Mail Merge in Word 2007/2010

Steps to a Mail Merge

 The first time you use Word to do a mail merge you should change a preference which will allow you to use the formatting you create in Excel (so that dollars come in with a dollar sign, and zip codes have leading zeroes, for instance). From the File menu (or Office Button in Word 2007) select "Options" and then "Advanced." Scroll down to the "General" section and put a checkmark in "Confirm file format conversion on open."

General Save Display Prognip tefore saving Normal template () Proofing Always create backup copy Save Copy remotely stored files onto your computer, and update the remote file when saving Advanced Preserve figelity when sharing this document: ID Document1 Quick Access Toolbar Save form gata as delimited text file Quick Access Toolbar General Add-Ins General Trust Center Provide feedback with gound Provide feedback with gound Provide feedback with gound Show outling a document in Draft view Enable background reagination Show outling a document in Draft view Enable background regination Show add-in user interface errors Show customer submitted Office.com content Mailing address:	ord Options	[8 8
Display Proofing Proofing Always create backup copy Save Copy remotely stored files onto your computer, and update the remote file when saving Language Allow background saves Advanced Preserve figelity when sharing this document: Docu	General	Save	
Proofing Promoting Save Always create backup copy Language Always create backup copy Advanced Preserve figlelity when sharing this document: Image background saves Advanced Save form gata as delimited text file Quick Access Toolbar Embed linguistic data Add-Ins Provide feedback with sound Trust Center Provide feedback with sound Ø Copy regional document in Draft view Confirm file format congersion on open Ø Coptier submited Office.com content Mailing address: Ø Show add-in user interface errors Show add-in user interface errors Ø Show add-in user interface errors Compatibility options for: Document1 Lay ougt this document as if created in: Microsoft Word 2010 Lay ougt this document as if created in: Microsoft Word 2010	Display		
Image and the second serves of the second second serves of the second serves of the	Proofing	Prompt before saving Normal template i	
Save Copy remotely stored files onto your computer, and update the remote file when saving Language Atlow background saves Advanced Preserve figelity when sharing this document: Document1 Customize Ribbon Save form gata as delimited text file Quick Access Toolbar Save form gata as delimited text file Add-Ins Embed linguistic data Trust Center Provide feedback with goingtion Provide feedback with goingtion Confirm file format conversion on open Quick Access Toolbar Allow opening a document in Draft view Enable background repagination Show add-in user interface errors Show customer submitted Office.com content Mailing agdress: Eile Locations Eile Locations Eile Locations Web Options Lay out this document as if created in: Microsoft Word 2010 P Layout Options Jayout Options	Frooming	Always create <u>b</u> ackup copy	
Language Image Advanced Preserve figlelity when sharing this document: Documenti Image Documenti	Save	Copy remotely stored files onto your computer, and update the remote file when saving	
Advanced Preserve figlelity when sharing this document: Image: Document1 Customize Ribbon Save form gata as delimited text file Quick Access Toolbar Embed linguistic data Add-Ins Docuide feedback with gound Trust Center Docuide feedback with gound Docuide feedback with gound Docuide feedback with gound Docuide feedback with gound Docuide feedback with gound Optionate automatic miss at open Allow opening a document in Draft view Enable background repagination Show add-in user interface errors Show add-in user submitted Office.com content Mailing address: Elie Locations Elie Locations Compatibility options for: Document1 Lay out this document as if created in: Microsoft Word 2010 Layout Options Microsoft Word 2010	Language	Allow background saves	
Customize Ribbon Quick Access Toolbar Add-Ins Trust Center © Orwide feedback with gound © Dowide feedback with againation © Confirm file format conversion on open © Update agtomatic links at open Allow opening a document in Draft view © Enable background repagination © Show customer submitted Office.com content Mailing agdress: Elie Locations Web Options Compatibility options for: © Document1 • Lay out this document as if created in: Microsoft Word 2010 • Layout Options	Advanced	Preserve fidelity when sharing this document:	
Quick Access Toolbar Image: Embed linggistic data Add-Ins Frovide feedback with sound Trust Center Provide feedback with gaimation Image: Output of the data on the set of the	Customize Ribbon	Save form <u>d</u> ata as delimited text file	
Add-Ins General Trust Center Provide feedback with gound Ørovide feedback with goinstion Ørovide feedback with goinstion Ørovide feedback with goinst for: Ørovide feedback with goinstine Ørovide feedback with goinst for: Ørovide feedback with goinstine Ørovide feedback with goins for: Ørovide feedback with goinstine Ørovide feedback with goinst feedback	Quick Access Toolbar	Embed linguistic data	
Image: Second and the second and th	Add-Ins	General	
Indst Center Provide feedback with animation Image: Confirm file format conversion on open Opdate agtomatic links at open Allow opening a document in Draft view Enable background repagination Show add-in user interface errors Show customer submitted Office.com content Mailing address:	Trust Contor	Provide feedback with sound	
☑ Confirm file format conversion on open ☑ Opdate automatic initis at open △ Allow opening a document in Draft view ☑ Enable background repagination ⑤ Show add-in user interface errors ☑ Show customer submitted Office.com content Mailing agdress:	frust Center	Provide feedback with animation	
Opdate agromatic links at open Allow opening a document in Draft view Enable background repagination Show add-in user interface errors Show customer submitted Office.com content Mailing address: Eile Locations Web Options Compatibility options for: Document1 Lay out this document as if created in: Microsoft Word 2010 Lay out Options		Confirm file format conversion on open	
 Allow opening a document in Draft view Enable background repagination Show add-in user interface errors Show customer submitted Office.com content Mailing address: File Locations Web Options Compatibility options for: Document1 Lay out this document as if created in: Microsoft Word 2010 Lay out Options 		Update automatic links at open	
✓ Enable background repagination Show add-in user interface errors ✓ Show customer submitted Office.com content Mailing address: File Locations Web Options Compatibility options for: Document1 Lay out this document as if created in: Microsoft Word 2010 ↓ Layout Options		Allow opening a document in <u>D</u> raft view	
Show add-in user interface errors Image: Show customer submitted Office.com content Mailing address: File Locations Web Options Compatibility options for: Image: Document1 Image: Lay out this document as if created in: Microsoft Word 2010 Image: Lay out Options		Enable <u>background repagination</u>	
Show customer submitted Office.com content Mailing address: Eile Locations Web Options Compatibility options for: Document1 Lay out this document as if created in: Microsoft Word 2010 Layout Options		Show add-in user interface errors	
Mailing address:		Show customer submitted Office.com content	
Eile Locations Web Options Compatibility options for: Document1 Lay out this document as if created in: Microsoft Word 2010 Lay out Options Options		Mailing a <u>d</u> dress:	
File Locations Web Options Compatibility options for: Document1 Lay out this document as if created in: Microsoft Word 2010 Layout Options Options			
Eile Locations Web Options Compatibility options for: Document1 Lay out this document as if created in: Microsoft Word 2010 Layout Options Options			
File Locations Web Options Compatibility options for: Document1 Lay out this document as if created in: Microsoft Word 2010 Layout Options Options			
Compatibility options for: Document1 Lay out this document as if created in: Microsoft Word 2010 Layout Options		Eile Locations Web Options	
Compatibility options for: Document1 ▼ Lay o <u>u</u> t this document as if created in: Microsoft Word 2010 ▼ ↓ Layout Options			
Lay o <u>u</u> t this document as if created in: Microsoft Word 2010 > Layout Options		Compatibility options for:	
► Layout Options		Lav out this document as if created in: Microsoft Word 2010	
		Lavout Ontions	
		h Falagraphicus	
			Cancel

