

# Word 2007: Mail Merge

## Learning Guide

### Getting Started

Mail merge techniques allow you to create a document which combines repetitive text elements with data drawn from an external data document.

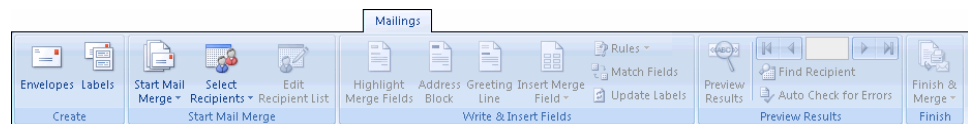
To perform a mail merge, you'll need the following:

- A template (previously created, or generated during the merge)
- A recipient list or data source (created during the merge, or an existing file)

Word will then create a new document by inserting the data from your data source into the structure of your template document.

### The Mailings Ribbon

The **Mailings** ribbon, which replaces the Task Pane in Word 2003, allows you to perform mail merges.



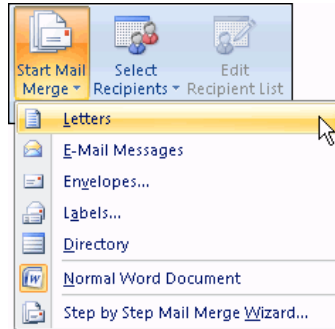
### Choosing the Type of Mail Merge

Using Word's mail merge, you can create letters, e-mail messages, envelopes, labels, and directories. To choose the type of merge:

- From the **Mailings** ribbon locate the area labeled **Start Mail Merge**



- Click on the down-facing arrow of the button labeled **Start Mail Merge**
- From the list that appears, select the type of merge you wish to create (for example, Letters)

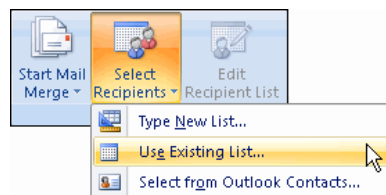


*Tip: Starting your merge as a letter will allow you to also create email message.*

## Selecting your Recipients

Once you have selected the type of merge you would like to perform you can select the recipient list or data source you wish to use. This data source can be a Word text file, an Excel spreadsheet, or an Access database. To select your recipients:

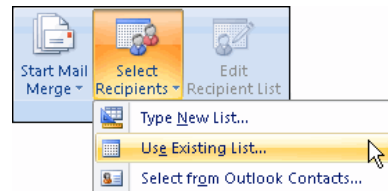
- From the **Mailings** ribbon, locate the **Start Mail Merge** area
- Click on the down-facing arrow of the button labeled **Select Recipients**
- From the list that appears, select **Use Existing List**



### ***Tip: Switching your Data Source***

*If you are using a document that has already been used in a mail merge, Word 2007 will retain your document's link to its data source. However, if you would like to switch the data source to another data source:*

- From the **Mailings** ribbon, locate the **Start Mail Merge** area
- Click on the down-facing arrow of the button labeled **Select Recipients**
- From the list that appears, select **Use Existing List**



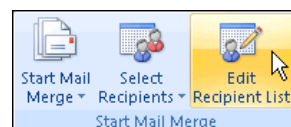
### **Editing the Recipient List**

Word 2007's **Mail Merge Recipients** window allows you to control your data from within Word. From this window you can:

