Mail Merge, Word 2007

Mail Merge—Letters

Mail merge allows you to create two files and merge them into several finalized merge documents:

- The first file is a *main document*, such as a form letter, that contains boilerplate (generic) content that doesn't change.
- The second file is the *data source* file that contains variable information specific to the recipient (the person receiving the finalized merged document), such as the inside address and names in the salutation.

Mail merge is also very useful when creating corresponding envelopes and labels for a form letter. You will learn how to do that in the next section.

Four basic steps are followed to execute a mail merge:

1. Create the *main document* (such as a form letter) that includes boilerplate content.
2. Create a *data source* file (such as a recipient list with the names and addresses of those receiving the letter) that includes unique information for each merged document.
3. Insert *placeholder fields* (codes that will be replaced with actual text) in the main document that link unique content from the data source file to the boilerplate text in the main document.

4. Merge the two files to create a number of finished documents that combine the main document with the variable text (such as the inside address and greeting).

When you update or edit the main document and/or the data source, simply execute a new merge and preview results again. All changes will be reflected in each new merged document. You can add new data to the data source or delete it as needed.
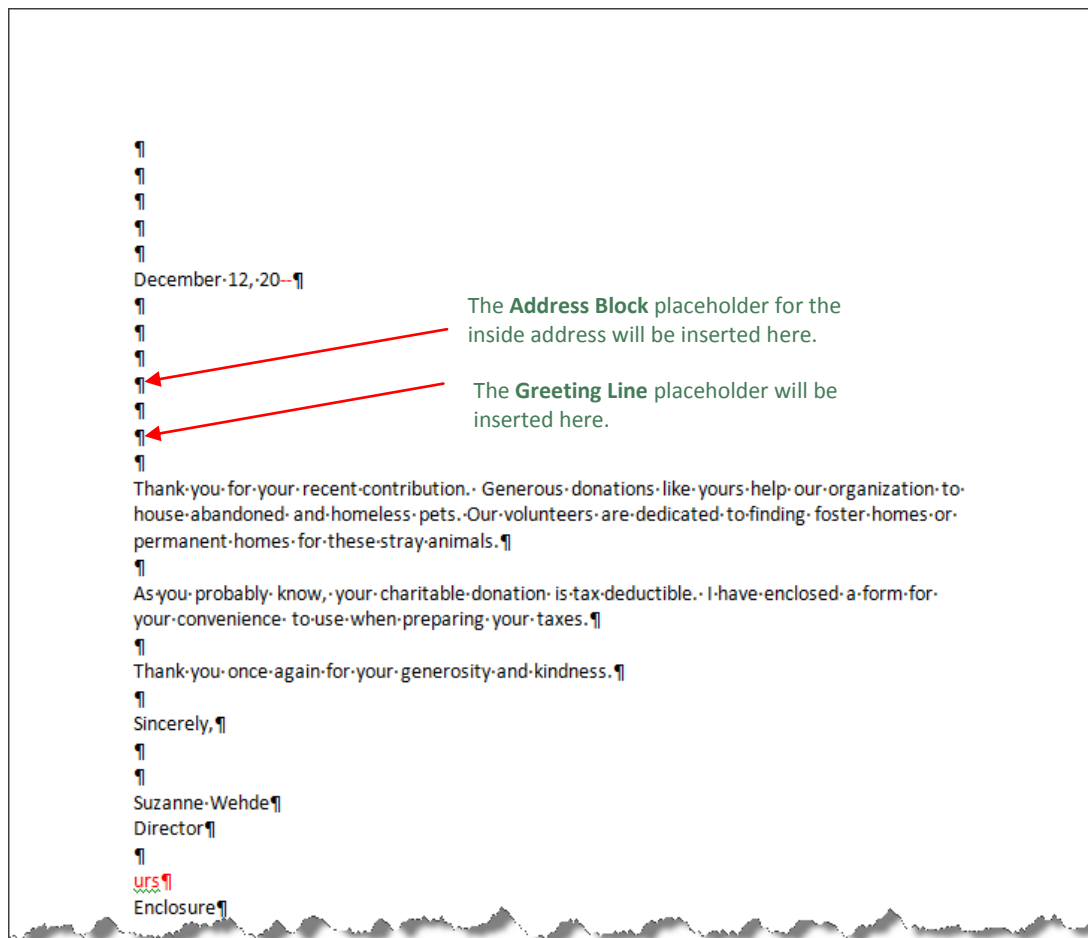
Letters—Main Document

To create the main document for a form letter:

1. Open a blank document.

⚠️ Before creating a main document and its data source file, close any other Word files that might be open. Otherwise, your data source file could be linked to the open files.

2. Press **ENTER** 5 times, type the date, and press **ENTER** 7 times after the date to allow space for the placeholders, which will insert the variable information for the **Address Block** and **Greeting** Line placeholder fields later in the merge.

