



# Mail Merge with Microsoft® Office Word 2007

**Northern New York Library Network**

*Workshop*  
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## Course objectives

- To explore the mail merging with Microsoft Word.
- To develop computer and basic database literacy.
- To address the class' questions.

## Course description

Suppose an institution needs to send each employee a letter containing personal tax withholding and salary information; or perhaps a personalized form letter or email needs to be sent to a list of donors. Creating each letter individually would take hours, but when using the mail merge function, all that has to be done is create one document, add some placeholders, and Microsoft Word will combine the main document with unique information to create a set of complete documents.

Students will learn to use Word's mail merge function - importing mailing information from other sources such as Excel or Access.

Learn how to effectively use the mail merge function in this class and save hours of menial work.

## Schedule

- |       |                   |
|-------|-------------------|
| 9:00  | Registration      |
| 9:30  | Morning session   |
| 10:45 | approximate break |
| 12:30 | Dismissal         |

Handouts available in PDF format at [www.crowleycomputers.com/handout.htm](http://www.crowleycomputers.com/handout.htm).


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# Mail Merge with Microsoft Office 2007

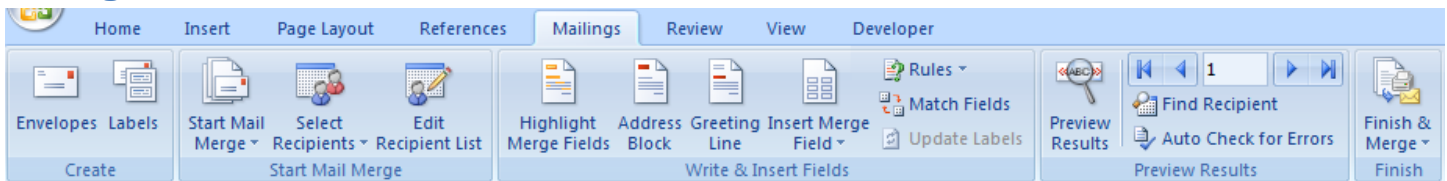
## Quiz

### Process

- |   |   |  |
|---|---|--|
| <p>1. In the bad old days...</p> <ul style="list-style-type: none"> <li>A. You had your letter with a blank address block and salutation</li> <li>B. You had your list of recipients</li> <li>C. You made 200 copies of the letter</li> <li>D. You hand wrote or typed in each address block and salutation</li> <li>E. And the next time, realized that was a waste of time and you sent a generic letter</li> </ul> |  | <p>2. Today, you do the same thing, but better and smarter!</p> <ul style="list-style-type: none"> <li>A. You write your letter</li> <li>B. Create your list of recipients</li> <li>C. Insert fields where recipient's information go</li> <li>D. Preview</li> <li>E. Merge and print</li> </ul> |
|---|---|--|

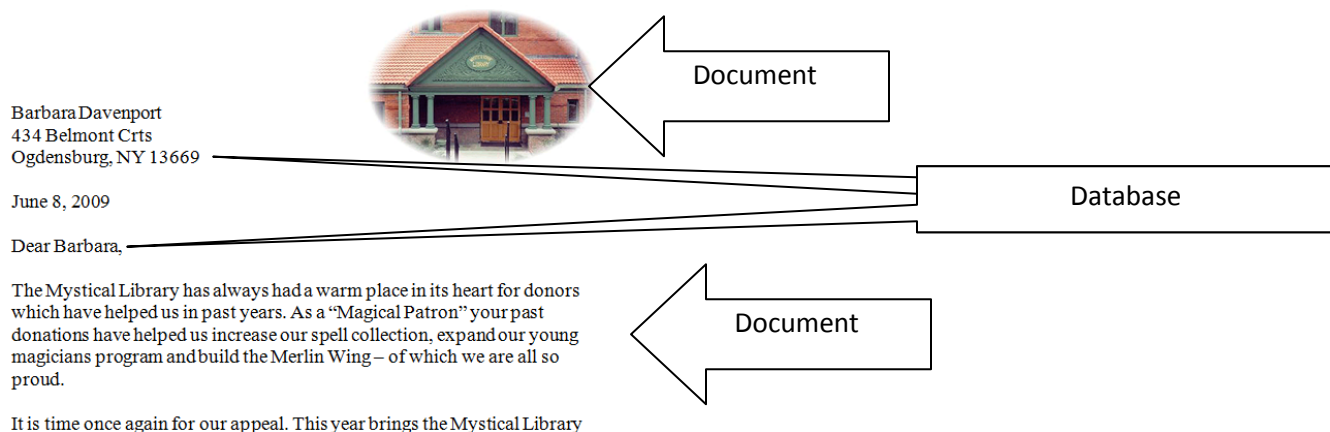
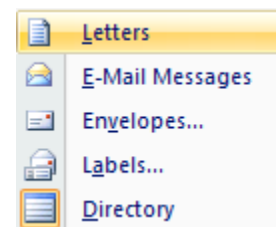
## The Basics

### Mailings ribbon



### Basic concepts

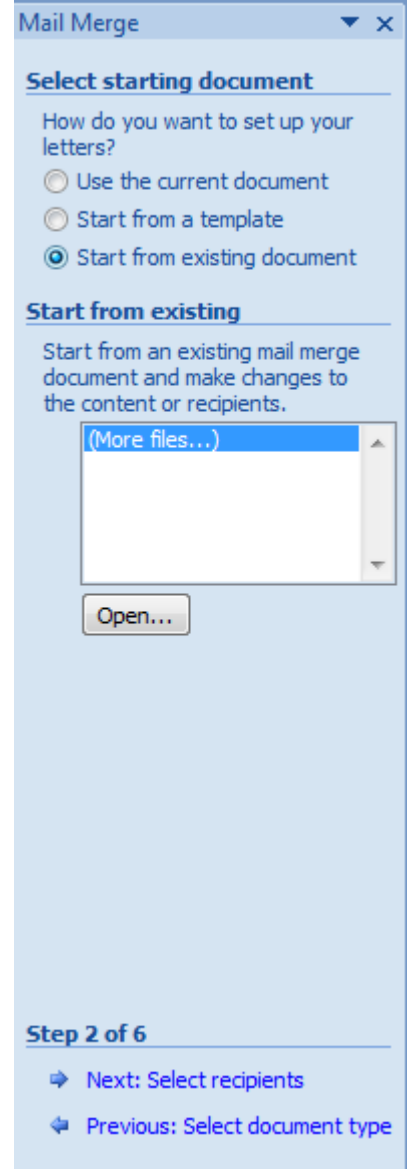
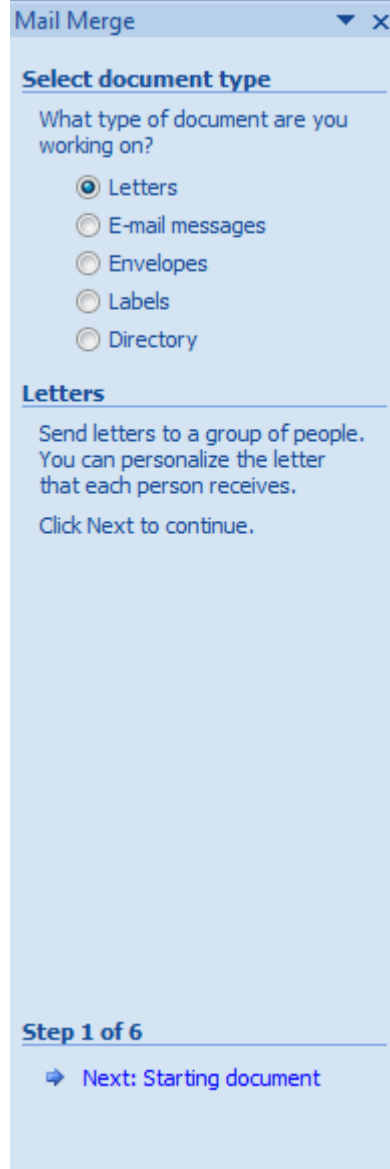
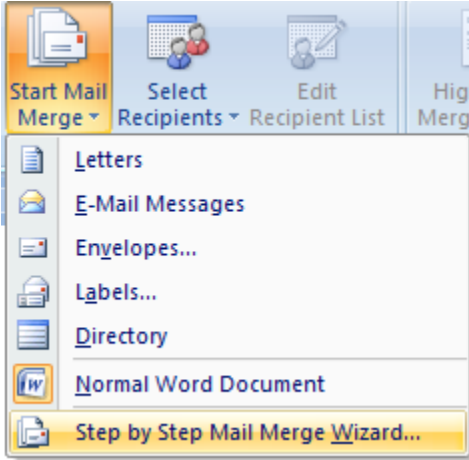
1. Mail merges require two pieces of information
  - A. Document
    - i. Might be a letter, email, fax, envelope, label, directory (list) ...
    - ii. Contains the content or message
  - B. Recipient's list or database or data source from
    - i. New list
    - ii. Existing list
    - iii. Outlook Contacts