2. Prepare your data source in Excel. Column titles will become field names.

1	D	E	F	G	Н	1	J	К
1	Last Name	Name Suffix	Company Name	Address	City	State	Zip	Email Address
2	Appel	Ph.D.	Powell Motors	1849 Seventh Avenue	Harrisonburg	OR	63667	cjamdpp@goirmtfxm
3	Ashworth		Wernham Hogg	1420 Pine Circle	Kingston	FL	14931	hathhpv@zrftanexyp.
4	Battle	Sr.	McMahon and Tate	659 Elm Avenue	Colleyville	FL	16429	exfzjbt@wkdaocdktz.
5	Beebe		Barrytron	2773 Elm Circle	Bogalusa	FL	03430	zazguza@scmtvopdyz
6	Bernier		Chasers	134 Washington Blvd.	Calumet City	CO	68722	ødøødxo@nvkavtkthx

- 3. Let Word know what kind of mail merge you're doing. Choices are:
 - Letters: Printed form letters.
 - Email Messages: Form letters to be emailed.
 - Envelopes: Standard layout or custom.
 - Labels: Many, many label layouts provided, or define custom.
 - Directory: For a phone directory style of listing



4. Select your recipient list, usually an Excel document, but may be typed in as you go.



To preserve formatting you should open it via DDE, which means checking the "Show all" option and selecting "MS Excel Worksheets via DDE(*.xls)" from the available options.