¶
¶
¶
¶
¶
December·12,·20--¶
¶   The **Address Block** placeholder for the
¶   inside address will be inserted here.
¶
¶   The **Greeting Line** placeholder will be
¶   inserted here.
¶
¶
Thank·you·for·your·recent·contribution.·Generous·donations·like·yours·help·our·organization·to·
house·abandoned·and·homeless·pets.·Our·volunteers·are·dedicated·to·finding·foster·homes·or·
permanent·homes·for·these·stray·animals.¶
¶
As·you·probably·know,·your·charitable·donation·is·tax·deductible.·I·have·enclosed·a·form·for·
your·convenience·to·use·when·preparing·your·taxes.¶
¶
Thank·you·once·again·for·your·generosity·and·kindness.¶
¶
Sincerely,¶
¶
¶
Suzanne·Wehde¶
Director¶
¶
urs¶
Enclosure¶

3. Type the rest of the letter (the body, closing, and so forth), save the main document naming it descriptively so it will be easy to recognize later. Perhaps include "main" in the file name.

Letters—Data Source File

To create the data source file with an address list:

1. From the **Mailings** tab, **Start Mail Merge** group, click the **Select Recipients** button; then click the **Type New List** button.
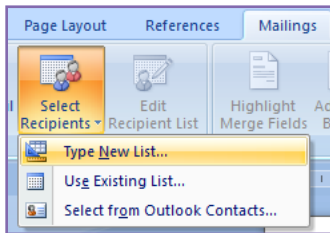

2. In the **New Address List** dialog box, type the information for the first recipient in the desired fields pressing **TAB** to move from field to field.

The insertion point is in the **Title** field ready for input.
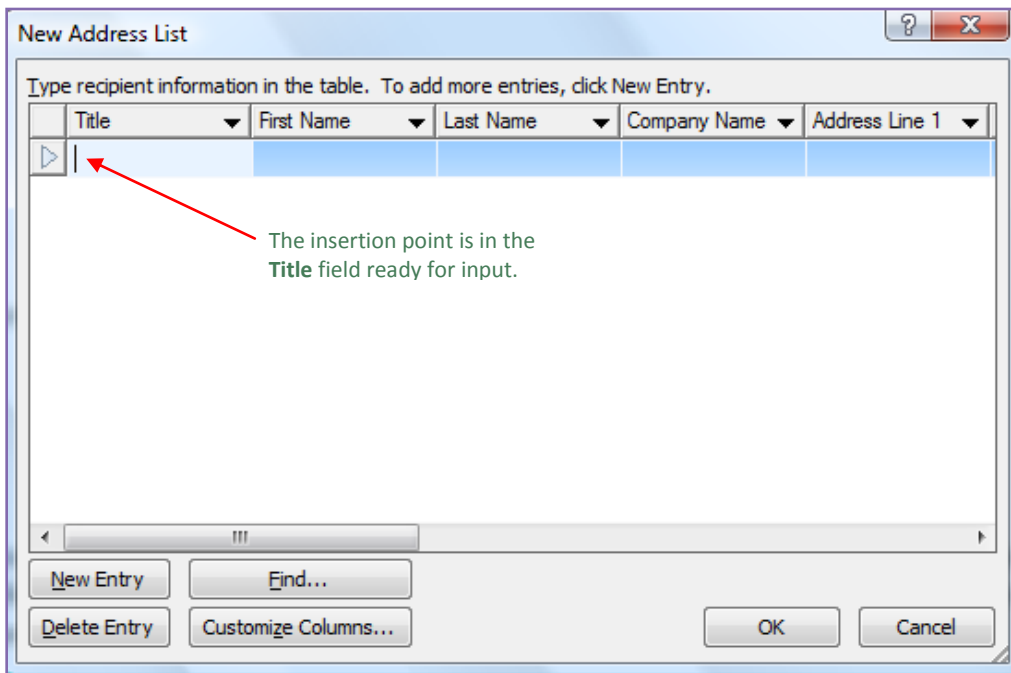
3. When you finish with one entry, click **New Entry** to begin the next address block until all entries are completed; then click **OK**.
4. Look at the **Mailings** tab behind the dialog box, and note that the **Write & Insert Fields** group is dimmed. It will become active as soon as you save the address list in the next step.
5. From the **Save Address List** dialog box, type a descriptive name in the **File name** box that will be easy to recognize later. Consider using "data" in the file name.

