# Word 2007: Mail Merge

## Session Goals:

* **Learn basic mail merge methods and successfully complete the process several times.**
* **Review the advantages of using Address blocks, Greeting lines, and Rules.**
* **Create, format, and store a label template for repeated use.**
* **Learn what adjustments are needed to retain number formatting when connecting to external data sources.**

## What is Mail Merge?

**Mail merge is a method of taking data from a database or spreadsheet and inserting it into documents such as letters, mailing labels, and name tags. A mail merge requires two files:**

1. **The first file contains the information that will be the same for each document.**
2. **The second file stores the variable data you want to insert.**

## Mail Merges are launched from the Mailings Ribbon

## Mail Merge Steps

1. Set up the main document. The main document contains the text and graphics that are the same for each version of the merged document (e.g., the return address or salutation in a form letter).
2. Connect the document to a data source. A data source is a file that contains the information to be merged into a document (e.g.,the names and addresses of the recipients of a letter).
3. Refine the list of recipients or items. If you want to generate copies for only certain items in your data file, you can choose which items (records) to include.
4. Add placeholders (mail merge fields) to the document. When you perform the mail merge, the mail merge fields are filled with the information from your data file.
5. Preview and complete the merge. You can preview each page of the document before you print the entire file.

## Mail Merge Elements that Add Value

* **Address Block: Especially useful when data has missing values or mailings including addresses outside the U.S.**
* **Greeting Line: Especially useful when data has missing values.**
* **Rules: Using *If…Then…Else* and gender values to generate appropriate pronouns (he/she, him/her, etc.).**

## Create a Mail Merge Label Template

* + **Mailings Tab** ⇒ **Start Mail Merge** ⇒ Labels
* **Label vendor** ⇒ Avery US label ⇒ select product from list (i.e., 5160) ⇒ OK.
  + If gridlines are not shown: Table Tools Tab ⇒ Layout ⇒ View Gridlines.
* Select Recipients and edit list as needed.
* Insert an Address Block in the first cell.
  + Match fields if necessary.
* Update Labels to insert Address Block to other 29 cells.
* **Click the icon in the upper-left corner of the label table to select all** 
* **Home Tab** ⇒ Font group (size=10) ⇒ Paragraph group (Remove space before/after paragraph and size line space to 1.0/single).
* **Page Layout Tab** ⇒ Margins ⇒ Custom Margins
  + Top=.65, Left=.3
  + Click OK. Ignore error message.
* Office button ⇒ Save As ⇒ MyLabel ⇒ File type–Word Template \*.dotx
  + To store Templates to be easily accessible in the future, the path looks similar to C:\Documents and Settings\*Profile name*\Application Data\Microsoft\Templates.
  + To reuse the template
    - Office Button ⇒ New ⇒ My Templates.
    - **Mailings Tab** ⇒ **Start Mail Merge** ⇒ Labels ⇒ Cancel.
      * Without completing this step, the option to update labels may not be available

## Retain Number Formats

Preformatted numbers from Excel worksheets—percentages, currency, phone numbers, dates, or postal codes—will not display properly in your merge unless you complete the following steps:

1. Change the default settings in Word (this step is only done once):
   * Microsoft Office Button ⇒ Word Options.
   * Advanced ⇒ General.
   * Confirm file format conversion on open check box. Click OK.
2. During every mail merge process:
   * Click Select Recipients ⇒ Use Existing List.
   * Locate the Excel worksheet in the Select Data Source dialog box and double-click it.
   * In the Confirm Data Source dialog box, click MS Excel Worksheets via DDE (\*.xls) then click OK.
     + Note:  If you don't see MS Excel Worksheets via DDE (\*.xls), select the Show all check box.

## Resources

* University of Delaware Resources
  + <www.udel.edu/learn>, [usered-info@udel.edu](mailto:usered-info@udel.edu?subject=Word%202007%20mail%20merge%20help%20needed)
  + <www.udel.edu/help>, <mailto:consult@udel.edu>, 831-6000
  + <www.udel.edu/cod/minoffice/index.html>
* Help within Microsoft Word, keyword: mail merge
  + Look for: “Use mail merge to create and print letters and other documents”
* Microsoft Tutorials (<http://office.microsoft.com/training/>)
  + [Mail merge I: Use mail merge for mass mailings](http://office.microsoft.com/training/training.aspx?AssetID=RC102778121033&pid=CR100654561033)
  + [Mail merge II: Use the Ribbon and perform a complex mail merge](http://office.microsoft.com/training/training.aspx?AssetID=RC102798041033&pid=CR100654561033)