



Your Short Cut to Knowledge

Mail and Data Merges Using Word 2007

Faithe Wempen



Contents at a Glance

What Is a Mail Merge	2
Performing a Letter Merge with the Mail Merge Wizard	4
Selecting a Main Document Type	7
Selecting a Data Source	10
Preparing the Main Document ...	19
Inserting Merge Fields	20
Filtering and Sorting the Data ...	27
Previewing and Printing the Merge	32
Creating Custom Merges with Word Files	36



What Is a Mail Merge?

Mail merge is a term that can strike fear into the heart of many Word users. Once a tedious and frustrating procedure, it has become a very efficient tool for creating mass mailings like those you probably get in your mailbox every day. The process itself is fairly simple—a form letter (main document) is combined with a source (data file) that contains all of the necessary information to produce a personalized letter for each person in the source.

Mail merge combines a main document with a list of database records to create customized copies of the main document for each record. The most common type of mail merge, of course, is a mailing. Mail merging was originally developed to create form letters, like the kind you probably get in your mailbox every day that address you by name and suggest that you buy some can't-live-without product.

Word 2007's mail merge feature can actually do much more than generate form letters, however. You can use it to generate personalized addresses for envelopes and labels, personalized copies of business reports or children's stories, auction catalogs—just about anything that combines fixed text with variable text.

What's in a Mail Merge?

Let's start by looking at the files involved in a mail merge. A mail merge uses two files:

- The **main document** is a Word document. It contains all the text that doesn't change in whatever you are generating, whether it is a form letter, report, catalog page, and so on.
- The **data file** contains the variable data that is merged with the main document. It can be a Word document (with the data in a table), an Excel worksheet, an Outlook contact list, a Windows Mail address book, a delimited text file, or any of several other data types. See "Selecting a Data Source" later in this Shortcut for more information about data types.

The next thing you need to create a merge file is *merge fields*. Merge fields represent the information in your source (data file). To set up a mail merge, you insert the merge fields that reference the data file into the main document. For example, if the data file has a `FirstName` field, you might have a greeting line in the main document that looks like this:

Dear <<**FirstName**>>:

SECTION 1

What Is a Mail Merge?

When you perform the merge, Word refers to your data file, finds the information in the data that corresponds to the merge field you entered in the main document, and then inserts that information from each record in the data file onto separate copies of the main document. The result is a separate copy of the main document for each of the database records, with that record's information inserted:

Dear Joe:

When you perform a merge, you can send the results either to a new file or directly to the printer.

You can set up a mail merge main document manually, but Word provides several features that partially automate the process. The features differ depending on the document type you want to produce:

- **Letters**—Create a personalized form letter for each recipient. Each letter prints on a separate sheet of paper.
- **E-mail Messages**—Create an email message for each recipient with customized information inserted from the recipient's contact information, pulled from Microsoft Outlook.
- **Envelopes**—Create an envelope addressed to each recipient. This is similar to Letters except for the paper size and type.

- **Labels**—Create sheets of mailing labels in which each label on one sheet contains the mailing address of a different recipient. This is similar to Envelopes except, instead of each recipient being on a separate sheet, each label on a sheet contains a different address.
- **Directories**—Create a listing of database entries, such as a product catalog. This is like Labels except there is not a defined area in which each record's data appears; instead, you can set up the layout any way you like.
- **Normal Word Document**—This option is new in Word 2007. It enables you to use mail merge features in an ordinary Word document—that is, one that is not one of the listed special types. You could personalize copies of a research report, for example.

Exploring the Mailings Tab

Word provides all the tools you need for setting up merges on the Ribbon's Mailings tab, shown in Figure 1.1. You can manually set up the merge, or you can use a step-by-step Mail Merge Wizard to guide you.

SECTION 2

Performing a Letter Merge with the Mail Merge Wizard

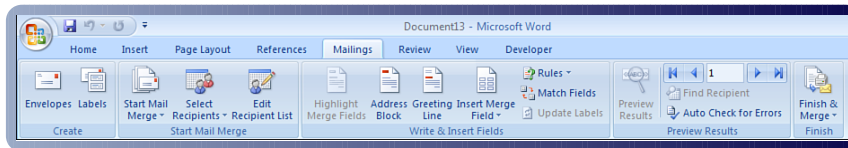


Figure 1.1 *The Mailings tab contains buttons and lists for setting up mail merges.*

The Mailings tab has five groups to it. The first one, Create, has buttons for creating individual envelopes and labels.

note

The Create group has no role in mail merging.