6. Click **Save** to save the file in the **My Data Sources** folder; or browse to the desired location and save the file.
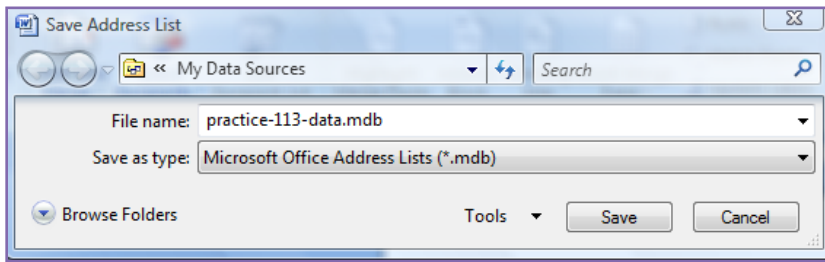
7. Look at the **Mailings** tab behind dialog box, and note that the **Write & Insert Fields** group is now active so that you can insert merge field placeholders next.
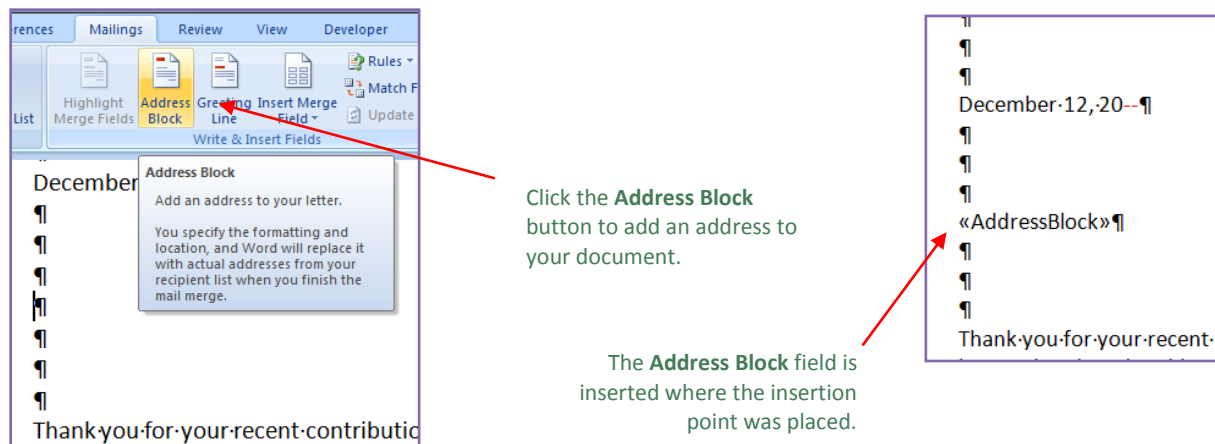
⚠️ When a main document is created and a new data source file is created as described previously, the two files are now "linked" to each other. Thereafter, when you open the main document, you will see a warning that opening the document will run an SQL command. Answer **Yes** to that prompt. This behavior is expected for this main document file, which needs to access your data source file.

❓ To detach a main document from the data source: From the **Mailings** tab**, Start Mail Merge Group**, click the **Mail Merge Button**, and click **Normal Word Document**.

Letters—Placeholders

To add merge field placeholders for the **Address Block** (inside address) and **Greeting Line** (salutation) placeholders in the main document for the letter:

1. Open the main document, and click where the inside address would normally be typed.
2. Click **Yes** if you are warned that opening the document will run an SQL command.
3. From the **Mailings** tab, **Write & Insert Fields** group, click the **Address Block** button.

Click the **Address Block** button to add an address to your document.

The **Address Block** field is inserted where the insertion point was placed.

4. From the **Insert Address Block** dialog box, review the choices, make any desired changes, and click **OK**.
5. Click where the salutation would normally be typed.
6. From the **Mailings** tab, **Write & Insert Fields** group, click the **Greeting Line** button.
7. From the **Insert Greeting Line** dialog box, review the choices, make any desired changes, and click **OK**.
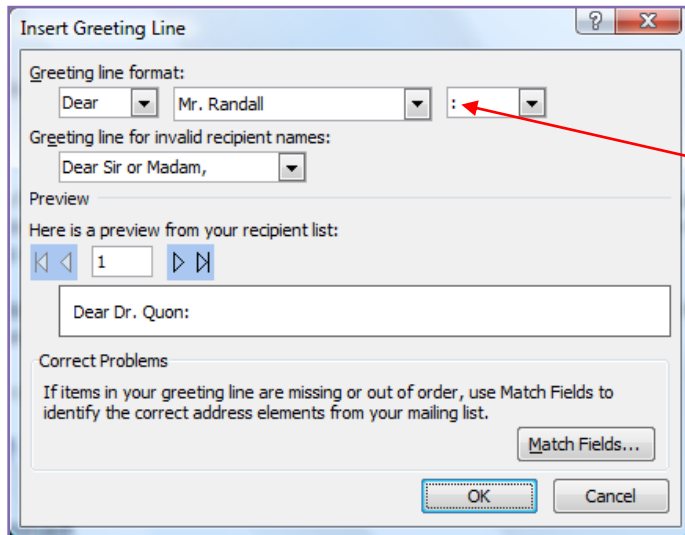
Change the punctuation after the salutation from a comma to a colon.

