

Mail Merge 2007 Guide

Any type of Mail Merge has two components, the main document and the data file. The main document contains the body of the text, plus any graphics, photos, etc. It is usually composed in a Word Processing program (Word). The data file contains a list of names, addresses, etc. The data file is often created in a spreadsheet program (Excel), or uses a list of contacts from an e-mail program (Outlook). Selected components from the data file are inserted into the main document, and the two files are merged to create one seamless document.

Using Excel to Create a Data File

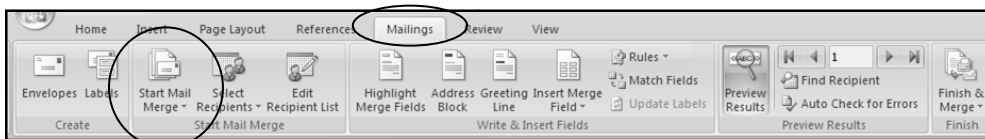
1. Open Your Spreadsheet Program
2. Create Headings in Row 1 for all components of the mail merge
 - Recommended: Last Name, First Name, Address, City, State, Zip Code
 - Optional: Title, Middle Initial, Suffix, Partner Name, etc.
 - They do not need to be in any particular order.

C	D	E	F	G	H	I
LAST NAME	FIRST NAME	ADDRESS	CITY	STATE	ZIPCODE	START DATE

3. Enter all data into the data file. Watch Your Spelling! If it's wrong in the data file, it will be wrong in the main document.

- **Note:** Many zip codes on the east coast begin with a 0 (e.g. 07924). Excel often does not recognize the zero and will remove it from the zip code (e.g. 7924). To correct this, **right-click on the zip code column → Format Cells**. Select *Text* in the list of *Categories*. You may need to add the 0s in again, but now they will stay.

Beginning the Mail Merge



Go to Mailings → Start Mail Merge → Start Mail Merge button

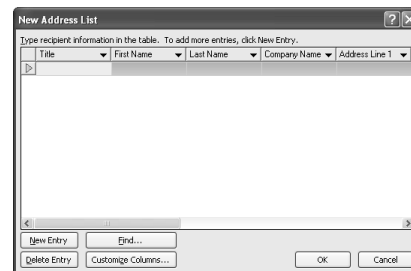
1. Select Document Type

- **Letters** – Easily insert addresses, greetings, etc. into a letter
- **E-Mail Messages** – Send a mass e-mail that's personally addressed to each individual
- **Envelopes** – Print a stack of envelopes instead of typing them individually.
- **Labels** – Create mailing labels to be printed.
 - If you select labels, be ready to provide the type of label (e.g. Avery 5160). This information is typically found on the bottom right corner of the box.

- Word 2007 will automatically select Microsoft as the brand of the label, make sure you change this, if necessary
- **Directory** – Create a printed list of addresses (like a phone book)

2. Select Recipients

- **Type New List** – Word has a limited capacity for storing names and addresses. If you do not have Excel or any other type of spreadsheet program, this can be a good alternative.
- **Use an Existing List** – This refers to a data file, such as one created in Excel or Access.
 - Browse to locate the file where the addresses are stored.
 - If using Excel, you will be asked to select the name of the table where the data is stored, so make sure you know it!
- **Select from Outlook Contacts** – Pull your contacts list from Microsoft Outlook.



3. Edit Recipient List

- Scroll through the list to make sure all entries are correct. You may uncheck names that are unneeded for the merge. This allows you to keep the data file intact, while still providing the flexibility to remove irrelevant names from your merge.

4. Write and Insert Fields

- Address Block (Wheaton Public Library; 225 North Cross St.)
- Greeting Line (Dear Wheaton Public Library)
- Insert Merge Field (allows the user to select individual fields)

- **Note:** When using Labels, it is vital to click *Update All Labels* in this step. Skipping this step results in a single label printing.

5. Preview Results

- Browse through the recipients to ensure that names are spelled correctly, that addresses are aligned properly, etc.

6. Finish and Merge

- Click *Print Documents* to print the entire merge. To make changes to individual letters within the merge, click *Edit individual Documents* and this opens a new document containing the merged items. If printing labels or envelopes, make sure the correct media is loaded into the printer before printing.

If You Have Used The Mail Merge Wizard In Previous Versions Of Microsoft Word, It Is Still Available In MS Word 2007. Go To *Mailings* → *Start Mail Merge* → *Start Mail Merge* → *Step By Step Mail Merge Wizard*.