

MAIL MERGE USING WORD 2007

TOPICS COVERED

For assistance contact the
Technology Assistance Center:
962-4357
E-mail: tac@uncw.edu

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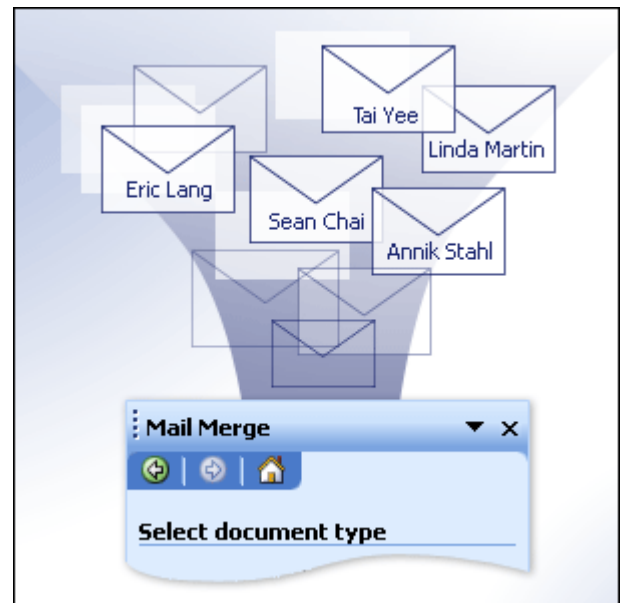


The Power of Mail Merge

You use Mail Merge when you want to create a set of documents that are essentially the same but where each document contains unique elements. For example, in a letter that announces a new product, your company logo and the text about the product will appear in each letter, and the address and greeting lines will be different in each letter.

Using mail merge, you can create:

- *A set of labels or envelopes* – The return address is the same on all the labels or envelopes, but the destination address is unique on each one.
- *A set of form letters, e-mail messages, or faxes* – 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.
- *A Catalogue* – This option is not as popular as the others but it is very useful. If you have a lot of data for a group of individuals, for example, but you just want to print a list of names and numbers, this option will save a lot of time.



Creating each letter, message, fax, label, envelope, or catalogue individually would take hours. That's where mail merge comes in. Using mail merge, all you have to do is create one document that contains the information that is the same in each version. Then you just add some placeholders for the information that is unique to each version. Word takes care of the rest.

The Three Parts of a Mail Merge

The Main Document - This is the form in which you want to merge the individual's information.

Example:

February 18, 2003

<Address Block>

Dear, <First Name Block>,

I wanted to take a moment to thank you for your continued support of The Garden Company! Were it not for loyal customers like you, we would not be celebrating our 10th anniversary on March 15th of this year. In honor of that anniversary, we will be hosting a special *March Madness* sale! Everything in the store is available at 10% off throughout the month, and selected specials will be offered each day at higher discounts. Please pick up one of our promotional flyers in the store for a complete schedule of these bonus promotions and the dates they will run.

<First Name Block>, you can realize an even greater savings by bringing this letter with you when you shop. Present it to the cashier at checkout to identify yourself as a VIP Customer and receive an additional 5% off your total bill. This is just our way of thanking you for your continued patronage of The Garden Company. Remember, The Garden Company is your one stop shop for all of your spring planting needs!

Sincerely,

Jarrett Piner
UNCW Station
601 South College Rd.
Wilmington, NC 28403



The Data Document - This is the document where all of your information is being pulled from.

Examples:

Excel Data Source

	A	B	C	D	E	F
1	FirstName	LastName	Address1	City	State	PostalCode
2	Cindy	Durkin	7899 38th St.	Tucker	NJ	10025
3	Stephen	Nelson	5678 Ford Ave.	Planter	PA	10002
4	Lani	Ota	1234 Editorial Way	Harvest	PA	10004
5	Mike	Tiano	456 South Rd.	Harvest	PA	10004
6	John	Rodman	987 Hard Rock Way	Potential	DE	17540

Access Table

Data : Table						
	FirstName	LastName	Address	City	State	PostalCode
▶	Stephen	Nelson	5678 Ford Ave.	Planter	PA	10002
	Lani	Ota	1234 Editorial V	Harvest	PA	10004
	Mike	Tiano	456 South Rd.	Harvest	PA	10004
	Cindy	Durkin	7899 38th St.	Tucker	NJ	10025
	John	Rodman	987 Hard Rock	Potential	DE	17540
*						