8. Review all placeholders and their positions and edit as needed.

To edit any merge field placeholders:

1. Right-click the placeholder.
2. Click **Edit Address Block**, **Edit Greeting Line**, and so forth.

To delete a merge field placeholder, select the placeholder and cut or delete it.

Letters—Merge

To begin the merge process and preview merge results:

1. From the **Mailings** tab, **Write & Insert Fields** group, click **Highlight Merge Fields** so you can see the merge fields in the main document.
2. Adjust any spacing around the merge fields as needed.
3. From the **Mailings** tab, **Preview Results** group, click **Preview Results**.
4. Click the **Next Record** (>) and **Previous Record** (<) buttons to page through your finalized merge files.
5. From the **Mailings** tab, **Preview Results** group, click **Preview Results** to toggle it off and return to the main document with the placeholders.
6. Edit the main document or data source as needed, and preview your results again.

7. When you're satisfied with the merge results, from the **Mailings** group, **Finish** group, click **Finish & Merge**; make any desired choice from the drop-down menu.
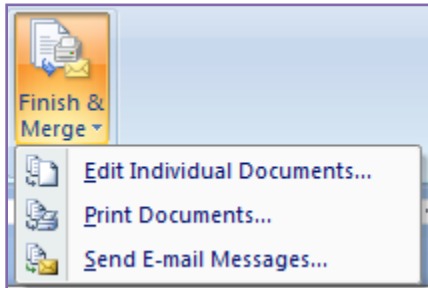
8. Save and close the main document.

⚠️ Save and close your main document before opening or creating any other Word files. Otherwise, data from your database could be linked to other open files.

To edit the data source:

1. Open the main document.
2. Click **Yes** if you are warned that opening the document will run an SQL command.
3. From the **Mailings** tab, **Start Mail Merge** group, click **Edit Recipient List**.
3. In the **Select Data Source** dialog box, browse to the desired data source; click **Open**.
4. In the **Mail Merge Recipients** dialog box, under **Data Source**, click the data source file name; click **Edit**.
5. In the **Edit Data Source** dialog box, click in any desired field and edit data as needed. (Note that you can also click **New Entry** and **Delete Entry** if needed.)
6. Click **OK** when you're finished, and answer **Yes** to the prompt to update your recipient list and save changes to the data source file; click **OK**.
7. Preview your merge results again and repeat this process if further edits are needed.

Mail Merge—Envelopes and Labels

In the previous section, you learned to use mail merge to create two files: a *main document* file (a form letter with boilerplate text and placeholder fields) and its corresponding *data source* file (an address list). That same data source file can be used again to create envelopes and labels. To create a new data source file with a recipient list, refer to the previous section. In this section, you will practice using an existing list of recipients.

The same four basic steps are followed in a mail merge for envelopes and labels:

1. Create the *main document* file (such as an envelope or label) that includes boilerplate (generic) content that is the same in the finalized merged documents. Normally, most envelopes and labels will start with any content.
2. Create a *data source* file (such as a recipient list with the names and addresses of those receiving a mailing) that includes information that is unique for each merged document.
3. Insert *placeholder fields* (codes that will be replaced with actual text) in the main document to link unique content from the data source file to the main document.
4. Merge the two files to create a finished documents (envelopes and labels with addresses) that combine the main document with the variable text, such as the inside address block.

When you update or edit the main document and/or the data source, simply execute a new merge; and preview results again. All changes will be reflected in each new merged document. You can add new data to the data source or delete it as needed.
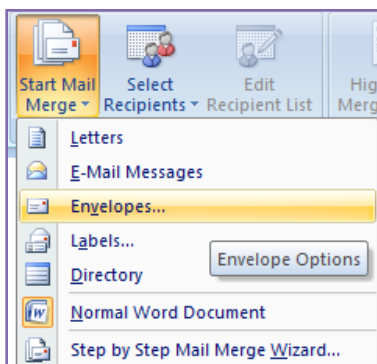
Envelopes—Main Document

To create the main document for an envelope:

1. Open a blank document.

   ⚠️ Before creating a main document and its data source file, close any other Word files that might be open. Otherwise, your data source file could be linked to the open files.
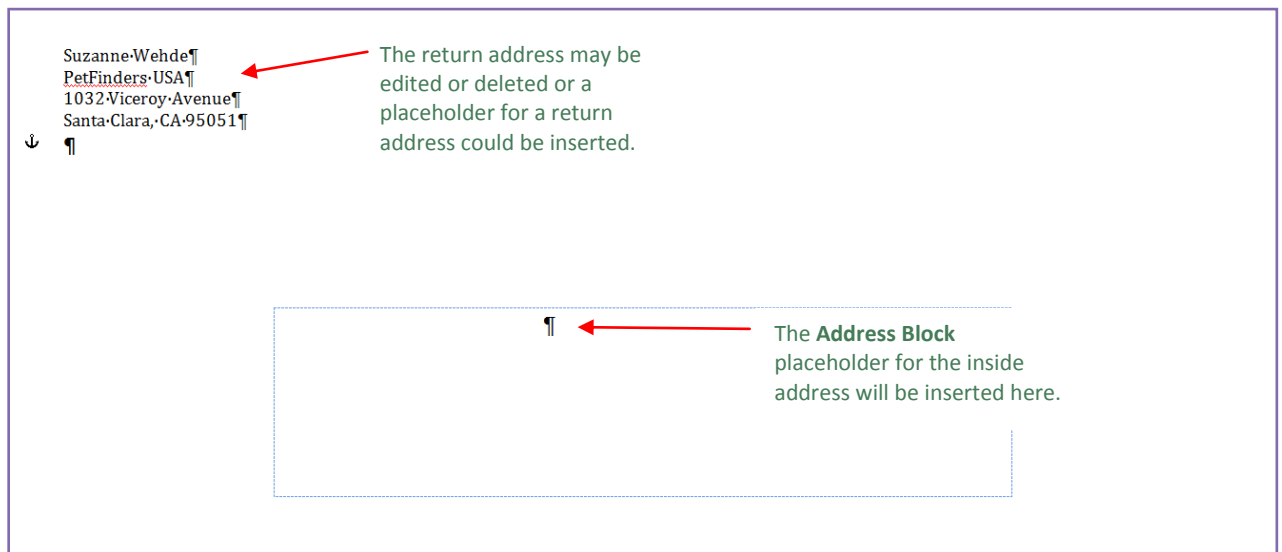
2. From the **Mailings** tab, **Start Mail Merge** group, click the **Envelopes** button.

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3. From the **Envelope Options** window, **Envelope Options** tab, make any desired changes, and click **OK** to create and open the main document for an envelope.
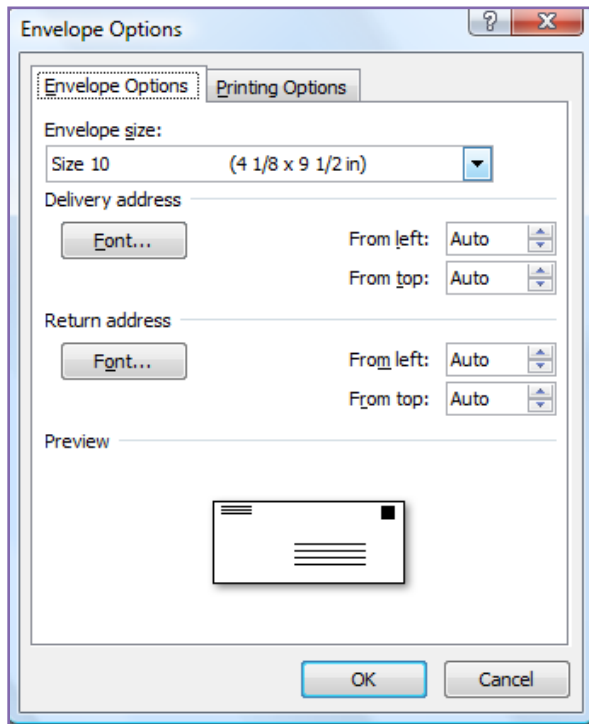
4. Edit the return address as desired in the new main document—either delete the existing one or type a new one.


5. Save the main document, and name it descriptively (use "main" in the name) so it will be easy to recognize and reuse.

## *Envelopes—Data Source File and Placeholders*

To add the **Address Block** merge field placeholder from an existing data source file to the main document for the envelope:

1. Open the main document for the envelope, and click where the inside address would normally be typed.
2. From the **Mailings** tab, **Start Mail Merge** group, click the **Select Recipients** button, Use **Existing List**.
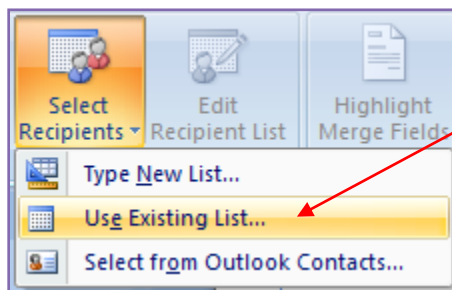
Click **Use Existing List**.

