

Microsoft Word 2007

Create Letters Using the Mail Merge Wizard



Mail Merge

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, the return address is the same on all the labels or envelopes, but the destination address is unique on each one.

Laying the ground work for a successful **Mail Merge** will take a little time, but once it is set up you can reuse your template.

Summary

1. Format data
2. Use Mail Merge Wizard to create and print letters
3. Cleaning up
4. Shortcut for addresses

Format Data

You can use data from a variety of sources (such as a table in Access, an Excel worksheet or Outlook contacts).

If you create your own data file in Excel, ensure that the top row contains titles (Figure 1, 1) for the data directly below it (Figure 1, 2). When performing a Mail Merge, the file containing the data is referred to as the **Data Source**.

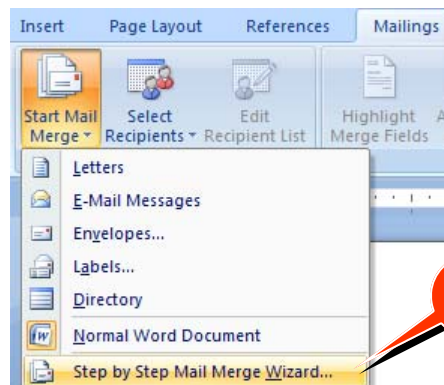
Figure 1

	A	B	C	D	E	F	G
1	Title	First Name	Last Name	Home Address	City		State Zip
2	Mr.	Barry	Adams	145 Elmwood Ave	Fairport	MD	14450
3	Dr.	Francis	Allen	128 Kimberly Dr	Pittsford	MD	14534
4	Ms.	Elizabeth	Barry	61 Granger Rd	Fairport	MD	14420
5	Dr.	Jackson	Bell	323 Monroe Ave	Spencerport	MD	14559
6	Mr.	Adam	Boller	145 Elmwood Ave	Fairport	MD	14450
7	Ms.	Sabrina	Cedar	145 Elmwood Ave	Hamlin	MD	14464

Mail Merge for Letters Using the Mail Merge Wizard

1. Click on the **Mailings** tab.
2. In the **Start Mail Merge** group, click **Start Mail Merge** and **Step by Step Mail Merge Wizard** (Figure 2, 1).

Figure 2



Step 1

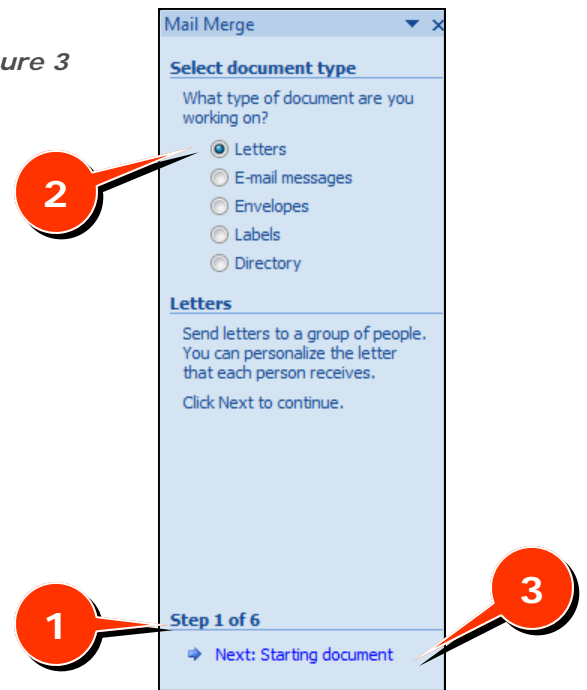
The **Mail Merge** pane should open on the right side of the screen (Figure 3).

Notice that the bottom of the window shows that you are on **Step 1 of 6** (Figure 3, 1). To move through this entire wizard, you will either click **Next** or **Previous** at the bottom of the pane.

For each step, read from top to bottom and answer each question. The wizard will step you through the process.

