

UNIVERSITY OF WISCONSIN OSHKOSH

Word 2007

Mail Merge

UW Oshkosh

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The Mail Merge Process

Mail Merge is one of the most helpful tools available in Word 2007. The idea is to take two separate documents and merge them together into a set of new documents, that although have slight differences share the same basic structure.

For example, imagine that you need to send out a series of letters to alumni thanking them for their generous donations to the University. You have a basic form letter written but the thought of changing the inside address for each individual letter seems like an overwhelming task. This is where mail merge comes in handy.

In order to complete the mail merge process you will need two pieces of information, the first is the letter, form, etc. that you will be sending out, this is referred to as the **main document**. The second piece is the set of recipients and their unique information that will change for each document merged. In the Thank you letter example used above, this would be a list of the people and address that would need to change for each letter sent. This second piece of information is called the **data source**.

In Word 2007, the Mailing Ribbon is used to complete all Mail Merges. See the included buttons on the graphic below.



There are several steps in the mail merge process. The steps will change slightly depending on the type of document being produced, however the overall process remains the same: Create a main document, connect the main document to the data source, format the document and print. The steps below will guide you through the process.

Select Document Type

1. Open a new blank document
2. Activate the Mailings Ribbon
3. Click Start Mail Merge button.
4. A dropdown will appear, select the type of document you would like to create.

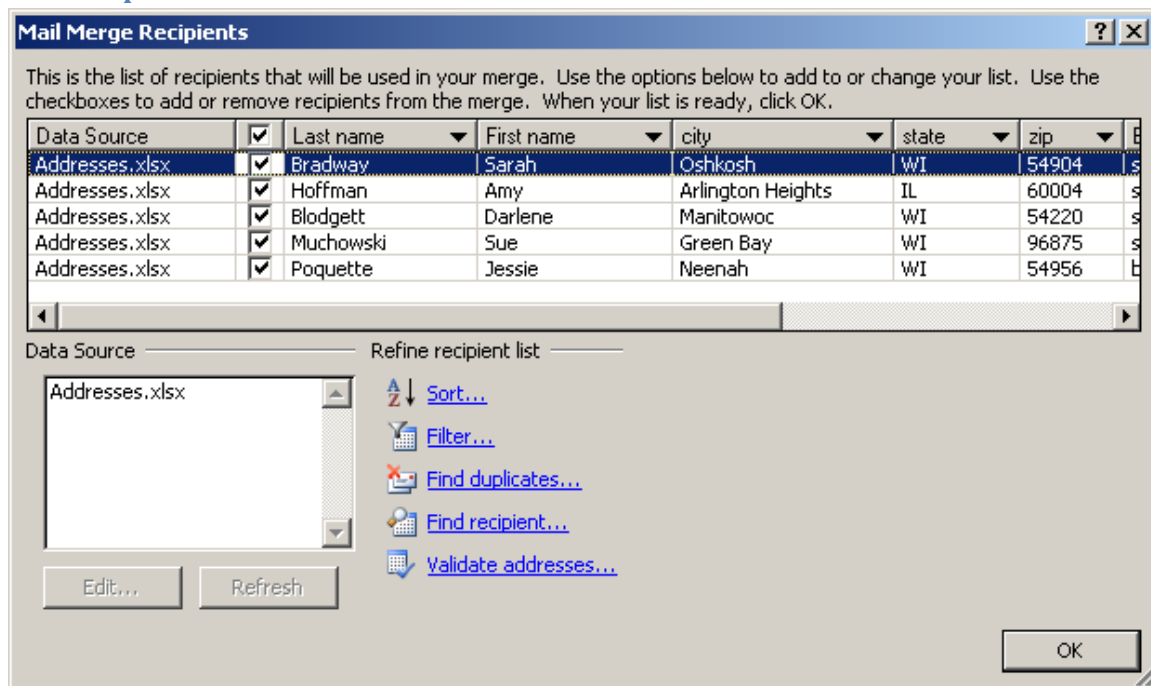
Note: Word 2007 primarily uses the mailing ribbon to complete mail merges. If you prefer to use the Mail Merge Wizard (common in 2003), select "Step by Step Mail Merge Wizard" from the bottom of the "Start Mail Merge" dropdown menu.

Select Recipients

Although Word 2007 gives the option to create a list of recipients as part of the mail merge process, we recommend having a list of recipients already created in Word or Excel. This allows you to reconnect to the list as many times as necessary. For example the list could be used to send letters inviting faculty to a conference, the same list can then be used to create name badges and eventually to send thank you letters.

