

Word 2007: 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.

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.
- To avoid extra work later, 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 are essentially the same as they were in Word 2003, but they’re laid out in the ribbon across the top instead of in the task pane on the right. The basic steps are (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. If you prefer to use the Word 2003-style process with the task pane, choose Step by Step Mail Merge Wizard.
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*. The Mail Merge Recipients window no longer opens automatically like it did in Word 2003. 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. Fortunately, the annoyances from Word 2003 have been fixed in Word 2007, so this option is much easier to use now.
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 cannot 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 will 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. If you prefer to use the Word 2003-style process with the task pane, choose Step by Step Mail Merge Wizard.
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**. If you prefer to use the Word 2003-style process with the task pane, choose **Step by Step Mail Merge Wizard**.
2. In the **Label Options** box, you'll probably have 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 then see a blank sheet of labels. If you can't see the lines defining the labels, go to the **Design** tab under **Table Tools**, click on **Borders**, and choose **View Gridlines**. Click the **Mailings** tab to continue with the merge.
4. 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.")
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, see step 5 under **Creating form letters** on page 2.
7. If you need to alter the formatting of the text on the label, do so now on the first label only, then click the **Update labels** button to replicate the label setup for the entire sheet.
8. To see how your finished labels will look, click the **Preview Results** button on the ribbon. Use the arrows next to that button to review more of the labels if you wish*.

***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.

9. When you're ready to print the labels, click the **Finish & Merge** button on the ribbon and choose **Print Documents**. If you want to merge all of the labels into a single document to view, edit, or format them further, choose **Edit Individual Documents**.

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.