WORD 2007

Using Mail Merge

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INTRODUCTION

This training guide provides information on Microsoft Office Word 2007 Mail Merge function. You'll notice that Word 2007 has a new look using a 'Ribbon' that contains tabs, groups and commands. The Mail Merge Wizard is used to create form letters, envelopes and labels. Also covered is how to create an address data file in Excel.

THINGS TO KNOW

When to Use Mail Merge

Use mail merge when you want to create a large number of documents, like letters, that are mostly identical but include some information that is unique. For example, you can use mail merge to create thank you letters for donors. The text of the letter is the same, but the name, address and salutation are different for each donor. Use the Mail Merge task pane to guide you through the steps for creating a mail merge.

Mail Merge Terms

- **Main Document** - The letter, email, envelope or label that you will merge data with.
- **Source File/List** - The file from which the merge data originates.
- **Merge Fields** - The fields that are inserted in the text that tells Word the position and type of data that you want to be inserted at that point within the main document.
- **Address Block** - Includes name and address information.
- **Greeting Line** - Inserts the greeting with the name of the recipient.
DATA SOURCES

Input data for mail merge can come from many sources. For example, data can come from Outlook Contacts, Excel workbooks or Access. The protocol file structure requires that each field of data be in a separate cell. This section explains how to create an Excel data file.

Create an Excel Data File of Addresses

1. Select the Start button at the bottom, left-hand corner of your screen.

2. Select All Programs.

3. Select Microsoft Office and then select Microsoft Office Excel 2007.

4. A blank worksheet, Sheet 1, opens (see Figure 1).

5. The first row must contain the column headings. Type the following column headings (each in their own column):
   
   a. First Name (do not use ‘Name’ as it is not specific enough).
   b. Last Name
   c. Address
   d. City
   e. State
   f. Zip

6. Enter the name and address info into the spreadsheet.

Figure 1 - Excel Spreadsheet

Note: If you have 9-digit zip codes in your file (99999-9999), in order for you to maintain this format through the merge process, make sure that you have the Confirm file format conversion on open option checked. This is located at Office Button > Word Options > Advanced > General > Confirm file format conversion on open. Check it, and then select OK to save. Then in Step 2, Select Recipients > Browse, in the Confirm Data Source dialog box, select OK.
7. After entering, save your file. Select the **Office** button located at the top, left-hand corner of the screen.

8. Select **Save As**. The **Save As** window displays (see Figure 2, below).

![Figure 2 – Save As Window](image)

9. Name your file in the **File name** box (see Figure 2, above).

10. Select **Save**.

11. Select the **X**, in the upper, right-hand corner of your screen to exit Excel.

**USING THE MAIL MERGE WIZARD**

**Basic Steps**

The following steps describe the basic steps in the mail merge process, using form letters as an example. It’s the best way to get an overall picture of the process.

1. Launch the Word application from the desktop.
2. In the Ribbon (A), select the **Mailings** tab (B).
3. Select **Start Mail Merge** in the **Start Mail Merge** group (C).
4. Select **Step by Step Mail Merge Wizard** (D) (see Figure 1).
5. The **Mail Merge Wizard Task Pane** is displayed on the right side (see Figure 2).

**Mail Merge Wizard – Steps 1 through 6**

**Select Document Type**

1. Select the document type. Choose the type of document that you want to merge information into. The **Letters** option is the default.
2. Select **Next: Starting Document** (see Figure 3, above).

**Select Starting Document**

1. How do you want to set-up your letters? Choose the main document you want to use. For class, select **Use the current document**.

Figure 4 – Use Current Document Option

2. Select **Next: Select recipients** (see Figure 4).

**Select Recipients**

1. Select the appropriate selected recipients.
   - If you choose **Use an existing list**, select **Browse** (see Figure 5).
   - Select the appropriate file/data source.
Note: if you choose Select from Outlook contacts, select the Choose Contacts Folder option and select the appropriate file. Select OK. The Mail Merge Recipients window opens (see Figure 7).

Figure 5 – Select Recipients Options

"Use an existing list" option, click on Browse.

Figure 6 – Choose Contacts Folder

If choose "Select from Outlook contacts", click on "Choose Contacts Folder".