3. From the **Select Data Source** dialog box, browse to the desired data source, click **Open**.
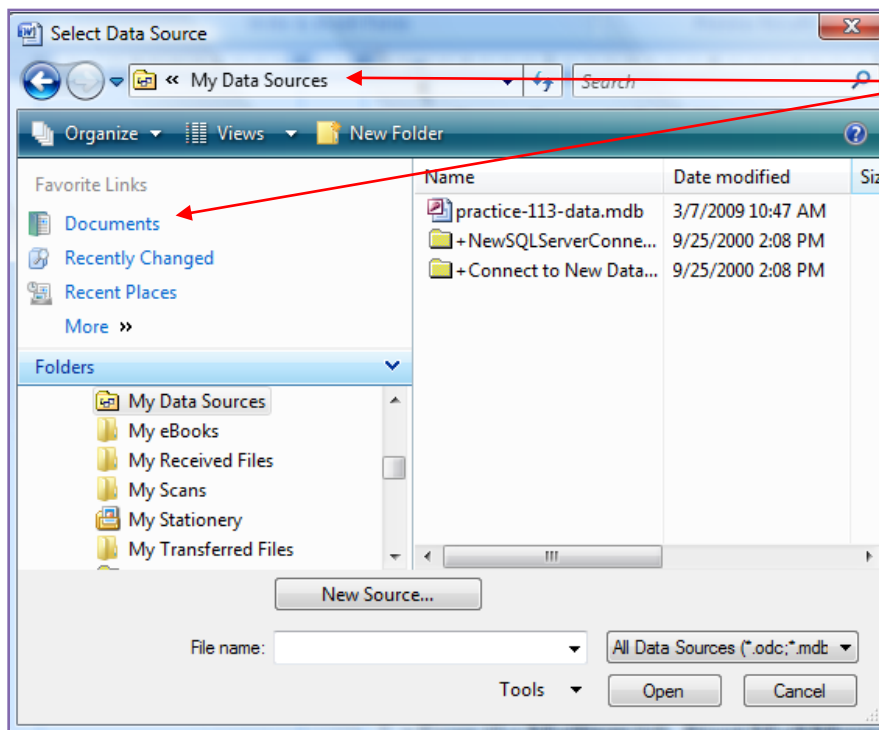
Browse to **My Data Sources** by clicking **Documents**, **My Data Sources**.
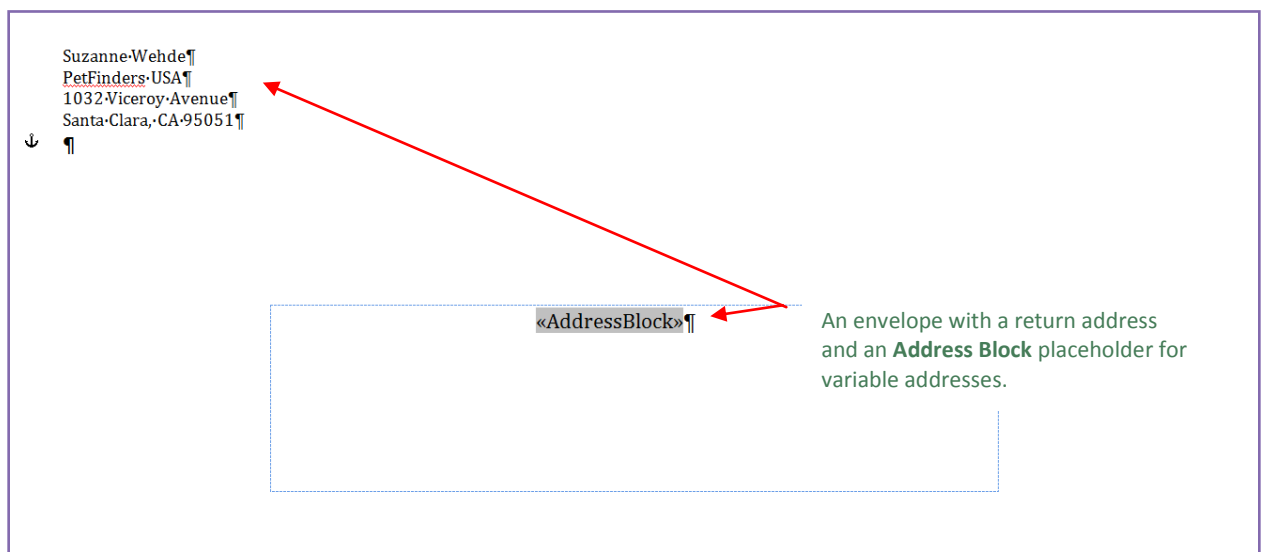
⚠️ When a main document is created and an existing data source file is used as described previously, the two files are now "linked" to each other. Thereafter, when you open the main document, you will see a warning that opening the document will run an SQL command. Answer **Yes** to that prompt. This behavior is expected for this main document file, which needs to access your data source file.