Word Table

<u>FirstName</u>	<u>LastName</u>	<u>Address1</u>	<u>City</u>	<u>State</u>	<u>PostalCode</u>
Cindy	Durkin	7899 38 th St.	Tucker	NJ	10025
Stephen	Nelson	5678 Ford Ave.	Planter	PA	10002
Lani	Ota	1234 Editorial Way	Harvest	PA	10004
Mike	Tiano	456 South Rd.	Harvest	PA	10004
John	Rodman	987 Hard Rock Way	Potential	DE	17540



The Final Document(s) - Once you have completed the merge, you will have a document for every individual you selected in your data source, personalized to your specifications.

Example:

February 18, 2003

Amy Egert
678 Pine St
Agriculture, PA 19003

Dear Amy Egert,

I wanted to take a moment to thank you for your continued support of The Garden Company! Were it not for loyal customers like you, we would not be celebrating our 10th anniversary on March 15th of this year. In honor of that anniversary, we will be hosting a special *March Madness* sale! Everything in the store is available at 10% off throughout the month, and selected specials will be offered each day at higher discounts. Please pick up one of our promotional flyers in the store for a complete schedule of these bonus promotions and the dates they will run.

Amy, you can realize an even greater savings by bringing this letter with you when you shop. Present it to the cashier at checkout to identify yourself as a VIP Customer and receive an additional 5% off your total bill. This is just our way of thanking you for your continued patronage of The Garden Company. Remember, The Garden Company is your one stop shop for all of your spring planting needs!

Sincerely,

Jarrett Piner
UNCW Station
601 South College Rd.
Wilmington, NC 28403



Starting the Mail Merge Process

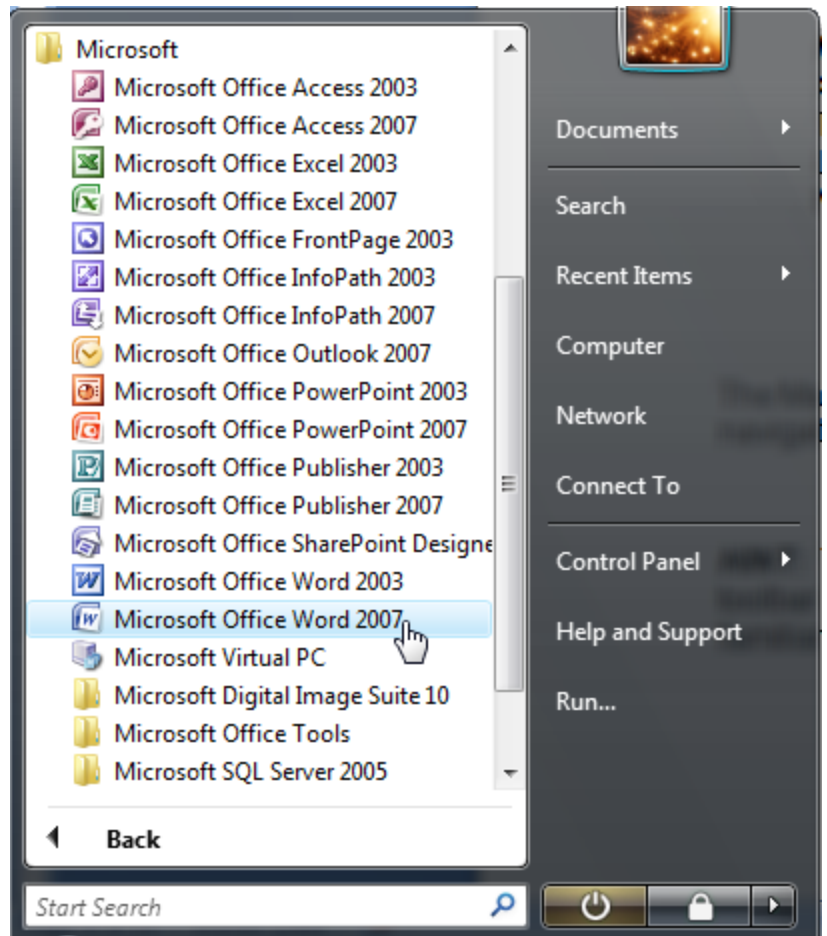
To start the Mail Merge process:

1. Start Word 2007.

A blank document opens by default. (Leave it open. If you close it, the next step won't work.)