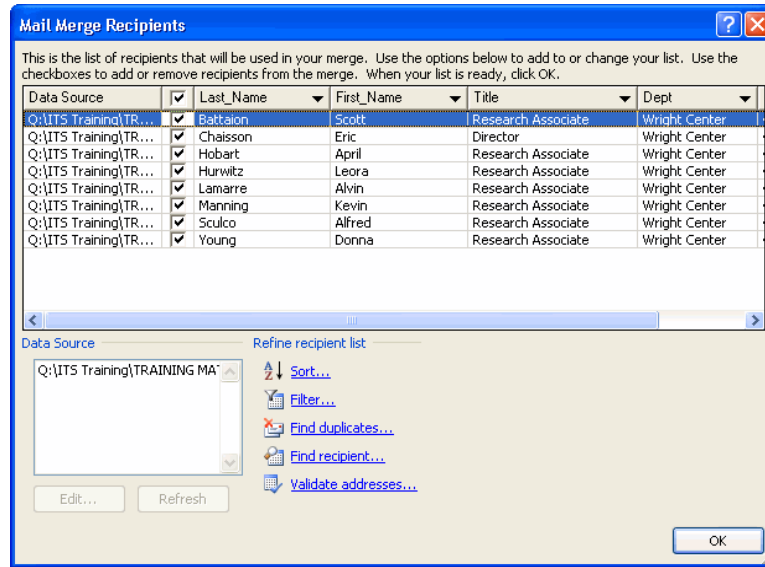
- Select and deselect individual recipients in the list
- Sort items in the list
- Filter items in the list

### **Viewing your Recipient List**

- From the **Mailings** ribbon locate the area labeled **Start Mail Merge**
- Click on the button labeled **Edit Recipient List**



- The **Mail Merge Recipients** window will appear



### Selecting and Deselecting Recipients

Using the **Mail Merge Recipients** window you can select (or deselect) recipients from your Data Source. To select a recipient:

- When the **Mail Merge Recipients** window is open for the first time, all the recipients will appear with a checkmark next to their name

Data Source	<input checked="" type="checkbox"/>	Last_Name	First_Name	Title	Dept
Q:\ITS Training\TR...	<input checked="" type="checkbox"/>	Battaion	Scott	Research Associate	Wright Center
Q:\ITS Training\TR...	<input checked="" type="checkbox"/>	Chaisson	Eric	Director	Wright Center
Q:\ITS Training\TR...	<input checked="" type="checkbox"/>	Hobart	April	Research Associate	Wright Center
Q:\ITS Training\TR...	<input checked="" type="checkbox"/>	Hurwitz	Leora	Research Associate	Wright Center
Q:\ITS Training\TR...	<input checked="" type="checkbox"/>	Lamarre	Alvin	Research Associate	Wright Center
Q:\ITS Training\TR...	<input checked="" type="checkbox"/>	Manning	Kevin	Research Associate	Wright Center
Q:\ITS Training\TR...	<input checked="" type="checkbox"/>	Sculco	Alfred	Research Associate	Wright Center
Q:\ITS Training\TR...	<input checked="" type="checkbox"/>	Young	Donna	Research Associate	Wright Center

- Click to remove the check mark from the box next to the recipient you wish to remove from the mail merge

Data Source	<input checked="" type="checkbox"/>	Last_Name	First_Name	Title	Dept
Q:\ITS Training\TR...	<input checked="" type="checkbox"/>	Battaion	Scott	Research Associate	Wright Center
Q:\ITS Training\TR...	<input checked="" type="checkbox"/>	Chaisson	Eric	Director	Wright Center
Q:\ITS Training\TR...	<input type="checkbox"/>	Hobart	April	Research Associate	Wright Center
Q:\ITS Training\TR...	<input checked="" type="checkbox"/>	Hurwitz	Leora	Research Associate	Wright Center
Q:\ITS Training\TR...	<input checked="" type="checkbox"/>	Lamarre	Alvin	Research Associate	Wright Center
Q:\ITS Training\TR...	<input checked="" type="checkbox"/>	Manning	Kevin	Research Associate	Wright Center
Q:\ITS Training\TR...	<input checked="" type="checkbox"/>	Sculco	Alfred	Research Associate	Wright Center
Q:\ITS Training\TR...	<input checked="" type="checkbox"/>	Young	Donna	Research Associate	Wright Center

- To reselect that recipient, click to replace the checkmark in the box

**Tip:** If you know you want to include most of the list in your merge, click on the checkboxes next to the names you want to deselect. Alternatively, if you want to include only a few records from the data source, click **Clear All**, and then click the checkboxes next the names you want to include.

