

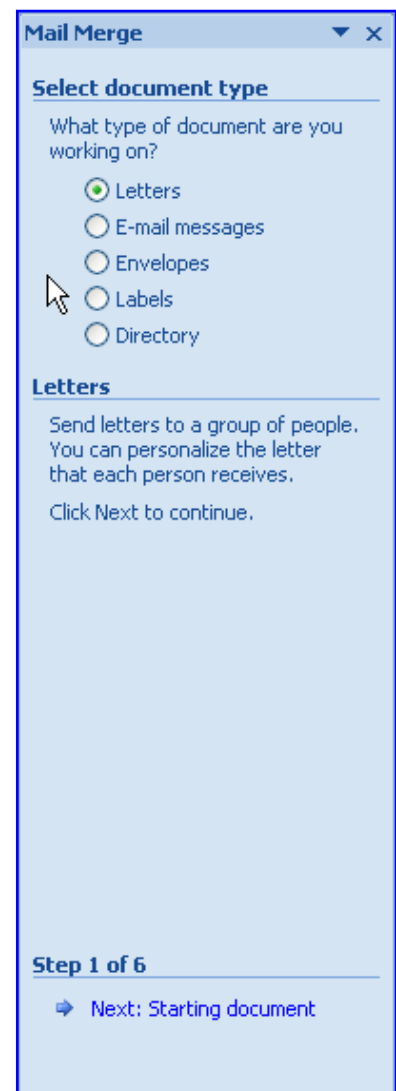
MAIL MERGE - LETTERS USING THE MAIL MERGE WIZARD

When working with the Mail Merge feature, it is possible to create several types of documents, such as letters and envelopes. In this document, information on how to set up a letter merge is explained. A letter merge can be completed using a previously created letter or a new letter can be input. For information on the terms that are used in this document, such as boilerplate text, see the General Information Link on the Word Web page.

STARTING THE MERGE

- ❖ Click the **Mailings Tab**.
- ❖ Click the **Start Mail Merge** list arrow.
- ❖ Click the **Step by Step Mail Merge Wizard** link at the bottom of the list.
- ❖ The **Mail Merge Task Pane** will appear, displaying the first step in the Mail Merge process (see illustration at right).

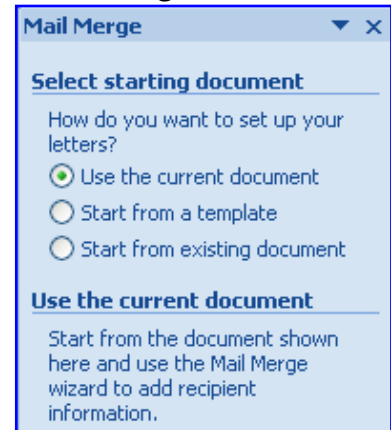
- ❖ **Select Document Type** - The following choices will appear:
 - **Letters**
 - This option is used to create letters, memos, and so forth by inserting Boilerplate information and variable information from the Recipient List/Data Source.
 - Each letter or memo is placed on a new page.
 - **E-mail Messages**
 - Use this option to create a Mail Merge to send to e-mail recipients.
 - It uses the e-mail addresses contained in the Outlook contact list.
 - When using this feature, it is not possible to add an attachment to the letter.
 - **Envelopes**
 - This option is used to create Envelopes by inserting the variable information from the Recipient List/Data Source.
 - Each envelope appears on a new page.
 - **Labels**
 - Use this option to create Mailing Labels by inserting variable information from the Recipient List/Data Source.
 - Labels are placed one after another on a page.
 - The size and type of label are defined when they are created.
 - **Directory**
 - This option is used to create a document with variable information from the Recipient List/Data Source.



- Instead of each item appearing on a new page, the data is placed continuously on a page.
- Select **Letters** for the type of document.

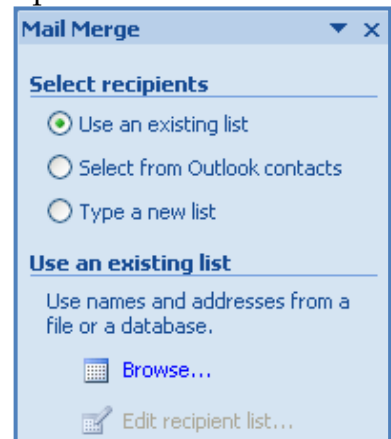
❖ **Click Next: Starting document.** This appears at the bottom of the **Mail Merge Task Pane**.