2. Usually a document repeats for each record in the database, directories repeat records in a single document.

## Basic mail merge via the wizard

1. Open Word to a blank new document
2. Select Mailings ribbon
3. Start Mail Merge command
4. Step by Step Mail Merge Wizard



5. Select "Mystic Library 1 (no fields).docx"

**Mail Merge**

**Select recipients**

- Use an existing list
- Select from Outlook contacts
- Type a new list

**Use an existing list**

Use names and addresses from a file or a database.

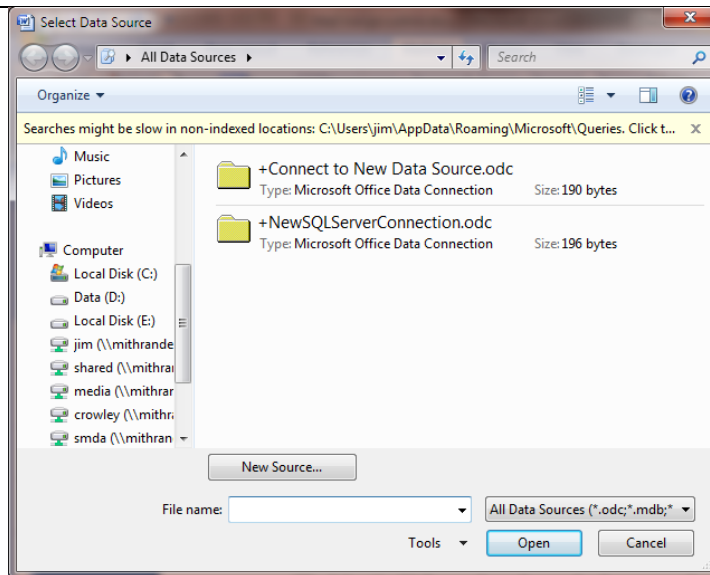
[Browse...](#)

[Edit recipient list...](#)

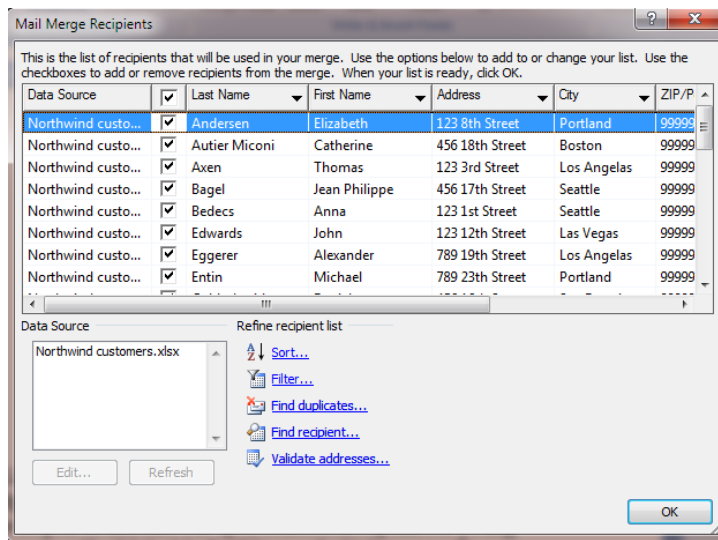
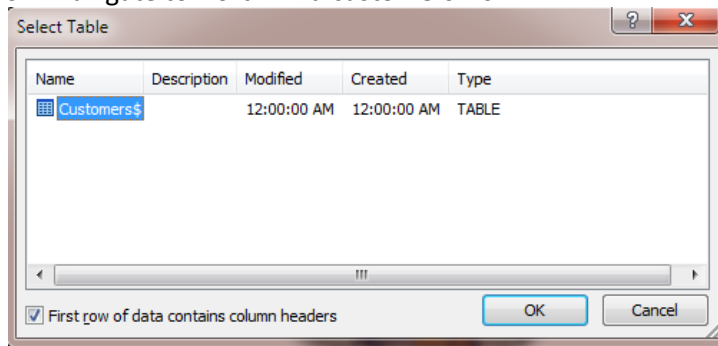
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**Step 3 of 6**

- [Next: Write your letter](#)
- [Previous: Starting document](#)



6. Navigate to Northwind customers.xlsx.



**Mail Merge**

**Write your letter**

If you have not already done so, write your letter now.

To add recipient information to your letter, click a location in the document, and then click one of the items below.

- Address block...
- Greeting line...
- Electronic postage...
- More items...

When you have finished writing your letter, click Next. Then you can preview and personalize each recipient's letter.

**Step 4 of 6**

- Next: Preview your letters
- Previous: Select recipients

**Insert Address Block**

Specify address elements

Insert recipient's name in this format:

Josh  
Josh Randall Jr.  
Josh Q. Randall Jr.  
Joshua  
Joshua Randall Jr.  
Joshua Q. Randall Jr.

Insert company name

Insert postal address:

Never include the country/region in the address  
 Always include the country/region in the address  
 Only include the country/region if different than:

United States

Format address according to the destination country/region

Preview

Here is a preview from your recipient list:

Elizabeth Andersen  
123 8th Street  
Portland 99999

Correct Problems

If items in your address block are missing or out of order, use Match Fields to identify the correct address elements from your mailing list.

Match Fields...

OK Cancel

**Date and Time**

Available formats:

6/9/2009  
Tuesday, June 09, 2009  
June 9, 2009  
6/9/09  
2009-06-09  
9-Jun-09  
6.9.2009  
Jun. 9, 09  
9 June 2009  
June 09  
Jun-09  
6/9/2009 4:27 AM  
6/9/2009 4:27:44 AM  
4:27 AM  
4:27:44 AM  
04:27  
04:27:44

Language:  
English (United States)

Update automatically

Default... OK Cancel

**Insert Greeting Line**

Greeting line format:

Dear Joshua ,

Greeting line for invalid recipient names:

Dear Sir or Madam,

Preview

Here is a preview from your recipient list:

Dear Elizabeth,

Correct Problems

If items in your greeting line are missing or out of order, use Match Fields to identify the correct address elements from your mailing list.