2. On the Mailings tab, Click “Start Mail Merge”, and then “Step by Step Mail Merge Wizard”.

Note: In Word XP/2003, on the Tools menu, point to Letters and Mailings, and then click Mail Merge Wizard.



The Mail Merge task pane opens. By using hyperlinks in the task pane, you navigate through the mail-merge process.

HINT: You can also perform a mail merge by using buttons on the Mailings tab). Until you are familiar with the process, however, it is recommended to use the wizard.

Mail Merge Step 1: Choose a Document Type and Main Document

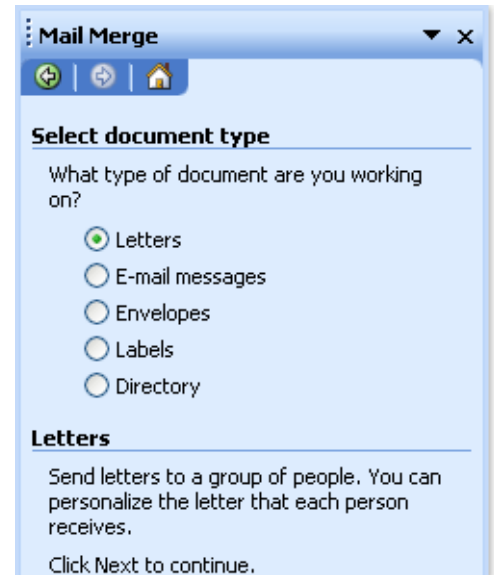
This step in the mail merge process involves two choices. First, you choose the type of document that you want to create. Then, you choose the main document that you want to use. The main document is the document that you start with. It's the model for all of the merged documents that you eventually create.

Note: In this example, we're using form letters. If you are creating a set of merged labels or envelopes, the process is a little different.

Choose the type of document you want to merge information into:

The Mail Merge task pane opens with a question about what type of merged document you are creating. After you make your choice, click Next at the bottom of the task pane.

Note: If you don't see the Mail Merge task pane, on the Tools menu, point to Letters and Mailings, and then click Mail Merge (or Mail Merge Wizard, if you're using Word 2002).

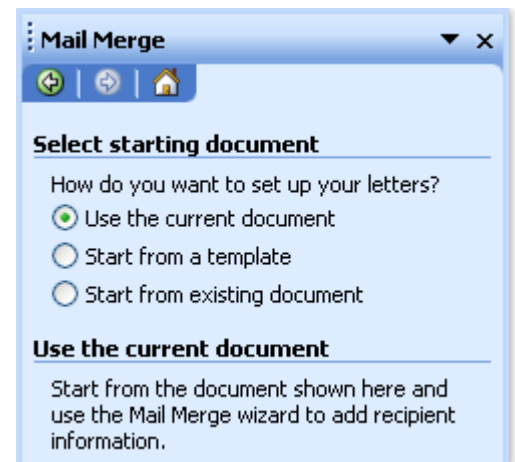


Choose the main document you want to use:

If your main document (called the starting document in the task pane) is already open, or you are starting with a blank document, you can click "Use the current document."

Otherwise, click "Start from a template" or "Start from existing document," and then locate the template or document that you want to use.

HINT: When you click "Start from a template" and then click "Select template" in the task pane, you open the Select Template dialog box. From there, you can open one of the many templates that are installed with Word. You can also access the hundreds of templates available on the Microsoft Office Online Web site.



Mail Merge Step 2: Connect to a Data File and Select Records

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 select specific records to use.

Connect to the data file:

In this step in the mail merge process, you connect to the data file where the unique information that you want to merge into your documents is stored.

If you keep complete, up-to-date information in your Microsoft Office Outlook® Contacts list, that is an excellent data file to use for customer letters or e-mail messages. Just click “Select from Outlook contacts” in the task pane, and then choose your Contacts folder.

If you have a Microsoft Office Excel worksheet or a Microsoft Office Access database that contains your customer information, click “Use an existing list,” and then click Browse to locate the file.

