Mail Merge

Using Mail Merge, you can create:

- <u>A set of labels or envelopes:</u>
  The return address is the same on all the labels or envelopes, but the destination address is unique on each one.

- <u>A set of form letters, e-mail messages, or faxes</u>:
  The basic content is the same in all the letters, messages, or faxes, but each contains information that is specific to the individual recipient, such as name, address, or some other piece of personal data.

- <u>A set of numbered coupons</u>:
  The coupons are identical except that each contains a unique number.

Form Letters:

- Start Word 2007.

- On the Mailings tab, click **Start Mail Merge**. The Mail Merge task pane drops down. Choose **Letters**.

- Write the main document as you want it to be. In places where unique information is to be inserted, type in a placeholder in capital letters.
  - Example: for a first name, the placeholder would be FIRST NAME.

- If you want to use an existing document, open that document in Word, click on the Mailings tab.

- Complete writing and formatting your main document before proceeding to the next step, **Select Recipients.**
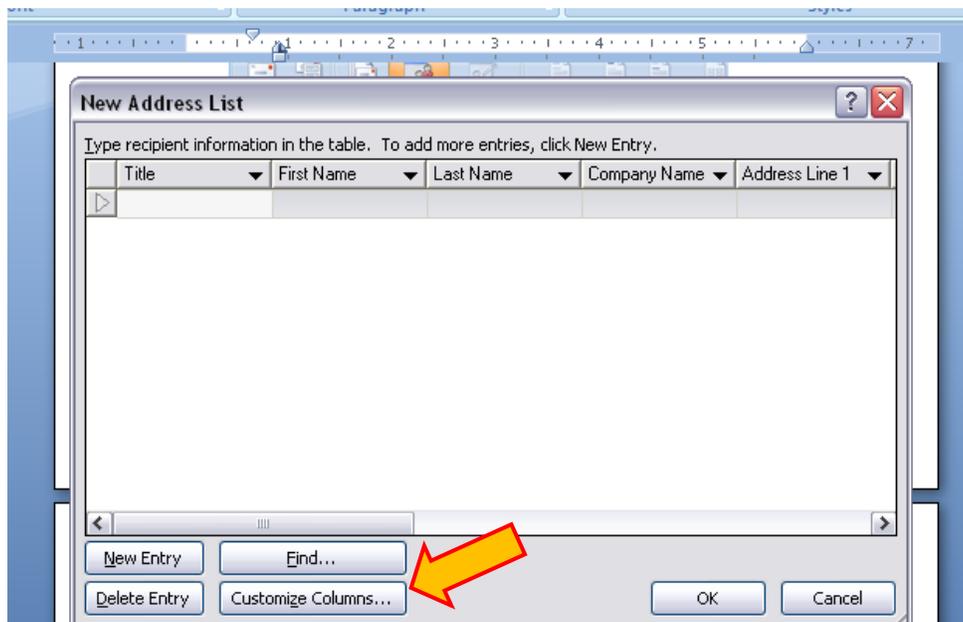
Connecting to the data file

To merge unique information into your main document, you must connect to (or create and connect to) the data file where the unique information is stored. If you don't want to use all the data in the file in your merge, you can choose the records that you want to use.

- On the Mailings tab, go to **Select Recipients** and click on the drop down arrow.
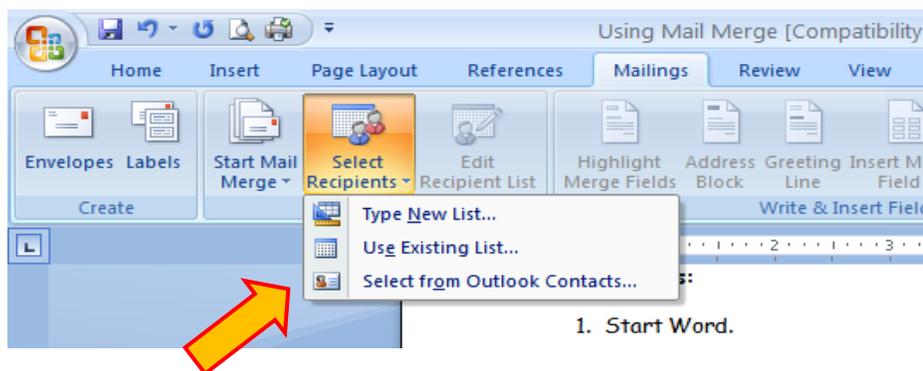
- If you have a Microsoft Office Excel worksheet or a Microsoft Office Access database that contains your customer information, click **Use Existing List** and then click "Browse" to locate the file.