Match Fields...

OK Cancel

«AddressBlock»

June 9, 2009

«GreetingLine»

The Mystical Library has:  
which have helped us in p:

<p><b>Mail Merge</b> [Close]</p> <p><b>Preview your letters</b></p> <p>One of the merged letters is previewed here. To preview another letter, click one of the following:</p> <p>&lt;&lt; Recipient: 1 &gt;&gt;</p> <p> Find a recipient...</p> <p><b>Make changes</b></p> <p>You can <b>Find in recipient list</b> recipient list:</p> <p> Edit recipient list...</p> <p><b>Exclude this recipient</b></p> <p>When you have finished previewing your letters, click Next. Then you can print the merged letters or edit individual letters to add personal comments.</p> <p><b>Step 5 of 6</b></p> <p>➔ Next: Complete the merge</p> <p>⬅ Previous: Write your letter</p>	<p><b>Mail Merge</b> [Close]</p> <p><b>Complete the merge</b></p> <p>Mail Merge is ready to produce your letters.</p> <p>To personalize your letters, click "Edit Individual Letters." This will open a new document with your merged letters. To make changes to all the letters, switch back to the original document.</p> <p><b>Merge</b></p> <p> Print...</p> <p> Edit individual letters...</p> <p><b>Step 6 of 6</b></p> <p>⬅ Previous: Preview your letters</p>	
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## Preview

Off

Envelopes  
Labels

Start Mail Merge | Select Recipients | Edit Recipient List

Highlight Merge Fields | Address Block | Greeting Line | Insert Merge Field

Preview Results | Find Recipient | Auto Check for Errors

1

Mail Merge

**Complete the merge**

Mail Merge is ready to produce your letters.

To personalize your letters, click "Edit Individual Letters." This will open a new document with your merged letters. To make changes to all the letters, switch back to the original document.

**Merge**

Print...


Edit individual letters...

«AddressBlock»

June 9, 2009

«GreetingLine»

The Mystical Library has always had a warm place in its heart for donors which have helped us in past years. As a "Magical Patron" your past



On

The screenshot shows the Mail Merge ribbon in Microsoft Word. The ribbon includes groups for 'Create' (Envelopes, Labels), 'Start Mail Merge' (Start Mail Merge, Select Recipients, Edit Recipient List), 'Write & Insert Fields' (Address Block, Greeting Line, Insert Merge Field), and 'Preview Results' (Preview Results, Find Recipient, Auto Check for Errors). Below the ribbon is a ruler and a letter template. The letter is addressed to Elizabeth Andersen at 123 8th Street, Portland 99999, dated June 9, 2009. The salutation is 'Dear Elizabeth,'. The body text reads: 'The Mystical Library has always had a warm place in its heart for donors which have helped us in past years. As a "Magical Patron" your past'. A circular image of a building is on the right side of the letter. On the far right, a 'Mail Merge' task pane is visible with sections for 'Complete the merge' and 'Merge'.

Elizabeth Andersen  
123 8th Street  
Portland 99999

June 9, 2009

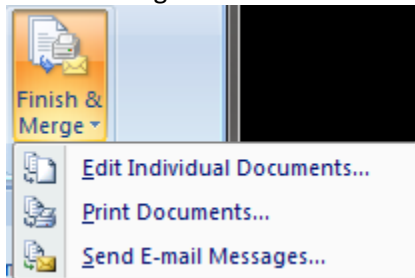
Dear Elizabeth,

The Mystical Library has always had a warm place in its heart for donors which have helped us in past years. As a "Magical Patron" your past

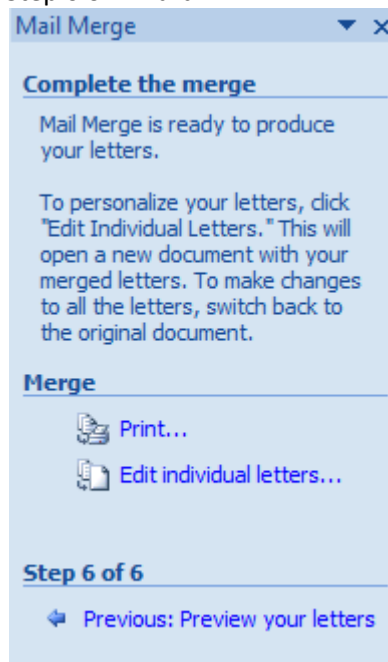
## Document vs. Individual Letters

### 1. Accessible via

#### A. Finish & Merge



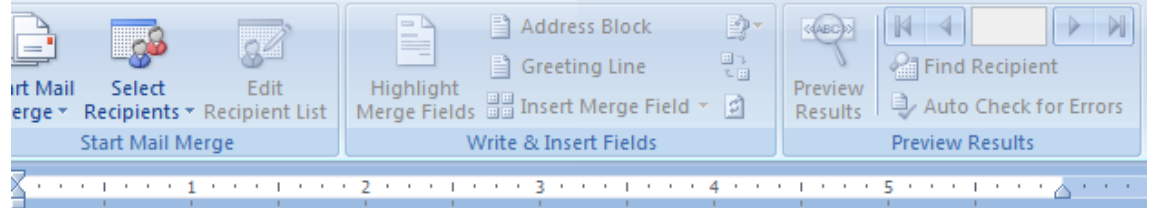
### B. Step 6 of wizard



2. Notice most merge ribbon commands are not available.

Commands that are available will start a new merge.

3. Each letter is a single page of the document and can be altered or printed separately.



Elizabeth Andersen  
123 8th Street  
Portland 99999

June 9, 2009

Dear Elizabeth,

The Mystical Library has always had a warm place in its heart for donors which have helped us in past years. As a "Magical Patron" your past



### What to save...

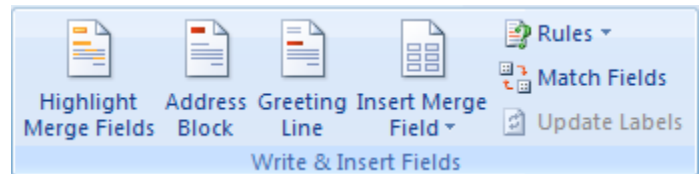
1. Original document – save for recycling
2. Data source – you've gone through all this effort, don't you think you're going to reuse it?
  - A. If your data is from an application other than Word, you will have to save from that application. IE. Excel.
3. Possibly the individual letters – if you need to double check who got a document or if you need to edit individual letters because your data source isn't perfect.
  - A. Can be much larger than original document and data source!

### Focus on Data

1. You must be able to "find" or "define" your data source.
2. The better the data source, the easier and more possibilities for the merge.