❓ To detach a main document from the data source: From the **Mailings** tab**, Start Mail Merge Group**, click the **Mail Merge Button**, and click **Normal Word Document**.

4. From the **Mailings** tab, **Write & Insert Fields** group, click **Address Block**; click **OK.**
5. From the **Mailings** tab, **Write & Insert Fields** group, click **Highlight Merge Fields** to view the inserted placeholder field.

Suzanne·Wehde¶
PetFinders·USA¶
1032·Viceroy·Avenue¶
Santa·Clara,·CA·95051¶
⚓ ¶

«AddressBlock»¶

An envelope with a return address and an **Address Block** placeholder for variable addresses.

6. Review the placeholder and its position, and edit as needed.
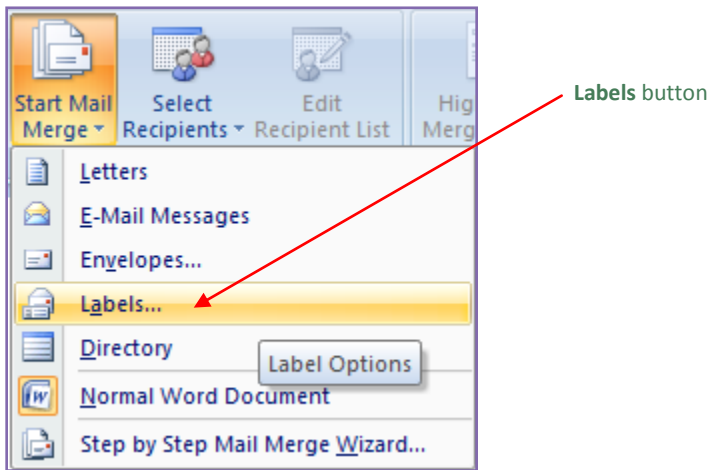
Labels—Main Document

To create the main document for labels:

1. Open a blank document.

⚠️ Before creating a main document and its data source file, close any other Word files that might be open. Otherwise, your data source file could be linked to the open files.
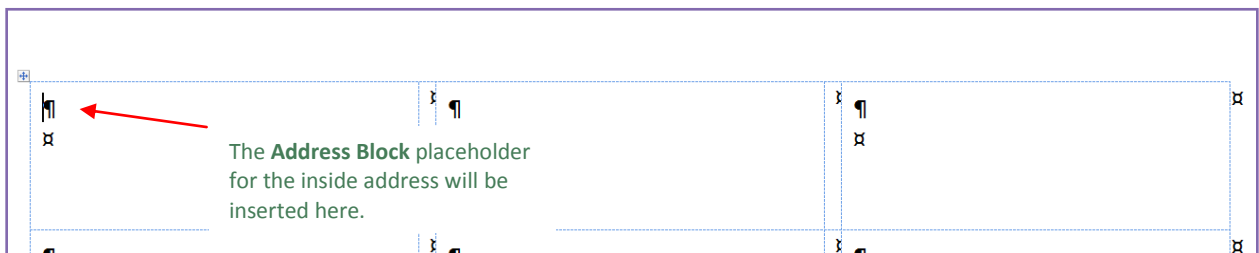
2. From the **Mailings** tab, **Start Mail Merge** group, click the **Labels** button.

Labels button

3. From the **Label Options** window, under **Label vendors**, click **Avery US Letter** (or the desired label vendor).

4. Under **Product number**, click **5160** (or the desired product number).

Click the desired vendor.

Click the desired product number.
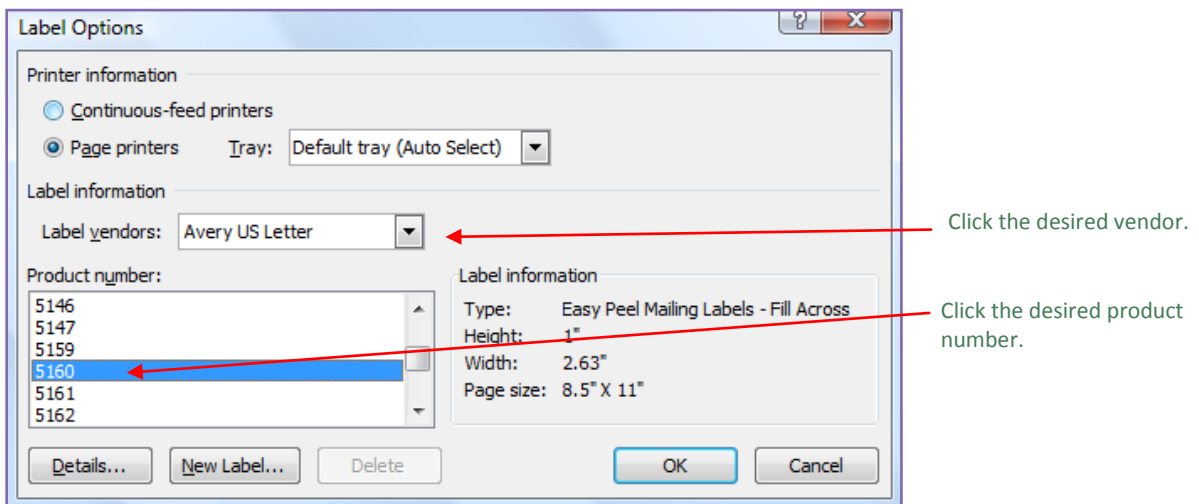
5. Click **OK** to create a page of blank labels.