Figure 7 – Mail Merge Recipients Window
If you choose **Type a new list**, select the **Create** option. The **New Address List** dialog box opens to create the new list (see Figure 9).

**Figure 9 – New Address List**

- Start entering names and addresses.
- Use the **Tab** key on your keyboard to go to the next cell.
- Select **New Entry** to enter the next address.
- When you’re done entering, select the **OK** button.
- The **Save Address List** window opens.
- Name your file and select **Save**.
- The **Mail Merge Recipients** window opens.
- Select the recipients. Select **OK**.

**Finishing**

1. Select **Next: write your letter**.

**Figure 10 – Next: Write Your Letter Option**
Write Your Letter

1. Begin typing your letter if you haven’t already done so.
   a) Insert recipient information by selecting the appropriate icons in the Mail Merge Task bar (see Figure 11).
   b) To insert recipient name and address, select Address block. The Insert Address Block window appears. Select the address elements you want to include then select the OK button.

Figure 11 – Write Your Letter – Address Block Option
Arrange Your Envelope

1. Format your envelope.
   - Insert the recipient information by clicking on the appropriate icons in the Mail Merge task bar (see Figure 12).

Figure 12 – Arrange Your Envelope Options

```
Arrange your envelope
If you have not already done so, lay out your envelope now.
To add recipient information to your envelope, click a location in the document, and then click one of the items below.

Address block...
Greeting line...
Electronic postage...
More items...

When you have finished arranging your envelope, click Next. Then you can preview each recipient's envelope and make any individual changes.

Step 4 of 6
Next: Preview your envelopes
Previous: Select recipients
```

- To put in a return address, position the cursor in the upper, left-corner of the envelope and type it in. Change the font and font size if needed.

Figure 13 – Sample Envelope

- To insert recipient address, place your cursor in the lower, middle area of the envelope and click (see Figure 13). A blue dotted rectangle appears. Select Address block on the task pane (see Figure 12). The Insert Address Block window displays (see Figure 14).
To insert a greeting line, click on **Greeting line** (Figure 12). The **Insert Greeting Line** dialog box displays (see Figure 15). Select options and then select the **OK** button.

Your letter should look something like this (see Figure 16).
• If you have other fields of information to merge in the document, place your cursor where you want your merge field to go, select **More items**, find your field, select **Insert**, then select **Close**.

2. Save the document.
   • Select the **Microsoft Office** button.
   • Select **Save As**.
   • Name the document.
   • Select **Save**.

3. Select **Next: Preview your letters** at the bottom of the wizard pane.

### Preview Your Letters

1. Preview your letter (see Figure 17).
2. Adjust the line spacing if needed. **Line Spacing** is found in the **Ribbon** in the **Home** tab within the **Paragraph** group.
3. Click the right or left chevrons to preview letters in order (see below).

![Figure 17 – Preview Your Letters](image)

4. To locate a specific item, click **Find a recipient**. Use **Find Entry** to search for text in data fields.

![Figure 18 – Find a Recipient and Find Entry](image)

5. Click **Exclude this recipient** if you want to exclude a particular recipient.
6. Click **Edit recipient list** to change the list of recipients (see Figure 20, below). Then make changes in the **Mail Merge Recipients** window and select **OK**.

7. Click **“Next: Complete the merge”** at the bottom of the **Mail Merge** wizard box.

---

**Complete the Merge**

To complete the merge you can personalize individual letters, print the letters or save the merged letters for later use:

1. **Personalize Individual Letters**. To personalize individual letters, you actually complete the merge then edit the information that you want, in the resulting merged document. To do this, follow these steps:

   a. Click **Edit individual letters** (see Figure 21, below).
b. In the **Merge to New Document** window, select the records that you want to merge.

![Merge New Document Window](image)

Figure 22 – Merge New Document Window

c. Select **OK**. Word creates and opens a new merged document. Your main document also remains open. You can switch back to it if you want to change all of the documents.

d. Scroll to the letter that you want to edit, and then make your changes.

e. Print or save the document.