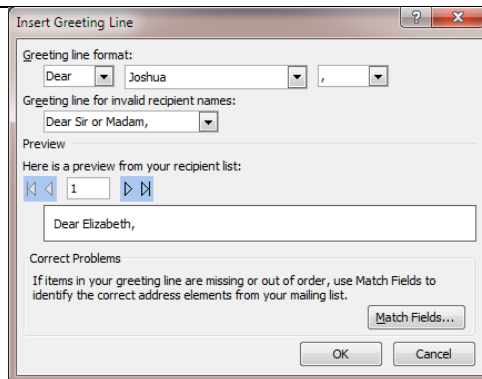
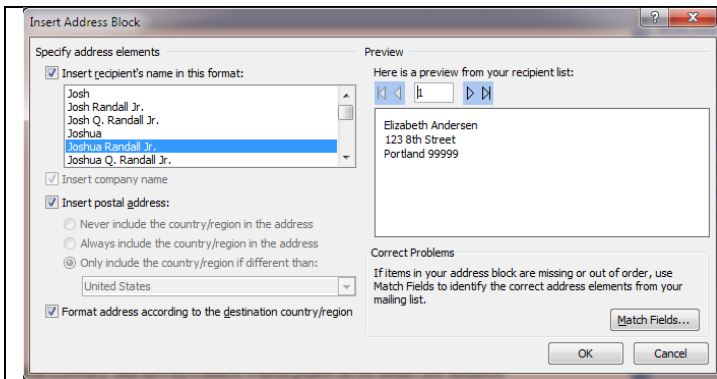
### Write & Insert Fields

1. Highlight Merge Fields puts shading behind the fields so you can see what is merged easier. Shading does not print.

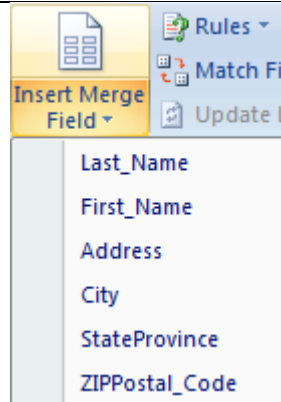


2. Address Block inserts an address block
  - A. Does more than just addresses!
    - i. Recipient's name, adjusting format
    - ii. Company name
    - iii. Postal address
    - iv. Format address according to destination
  - B. Great for just throwing in names!

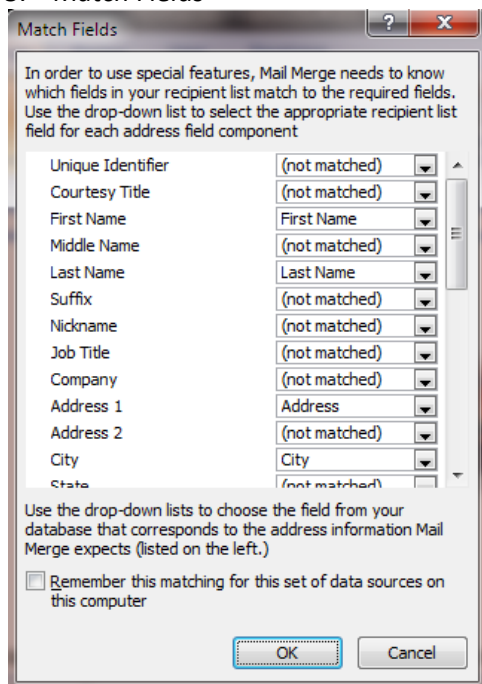
3. Greeting line
  - A. Salutation options
  - B. Name format options
  - C. Notice how you can handle invalid names!



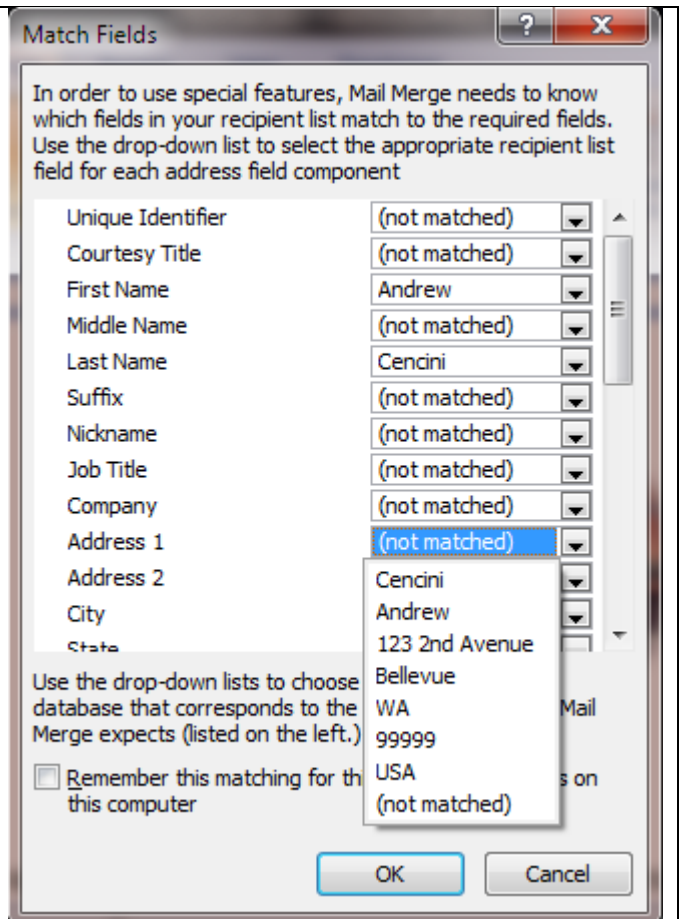
#### 4. Insert Merge Fields



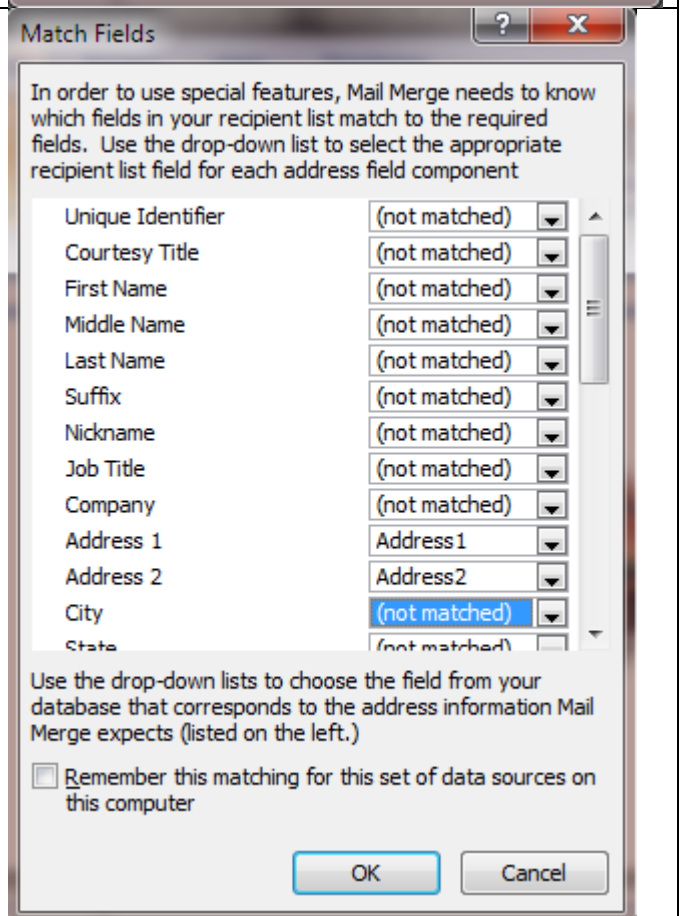
#### 5. Match Fields



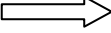
6. Remerge with Northwind Employees.xlsx - no header row!
- A. Process
    - i. Select recipients
    - ii. Use existing list
    - iii. My Documents
    - iv. Northwind Employees.xlsx
  - B. Address block – notice no preview. Since the spreadsheet doesn't have headers Excel can recognize, we have to Match Fields manually.
  - C. Word will convert the first record into a header! You will lose this merged record! You may need to go to the data source and add headers!