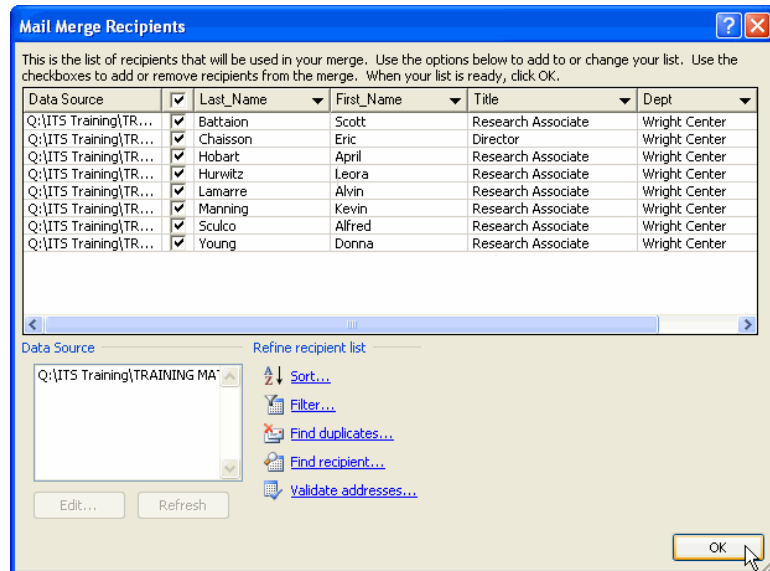
## Sorting Recipients

Sorting your data can be helpful if you want your merged document to be organized in alphabetical or numerical order. When you sort using the **Mail Merge Recipients** window, you'll immediately see the results of your sort in your recipient list. To sort data:

- Click the column heading of the item by which you want to sort (if you want to display the name in alphabetical order, for example, click on Last Name)
- From the list that appear, select **Sort Ascending**

Data Source	Last_Name	First_Name	Title	Dept
Q:\ITS Training\TR...	Sort Ascending		Research Associate	Wright Center
Q:\ITS Training\TR...	Sort Descending		Director	Wright Center
Q:\ITS Training\TR...			Research Associate	Wright Center
Q:\ITS Training\TR...	Hurwitz	Leora	Research Associate	Wright Center
Q:\ITS Training\TR...	Lamarre	Alvin	Research Associate	Wright Center
Q:\ITS Training\TR...	Manning	Kevin	Research Associate	Wright Center
Q:\ITS Training\TR...	Sculco	Alfred	Research Associate	Wright Center
Q:\ITS Training\TR...	Young	Donna	Research Associate	Wright Center

- If necessary, click to place (or to remove) check marks next to the boxes to the left of the recipient's names
- Click **OK** to select the recipients you wish to include



## Filtering your Data

Filtering items in a data source is useful when you want to select and include only a specific set of records in your merge based upon specific criteria. Word 2007 offers two ways to filter data. To filter quickly, you can use pre-set criteria in the drop-down menus of the **Mail Merge Recipients** window. These pre-set criteria can be used to instantly filter for any record matching those criteria. More advanced filtering allows you to set sophisticated queries for retrieving specific records that match your criteria.

### *Quickly Filtering your Data*

- From the **Mailings** ribbon locate the area labeled **Start Mail Merge**
- Click on the button labeled **Edit Recipient List**
- The **Mail Merge Recipient** window will appear
- Click on the down-facing arrow next to the heading of the column whose data you want to use in your filter
- From the list that appears, select the criteria you wish to filter (for example, Wright Center) or one of the other preset options

Data Source	Last_Name	First_Name	Title	Dept
Q:\ITS Training\TR...	Battaion	Scott	Research Associate	Sort Ascending
Q:\ITS Training\TR...	Chaisson	Eric	Director	Sort Descending
Q:\ITS Training\TR...	Hobart	April	Research Associate	(All)
Q:\ITS Training\TR...	Hurwitz	Leora	Research Associate	Wright Center
Q:\ITS Training\TR...	Lamarre	Alvin	Research Associate	(Blanks)
Q:\ITS Training\TR...	Manning	Kevin	Research Associate	(Nonblanks)
Q:\ITS Training\TR...	Sculco	Alfred	Research Associate	(Advanced...)
Q:\ITS Training\TR...	Young	Donna	Research Associate	