1. Select **Letters** under **Select document type** (Figure 3, 2).
2. Click **Next** (Figure 3, 3).

Figure 3



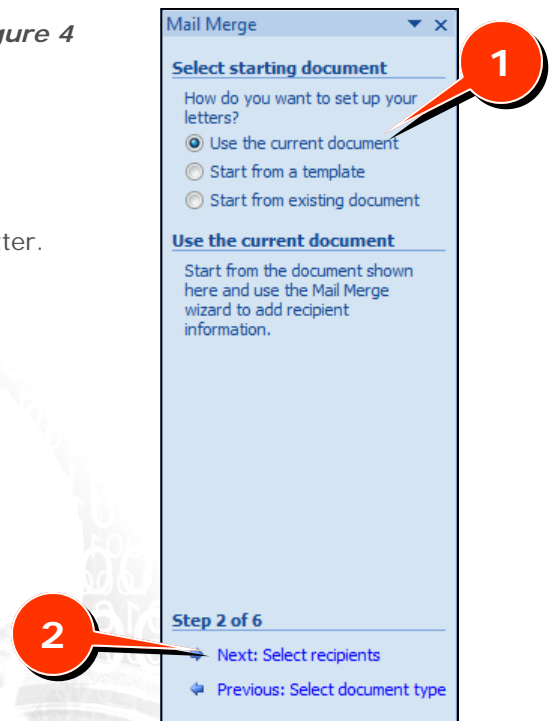
Step 2

1. For a brand new letter, under **Select starting document**, select **Use the current document** (Figure 4, 1).

Note: You can also start from a template or open an existing letter.

2. Click **Next** (Figure 4, 2).

Figure 4



Step 3: Select recipients

Figure 5

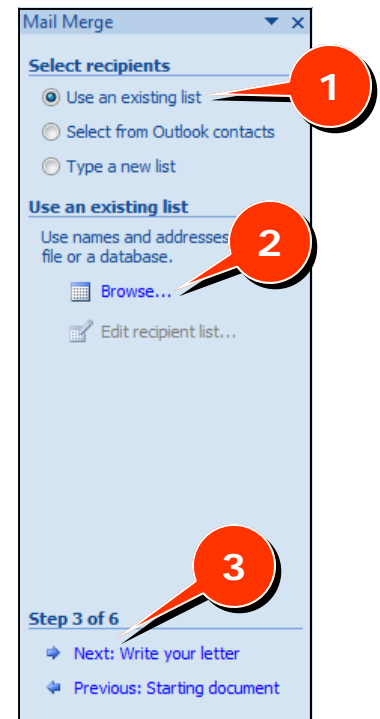
Here you will connect this Word document with the data source that contains your recipient information. For this example, we are connecting to an Excel file.

Note: You can also select recipients from your Outlook contacts, or type a new list on the fly.

1. Under **Select recipients**, ensure that **Use an existing list** is selected (Figure 5, 1).
2. Under **Use an existing list**, click the **Browse** button to connect with your data source (Figure 5, 2).

★ Once you select your Excel sheet, click **OK** when you are prompted through two windows (**Select Table** and **Mail Merge Recipients**).

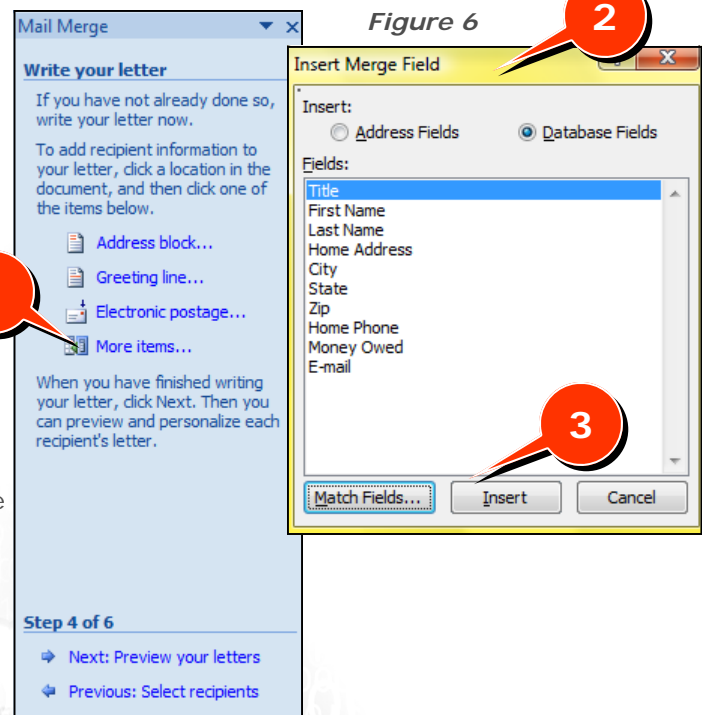
3. Click **Next** (Figure 5, 3).

**Step 4: Write your letter**

1. If you haven't done so, type out the generic parts of your letter that are the same for each recipient.

Next, it takes several steps to add **Fields** to your document. **Fields** serve as place markers that Word will fill in with recipient information when we finish the merge.

2. Click your cursor in your letter where you want to add your first field.
3. Under **Write your letter**, click on **More items** (Figure 6, 1).
4. The **Insert Merge Field** window should open up (Figure 6, 2). It should list all of the titles from the title row of your data source (i.e. First Name, Last Name, City, State, etc.).
5. To add a field to your document, click on the field (i.e. First Name) and click **Insert** (Figure 6, 3).