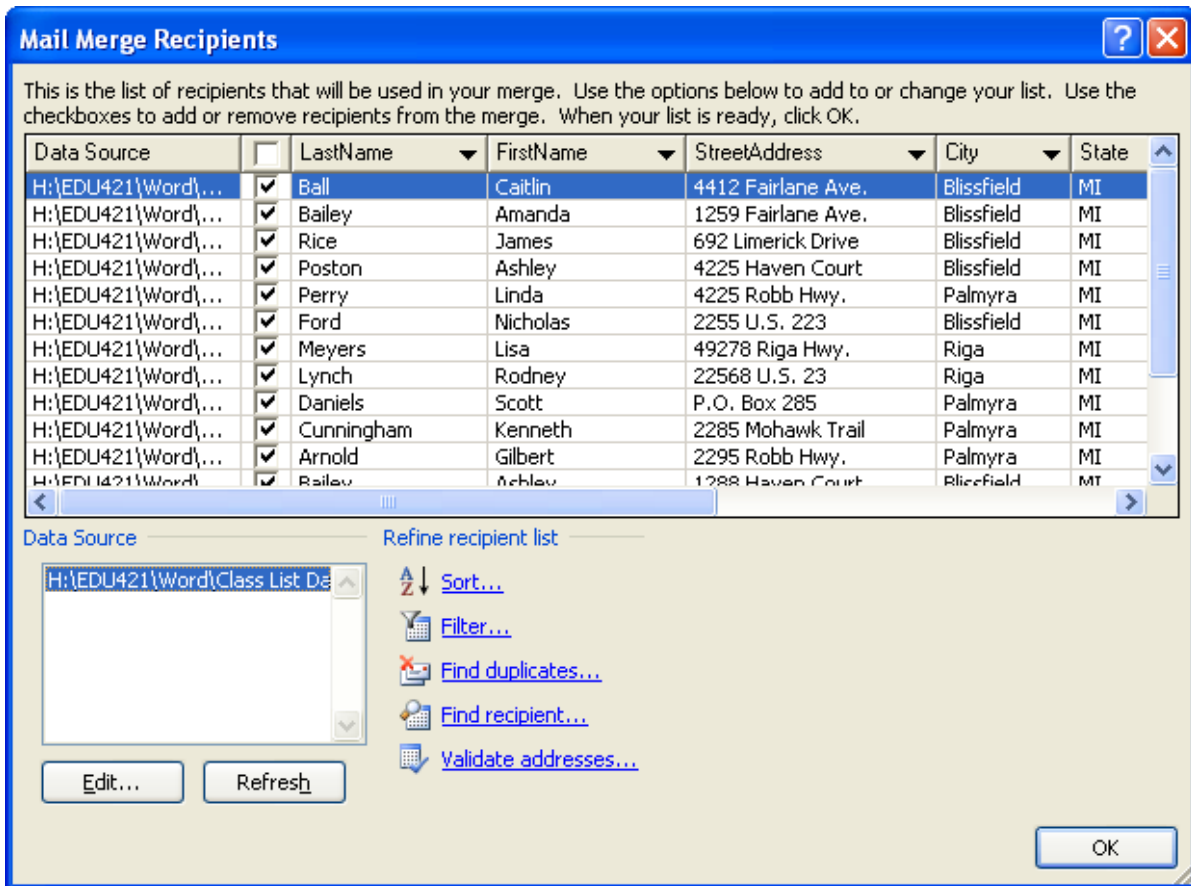
- In this step, choose one of the three options:
 - **Use the current document** – When this option is chosen, the merge will use the document where the insertion point is located.
 - **Start from a template** – To create a Mail Merge using a template, click **Select Template** to choose which template to use.
 - **Start from existing document** – A list of documents that were created earlier will appear. Choose the document that is to be used for the merge.



❖ **Click Next: Select recipients.** The options here are:

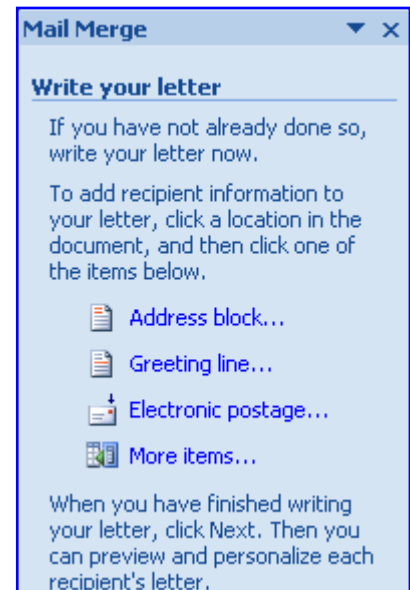
- **Use an existing list** – Click the **Browse** link to select a list of recipients.
- **Select from Outlook contacts** – This option is used when your Outlook contacts list is to be used for the Mail Merge. To access the Contacts list, click the **Choose Contacts Folder** link. A list of contact folders will appear. Choose the one that is to be used for the Mail Merge.
- **Type a new list** – To start a new list of recipients, click **Create** to start creating the recipient list. For information on how to create a new Recipient List, click the Recipient List link in the Word 2007 Web page.
- Click **Use an Existing List**.
- Click **Browse** to select a list.
- Select the list that is going to be used for this merge from the area where it is stored.
- The **Mail Merge Recipients** dialog box will appear (see illustration below).
- See the illustration at the top of the next page for the options that are available in this dialog box. These options are:
 - **Sort** – Use this option to sort the records in the Recipient List. A dialog box will display where the Sort options can be chosen.
 - **Filter** – This option is used to filter out the records that are going to be used in the merge. A dialog box will appear where the appropriate criteria can be selected.
 - **Find Duplicates** – To locate duplicate records in the Recipient List, click this link. A dialog box will appear which will contain the records that are duplicates.
 - **Find Recipient** – This option provides a dialog box that allows you to look for a particular record in the recipient list.
 - **Validate Addresses** – This option allows specific criteria to be applied to a field in a record so that improper data cannot be entered. This needs to be installed before it can be used.
- Click **OK** to exit the **Mail Merge Recipients** dialog box.



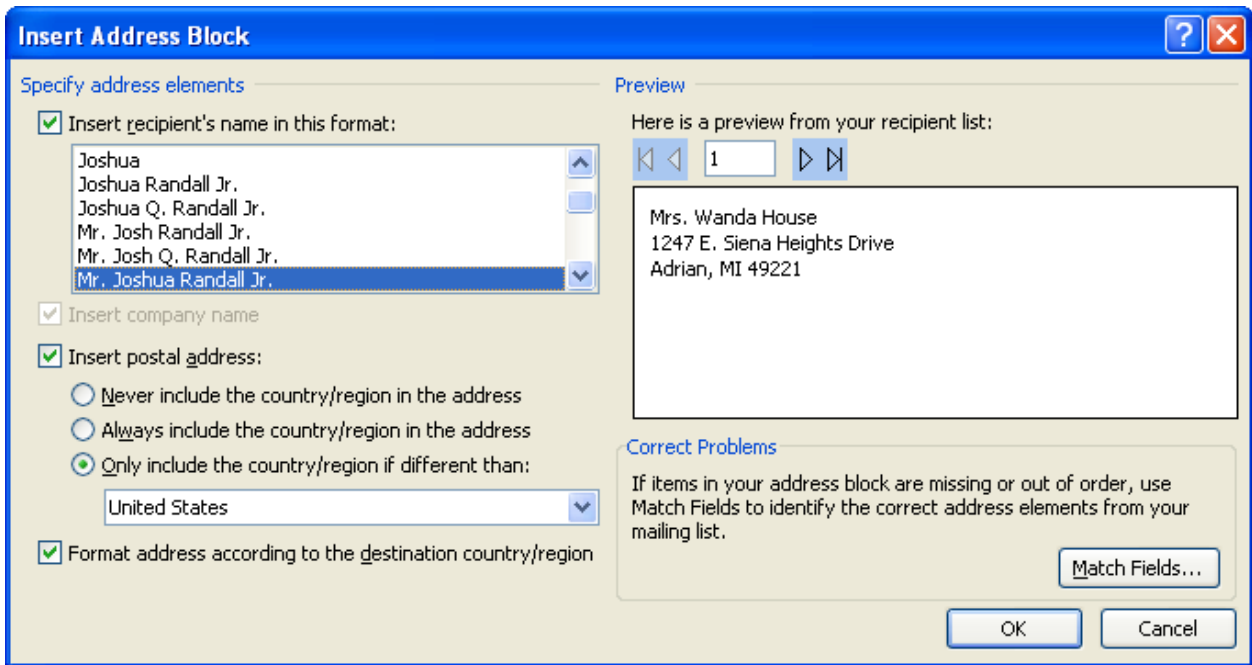


- ❖ **Click Next: Write your letter.** Choose one of the options:
 - **Address Block** - Includes the entire address, such as Last Name, First Name, etc. Options are available to choose the format for the names. See the illustration below for the options that are available in this dialog box. These include:

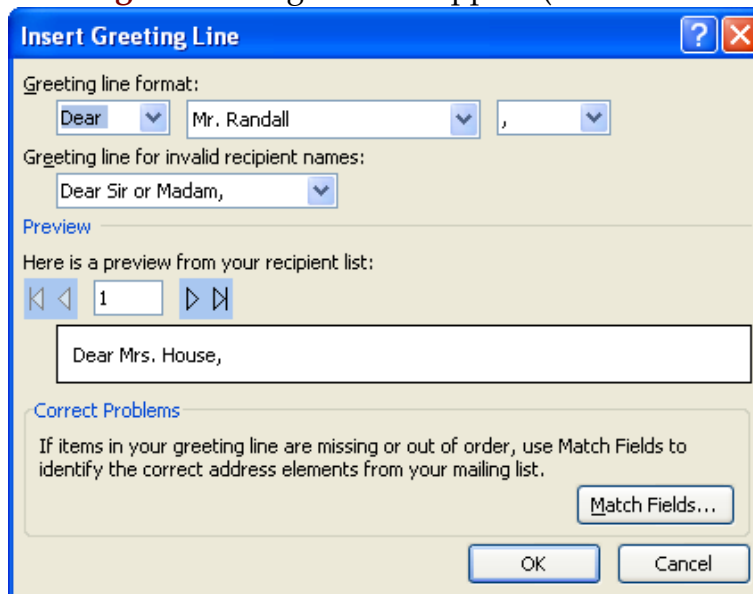
- **Insert recipient's name in this format** - Click a format to use from the list.
- **Insert company name** - Click this option to deselect it if the company name is not to be included in the address block.
- **Insert postal address** - Choose from one of the three options listed below this area. These include:
 - Never include the country/region in the address.
 - Always include the country/region in the address.
 - Only include the country/region if different than _____. When this option is chosen, specify the country or region in the box below the option.
- **Match Fields** - If the fields in the recipient list are different than the default ones, this option allows you to match the fields with the default ones so that they will appear in the Address Block.



- **Preview** – On the right side of the **Insert Address Block** window, a preview of the entries in the Recipient List will display. Click the arrows to move from one entry to another.
- **Format address according to the destination country/region** – Click this check box if the address is to be included for the country to which it is being sent.



- Once all the options have been selected, click the **OK** button.
 - The **Address Block** field will be inserted into the document at the location of the insertion point.
- **Greeting Line** – This option is used to choose the format for the salutation in the document.
- The **Insert Greeting Line** dialog box will appear (see illustration below).



- Under **Greeting Line Format** in the first box, select from options such as Dear.

- In the second box on the same line, select the format for how the name will display in the letter.
 - In the third box on the same line, choose the proper punctuation for the letter. The options are:
 - **Colon** – A colon is used at the end of a greeting line for a business letter.
 - **Comma** – Commas are used at the end of the greeting line in a personal letter.
 - **Preview** – This area provides a preview of how the Greeting Line will appear in the letter. Use the arrows to move from one Recipient to another.
 - **Match Fields** – If the fields in the recipient list are different than the default ones, this option allows you to match the fields with the default ones so that they will appear in the Address Block.
- **Electronic Postage** – This option must be installed before it can be used.
 - **More Items** – When this option is chosen, a list of fields that are included in the data source will be displayed. Use this to insert additional fields into a letter or to match personally created fields with the default fields in Word.
 - **When choosing any of these options, make sure the insertion point is in the correct location within the letter so that the fields will be inserted properly.**
 - Once all the options have been chosen, click the **OK** button.
 - The Greeting Line will be inserted into the document at the location of the insertion point.

❖ **Click Next: Preview your letters**

❖ The following options are available in this step.

- **Left/Right Arrows** – These arrows allow you to move through the merge one letter at a time.
- **Find a Recipient** – This option allows you to look for a particular person in the recipient list.
- **Edit Recipient List** – To display the recipient list so it can be edited, click this option.
- **Exclude this recipient** – To remove a recipient from the Mail Merge results, but not from the recipient list, click this button.



❖ **Click Next: Complete the merge**

- **Print** – To send letters directly to the printer, choose this option.
- **Edit Individual Letters** – To make changes to individual letters, click this option.
 - When this option is selected, the **Merge to New Document** dialog box will appear (see illustration bottom right).
 - In this box, it is possible to choose whether to merge all the records or just part of the records.



- ❖ In the **Merge to New Document** dialog box:
 - Click the **All** option button to merge the letter to all the entries in the **Mail Merge Recipients List**.
 - Click the **Current Record** button to merge just one record.
 - Click the **From ___ To ___** option to merge specified records in the **Recipient List**.
- ❖ When the merge is completed, the letters will appear in a new Word window.