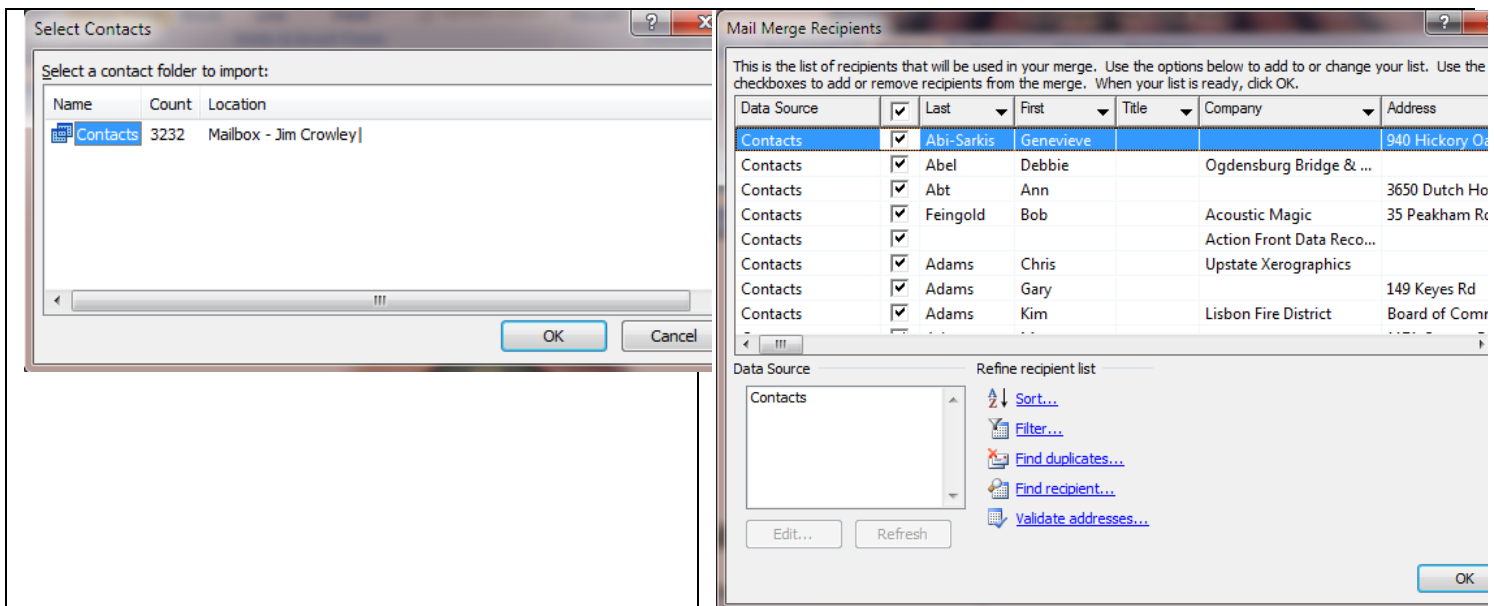
7. Remerge with Northwind Employees bad header.xlsx - header row that Word doesn't recognize!
- A. Process
    - i. Select recipients
    - ii. Use existing list
    - iii. My Documents
    - iv. Northwind Employees.xlsx
  - B. Address block – notice lots of data missing in the preview. Since the spreadsheet doesn't have headers Excel can recognize, we have to Match Fields manually.



## Data sources

1. See possibilities 
2. You do NOT want to recreate the data if it already exists!
  - A. Typical sources
    - i. Excel lists
    - ii. Access tables or queries
    - iii. Lists typed in Word
  - B. Less typical, but powerful data sources are ODBC or database queries to SQL database on company servers.
    - i. Usually require some expertise to make the connection the first time.
    - ii. Once the connection is created, Windows remembers it and you can re-access it easily.
3. Outlook Contacts – if you have an extensive list of names in Outlook, you probably will want to use it. Outlook Contact lists are great little databases! Demonstration will not work in class, Outlook is not configured.

Office Database Connections (\*.odc)  
 Access Databases (\*.mdb;\*.mde)  
 Microsoft Office Access 2007 Database (\*.accdb;\*.accde)  
 Microsoft Office Address Lists (\*.mdb)  
 Microsoft Office List Shortcuts (\*.ols)  
 Access Projects (\*.ade;\*.adp)  
 Microsoft Data links (\*.udl)  
 ODBC File DSNs (\*.dsn)  
 Excel Files (\*.xlsx;\*.xlsm;\*.xlsb;\*.xls)  
 Web Pages (\*.htm;\*.html;\*.asp;\*.mht;\*.mhtml)  
 Rich Text Format (\*.rtf)  
 Word Documents (\*.docx;\*.doc;\*.docm)  
 All Word Documents (\*.docx;\*.doc;\*.docm;\*.dotx;\*.dot;\*.dotm;\*.rtf;\*.htm;\*.html)  
 Text Files (\*.txt;\*.prn;\*.csv;\*.tab;\*.asc)  
 Microsoft Works Databases (\*.wdb)  
 Lotus 1-2-3 Files (\*.wk?;\*.wj?)  
 Paradox Files (\*.db)  
 dBASE Files (\*.dbf)  
 Database Queries (\*.dqy;\*.rqy)



4. Be patient when working with large lists!

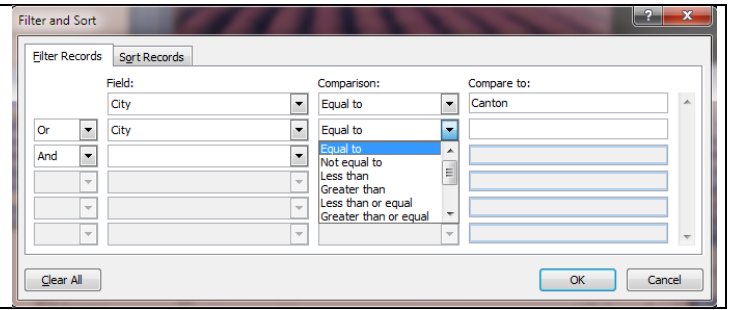
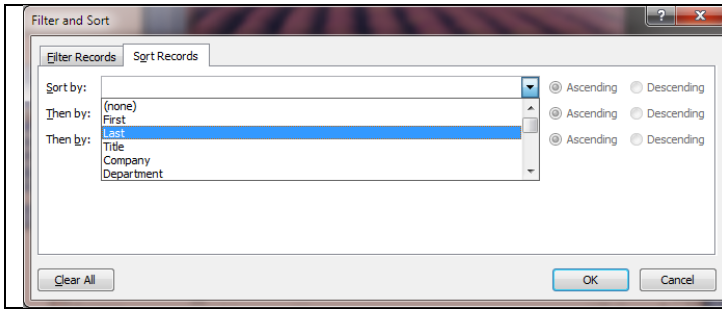
## Edit Recipient List