The other four groups on the Mailings tab, shown in Figure 1.1, correspond to the stages of setting up a mail merge. They appear from left to right in chronological order:

- **Start Mail Merge**—In this group you choose the type of document and select the data source.
- **Write & Insert Fields**—In this group you insert field codes and set up rules that sort and filter the records to be included.
- **Preview Results**—In this group you view and proofread the merge, so you can make any changes needed to it.
- **Finish**—In this group you choose whether to save the results to a file, print them, or email them.

Because many beginners find mail merges intimidating to set up, Word also offers a Mail Merge Wizard utility. The following section shows how to use this wizard to do a simple mail-merged letter.

Performing a Letter Merge with the Mail Merge Wizard

The Mail Merge Wizard is a carryover feature from Word 2003. It guides you through the process of setting up a mail merge for letters, email messages, envelopes, labels, or a directory. Mail merge beginners find it useful because it prompts you for each step of the process; mail merge experts seldom use it because it is a bit clunky and because when you understand the process, creating your own merges on-the-fly is faster.

Because the rest of this Short Cut covers each step of the mail merge process in much greater detail, I won't go into detail for each step here. Instead, I'll step you through a simple Letters type of merge using the Mail Merge Wizard and your Microsoft Outlook contact list. After you've completed the rest of this Short Cut, you can come back to the Mail Merge Wizard with a better understanding of its options.

SECTION 2

Performing a Letter Merge with the Mail Merge Wizard

To use the Mail Merge Wizard to create a set of mail-merged letters based on the addresses in your Microsoft Outlook contact list, follow these steps:

1. Open a new blank document (using the New command on the Office menu).
2. Click the Mailings tab. In the Start Mail Merge group, click Start Mail Merge and then click Step by Step Mail Merge Wizard. The Mail Merge task pane appears.
3. In the Mail Merge task pane, click Letters (see Figure 1.2, left). Then at the bottom of the task pane, click Next: Starting Document.
4. In the Select Starting Document section of the task pane, leave Use the Current Document selected (see Figure 1.2, center). Then click Next: Select Recipients.
5. Click Select from Outlook Contacts.
6. Make sure the correct contact list is selected by doing the following:
 - Click Choose Contacts Folder.
 - In the Select Contacts dialog box, click the desired contact folder. The name of the folder depends on your mail setup.
 - Click OK.

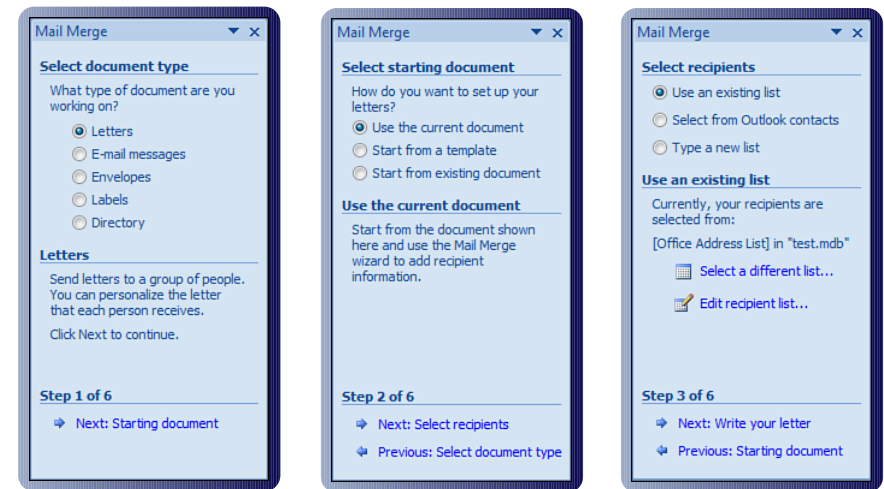


Figure 1.2 Steps 1 through 3 of the Mail Merge Wizard.

7. If the Mail Merge Recipients dialog box does not open automatically, click Edit Recipient List.
8. (Optional) If you don't want to send the letter to every contact in the data source, clear the check box next to each entry you want to exclude.
9. Click OK.
10. At the bottom of the task pane, click Next: Write Your Letter.
11. Position the insertion point at the top of the document and then click Address Block (see Figure 1.3, left).