Mail Merge 2007

Mail Merge Wizard

To start the Mail Merge in the new Word 2007, click on the Mailings tab. The Ribbon, the groups of commands you see on each tab, replaces the toolbars and menus. Commands are organized in groups related to activities such as you see below in the Create, Start Mail Merge, and Write & Insert Fields groups on the Mailings tab.

When you click on the arrow beside Start Mail Merge, a drop-down list appears as shown below. Select the last option, “Step by Step Mail Merge Wizard.”

This brings up the task pane as shown below. Select Letters (or whatever type you want) as the type of document and then click on the “Next: Starting document” link at the bottom of the task pane to go to the next step to select your starting document.
Selecting a Template

You have options to use the current document you have open, to select a template, or to browse to an existing document not open. For this practice, select “Start from a template.” This brings up a link you click on to “Select template.”
This opens the “Select Template” dialog box shown. Select the “Letters” tab and choose “Oriel Merge Letter.” Click on OK.
This takes you to Step 3 in the Mail Merge process in which you “Select recipients.”

**Selecting Recipients**

Select “Use an existing list” and click on the “Browse” link. Locate and open the file containing your data source.
This opens the following dialog box in which you select the table (the named range defined within Excel) containing the mail merge recipients info you want to pull into the merge fields in your document. Select “seminar” or “training” or whatever you named the range in your spreadsheet containing the names and addresses you want to use for the mail merge ("attendees" is the defined range selected as shown below).
Make sure to check the box indicating that the “First row of data contains column headers” so that the field labels (Last Name, First Name, Address1, etc.) on your spreadsheet won’t be mistaken for data.

This opens the **Mail Merge Recipients** dialog box shown below. Here you can select which recipients to include or deselect by unchecking the check box by the name.

You can sort and filter the list using the drop-down list located on each field name indicated by the triangular black arrow. Note there are also links to Sort and Filter or Find Duplicates and recipients in the “Refine recipient list” section.
Click on the link “Next: Write your letter” to go on to the next step to edit the mail merge template letter content.

**Inserting Merge Fields**

Notice that the Address Block and Greeting Line fields are already inserted into this template letter. If you weren’t using a preformatted mail merge letter, you would just simply click on the links on the right to insert the Address block, Greeting line, or more items (more merge fields). You also have these same options on the Mailings toolbar at the top—you don’t have to use the wizard each time you do a mail merge. Pick the date and replace the letter content with your own and then go on to the next step to preview your letters by clicking on the link at the bottom of the task pane.
Matching Fields

When you click on the Address block link, the following dialog box appears in which you can choose the format of the address. Also, you can click on the Match Fields button to match the missing address field (the Match Fields button is also on the Mailings tab in the "Write and Insert Fields" grouping).

Clicking on the Match Fields button brings up the following dialog box. Use the Address 1 drop-down list to select the Street field name from the Excel spreadsheet.
Previewing Results

You have buttons on both the Preview Results group on the Mailings ribbon as well as the task pane to look at different recipient info before going on to the next step to complete the merge.
Completing the Merge

When you click on the link, “Next: Complete the merge,” the following appears:

Click on the link “Edit individual letters” which you can see from the screen tip is the link to “Merge to new document.” This is also a button on the "Finish & Merge" dropdown list on the Mailings Ribbon.
The Print link on the Task Pane or Print Documents on the Ribbon dropdown list allows you to merge directly to the printer. When you click on the link to edit the letters, the following dialog box appears:

![Merge to New Document dialog box](image)

You can choose whether to merge all or selected records. Click OK and then a new merged document entitled Letters1 is created. It contains the individual letters for each recipient. If you look at the status bar, you will see that it indicates multiple letters.
1/9/2007

Sims Lewis
919-Green Cove Lane
Huntville TX 77323

Dear Sims,

I look forward to seeing you at the conference next week. I’ve enclosed the requested materials. If you have any questions, please call or e-mail me.

Sincerely,