2. **Print the Letters.**

   a. If you personalize the letters and the merged document is active:
      - Select the **Microsoft Office** button.
      - Select **Print**.
      - Select your options.

   b. If you print directly from the wizard:
      - In Step 6 select **Print**.

![Print Option](image)

Figure 23 – Print Option
• In the **Merge to Printer** window, make a selection.

![Merge to Printer Window](image)

- To print all documents, leave **All** selected then select **OK**  **OR**
- To print the document you see in the document window, select **Current record** and select **OK**  **OR**
- To merge a range, select **From** then type in the record numbers in the boxes then select **OK**.

![Merge to Printer](image)

3. **Save the Merged Letters for Later Use.** If you want to edit merged letters or save them for later use, collect them into a single document. To do this, do the following:

   a. Click **Edit** individual letters (see Figure 26).

![Merge Options](image)

   b. In the **Merge to New Document** window (see Figure 26):
      - Select **All** to merge the documents  **OR**
      - Select **Current record** to merge only the current documents  **OR**
      - Select **From** and type in the **From** and **To** record numbers.
      - Select **OK**.
c. Word opens in a single new document that contains all the letters.
   • Save the document.

PRINTING ENVELOPES

Printing envelopes uses the same basic steps as the merge process in the previous section. Launch the Word application and refer to page 3 which discusses the Mail Merge Wizard.

Mail Merge Wizard – Steps 1 through 6

Select Document Type

1. Select Envelopes.
2. Select Next: Starting document.

Figure 1 – Document Type – Envelopes
1. How do you want to set-up your envelopes? Select **Change document layout**, if not already selected. Word explains the option in the lower part of the task pane (See Figure 2, below).

2. Select **Envelope options**.

Figure 2 – Envelopes – Starting Document

3. The **Envelope Options** window opens (Figure 3).

4. Select the down arrow in the **Envelopes Size** field.

Figure 3 – Envelope Options
5. Scroll down and select the desired envelope size from the selection list (Figure 4).

Figure 4 – Select Envelope Size

6. Select **OK**.
7. Select **Next: Select recipients**.

Figure 5 – Next: Select recipients Option

Select Recipients

1. Chose the appropriate selected recipients.

Figure 6 – Envelopes – Select Recipient

*Use an existing list option, click **Browse**.*
• If you choose *Use an existing list*, select **Browse**.
• Select the appropriate file data source.
• If you choose *Select from Outlook contacts*, select the **Contacts** folder and choose the appropriate file, select **OK**.
• By selecting the **Contacts** folder, the **Mail Merge Recipients** window opens (see Figure 8).

Figure 7 – Envelopes – Select Outlook Contacts

Figure 8 – Mail Merge Recipients

"Select from Outlook contacts" option, click **Choose Contacts Folder**
• If you choose ‘Type a new list’, select Create (see Figure 9).

Figure 9 – Mail Merge Options – Type a New List

Figure 10 – New Address List

• The New Address List dialog box opens to create a new address list (Figure 10).
• Use the Tab key to move to the next field. Add name and address.
• Select New Entry after entering each address.
• Select OK.
• Save the file.

2. Select the recipients. If you want all of them, select OK. Otherwise deselect the people to exclude then select OK.
Finishing Step

3. Select **Next: Arrange your envelope.**

Figure 11 – Next: Arrange your envelope Option

<table>
<thead>
<tr>
<th>Step 3 of 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>✅ Next: Arrange your envelope</td>
</tr>
<tr>
<td>✅ Previous: Starting document</td>
</tr>
</tbody>
</table>

Arrange Your Envelope

1. Format your envelope.
   - Insert the recipient information by selecting the appropriate icons in the **Mail Merge** task bar (see Figure 12).

Figure 12 – Arrange Your Envelope

- To put in a **return address**, position the cursor in the upper, left corner of the envelope and type it in. Change the font and font size if needed.
To insert recipient address, place your cursor in the lower, middle area of the envelope and click (see Figure 13). A blue, dotted rectangle appears. Click on the address block in the task pane (see Figure 12). The Insert Address Block window opens (see Figure 14).

Figure 14 – Insert Address Block

- Make selections.
- Select OK.
- <<AddressBlock>> merge field appears (see Figure 15).