1. See screen shot above and right

A. Sort records

B. Filter records

- i. Manual filtering via check marks on listing
- ii. Powerful automated filters



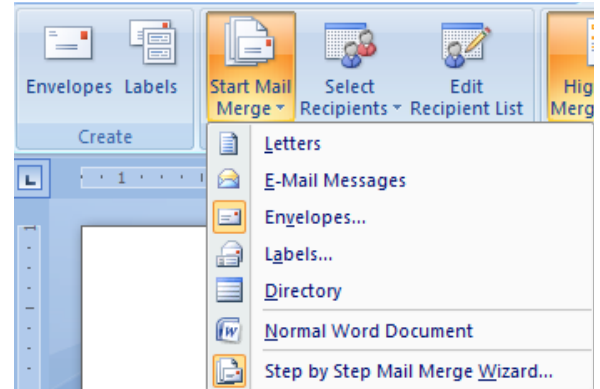
## Focus on documents

### Letters

1. Basically, if you can write your letter...

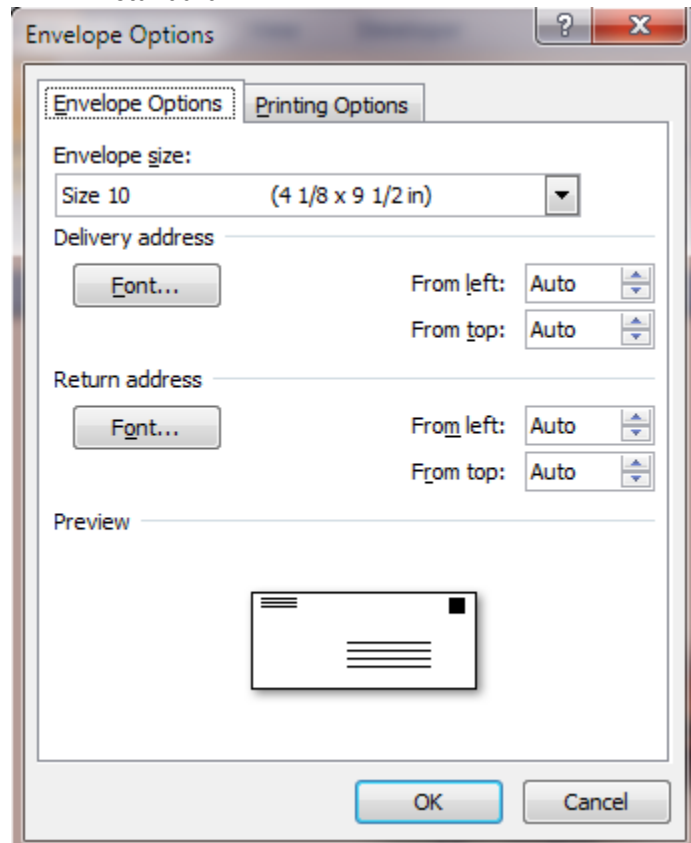
### Envelopes

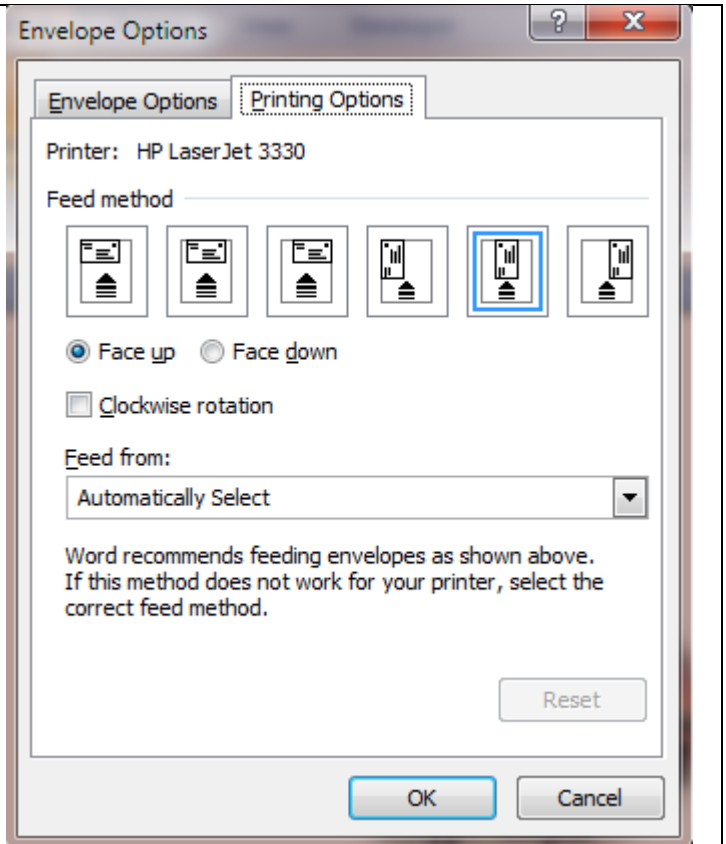
1. Can be started from
  - A. Create group, Envelopes
  - B. Start Mail Merge group, Start Mail Merge, Envelopes...
  - C. Step by Step Mail Merge Wizard
2. If used before a merge process is started, you get the ability to print a single envelope. I suggest using this rather than your typewriter!



3. Select envelope options – specific to the size envelope!
  - A. You can adjust fonts and margins, defaults are “standard.”

4. Select printing options – specific to the printer you are using!
  - A. Check printer or manual for recommended direction of feed. Windows will get good information from good printer drivers.
  - B. Feed from may require attention, especially with more sophisticated printers.

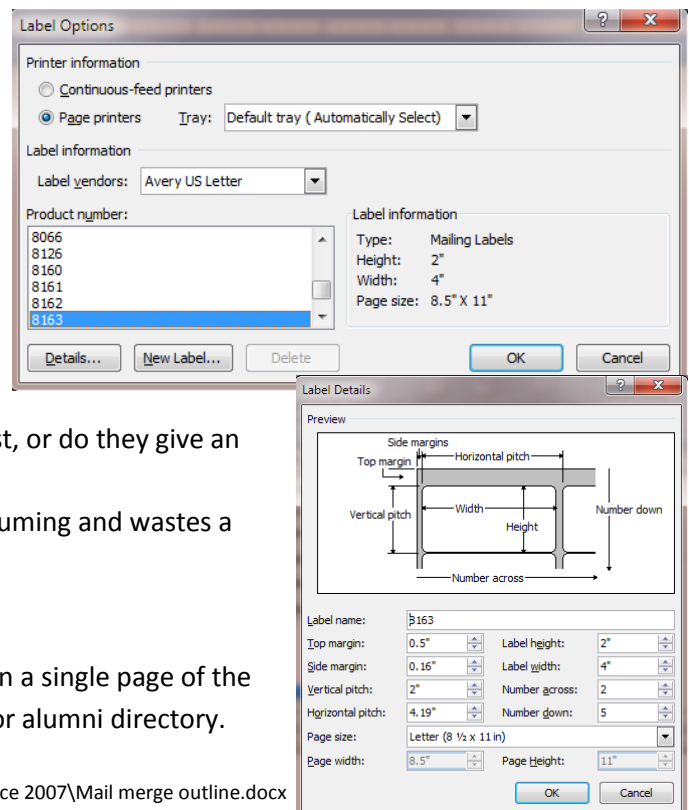




5. Use Wizard
  - A. Create envelopes from a new document using OFA 83 Simple.acbdb
    - i. Enter return address and reduce spacing
    - ii. Click around to find the address block area
    - iii. Address block will require match field for Town, watch preview!