To display ...	Choose the sorting option ...
All the records in the data source	All
The blank records in this field	Blanks
The nonblank records in this field	Nonblanks

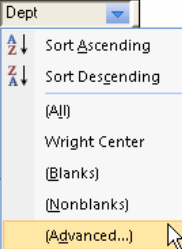
- Click on the button labeled **OK**

### Advance Filtering

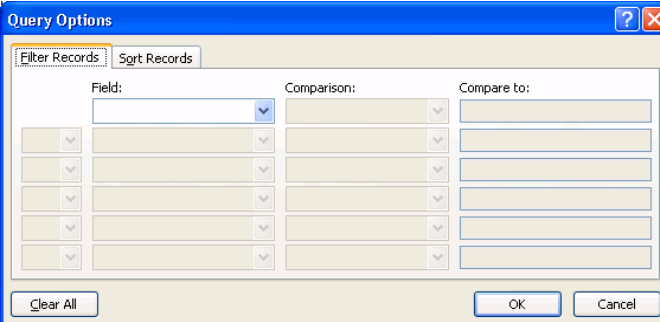
The Advanced Filtering process in Word 2007 uses queries to allow you to specify the data records to utilize in your merge as well as the order in which your data will be sorted.

- From the **Mailings** ribbon locate the area labeled **Start Mail Merge**
- Click on the button labeled **Edit Recipient List**
- The **Mail Merge Recipient** window will appear
- Click on the down-facing arrow next to any column header
- From the list that appears, select **Advanced**.

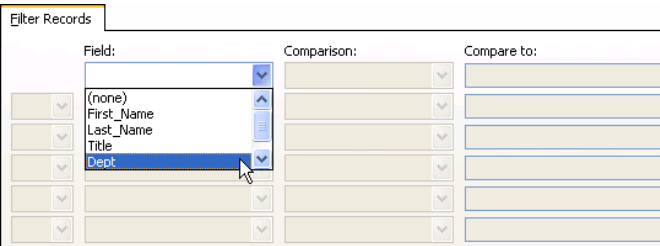
Data Source	Last_Name	First_Name	Title	Dept
Q:\ITS Training\TR...	Battaion	Scott	Research Associate	
Q:\ITS Training\TR...	Chaisson	Eric	Director	
Q:\ITS Training\TR...	Hobart	April	Research Associate	
Q:\ITS Training\TR...	Hurwitz	Leora	Research Associate	
Q:\ITS Training\TR...	Lamarre	Alvin	Research Associate	
Q:\ITS Training\TR...	Manning	Kevin	Research Associate	
Q:\ITS Training\TR...	Sculco	Alfred	Research Associate	
Q:\ITS Training\TR...	Young	Donna	Research Associate	



- The **Filter Records** tab of the **Query Options** window will be displayed



- Click on the down-facing arrow of the box labeled **Field**
- From the list that appears, select the name of the field containing the data you wish to use to filter (for example, Dept)



- Click on the down-facing arrow next to the box labeled **Comparison**
- From the list menu that appears, select the comparison operator you wish to use in your filter (for example, Equal to)

The screenshot shows a dialog box titled "Filter Records". It has three main sections: "Field:", "Comparison:", and "Compare to:". The "Field:" dropdown is set to "Dept". The "Comparison:" dropdown is open, showing a list of operators: "Equal to", "Not equal to", "Less than", "Greater than", "Less than or equal", "Greater than or equal", "is blank", and "is not blank". The "Compare to:" field is empty. There are also "And" and "Or" dropdowns for combining filters.

