

Word 2007/2010: Mail Merge

With Microsoft Word's mail merge feature, you can mass-produce a set of personalized documents, such as form letters, mailing labels, or envelopes. This handout explains the mail merge process in Word 2007-2010.

Parts of a mail merge

Starting document

The *starting document* is the form letter, label setup, or envelope setup containing the text and graphics that stay the same for each version of the merged document.

Recipient list

The *recipient list* contains the variable data – usually a list of names and addresses – which will be inserted into the letters, labels, or envelopes. This data is stored in a tabular format, with a column for each *field* (first name, last name, city, etc.) and a row for each *record*. The first row of cells should contain the field names; this is called the *header row*.

Programs you can use to make a recipient list

For a mail merge recipient list, you can use a list created as a table in Word, an Excel spreadsheet, or a comma- or tab-delimited text file exported from Access, Banner, or another source. Before you create your list, determine which program is best suited to your task:

- For a small- or medium-size list of names and addresses that you will only use once, use the “Type New List” option in Word’s mail merge process.
- For a longer list, which you expect to reuse by adding, deleting, and changing entries, use Excel or Access.
- For advanced sorting and searching capabilities, or full relational database capabilities, use Access.

Tips/rules for planning data sources/recipient lists

- Organize the data so that you can use it in different ways, for example, for both form letters and mailing labels or envelopes. Any data by which you may want to sort (e.g., postal code or last name) or use separately (e.g., using the first names for the salutation, as in “Dear John”) must be in its own field. In general, it’s best to separate the fields as much as possible. Place the title, first name, and last name in separate fields, and also place city, state, and zip code in separate fields.
- Use commonsense names for your fields. For example, use `FirstName` and `LastName`, instead of something like `NAME_1` and `NAME_2`.
- When using data from Excel, keep all of the data on one sheet. Excel files with data on multiple sheets sometimes cause problems when merging. If necessary, copy & paste the data into a new workbook/file.
- The order of the fields in the data source is not important when doing the mail merge.
- The data should have no blank lines or merged cells, just a header row followed by the records.
- When creating a new list, include as many fields as are needed for the records with the most information. Some people on a mailing list might have more address information than others (e.g., business name, apartment number, suite number, etc.). In a data source, each record must have the same number of fields. If some records don’t have data for a given field, just leave the fields blank for those records.

Overview of the mail merge process

The steps for a mail merge in Word 2007-2010 are laid out in the ribbon across the top. If desired, the task pane on the right can be opened by choosing Step by Step Mail Merge Wizard. The basic steps are the same whether followed across the ribbon at the top or the task pane on the right (detailed instructions follow):

1. Start Mail Merge: select the document type of letters, envelopes, or labels.
2. Select Recipients: select an existing list or type a new list.
3. Insert Fields: insert the merge fields (names, addresses, etc.) into the document.
4. Preview Results: see how the finished letters, labels, or envelopes will look.
5. Finish: Print the letters, labels, or envelopes.

Creating form letters

1. If you've already created the form letter, open it. If not, type the letter and save it.
2. Go to the Mailings tab, click on the Start Mail Merge button and choose Letters.
3. Click the Select Recipients button (in the ribbon on the Mailings tab) and choose Use Existing List. (If you do not already have your data file created, choose "Type a new list.")
4. Locate the file, select it, and click Open. If you use an Excel file, it will ask you to "Select Table" – basically, to choose which sheet in the workbook contains your data. Click OK to choose Sheet 1*. If you need to edit your recipient list, it's best to do so outside of Word, in the original source (e.g., Excel). If you need to sort or filter your recipient list from within Word (e.g., to deselect specific recipients), click the Edit Recipient List button on the ribbon. Note that editing the recipient list here will not affect the original data source.
*Again, to avoid problems, keep all of the data for your merge on one sheet. If necessary, copy and paste the data you need onto Sheet 1 of a new Excel workbook and use that.
5. Next you need to insert the merge fields (names, addresses, etc.) into the form letter:
 - To insert a greeting line (e.g., Dear Mr. Doe), click the "Greeting Line" button on the ribbon.
 - To insert an address, click the "Address Block" button on the ribbon. In the Insert Address Block window, select how you want the names and addresses formatted and click OK. In order for this to work, Word must be able to identify your fields, which is why it's important to use logical names for the fields in your data source. If Word doesn't identify them correctly, you can match the fields (details below).
 - To insert fields individually, click the Insert Merge Field button and choose the fields.
6. If you need to alter the formatting of the fields or other text in the letters, do so now and save the letter.
7. To see how your finished letters will look, click the Preview Results button on the ribbon. Use the arrows next to that button to review as many of the letters as you wish.
8. When you're ready to print the letters, click the Finish & Merge button on the ribbon and choose Print Documents. If you need to merge all of the letters into a single document to view, edit, or format them further, choose Edit Individual Documents.