Figure 15 – Address Block Merge Field

Address from your input file will be inserted here
2. Click **Next: Preview your envelopes**.

Figure 16 – Next: Preview your envelopes Option

<table>
<thead>
<tr>
<th>Step 4 of 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>➔ Next: Preview your envelopes</td>
</tr>
<tr>
<td>➙ Previous: Select recipients</td>
</tr>
</tbody>
</table>

**Preview Your Envelopes**

1. Preview the envelopes.
2. Select the double arrow icon (chevrons) to go from one envelope to the next (see Figure 17).

Figure 17 – Preview Your Envelope

3. Selecting **Edit recipient list** will open the mail merge recipient list. Make address changes as needed (see Figure 18).

Figure 18 – Make Changes

4. Select **Exclude this recipient** (see Figure 18) to delete the recipient’s envelope.
5. Click **Next: Complete the merge** at the bottom of the Mail Merge wizard box (see below).

Figure 19 – Next: Complete the merge Option

<table>
<thead>
<tr>
<th>Step 5 of 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>➔ Next: Complete the merge</td>
</tr>
<tr>
<td>➔ Previous: Arrange your envelope</td>
</tr>
</tbody>
</table>

**Complete the Merge**

1. Select **Print in the Merge** section of the Mail Merge task pane if there aren’t any changes needed (see Figure 20).

Figure 20 – Complete the Merge

2. If you need to personalize envelopes, select **Edit individual envelopes** (Figure 20).

   - The **Merge to New Document** window opens (see Figure 21).

Figure 21 – Merge to New Document Window
• Make the appropriate selection.
• Select OK. All of the envelopes will appear in one document for editing.
• Make the desired edits.
• Save your file.
• Select Office Button > Print (see Figure 22).

Figure 22 – Office Button > Print

- The Merge to Printer dialog box appears.
- Make appropriate selections.
- Select OK.
- Select desired printing options, select OK.

PRINTING LABELS

Printing labels uses the same six steps of the merge process that was described in the previous section.

Launch the Word application. Refer to page 3, which will walk you through the Mail Merge wizard.

Mail Merge Wizard – Steps 1 through 6

Select Document Type

1. Select Labels.
2. Click on **Next: Starting document** (to create a new sheet of labels) at the bottom of the wizard task pane.

**Select Starting Document**

1. How do you want to set-up your mailing labels? Select **Change document layout** (Figure 3).

**Figure 3 – Starting Document – Change Document Layout Option**
2. Select **Label options** (see Figure 4).

Figure 4 – Label Options

![Label Options window](image)

3. The **Label Options** window opens (Figure 5).

Figure 5 – Label Options

4. Choose the appropriate label vendor and product number/size (see Figure 5).

5. Select **OK**.

6. Select **Next: Select recipients**.

Figure 6 – Next: Select recipients Option

![Next: Select recipients option](image)

**Select Recipients**

1. Choose the appropriate selected recipients (see Figure 7).
Figure 7 – Select Recipients

- If you choose ‘Use an existing list’, select Browse.
- Select the appropriate file/data source.

Figure 8 – Select Outlook Contacts

- If you choose ‘Select from Outlook contacts’, select Choose Contacts Folder and choose the appropriate file.
- Select OK.
- The Mail Merge Recipients window opens (see Figure 9).
• If you choose ‘Type a new list’, select Create (see Figure 10).

Figure 10 – Labels – Type a New List

• The New Address List window opens to create the new address list (see Figure 11).

Figure 11 – Labels - New Address List Window

• Use the Tab key on your keyboard to go to the next field; add name and address.
• Select **New Entry** after entering each address (see Figure 11).
• Select **OK**.
• Save the file.

2. Select the recipients.

3. Select **OK**.

### Finishing

4. Complete the steps for the appropriate selection.

5. Select **Next: Arrange your labels**.

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**Figure 12 – Next: Arrange your labels Option**

**Arrange Your Labels**

1. Format your label.
   
   • Insert the recipient information by clicking on the appropriate icons in the **Mail Merge** task bar.