- Click in the box labeled **Compare to**
- Type the value you wish to use to filter your data
- Click on the button labeled **OK**

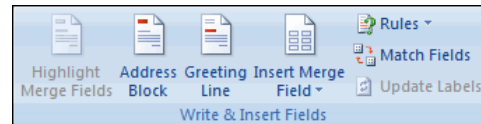
The screenshot shows a dialog box titled "Query Options" with two tabs: "Filter Records" and "Sort Records". The "Filter Records" tab is active. It contains the same fields as the previous screenshot: "Field:" (Dept), "Comparison:" (Equal to), and "Compare to:" (Wright Center). At the bottom, there are "Clear All", "OK", and "Cancel" buttons. The "OK" button is highlighted with a mouse cursor.

- The **Mail Merge Recipients** window will display only records that match the combination of field and/or comparison operator
- Click on the button labeled **OK** to select the recipients

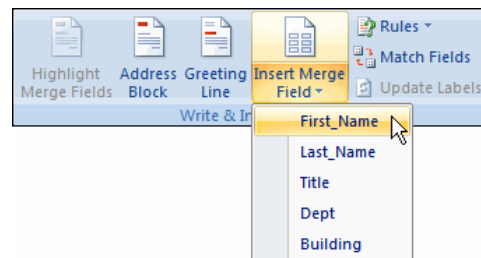
## Writing & Inserting Merged Fields

Now that you have selected your recipient list, you will be able to create your merge document. Although Word offers you a variety of options for adding merge field data to your form letter, in most cases you'll have more success directly inserting fields from your data document.

- From the **Mailings** ribbon locate the area labeled **Write & Insert Fields**



- Click on the button labeled **Insert Merge Field**
- Select the field you wish to insert (for example, **First Name**)



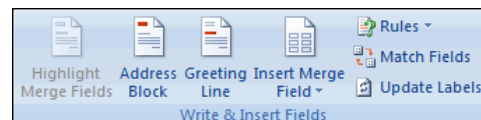
- Repeat the previous steps until you have inserted all necessary fields

### ***Tip: Updating Labels***

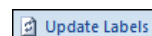
*Regardless of the type of merge you are creating, you will always use the above describe steps to insert merged fields. When creating labels, however, you must update all labels to apply the merged fields to label.*

*To update labels:*

- From the **Mailings** ribbon locate the area labeled **Write & Insert Fields**



- Click on the button labeled **Update Labels**

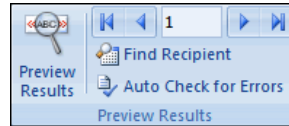


## Previewing your Merge Document

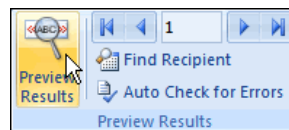
Using Word's Preview options you can view the data in your document and navigate through the recipients in your data document.

### Previewing your Results

- From the **Mailings** ribbon locate the area labeled **Preview Results**



- Click on the button labeled **Preview Results**







- The syntax will be replaced with the name of the first recipient in your data source

«Title» «First\_Name» «Last\_Name» → Research Assistant John Smith

### Navigating Through your Data

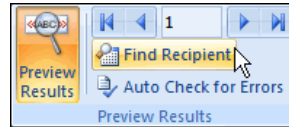
- From the **Mailings** ribbon locate the area labeled **Preview Results**
- Click on one of the following buttons to navigate through your recipient list

To display the ...	Click on ...
First recipient	
Previous recipient	
Next recipient	
Last recipient	

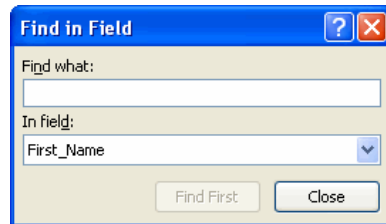
## Searching for a Specific Recipient

To find a specific recipient whose letter you would like to preview:

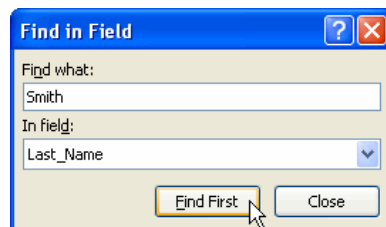
- From the **Mailings** ribbon locate the area labeled **Preview Results**
- Click on the button labeled **Find Recipient**



