

Conducting a Mail Merge in Microsoft Word 2007_

This document focuses primarily on creating letters and labels, the two most common merging needs.



Using the Mail Merge Wizard_

When using the Mail Merge Wizard, be sure to read all of the text that appears on the Mail Merge Task Pane. The Wizard has six steps, regardless of whether you are creating labels, letters, or something else entirely.

Using the Mail Merge Wizard to Create Letters

To begin, open the document containing your letter (or, if you haven't already done so, write your letter first!).

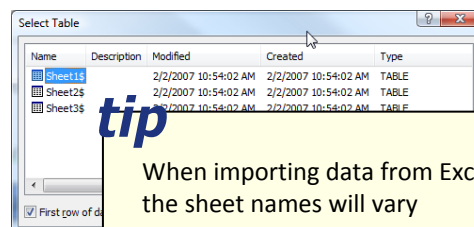
Go to the *Mailings* tab > *Start Mail Merge* group > *Start Mail Merge* > *Step-by-Step Mail Merge Wizard...*

[Step 1 of 6] Select "Letters." At the bottom of the pane, click "Next" to continue.

[Step 2 of 6] Select "Use the current document." Click "Next" to continue.

[Step 3 of 6] Choose your data source for the merge. To do so (accessing an existing file), click "Browse..."

- Navigate to your data source, select the file, and click "Open."
- If the file you selected is a database or worksheet with multiple tables or sheets, you will be prompted to select one table/sheet from which to pull your data (shown at right). Click "OK."
- Select the records to include in your merge. Click "OK."
- Click "Next" in the Mail Merge Wizard to continue.



[Step 4 of 6] To enter a merge field, first place your cursor where you wish to place a field.

- Click "More items" in the Mail Merge Task Pane.
- Insert the needed field(s) from the list that appears. Close the list and format as needed.
- When finished inserting and formatting your fields, click "Next" to continue.

[Step 5 of 6] Preview your document. It should look like a finished product.

- Click "Previous..." to go back a step. Perform edits where necessary.
- Click "Next" to continue.

[Step 6 of 6] Click "Print" to merge directly to your printer or "Edit individual letters" to merge all the letters into another Word document to review before printing.

Using the Mail Merge Wizard to Create Labels

To begin, open a blank Word document.

Go to the *Mailings* tab > *Start Mail Merge* group > *Start Mail Merge* > *Step-by-Step Mail Merge Wizard ...*

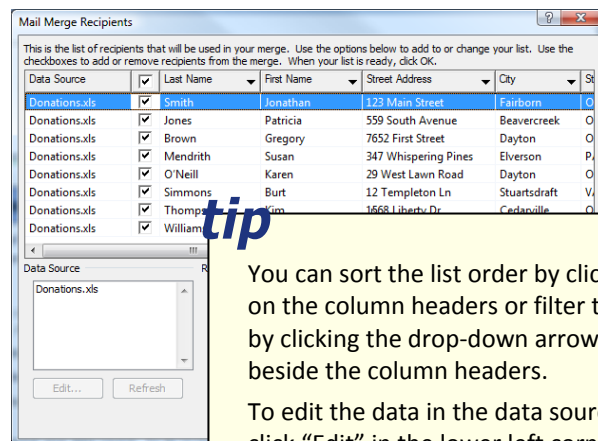
[Step 1 of 6] Select "Labels." At the bottom of the pane, click "Next" to continue.

[Step 2 of 6] Select "Change document layout." Click "Label options" and choose the appropriate type of label (according to the manufacturer and number of your box of labels). Click "Next" to continue.

[Step 3 of 6] Choose your data source. To do so (accessing an existing file), click "Browse..."

- Navigate to the data source, select the file, and click "Open."

- b. If the file you selected is a database or worksheet with multiple tables or sheets, you will be prompted to select one table/sheet from which to pull your data (shown on the previous page). Click “OK” to finish.
- c. Select the records you would like to include in your merge (shown right). Click “OK” to finish.
- d. Click “Next” on the Mail Merge Task Pane (the wizard) to continue.



tip
 You can sort the list order by clicking on the column headers or filter the list by clicking the drop-down arrows beside the column headers.
 To edit the data in the data source, click “Edit” in the lower left corner.

[Step 4 of 6] To enter a merge field, first place your cursor in the first label box.

- a. Click “More items” in the Mail Merge Task Pane.
- b. Insert field(s) from the list that appears. Close the list and format as needed.
- c. Click the “Update all Labels” button to create the rest of the labels.
- d. When finished inserting and formatting your fields, click “Next” to continue.

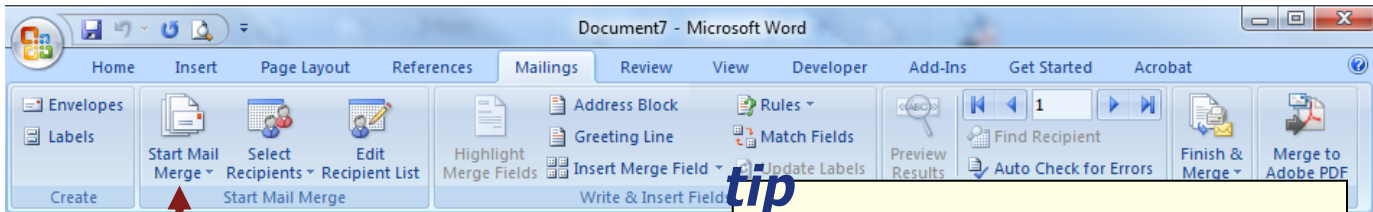
[Step 5 of 6] Preview your document. It should look like a finished product.

- a. Click “Previous...” to go back a step. Perform edits where necessary.
- b. Click “Next” to continue.

[Step 6 of 6] Click “Print” to merge directly to your printer or “Edit individual labels” to merge all the labels into another Word document to review before printing.

Using the Mailings Tab to Complete Merges

The Mailings tab on the Ribbon gives you all the features of the Mail Merge Wizard, with the added flexibility of having every button right at your fingertips. Plus, there are some advanced features for more complex merges.



To complete a mail merge, begin with the *Start Mail Merge* drop-down in the *Start Mail Merge* group to select the appropriate type of document. After that, you can pretty much work sequentially from left to right to perform the tasks needed to complete your merge:

- (1) Select your recipients; (2) [Optional] Edit the list to choose, sort, and/or filter recipients; (3) Insert merge fields;
- (4) Preview your results; and (6) Finish the merge.

tip
 When using the ribbon (as opposed to the wizard) to create labels, you must manually enter the “Next Record” field after the second and each successive label. Otherwise, you will print an entire page of labels for just one person.
 To insert the field, place your cursor at the *beginning* of the second label and, go to *Mailings* tab > *Rules* > *Next Record*.
 Do the same for each successive label (or copy and paste the field).

Merge Field Formatting Options

Are your merge fields formatted incorrectly or inconsistently? For example, numbers do not always display with the correct formatting (they could be missing a dollar sign, decimals, etc.). Go to <http://www.haverford.edu/administrativecomputing> and click “Help Pages,” then “Mail Merges: Formatting Numbers in a Merge Field” for information on formatting your fields.