1. Click the Select Recipients Button. Select one of the following options.
 - a. **Type a new list:** Allows the user to enter information manually.
 - b. **Use Existing List:** (Recommended) This method will allow you to browse for a document that contains a list of recipients and necessary information.
 - c. **Select from Outlook Contacts:** This option works much better when starting a Mail Merge from Outlook. If interested call the IT trainers for instructions.
2. Click the Edit Recipients Button.
3. The Mail Merge Recipients dialog box will appear.

Edit Recipient List



4. Manipulate Recipient list as necessary.
 - a. **Checkboxes:** Those individuals that are checked will be included in the mail merge. If there are any recipients that should not be included, uncheck the appropriate box.
 - b. **Sort:** Click the Sort option to access the sort dialog box or click on top of the field label you would like to sort. For example, to sort by last name click right on top of the words "Last name".

- c. **Filter:** Click the Filter option to access the filter dialog box or click the black dropdown arrow next to each column heading. Select the item you would like to filter for.
- d. **Find Duplicates:** When this option is clicked, a dialog box opens listing individuals who appear on the list more than once. Uncheck the box next to one name to prevent the individual from receiving duplicate items
- e. **Find Recipient:** The “Find Recipient” option reveals a Find dialog box so that a specific individual can easily be located.
- f. **Validate Addresses** This action requires address validation software, this is not standard on University computers.

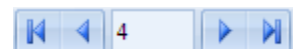
Write Your Document

1. Configure your item by adding text and when necessary, insert merge fields into the document.
2. Word 2007 provides several preformatted entries that are commonly used in mail merges. When clicked a dialog box will appear allowing the user to specify exactly how a field will be inserted into the item
 - a. **Address Block:** enters name, street address, city, state and zip into item. The address block formats these fields as they would appear on the front of an envelope.
 - b. **Greeting Line:** enters a greeting and name into an item. Use the dialog box to configure greeting and how name will be formatted.
 - c. **Insert Merge Field:** reviews the data source containing recipient information and lists the field names (column headings) associated with the file. Use the dropdown to enter pieces of information specific to the current project.
 - d. **Match Fields:** This feature is used when the word document does not connect exactly with the data source. See Match Fields below for further information.

Preview Your Project

The mail merge process is almost complete. Now is the time to make any needed changes and/or identify mistakes.

1. Click the “Preview Results” button to reveal merged fields.
2. Use the arrows in the Preview Results group to scroll through each letter. Check for major problems in format, such as street addresses that are missing or any other major issues.

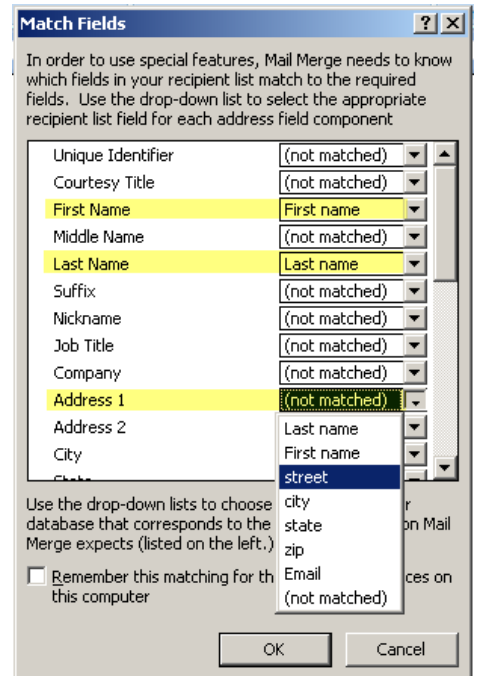


Match Field

Occasionally while previewing your document you may find errors. These can most often be attributed to a mismatched field. Word 2007 has certain field names that it uses to merge documents. For example, the address block is comprised of the First Name field, Last Name field, Address1, City, State and Postal Code. Occasionally the fields (column headings) in the data source do not have the same names. For example, the data source may have Zip code for a field name instead of postal code. In this situation, Word can't match the two fields so it leaves off the postal code in the address block. These types of miscommunications can be fixed by matching fields.