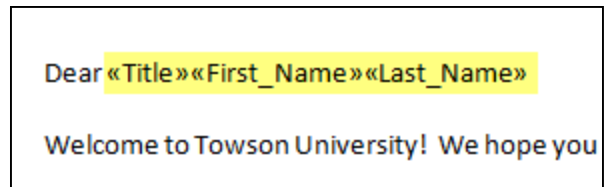


6. To add additional fields, click on the field and click **Insert** for each one.
7. Click **Cancel** or **Close** to close this window so you can move to a different part of the document and add more fields.
8. Repeat steps 2-6 until you have added all the fields you need.

⚡ For a short-cut to creating addresses out of fields, see **Shortcut for Step 4** on page 5.

Your document might look something like this (Figure 7):

Figure 7

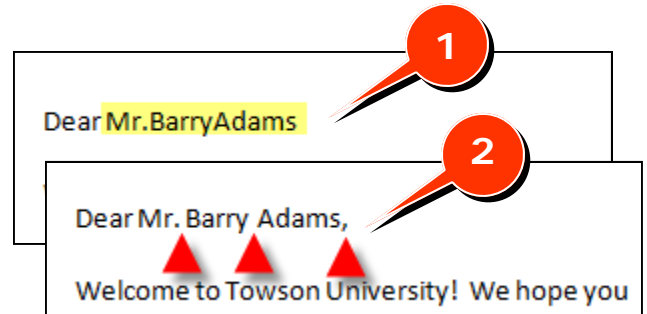


9. Click **Next**.

Step 5: Preview your letter

Figure 8

Now instead of seeing field titles in your document (as in Figure 7), you should see a preview of how the letter will look with the first recipient information instead of fields (Figure 8, 1).



1. Add any spaces, punctuation, or hard returns needed to format the text. In this example, spaces are needed between the several fields, and a comma is needed at the end (Figure 8, 2).

★ If you need to add additional fields, click the **Previous** button at the bottom of the pane to return to step 4.

2. You can also preview other letters by clicking the arrows next to **Recipient 1** (Figure 9, 1).
3. Once you're satisfied with the letter, click **Next** on the bottom of step 5 (Figure 9, 2).

Figure 9

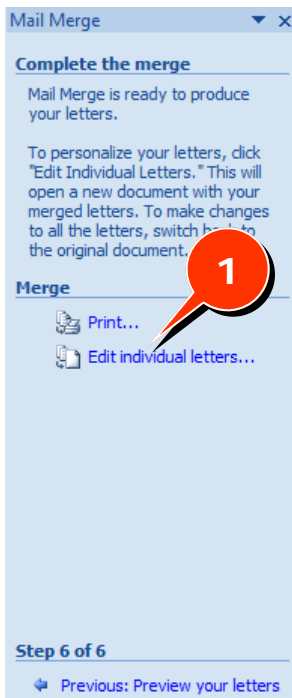
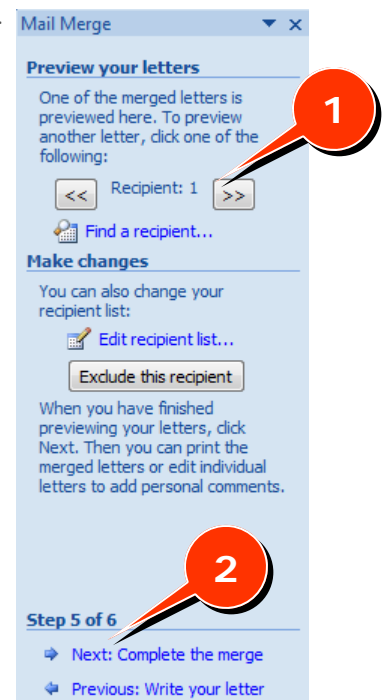


Figure 10

Step 6: Complete the merge

1. Click **Edit individual letters** to complete the merge (Figure 10, 1). A new document will open that will contain all of the mail merged letters.
2. Look over the new document carefully. Make any edits, as needed, to these merged letters.
3. Select the **Office** button and **Print** to print your letters.

Cleaning up

- ★ If you plan to use the same letter template again, you can reuse it!

You now should have two open documents: your original letter (which is likely titled "Document...") and a document containing all of your merged letters (titled "Letters...").