- The **Find in Field** window will appear



- Click in the box labeled **Find what** and type the information pertaining to the record you would like to find (for example, Smith)
- Click on the drop-down menu next to the box labeled **In field**
- From the menu that appears, select the field in which you would like to search (for example, Last\_Name)
- Click on the button labeled **Find First**



- The first record that matches the search criteria will be displayed
- Repeat the previous steps until you find the record you are searching for

## Finishing your Merge

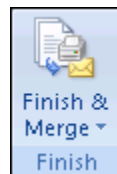
Once you have created your letter, inserted merged fields, and previewed your results, you can complete your merge in one of the following ways:

- Printing your letter (one per recipient)
- Editing individual letters (creating a new document with one letter per recipient)
- Sending email messages
- Merging your letter to a PDF for emailing

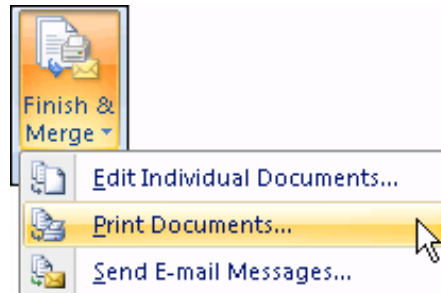
### Printing your Letters

To merge your letters directly to your printer:

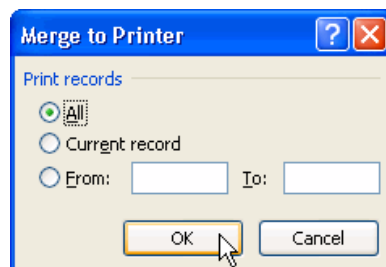
- From the **Mailings** ribbon locate the area labeled **Finish**



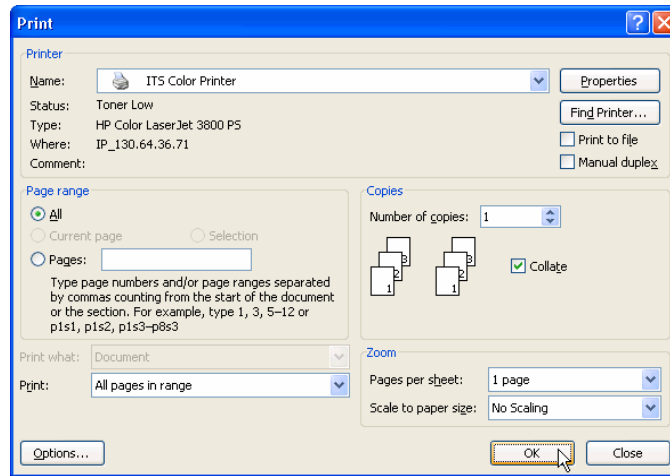
- Click on the button labeled **Finish & Merge**
- From the list that appears, select **Print Documents**



- The **Merge to Printer** window will appear
- Confirm that the radio button labeled **All** is selected
- Click on the button labeled **OK**



- The **Printer** window will appear
- Select the printer you wish to use
- Click on the button labeled **OK**



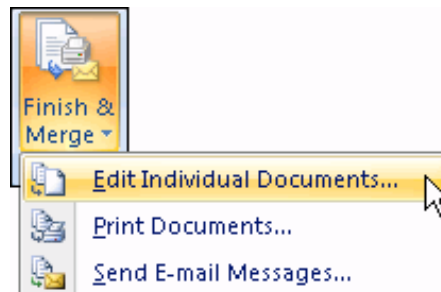
### Editing Individual Documents

If you wish to edit individual letters you can finish your merge by creating a new document with one letter per recipient.