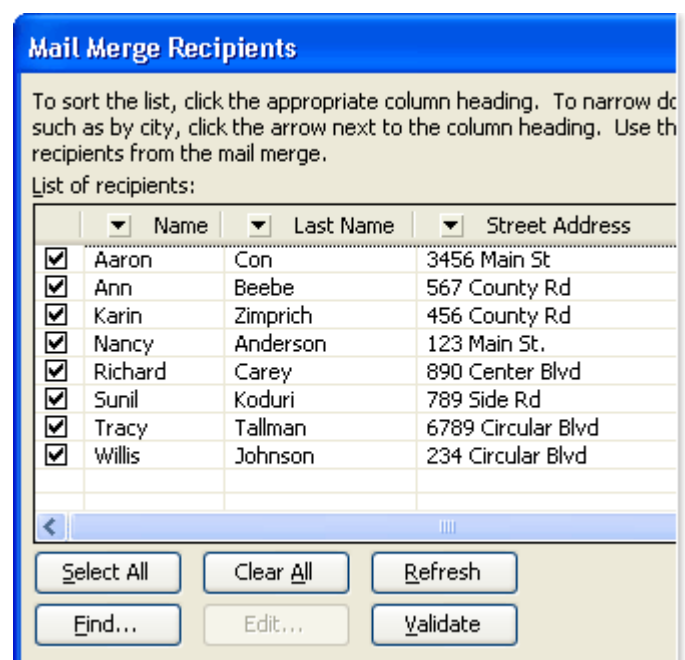
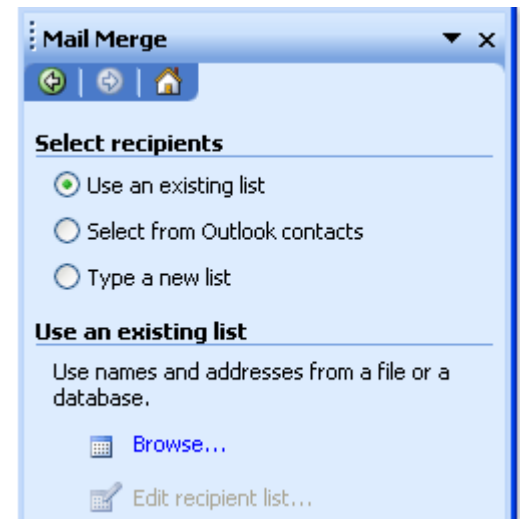
If you don't have a data file yet, click “Type a new list,” and then use the form that opens to create your list. The list is saved as a mailing database (.mdb) file that you can reuse.

Note: If you're creating merged e-mail messages or faxes, make sure that your data file includes a column for the e-mail address or fax number. You will need that column later in the process.

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 all the information from all the records into your main document.

After you connect to the data file you want to use (or you create a new data file) the Mail Merge Recipients dialog box opens.



You can select a subset of records for your mail merge by sorting or filtering the list.

Sort/Filter the Records to your specifications:

- 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.
- Clear the check box next to a record to exclude that record.
- Use the buttons to select or exclude all the records or to find specific records.

HINT: After you filter the list, you can display all the records again by clicking the arrow and then clicking (All).

If you created the data file as part of the mail merge process, the Edit button is available in this dialog box. You can make changes to the records if you need to update the file.

Mail Merge Step 3: Add Fields to the Main Document

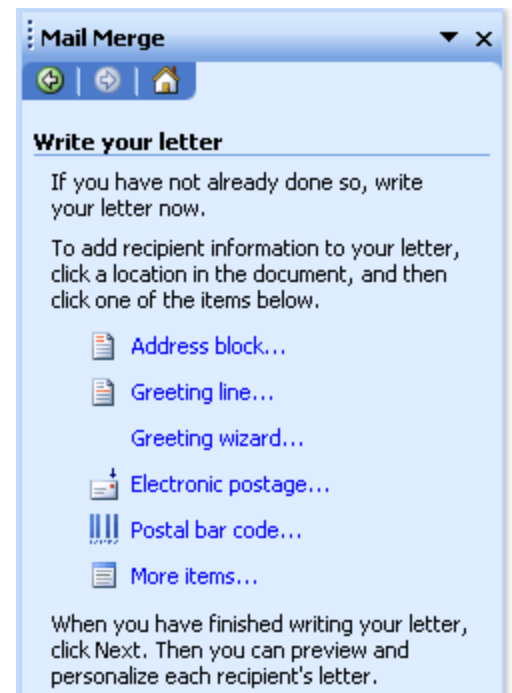
After you connect your main document to a data file, you're ready to add fields that indicate where the unique information will appear in each copy of the document that you generate when you merge. To make sure that Word can find a column in your data file that corresponds to every address or greeting element, you may need to match fields.