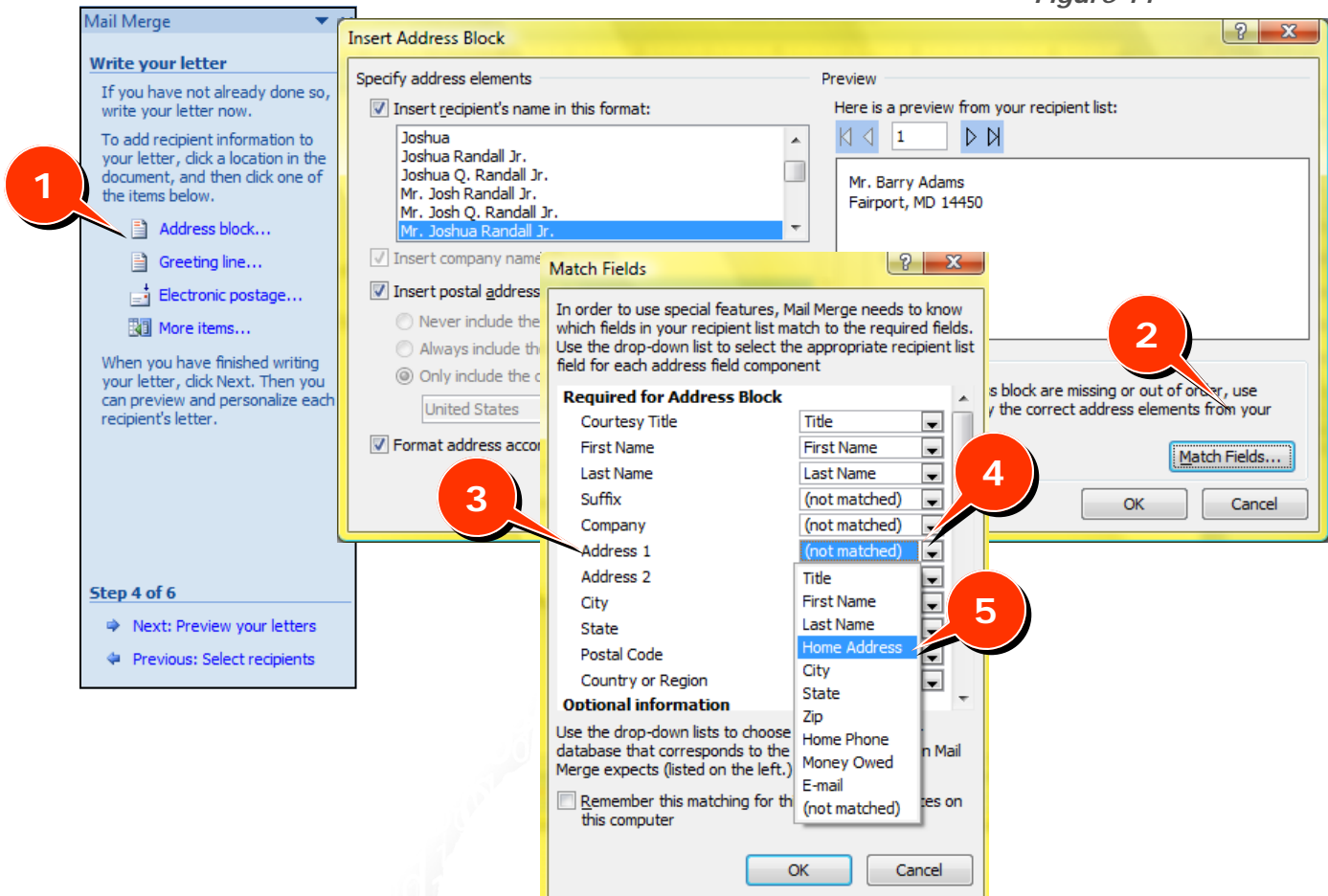
Save the document titled "Document..." as your template. Save the "Letters" document in case you need to make further edits to those letters.

⚡ Shortcut for Step 4: Adding Addresses

Looking for a quicker way to add addresses made up of recipient fields in step 4 (on page 3)?

1. Instead of selecting **More items** to insert fields, click **Address block** (Figure 11, 1).

Figure 11



2. In the **Insert Address Block** window, click **Match Fields** (Figure 11, 2).
3. In the **Match Fields** window, Word will try to match fields it's looking for (on the left) with the titles in your data source (on the right). If Word missed any critical fields, use the drop-down list to match them up. In this example, Word was looking for an **Address 1** field (Figure 11, 3), but it couldn't match that to one of the fields in the source document (Figure 11, 4). To match the correct field, you would click the down-arrow across from **Address 1** (Figure 11, 4) and click on the matching data source title (Figure 11, 5).
4. When all critical fields are match, click **OK** and **OK**.