---

**Figure 13 – Labels – Arrange Your Labels**
• To insert recipient name and address, click a location in the **first** label (see Figure 14), then click on **Address block** on the task pane (Figure 13). The **Insert Address Block** window opens (see Figure 15).

Figure 14 – Sample Label Format

![Image of sample label format](Figure14.png)

Figure 15 – Labels – Insert Address Block

![Image of address block window](Figure15.png)

• Make selections.
• Select **OK**.
• Address block merge field appears.

Figure 16 – Address Block Merge Field

![Image of address block merge field](Figure16.png)

2. Select **Update all labels**. This will copy the format of the first label to all the other labels.
3. The labels will be filled in with the data shown below.

4. Select **Next: Preview your labels**.

**Preview Your Labels**

1. Preview the labels.
2. Select the chevrons (double arrows) icon to move from one label to the next (see Figure 20).
3. Selecting the **Edit recipient list** will open the mail merge recipient list to make any address list changes (Figure 20).

4. Select **Next: Complete the merge** at the bottom of the **Mail Merge** wizard box (see Figure 20).

**Complete the Merge**

1. If everything is ready to go, just select **Print** to complete the merge and print your labels (see Figure 21).
2. If you have any editing to do, click on Edit individual labels in the Merge section.

- The Merge to New Document window displays.
- Make the appropriate selection.
- Select OK. All labels will appear in one document for editing.
- Make desired edits.

3. Save your file.

- Select the Office button.
- Select Print.
- Make the appropriate selections.
- Select OK. The Print window displays.
- Select the desired printing options.
- Select OK. Labels are printed.
HOW TO LEARN MORE

Some commands offer more help by pressing the F1 key. See example below. Just press F1 and a dialog box opens. Click on the X, in the top, right-hand corner to exit the application.

Figure 1 – F1 for More Help

Word Help is available by clicking on the question mark located at the top, right-hand edge of the Home bar.

Figure 2 – Word Help

By default, you access Word’s Help system online (see Figure 3).

Figure 3 – Help Online
Try using your own local offline Help first. It’s faster and you get help more directly related to Word and the problem. To do this, click the box in the lower right corner of Word Help and select “Show content only from this computer.” (See Figure 4).

You can scroll down, find your topic and click on it or type in your keywords to begin your search.

Figure 4 – Help Offline

Microsoft on the Web

Microsoft on the Web (www.microsoft.com) provides links to Web locations where you can find out more about Microsoft Word. It is a great source for learning; it provides a wealth of on-line training. You need Internet connectivity and a Web browser in order to make use of this feature.

Word 2007

For Beginning Word Users

On-line Training Tutorials & Quick Reference Cards

1. Get to know Word 2007 I: Create your first document


Quick Reference Card for Get to know Word 2007 I: Create your first document


2. Get to know Word 2007 II: Edit text and revise your documents

Quick Reference Card for Get to know Word 2007 II: Edit text and revise your documents


3. Get to know Word 2007 III: Make documents look great


Quick Reference Card for Get to know Word 2007 III: Make documents look great


On-line Training Tutorial & Quick Reference Cards

1. Get up to Speed with Word 2007


Quick Reference Card for Up to Speed with Word 2007 tutorial


2. Header and Footer Basics


Quick Reference Card for Header and Footer Basics in Word 2007 tutorial

3. Reuse Text and Other Document parts: Introducing building blocks


4. Decorate documents with backgrounds, borders, and text effects


Quick Reference Card for Decorate documents with backgrounds, borders, and text effects in Word 2007 tutorial


5. Save time with Templates


Quick Reference Card for Save time with templates in Word 2007 tutorial


6. Bullets, numbers and lists


Quick Reference Card for Bullets, numbers and lists in Word 2007 tutorial


7. Revise documents with Track Changes and Comments in Word 2007


Quick Reference Card for Track Changes and Comments in Word 2007 tutorial

TRAINING AND SUPPORT

IT Training

See what is coming up over the next few months by checking our website at:

www.csun.edu/it/training

Contact Us:
IT Training & Development
Phone: (818) 677-1700 or x1700 (on campus)
Email: training@csun.edu

Troubleshooting and Support

If you experience problems getting started with Office 2007, contact the Help Center at x1400 or helpcenter@csun.edu.