Add Fields:

If your main document is still blank, type the information that will appear in each copy (the body of the letter). Then, add fields by clicking the hyperlinks in the task pane.

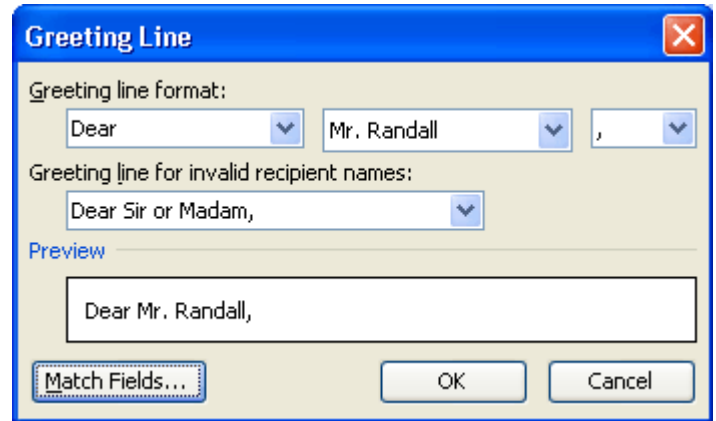
Fields are placeholders that you insert into the main document in locations where you want unique information to appear. For example, you can click the Address block or Greeting line links in the task pane to add fields near the top of a new letter, so that each recipient's letter contains a personalized address and greeting. Fields appear in your document within chevrons, for example, «AddressBlock».

If you click “More items...” in the task pane, you can add fields that match any of the columns in your data file. For example, your data file might include a column called Personal Note. By putting a Personal_Note field at the bottom of a form letter, you can further personalize each copy. You can even customize envelopes by adding a postal bar code—if you are using the English (U.S.) language version of Word—or electronic postage (if you have an electronic postage program installed).



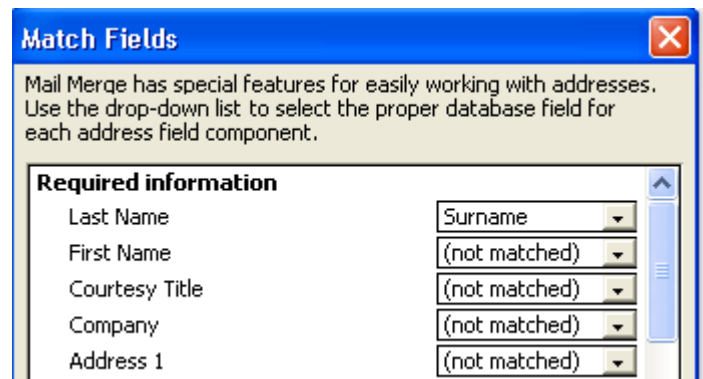
Match Fields:

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 task pane. You use the lists under "Greeting line format" to make your choices.



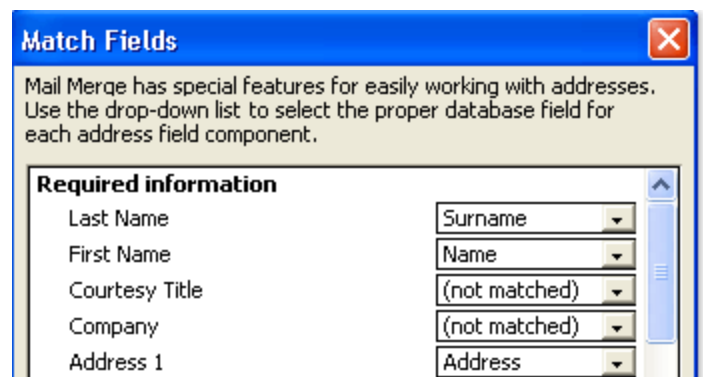
If Word can't match each greeting or address element with a column from your data file, the addresses and greeting lines will not be merged correctly. To help avoid problems, click Match Fields. The Match Fields dialog box opens.

The elements of an address and greeting are listed on the left. Column headings from your data file are listed on the right.



Word searches for the column that matches each element. In the illustration above, Word automatically matched the data file's Surname column to Last Name. But Word was unable to match other elements. From this data file, for example, Word can't match First Name or Address 1.