Matching fields

If your address blocks or greeting lines don't look right (if the data are not in the right places), that means that Word cannot recognize the fields in your recipient list and you need to use the "Match Fields" feature to tell Word what's what in your data. To do so, click on Match Fields on the ribbon. For each field that appears in your data, use the drop-down boxes to match Word's field names with yours. When finished, click OK.

If you can't match your fields to Word's because, for instance, you have the first and last names in a single field, then you may not be able to use the preconfigured address block insertion. Instead, you'll need to build your address block manually by inserting each field individually using the Insert Merge Field button.

Creating envelopes

1. Go to the Mailings tab, click on the Start Mail Merge button and choose Envelopes.
2. In the Envelope Options box, choose the type of envelopes you're using, then click OK.
3. You should then see what looks like a blank envelope.
4. In the upper left corner, type your return address if necessary (if not using pre-printed envelopes).
5. Click the Select Recipients button (in the ribbon on the Mailings tab) and choose Use Existing List. (If you do not already have your data file created, choose "Type a new list.")
6. Locate the file, select it, and click Open. If you use an Excel file, it will ask you to "Select Table" – basically, to choose which sheet in the workbook contains your data. Click OK to choose Sheet 1. (Again, to avoid problems, keep all of your data on one sheet.) For details, see step 4 under **Creating form letters** on page 2.
7. On the envelope, there's already a text box where the address goes, although you can't see it. Click on the envelope until you see your cursor in the box (it's a little lower than you might expect).
8. Next you need to insert the merge fields (names & addresses) on the envelope. For details, see step 5 under **Creating form letters** on page 2. If you need to alter the formatting of the text on the envelope, do so now.

9. To see how your finished envelopes will look, click the Preview Results button on the ribbon. Use the arrows next to that button to review as many of the envelopes as you wish. If your address blocks don't look right (if the data are not in the right places), that means Word cannot recognize the fields in your data source. To fix this problem, see the section **Matching Fields** on page 2.
10. When you're ready to print the envelopes, click the Finish & Merge button on the ribbon and choose Print Documents. If you need to merge all of the envelopes into a single document to view, edit, or format them further, choose Edit Individual Documents.

Creating mailing labels

1. Go to the Mailings tab, click on the Start Mail Merge button and choose Labels.
2. In the Label Options box, you'll probably need to change the "Label vendors" drop-down box to "Avery US Letter" to see the most common label types (e.g., 5160). Choose the type of labels you're using, then click OK.
3. You should see a blank sheet of labels. If you can't see the lines defining the labels, go to the Layout tab under Table Tools and click on View Gridlines. To move the label text further from the edges of the labels, click Properties, then click the Options button and increase the cell margins as needed. Click OK - OK.
4. Click back the Mailings tab to continue with the merge. Click the Select Recipients button on the Mailings tab and choose Use Existing List. (If you do not already have your data file created, choose "Type a new list.")
5. Locate the file, select it, and click Open. If you use an Excel file, it will ask you to "Select Table" – basically, to choose which sheet in the workbook contains your data. Click OK to choose Sheet 1. (Again, to avoid problems, keep all of your data on one sheet.) For details, see step 4 under **Creating form letters** on page 2.
6. Next you need to insert the merge fields (names, addresses, etc.) on the labels. You **only** need to set up **the first label** in the upper left corner. Do not type in or delete anything from any of the other labels (those that say «Next Record»). For details on inserting fields, see step 5 under **Creating form letters** on page 2.
7. If you need to change the font, do so now on the first label only (consult with the Mail Center regarding acceptable fonts for mail). If you need to make the label text upper-case for mailing, wait until step 9.
8. Click the Update labels button to replicate the label setup for the entire sheet.
9. To see how your finished labels will look, click the Preview Results button. Use the arrows next to that button to review more of the labels if you wish*. Click the button again to turn off the preview.

***Note:** If you have more than one sheet of labels, it may look like there's something wrong when you preview them, because Word displays the label previews oddly. When you use the arrow buttons to click through the labels, it will look like the same data is repeated over & over on each sheet of labels. This is because Word is previewing only *one* label at a time in the *first cell* (upper left corner), rather than whole sheets of labels. Basically, it wants you to focus on only first label and ignore the rest of the sheet. You can get a more accurate multi-sheet preview in the final step if you choose Edit Individual Documents.

If your address blocks don't look right (if the data are not in the right places), that means Word cannot recognize the fields in your data source. To fix this problem, see the section **Matching Fields** on page 2.

10. If you're ready to print the labels, click the Finish & Merge button on the ribbon and choose Print Documents. If you need to merge all of the labels into a single document to view, edit, or format them further, choose Edit Individual Documents. To make the text upper-case for mailing, do this, then press ctrl+a to select all, click the Change Case button on the Home tab, and select UPPERCASE.

Assistance and questions

If you have any questions or need more information, contact the Help Desk at (920) 403-HELP (4357) or helpdesk@snc.edu. The Help Desk is for St. Norbert College students and employees only.