1. Click the "Match Fields" button on the mailings ribbon.
2. The Match Fields Dialog Box appears. The items on the left side of the window are the fields that Word 2007 uses to merge documents. The items on the right side are fields from the data source. Notice that the First Name and Last Name are matched. Address1 was not matched.
3. Click the dropdown next to an unmatched field.
4. A list of fields included in the data source will appear.
5. Click the field from the data source that matches the field that Word uses.
6. Click OK

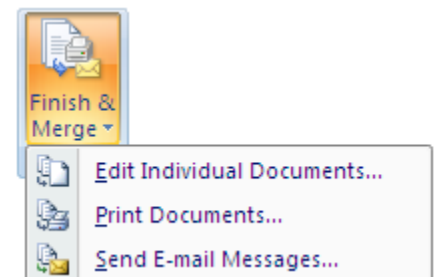
Note: If you discovered mismatched fields while previewing, you must advance the preview to see the newly updated field.



Complete the Merge

After a document has been previewed and everything looks accurate, the merge can be completed

1. Click the "Finish and Merge" button.
2. A dropdown will appear. Choose the appropriate action.
 - a. **Edit Individual Documents:** This option will create a new document consisting of all the merged items.
 - b. **Print Documents:** will open the print dialog box, so that all merged items can be printed
 - c. **Send E-mail Messages:** This will open the Merge to Email Dialog Box



Merging Letters

Select Document Type

1. Open a new blank document
2. Activate the Mailings Ribbon
3. Click Start Mail Merge button.
4. A dropdown will appear. Select the “Letters” option.

Select Recipients

5. Click the Select Recipients Button. Select one of the following options.
 - a. **Type a new list:** Allows the user to enter information manually.
 - b. **Use Existing List:** (Recommended) This method will allow you to browse for a document that contains a list of recipients and necessary information.
 - c. **Select from Outlook Contacts:** This option works much better when starting a Mail Merge from Outlook. If interested call the IT trainers for instructions.

Edit Recipient List

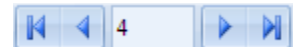
6. Click the “Edit Recipients” Button.
7. The Mail Merge Recipients dialog box will appear.
8. Manipulate Recipient list as necessary. See above instructions for sorting, filtering, etc.

Write Your Document

9. Configure your letter by adding text and when necessary, inserting merge fields into the document.
10. Word 2007 provides several preformatted entries that are commonly used in letter merges. Enter Address Block, Greeting Line or any other necessary merge fields.

Preview Your Project

11. Click the “Preview Results” button to reveal merged fields.
12. Use the arrows in the Preview results group to scroll through each letter. Check for major problems in format, such as street addresses that are missing or any other major issues.



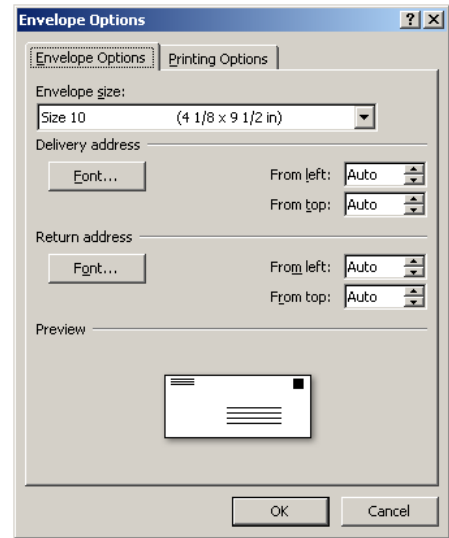
Complete the Merge

13. Click the “Finish and Merge” button.
14. A dropdown will appear. Choose the desired action.
 - a. **Edit Individual Documents:** This option will create a new document consisting of all the merged letters.
 - b. **Print Documents:** will open the print dialog box, so that all merged letters can be printed

Merging Envelopes

Select Document Type

1. Open a new blank document
2. Activate the Mailings Ribbon
3. Click Start Mail Merge button.
4. A dropdown will appear, select “envelopes”
5. The Envelope Options Dialog Box will appear.
6. Fill out as desired. Use the Preview section to see how the envelope will appear when printed
 - a. **Envelope Size:** Use the dropdown to select the size of envelope being used.
 - b. **Delivery Address:** Click the font button to format the size and style of the font in the delivery address. Use the roll boxes to determine placement of the address.
 - c. **Return Address:** Click the font button to format the size and style of the font in the return address. Use the roll boxes to determine placement of the address.
7. Click OK
8. Notice how the page changes, it now resembles an envelope



Select Recipients

9. Click the “Select Recipients” Button. Select one of the following options.
 - a. **Type a new list:** Enter information manually.
 - b. **Use Existing List:** (Recommended) This method will allow you to browse for a document that contains a list of recipients and necessary information.
 - c. **Select from Outlook Contacts:** This option works much better when starting a Mail Merge from Outlook. If interested call the IT trainers for instructions.