Confirm Data So	ource	8 🛛
Open data source	2:	
Recover Text fro WordPerfect 5.x WordPerfect 6.x Works 6 - 9 Doc	om Any File via Converter (*.*) via Converter (*.doc) via Converter (*.wpd;*.doc) ument via Converter (*.wps)	^
MS Access Data MS Excel Works	bases via DDE (*.mdb,*.mde) neets via DDE (*.xls)	
dBASE Files via (DDE (*.dbf,ndx,mdx)	~
☑ <u>S</u> how all	ОК	Cancel

 Create your document, inserting Address Block, Greeting Line, or Merge Fields as appropriate. If you are creating labels you should create a layout that works for the first label, and then use "Update Labels" to propagate it through.s



6. Preview your Results.

W				Documer	t2 - Micros	oft Word		
File	Home Ir	nsert	Page Layout	References	Mailings	Review	View	Acrobat
Create	📄 Start Mail Me 🚳 Select Recipie 💕 Edit Recipient	erge ▼ ents ▼ t List	Highlight Merge Fields	Address Block Greeting Line Insert Merge Fi	∎* * eld * 😰	Preview Results	▶ ▲ 1 Find Reci → Auto Che	pient eck for Error
	Start Mail Mer	ge	W	rite & Insert Fields			Preview Resu	ilts

7. Define any filtering or sorting that you need to do by using "Edit Recipient List."

Mail Merge Recipients								
This is the list of recipients that will be used in your merge. Use the options below to add to or change your list. Use the checkboxes to add or remove recipients from the merge. When your list is ready, click OK.								
Data Source		Last_Name	-	First_Name 🚽	Company_Name 🚽	Address 🔺		
D:\Users\Kate Ma	•	Appel		Myranda	Powell Motors	1849 Seventh 📕		
D:\Users\Kate Ma	✓	Ashworth		Jordon	Wernham Hogg	1420 Pine Circ		
D:\Users\Kate Ma	~	Battle		Jovan	McMahon and Tate	659 Elm Avenu		
D:\Users\Kate Ma	✓	Beebe		Enzo	Barrytron	2773 Elm Circl		
D:\Users\Kate Ma	✓	Bernier		Terrence	Chasers	134 Washingto		
D:\Users\Kate Ma	~	Bowden		Abbott	United Fried Chicken	3551 Washingt		
D:\Users\Kate Ma	✓	Carlton		Kiki	Osato Chemicals	4345 Second C		
D:\Users\Kate Ma	~	Conway		Chancellor	Flowers By Irene	1161 Lake Stre 🖕		
•								
Data Source		Refine r	ecipie	nt list				
D:\Users\Kate MacGr	egor≬	Desl ▲ 🛔 S	<u>ort</u>					
		1	ilter					
	Find duplicates							
	Find recipient							
Validate addresses								
Ealt								
						ОК		

8. When you're ready, select "Finish & Merge." You can merge directly to a printer, or create a new document that contains all of the letters (or labels, or whatever).

Conditional Fields

If you want to change what your letter says based on the value of a field, use the "Rules" button and an if_then_else:

Insert Word Field: IF			? X
IF Field name: Name_Prefix	<u>C</u> omparison: Equal to	Compare <u>t</u> o:	
Insert this text:			۸ ۲
Otherwise insert this text:			۸ ۲
		OK	Cancel

Email Mail Merge Setup

If you are using email to send out your merge messages you will need to use either Eudora or Outlook for that task. Please note that we do not support either program, and you should use them only for the mail merge. Documentation on switching your default mail program is provided separately, but you will need to know how to set up your account in Outlook in order to use it for mail merge.

- 1. In Outlook, from the File menu select "Info" and then click on "Add account."
- 2. In order for Outlook to automatically set up your account you should enter your Hampshire email address that is your initials and your department abbreviation, not your first initial/last name.

Add New Account		23
Auto Account Setu Click Next to conn	ect to the mail server and automatically configure your account settings.	ž
E-mail Account		
Your Name:	Kate MacGregor	
	Example: Ellen Adams	
E-mail Address:	kmmLO@hampshire.edu	
	Example: ellen@contoso.com	
Password:	*******	
Retype Password:	******	
	Type the password your Internet service provider has given you.	
🔘 Text Messaging (5MS)	
Manually configu	re server settings or additional server types	
	< Back Next >	Cancel