

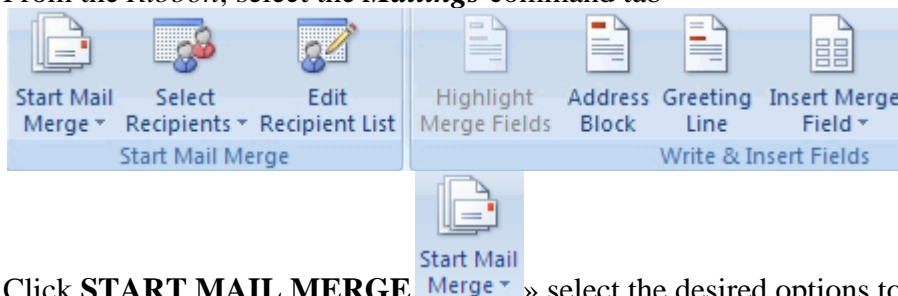
## Mail Merge: An Overview

Word 2007 provides easy access to all the commands necessary for creating a mail merge. These commands are available in the *Mailings* command tab on the *Ribbon*. For users unfamiliar with creating mail merges, the commands progress from left to right across the *Ribbon* in the order that they are needed for a successful mail merge.

NOTE: Although Mail Merge can be used for many types of documents, this document uses the example creating a Mail Merge letter.

### To access the Mail Merge commands:

1. From the *Ribbon*, select the *Mailings* command tab



2. Click **START MAIL MERGE** » select the desired options to create your mail merge

3.

### STEP 1: Selecting the document type

Your options for choosing a document type include the following:

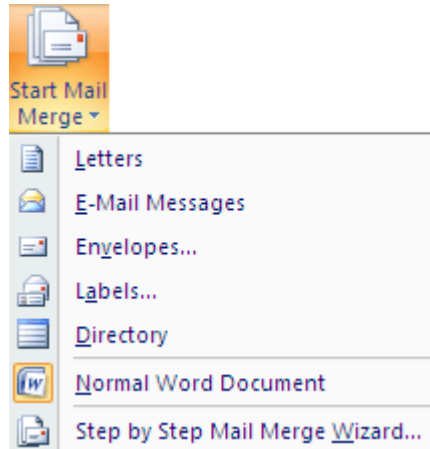
**Letters:** allows you to tailor one letter to many individuals.

**E-mail messages:** allows you to personalize generic messages for individual recipients and send them via email. For instructions on how to perform this type of merge, refer to Creating an Email Merge.

**Envelopes:** allows you to print envelopes with different addresses. For instructions on how to perform this type of merge, refer to Creating Merged Envelopes.

**Labels:** allows you to print labels with different addresses. For instructions on how to perform this type of merge, refer to Creating Mailing Labels.

**Directory:** allows you to gather varied but related information into a list. For example, to create a departmental or organizational directory, list the names, office locations, and phone numbers.

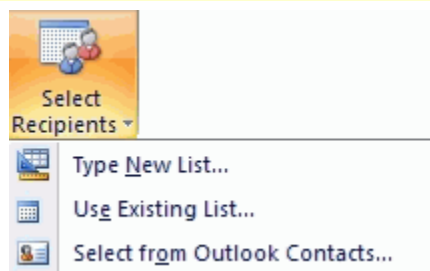


### STEP 2: Selecting the recipients

Your options for selecting recipients include the following:

**Type a new list:** allows you to create your own list by typing each recipient.

**Use an existing list:** uses a previously saved list. Once you make this selection, the *Browse* link appears. Clicking it takes you to the *Select Data Source* dialog box, where you can choose the file you want to use. Once you have selected the list, Word brings up the *Mail Merge Recipients* dialog box, where you can choose which members of the list should be included in the merge, sort the order that the records will be created in, or edit the recipient list. For more information, please refer to Mail



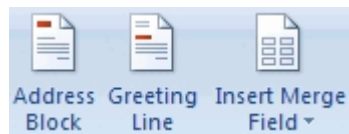
Merge: Working with the Recipient List.

**Select from Outlook contacts:** uses your Outlook contacts as recipients. You must have existing *Contacts* in Outlook for this option to work. Once you make this selection, the *Choose Contacts Folder* link appears. Clicking it takes you to the *Choose Profile* dialog box, where you can select the *Contacts* list folder you want to use.

### STEP 3: Write and Insert Fields

During this step, you will be adding text and variable information to your document. To assist you in this, Word has a number of pre-formatted entries along with the fields from your recipient list. Using these fields ensures that the desired information from each entry will be inserted into your document.

Frequently used options include the following:



**Address block:** allows you to specify the format of your recipients' names, whether to insert the company name and postal address, and the format of the postal address.

**Greeting Line:** allows you to format how the greeting line will appear (e.g., *Dear Mr. Randall,*) and choose which format to use for unknown names (e.g., *Dear Sir or Madam,*).

**Insert Merge Field:** allows you to insert fields for a variety of common options (such as the first or last name, phone number, or state of each recipient).

### STEP 5: Previewing your documents

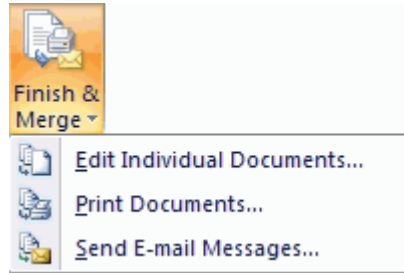
At this point, you are almost ready to merge. Before you do so, it is a good idea to preview your documents. Word will show you a preview of the document addressed to the first recipient, but also allows you to browse through the documents for the other entries by clicking the **PREVIOUS** or **NEXT** button. This allows you to locate specific recipients.



Based on what you see during this preview, you may decide to edit your document, edit the recipient list, or exclude one or more recipients from the merge.

## STEP 6: Finish and Merge

Once the merger is complete, you can print the merged documents or, prior to printing, you can edit individual documents. If you choose to edit individual letters, Word will open the letter being currently previewed for editing.



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