- If you don't have a data file yet, click **Type New List** and use the form that opens to create your list. The list is saved as a mailing database (.mdb) file that you can reuse.
  - If there is a column that you need but that is not offered, click on **Customize Columns**.

Choose the records in the data file that you want to use

Just because you connect to a certain data file doesn't mean that you have to merge information from all the records (rows) in that data file into your main document.

- On the Mailings tab, go to **Edit Recipient List**. Do any of the following:
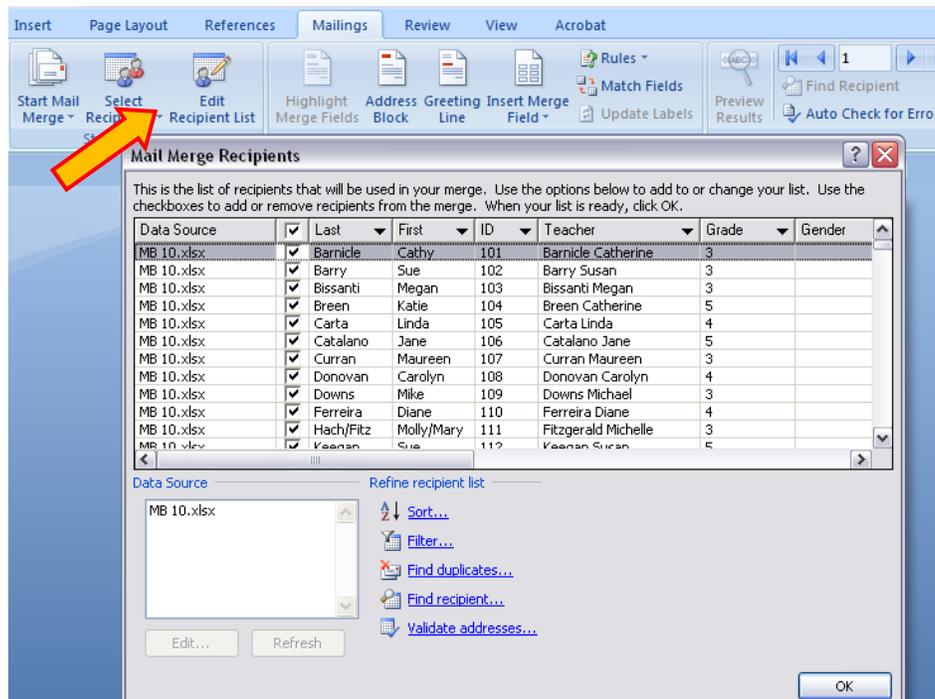
- To sort the records in a column in ascending or descending order, click the column heading.

- To filter the list, click the arrow beside the column heading that contains the value on which you want to filter. Then, click the value that you want. Or, if your list is long, click (Advanced) to open a dialog box where you can set the value. Click (Blanks) to display only records that contain no information or (Nonblanks) to display only records that contain information.

- To omit recipients, deselect the clicked arrow in the second column.

Add fields

Fields are placeholders that you insert into the main document at locations where you want unique information to appear. Fields appear in your document within chevrons, for example, **«AddressBlock»**.

- Find your placeholders in your main document. Highlight one placeholder.