Edit Recipient List

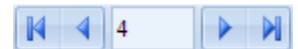
10. Click the Edit Recipients Button.
11. The Mail Merge Recipients dialog box will appear.
12. Manipulate Recipient list as necessary. See above instructions for sorting, filtering, etc.

Write Your Document

13. Activate the Home Ribbon.
14. Turn on the Show/Hide feature.
15. Click next to the first paragraph mark in the return address area of the envelope.
16. Type the return address.
17. Activate the Mailings Ribbon
18. Click next to the first paragraph mark in the delivery address area. Add text and when necessary, insert merge fields into the document.

Preview Your Project

19. Click the "Preview Results" button to reveal merged fields.
20. Use the arrows in the Preview results group to scroll through each envelope. Check for major problems in format, such as street addresses that are missing or any other major issues.



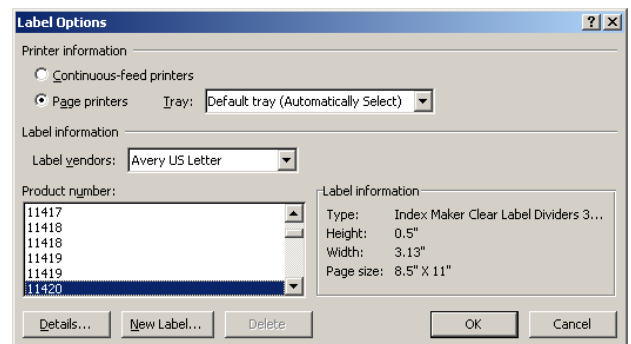
Complete the Merge

21. Click the "Finish and Merge" button.
22. A dropdown will appear. Choose the desired action.
 - a. **Edit Individual Documents:** This option will create a new document consisting of all the merged envelopes.
 - b. **Print Documents:** will open the print dialog box, so that all merged envelopes can be printed

Merging Labels

Select Document Type

1. Open a new blank document
2. Activate the Mailings Ribbon
3. Click Start Mail Merge button.
4. A dropdown will appear; select labels.
5. The Label Options Dialog Box will appear.
6. Fill out as desired.
 - a. **Printer Information:** Click the type of printer being used.
 - b. **Label Information:** Check the appropriate vendor for the type of label being used.
 - c. **Product Number:** Click the appropriate number for the type of label being used. Notice the label information on the right of the dialog box
7. Click OK



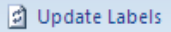
Select Recipients

8. Click the “Select Recipients” Button. Select one of the following options.
 - a. **Type a new list:** Enter information manually.
 - b. **Use Existing List:** (Recommended) This method will allow you to browse for a document that contains a list of recipients and necessary information.
 - c. **Select from Outlook Contacts:** This option works much better when starting a Mail Merge from Outlook. If interested call the IT trainers for instructions.
9. When recipients have been added, the page will change. The first label will be blank, all other labels will say, “next record.”

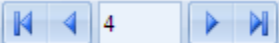
Edit Recipient List

10. Click the Edit Recipients Button.
11. The Mail Merge Recipients dialog box will appear.
12. Manipulate Recipient list as necessary. See above instructions for sorting, filtering, etc.

Write Your Document

13. In the space for the first label, add text or insert merge fields.
14. When finished adding text and merge fields to the first label, click the update labels button. 
15. The other labels will automatically be filled in with the appropriate text and merge fields.

Preview Your Project

16. Click the “Preview Results” button to reveal merged fields.
17. Use the arrows in the Preview results group to scroll through each label.  Check for major problems in format, such as street addresses that are missing or any other major issues.
18. Note: When previewing labels, direct your attention to the upper left label. That is the label that is getting previewed. As you scroll through the labels, it will appear as though labels will only print on half the page, it only appears this way, labels will print normally.

Complete the Merge

19. Click the “Finish and Merge” button.
20. A dropdown will appear. Choose the desired action.
 - a. **Edit Individual Documents:** This option will create a new document consisting of all the merged labels.
 - b. **Print Documents:** will open the print dialog box, so that all merged labels can be printed