The **Address Block** placeholder for the inside address will be inserted here.

6. Save the main document for the labels, and name it descriptively (use "main" in the name) so it will be easy to recognize later.

Labels—Data Source File and Placeholders

To add the **Address Block** merge field placeholder from an existing data source file to the main document for the labels:

1. Open the main document for the labels, and click in the first label cell where the inside address would normally be typed.

⚠️ If you see a warning that opening the document will run an SQL command, click **Yes**. This is expected behavior for this main document file, which will access your data source file.

2. From the **Mailings** tab, **Start Mail Merge** group, click the **Select Recipients** button, Use **Existing List**.
3. From the **Select Data Source** dialog box, browse to the desired data source, click **Open**.
4. From the **Mailings** tab, **Write & Insert Fields** group, click **Address Block**; click **OK.**
6. From the **Mailings** tab, **Write & Insert Fields** group, click **Highlight Merge Fields** to view the inserted placeholder field.
7. Review all placeholders and their positions and edit as needed.
8. To include the same **Address Block** placeholder field in each label, from the **Mailings** tab, **Write & Insert Fields** group, click **Update Labels**.
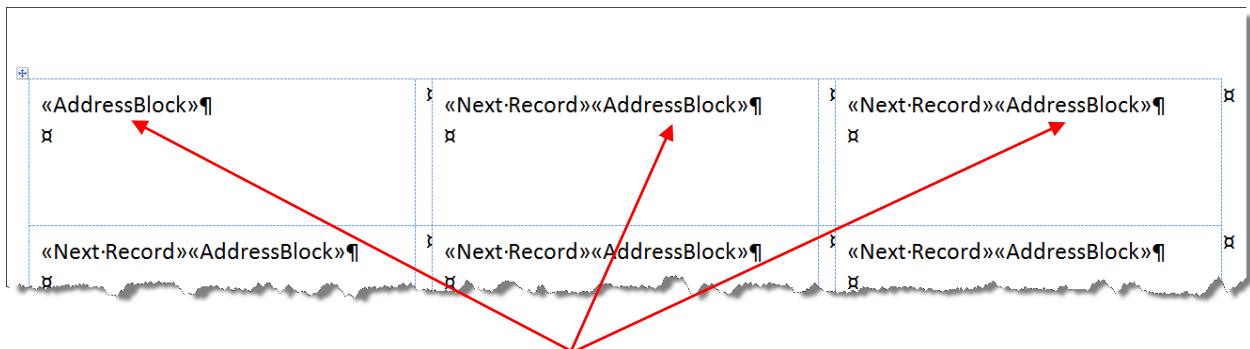
A sheet of labels with an **Address Block** placeholder for variable addresses appears in each cell after clicking **Update Labels**.

❓ To create a full page of the same label, from the **Mailings** tab, **Create** group, click **Labels**. From the **Envelopes and Labels** dialog box, **Labels** tab, type the desired address in the **Address** box. Click **New Document**.
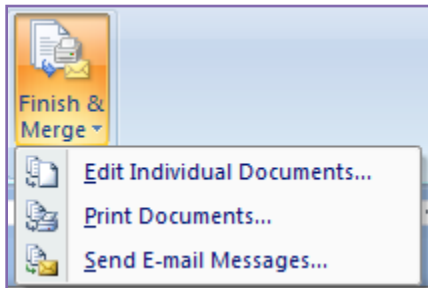
Envelopes and Labels—Merge

To begin the merge process and preview merge results:

1. From the **Mailings** tab, **Preview Results** group, click **Preview Results**.
2. Click the **Next Record** (>) and **Previous Record** (<) buttons to page through your finalized merge files for the envelopes; for labels, review the page of labels.

3. From the **Mailings** tab, **Preview Results** group, click **Preview Results** to toggle it off and return to the main document with the placeholders.
4. Edit the main document or data source as needed, and preview your results again.
5. When you're satisfied with the merge results, from the **Mailings** group, **Finish** group, click **Finish & Merge**; make any desired choice from the drop-down menu.

6. Save and close the main document.

> Save and close your main document before opening or creating any other Word files. Otherwise, data from your database could be linked to other open files.