## Labels

1. Process is pretty much identical to envelopes...
  - A. Continuous (dot matrix) vs page printers
  - B. Select vendor
  - C. Select label size. You can type in this list to get there faster!
  - D. Details show you exact dimensions of a label.
2. Label buying suggestions
  - A. Laser labels for laser printers, inkjet labels for inkjet printers!
  - B. Crappy labels gum up your printer.
  - C. Check to see if a manufacturer is listed in the vendor list, or do they give an "Avery equivalent."
  - D. Creating your own label sizes is possible, but time consuming and wastes a lot...



## Directory

1. Directories allow you to create lists with multiple records on a single page of the resulting document. Think telephone directory, phone list or alumni directory.

2. Create directory from a new document using OFA 83 Simple.accdb
  - A. Set up three columns
  - B. Enter name fields
  - C. Preview only shows one name on a page! Useless! You must merge to a new document to see the results!

«First_name» «Last_name»	Rita Crowley	Rita Crowley	Rita Tulip
		Lori Montroy	Tom Sharlow

- D. Optional
  - i. Sort
  - ii. Add additional information

## Email messages

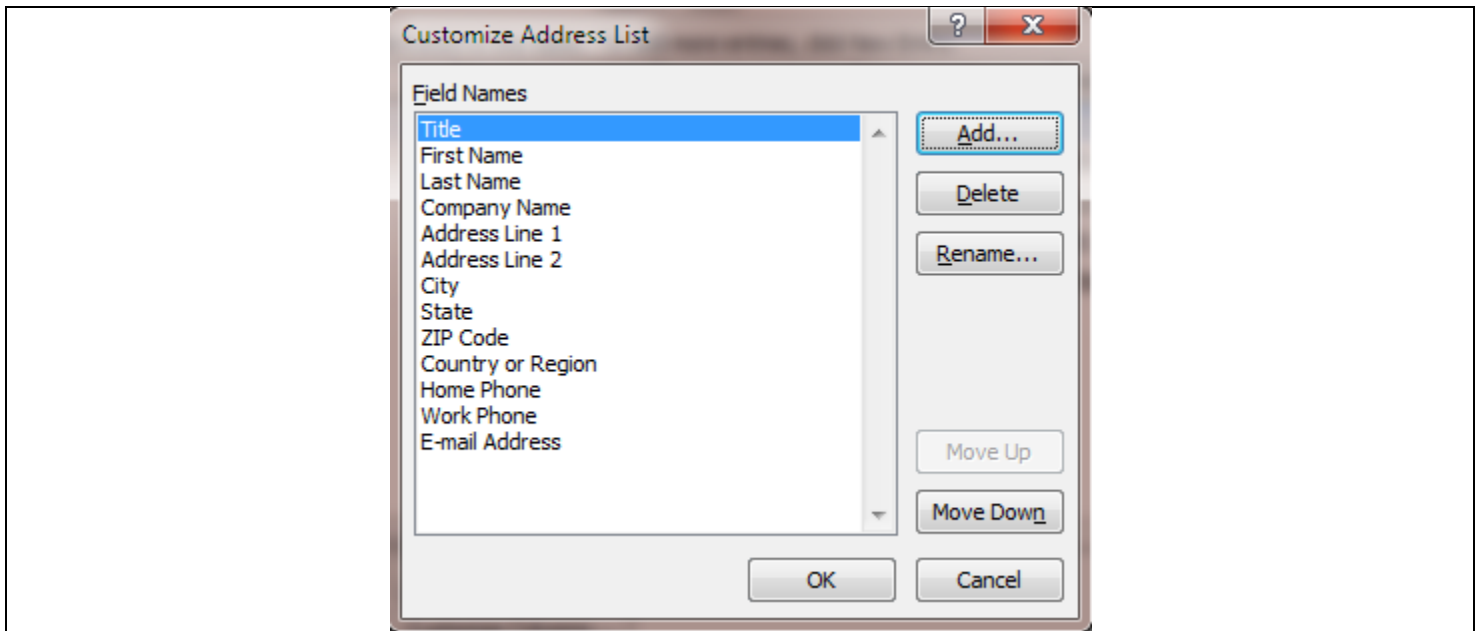
1. Email mergers send a single message to each record in your data source. Recipients will not see one another's email addresses.
2. Create an email from a new document and Soccer Coaches.xlsx
  - A. Notice a poor data source
    - i. Incomplete records
    - ii. Names not separated, first and last name in a single field.
    - iii. Improperly used fields, phone number in Greg Guimond's email field.

## Miscellaneous

### Data on the fly...

1. Data sources can be created in Word.
  - A. Start the Mail Merge wizard
  - B. Use Toilets R Us complaint merge doc.docx
  - C. Create a data source...

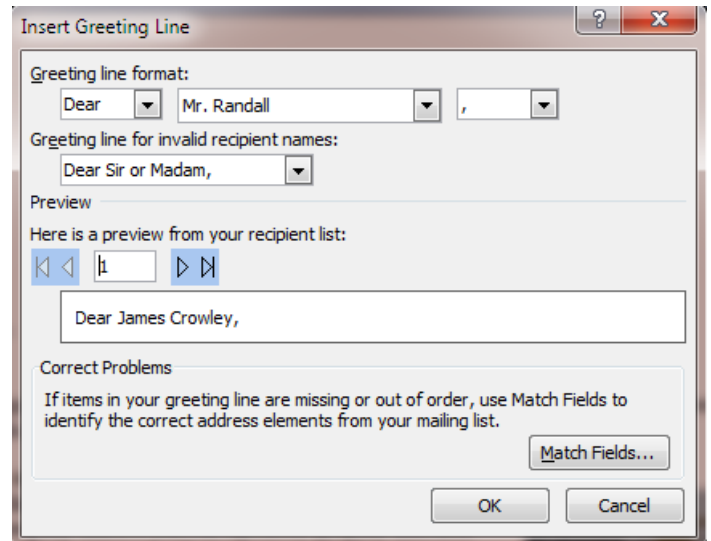
Title	First Name	Last Name	Company Name	Address Line 1	Address Line 2
	James	Crowley	C3 - Crowley C...	9148 State High...	
	Rita	Crowley		9148 State High...	
	Thomas	Crapper		123 Main St	
	Porcelain	Fixture		45 Jones Av	
	Uncle	Sam	American Fixture	7890 N Drainag...	



D. List is saved in a .mdb file – the old Microsoft Access format. It can be stored anywhere, but Windows looks in the My Data Sources folder by default.

### Greeting line oddity

Formal greeting lines will list first names if you aren't careful to give titles. See the example on the right, where you would expect "Dear Mr. Crowley," you get "Dear James Crowley," because there is no "Mr." in the title field or no title field. This is often overlooked when setting up data sources.



### More stuff and directories

Heading must be in headers....



Buchanan	UK	\$ 440.00
----------	----	-----------

### Top Sales

Suyama	UK	\$1,863.40
--------	----	------------

### Top Sales

Peacock	USA	\$1,552.60
---------	-----	------------

### Top Sales

But...