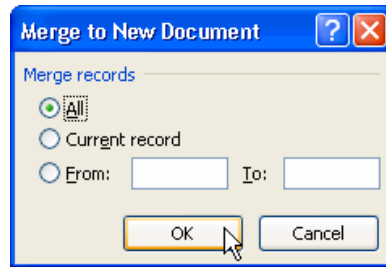
- From the Mailings ribbon locate the area labeled Finish



- Click on the button labeled **Finish & Merge**
- From the list that appears, select **Edit Individual Documents**



- The **Merge to New Document** window will appear
- Click on the option button labeled **All**
- Click on the button labeled **OK**



- A new document will open with one letter per recipient

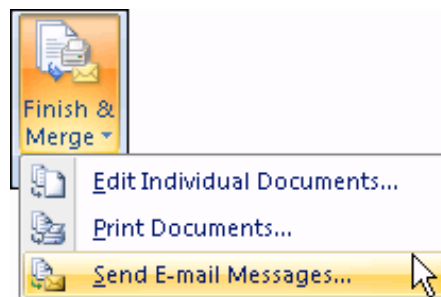
### Sending E-mail Messages

To send email messages to each of your recipients:

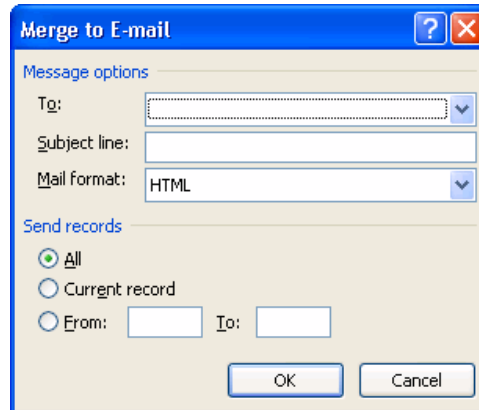
- From the **Mailings** ribbon locate the area labeled **Finish**



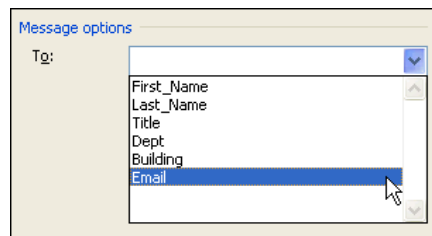
- Click on the button labeled **Finish & Merge**
- From the list that appears, select **Send E-mail Messages**



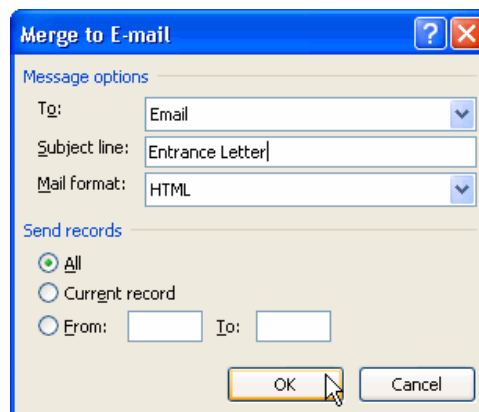
- The **Merge to E-mail** window will appear



- Click on the down-facing arrow next to the button labeled **To**
- From the list that appears, select the field name that contains e-mail address of your recipients (for example, Email)



- In the box labeled **Subject line**, type a name for your email (for example, Entrance Letter)
- Click on the option button labeled **All**
- Click on the button labeled **OK**

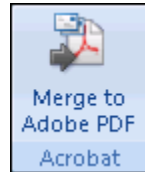


- An e-mail message will be sent to each recipient

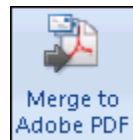
## Merging to an Adobe PDF

To create an Adobe PDF attachment (one document per recipient) that you can email to each recipient:

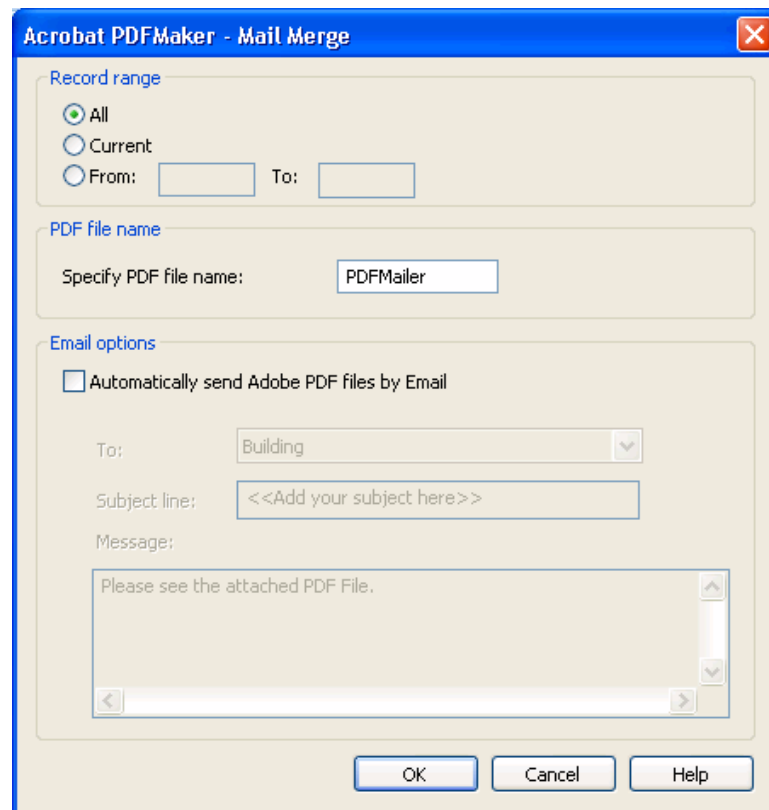
- From the **Mailings** ribbon locate the area labeled **Acrobat**



- Click on the button labeled **Merge to Adobe PDF**



- The **Acrobat PDFMaker – Mail Merge** window will appear



- Click to place a check-mark in the box labeled **Automatically send Adobe PDF files by Email**
- Click on the down-facing arrow next to the box labeled **To**
- From the list that appears, select the field that contains the email address of your recipient (for example, Email)

Automatically send Adobe PDF files by Email

To: Building

- Building
- Dept
- Email**
- First\_Name
- Last\_Name
- Title

- In the box labeled Subject line, type the subject for you email
- In the box labeled **Message**, type the text for the body of your email
- Click on the button labeled **OK**

Acrobat PDFMaker - Mail Merge

Record range

All

Current

From:  To:

PDF file name

Specify PDF file name: PDFMailer

Email options

Automatically send Adobe PDF files by Email

To: Email

Subject line: Entrance Letter

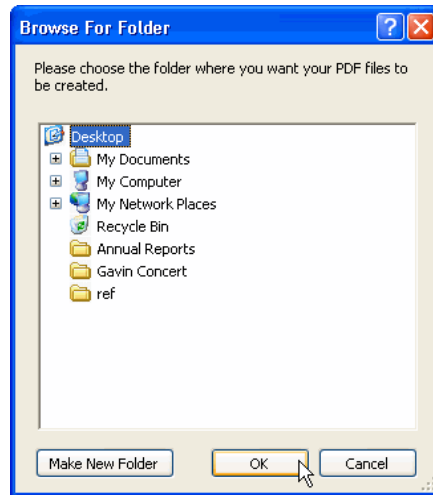
Message:

Please see the attached PDF File that contains your entrance letter.

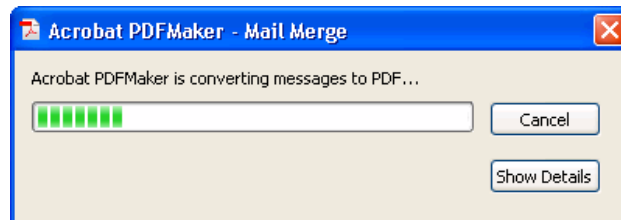
If you have any questions, please feel free to contact me.

OK Cancel Help

- The **Browse For Folder** window will appear
- Click on the location where you wish to save your PDF
- Click on the button labeled **OK**



- The **Acrobat PDFMaker – Mail Merge** window will appear displaying the status of your email



- The **Emails sent successfully** window will appear upon completion of the merge