- On the Mailings tab, click **Insert Merge Field**. Select the field that should replace your placeholder.
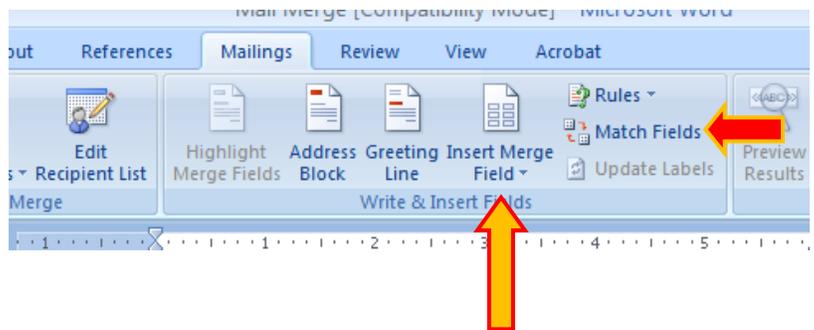
- If a column from your database does not show up as a field option, you may need to match a field. The **Match Fields** option can be found next to "Insert Merge Fields." (See previous illustration.)

- If you insert an address block field or a greeting line field into your document, you are prompted to choose the format that you prefer. For example, the illustration shows the **Greeting Line** dialog box that opens when you click Greeting Line in the "Write and Insert Fields" group. You use the lists under **Greeting line** format to make your choices.

Preview the merge

You can preview your merged documents and make changes before you actually complete the merge.

- To preview, do any of the following in the **Preview Results** group of the Mailings tab:

    - Click Preview Results.

- Page through each merged document by using the Next Record and Previous Record buttons in the Preview Results group. (See previous illustration.)

- Preview a specific document by clicking **Find Recipient**.

Complete the merge

You can modify the merged documents or print them individually. You can print or change all or just a subset of the documents.

To modify documents individually:

- On the Mailings tab, in the Finish group, click **Finish & Merge**, and then click **Edit Individual Documents**.
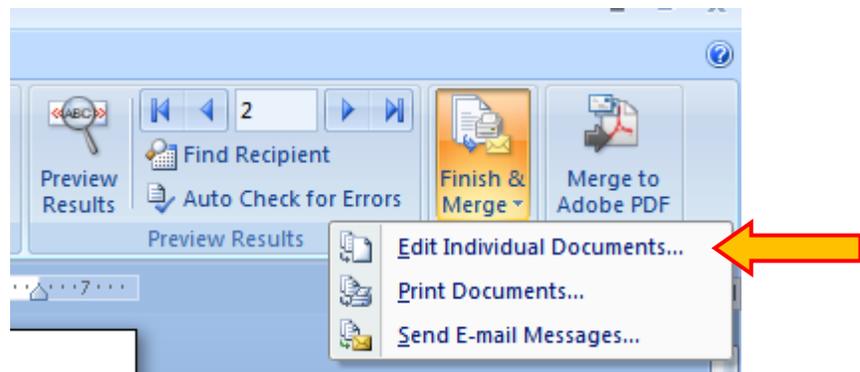
- Choose whether you want to edit the whole set of documents, only the copy that's currently visible, or a subset of the set, which you specify by record number. Word saves the copies that you want to edit to a single **new file**, with a page break between each copy of the document.

To print the merged documents:

- On the Mailings tab, in the Finish group, click **Finish & Merge**, and then click **Print Documents**.

- Choose whether to print the whole set of documents, only the copy that's currently visible, or a subset of the set, which you specify by record number.

Remember:

Merged documents that you save are separate from the main document. It's a good idea to save the main document itself if you plan to use it for another mail merge.

When you save the main document, you also save its connection to the data file. The next time that you open the main document, you are prompted to choose whether you want the information from the data file to be merged again into the main document.

- If you click Yes, the document opens with information from the first record merged in.

- If you click No, the connection between the main document and the data file is broken. The main document becomes a standard Word document. Fields are replaced with the unique information from the first record.

To learn about Mail Merge Envelopes and Labels, please visit:

Microsoft > Word 2007 > Help and How To > Mail Merge
http://office.microsoft.com/en-us/word/HA100819761033.aspx