By using the drop down fields on the right, you can select the column from your data file that matches the element on the left. In the illustration, the Name column now matches First Name, and the Address column matches Address 1. (It's okay if Courtesy Title, Company, and Spouse First Name aren't matched, because they aren't used in the documents that you are creating.)



Mail Merge Step 4: Preview the Merge

After you add fields to your main document, you are ready to preview the merge results. When you're satisfied with the preview, you can complete the merge.

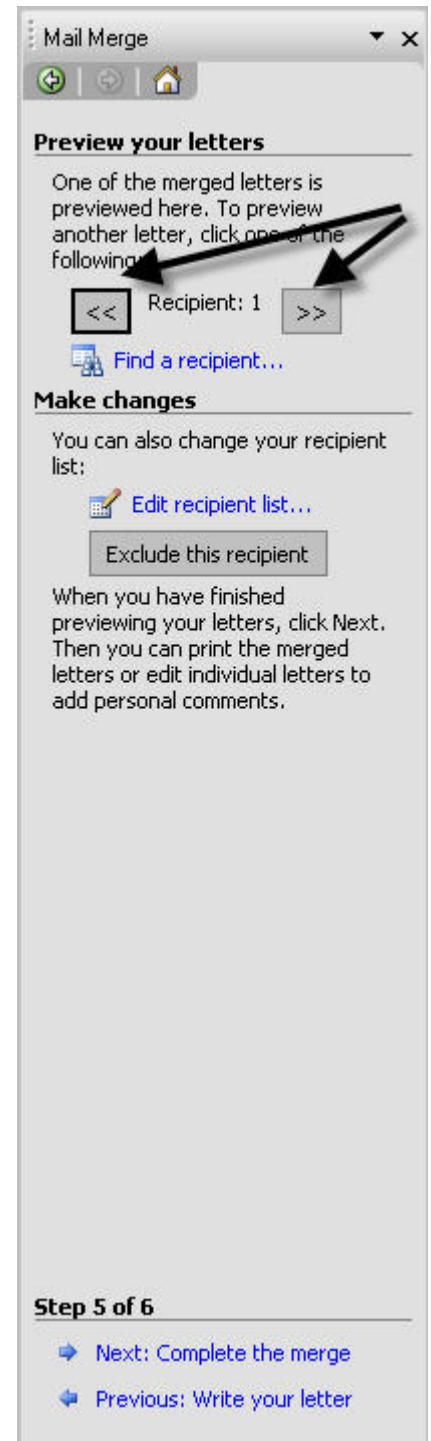
Preview the merge:

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

To preview, do any of the following:

- Page through each merged document by using the next and previous buttons in the task pane.
- Preview a specific document by clicking “Find a recipient.”
- Click “Edit recipient list” to open the Mail Merge Recipients dialog box, where you can filter the list if you see records that you don't want to include.
- Click “Exclude this recipient” if you realize you don't want to include the record that you are looking at.
- Click “Previous” at the bottom of the task pane to go back a step or two if you need to make other changes.

When you are satisfied with the merge results, click Next at the bottom of the task pane.



Mail Merge Step 5: Complete the Merge

What you do now depends on what type of document you're creating. If you are merging letters, you can print the letters or modify them individually. If you choose to modify the letters, Word saves them all to a single file, with one letter per page. It is recommended that you always select the Edit option so you can preview your letters; if you click Print then they are sent directly to the printer.

No matter what type of document you are creating, you can print, transmit, or save all or just a subset of the documents.

HINT: If you're creating merged e-mail messages, Word sends the messages immediately after you complete the merge. Therefore, after you choose which messages you want to send, you are prompted to indicate the column in your data file where Word can find e-mail addresses for the recipients. You also are prompted to type a subject line for the message.



Remember that 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, in addition to its content and fields, you also save its connection to the data file. The next time you open the main document, you're 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 open the task pane (Tools menu, Letters and Mailings submenu, Mail Merge command), you are at the Select recipients step. You can click hyperlinks in the task pane to modify the data file to include a different set of records or to connect to a different data file. Then, you can click Next at the bottom of the task pane to proceed with the merge.
- 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.

Questions or Problems?

Contact the Technology Assistance Center (TAC)

Location: Randall Library 1037

Phone: 962-HELP (4357)

Website: [Http://uncw.edu/tac](http://uncw.edu/tac)