Title

### Top Sales

Header

«Salesperson»

«Country»

«Order\_Amount»

Results in...

### Top Sales

Dodsworth	UK	5275.71
-----------	----	---------

Peacock	USA	4578.43
---------	-----	---------

Davolio	USA	5398.72
---------	-----	---------

Rules can be used to perform complex decisions. For example, using skip record if Order Amount is less than 4000 resulted in the previous list.

This should go at the beginning of the record's line.

«Skip Record If...»«Salesperson»

Insert Word Field: Skip Record If

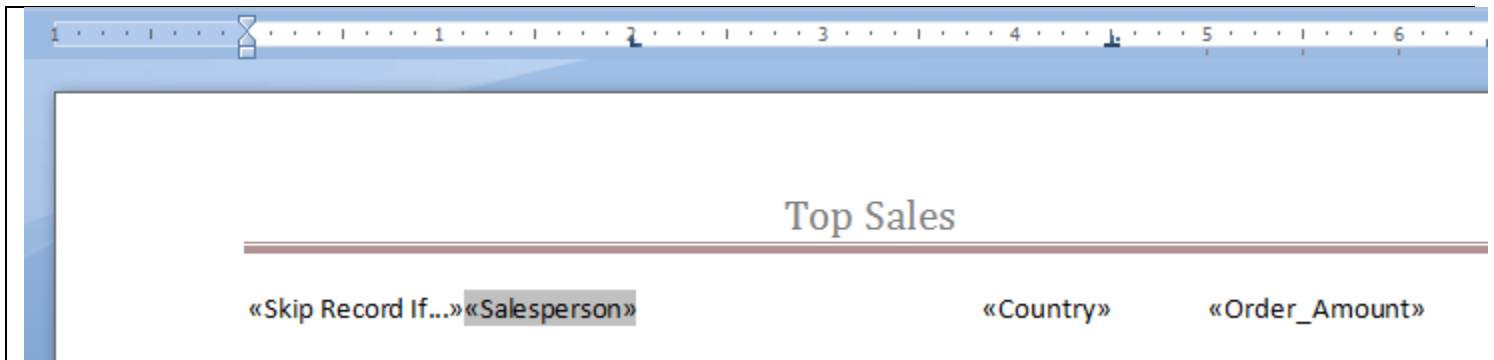
Field name:  
Order\_Amount

Comparison:  
Less than

Compare to:  
4000

OK Cancel

Wait a minute... How did you line up the decimals? Using tabs...



Select the tab type in the upper left corner of the ruler. Click on the Ruler where you want it.



A **Left Tab** stop sets the start position of text that will then run to the right as you type.



A **Center Tab** stop sets the position of the middle of the text. The text centers on this position as you type.



A **Right Tab** stop sets the right end of the text. As you type, the text moves to the left.

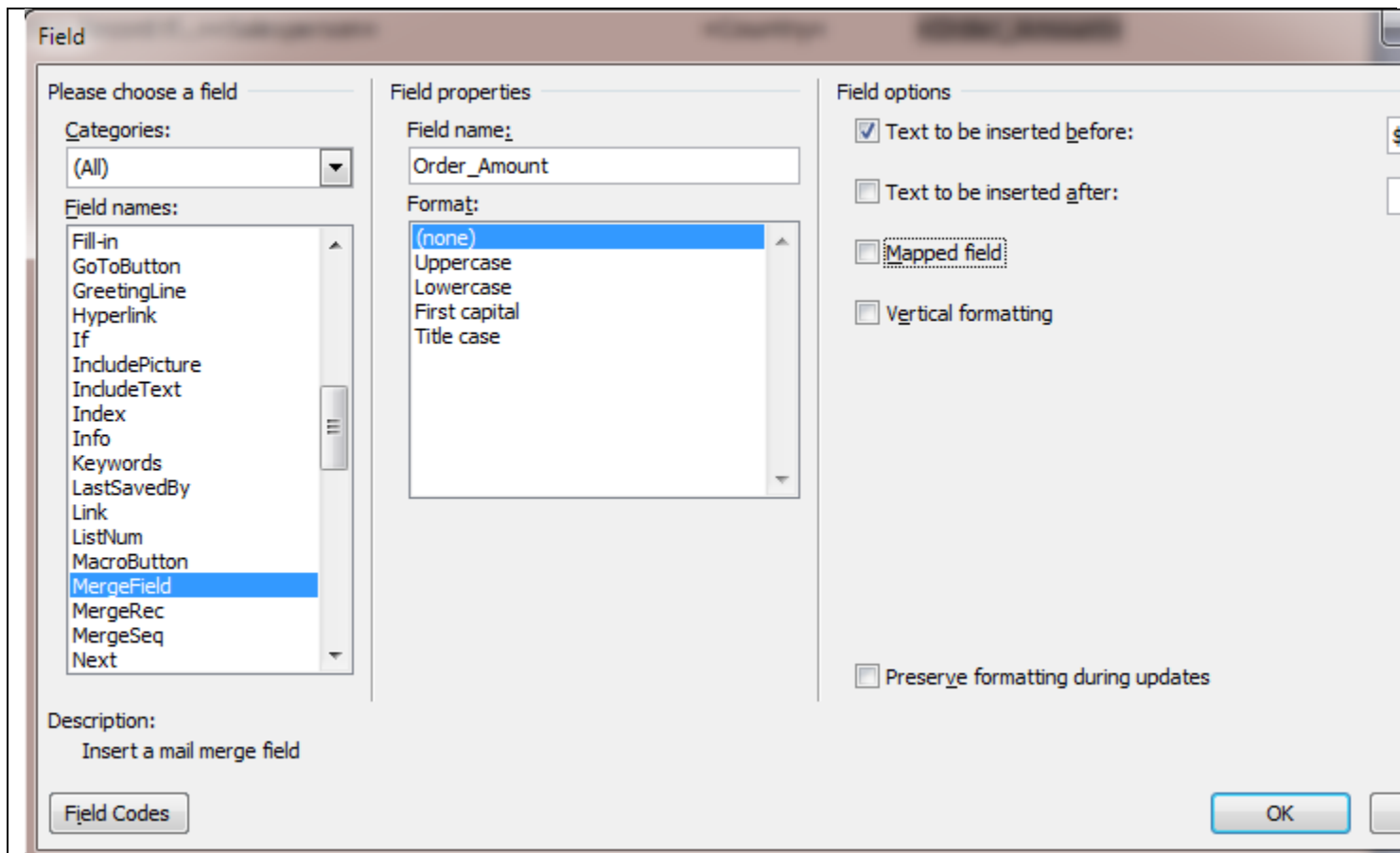


A **Decimal Tab** stop aligns numbers around a decimal point. Independent of the number of digits, the decimal point will be in the same position. (You can align numbers around a decimal character only; you cannot use the decimal tab to align numbers around a different character, such as a hyphen or an ampersand symbol.)



A **Bar Tab** stop doesn't position text. It inserts a vertical bar at the tab position.

And the dollar signs came from Edit Field...



And the truly fancy numeric formatting by toggling field codes and editing.

«Skip Record If...»«Salesperson»                      «Country»                      {MERGEFIELD  
 Order\_Amount \# \$##,###.00}

I was unable to find a nice concise listing of field code formatting. I googled “word merge format currency” to get the “\# \$##,###.00”

Cheating is good.