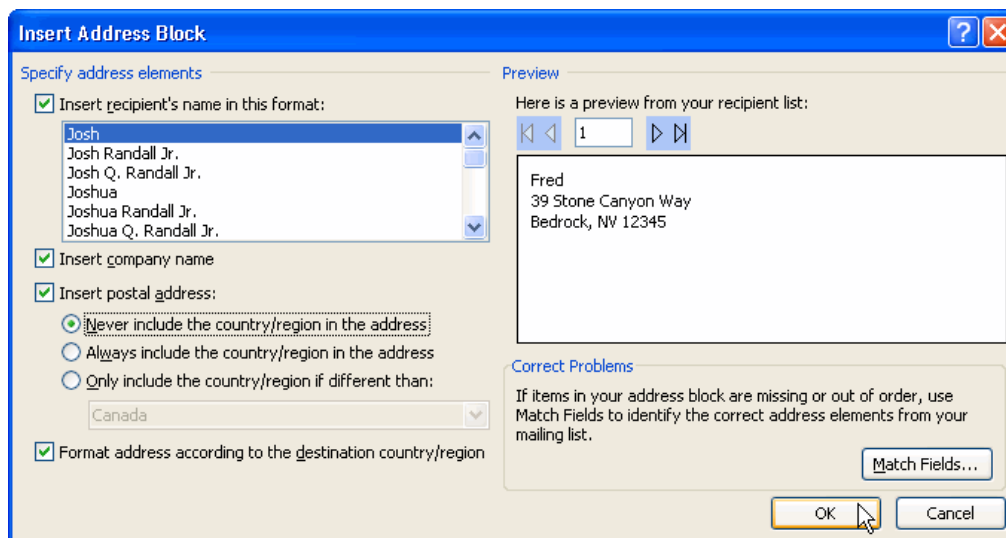
Once you choose a source, you will see a dialogue prompting you for more information. If you ever need to edit the list, click Edit Recipient List (next to Select Recipients).

## Adding Fields

To add fields, place your cursor where you want the field to appear and click any field name in the Write and Insert Fields chunk of the Mailings ribbon.



You will then be prompted to customize that element, just as we did with the Mail Merge wizard.



## Adding Rules

Rules are like fields, except that they operate on conditions. To add a rule, first click to place your cursor at the position that you want the rule. Then, click the Rules button on the Write and Insert Fields chunk of the Mailings ribbon and click the rule that you want.

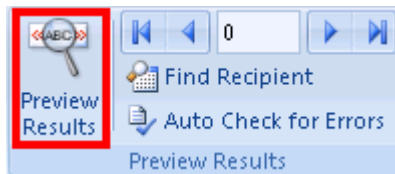


Let's take a look at each option.

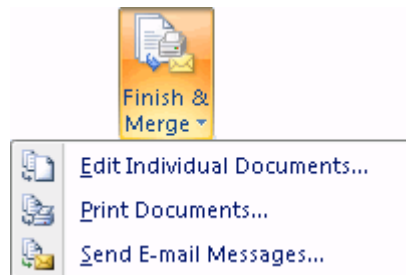
- |                            |                                                                                                                                                                                                                                                  |
|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Ask</b>                 | If you have created bookmarks, insert this field at the beginning of your document. Then, Word will ask you what text you want to put in and place that text at each bookmark as it merges each record. (Text can be different for each record.) |
| <b>Fill-in</b>             | When you complete the merge, Word will ask you what text you want to place in this field as it merges each record.                                                                                                                               |
| <b>If...Then...Else...</b> | This dialogue box lets you set exceptions for your merge. If a field equals a certain value, Word will insert a certain text string. Else, Word will insert a different text string.                                                             |
| <b>Merge Record #</b>      | This will add a number to each label.                                                                                                                                                                                                            |
| <b>Merge Sequence #</b>    | Counts the number of successfully merged records.                                                                                                                                                                                                |
| <b>Next Record</b>         | Inserts the next record into the current document.                                                                                                                                                                                               |
| <b>Next Record If...</b>   | Inserts next record into the current document if conditions are met.                                                                                                                                                                             |
| <b>Set Bookmark</b>        | Sets a bookmark at a specified location. In a mail merge, bookmarks are mainly used to indicate where to insert Ask text.                                                                                                                        |
| <b>Skip Record If...</b>   | Skips the record if certain conditions are met.                                                                                                                                                                                                  |

## Previewing and Finishing the Merge

To preview the results of your merge, click the Preview Results button.



Note that this command can be toggled on and off, giving you an easy way to check what the finished product will look like. Once your document is ready to be merged, click the Finish and Merge button and choose your option.



## Completing the Merge

To complete the merge, click "Finish & Merge" on the "Finish" chunk of the "Mailings" tab.