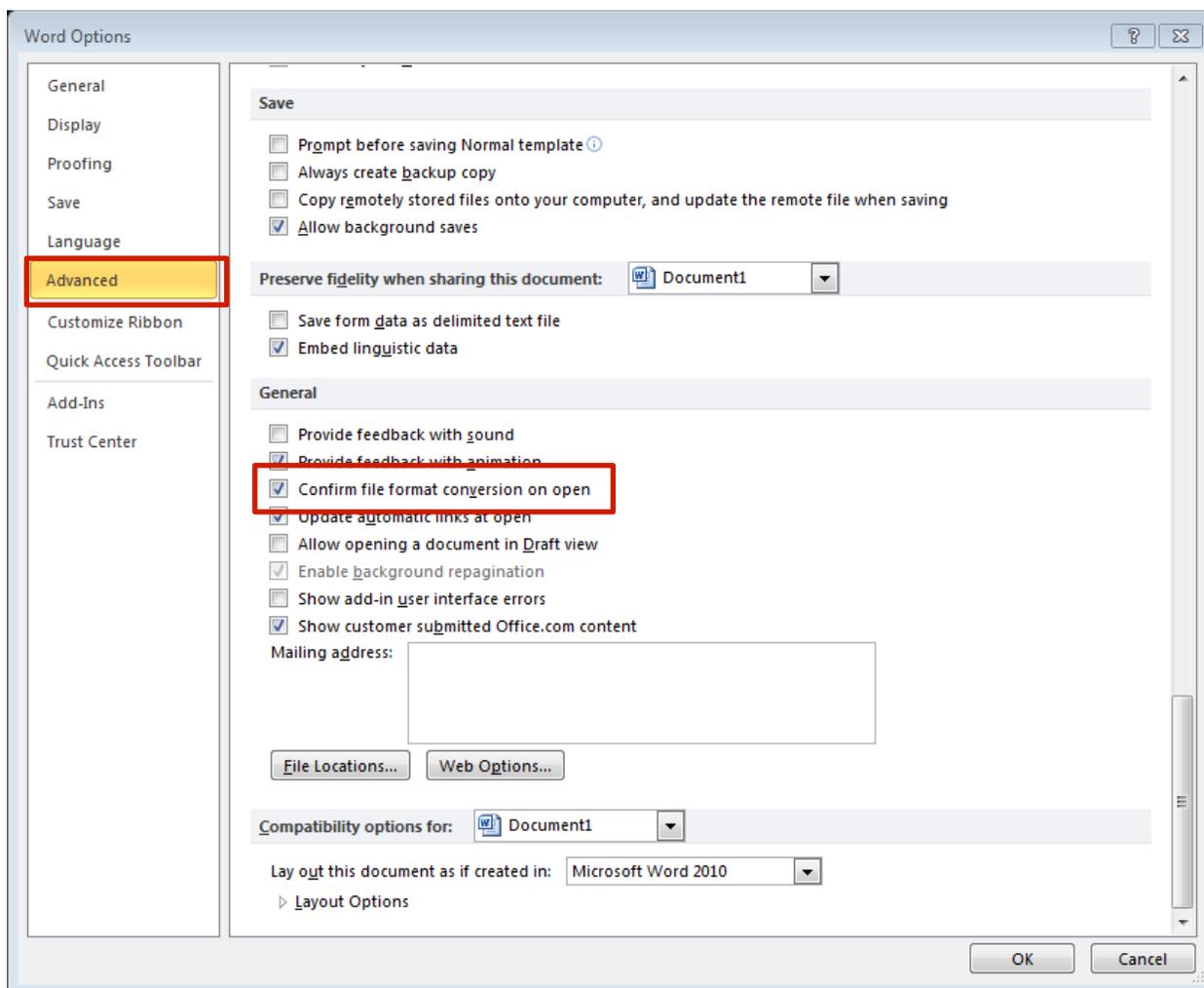


Mail Merge in Word 2007/2010

Steps to a Mail Merge

1. 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.”

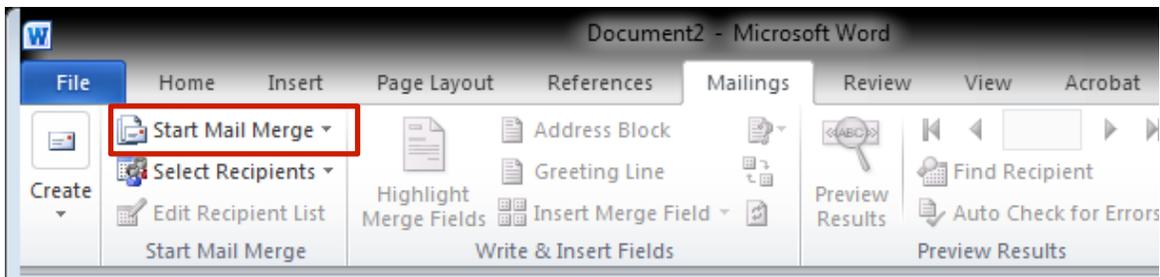


2. Prepare your data source in Excel. Column titles will become field names.

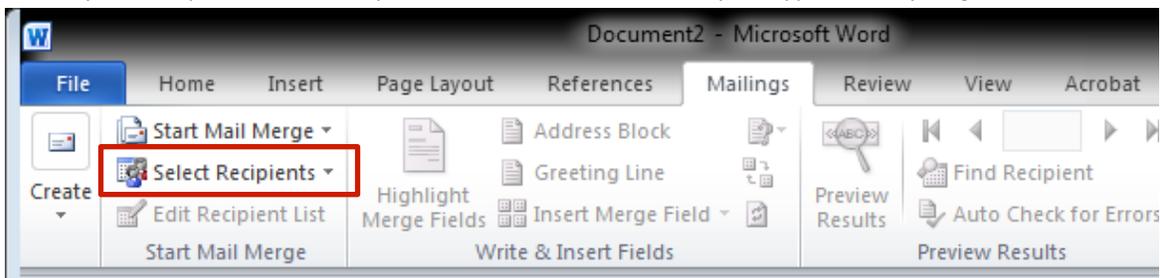
	D	E	F	G	H	I	J	K
1	Last Name	Name Suffix	Company Name	Address	City	State	Zip	Email Address
2	Appel	Ph.D.	Powell Motors	1849 Seventh Avenue	Harrisonburg	OR	63667	cjamdpp@goirmftxms
3	Ashworth		Wernham Hogg	1420 Pine Circle	Kingston	FL	14931	hathhpv@zrftanexyp.
4	Battle	Sr.	McMahon and Tate	659 Elm Avenue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

3. Let Word know what kind of mail merge you're doing. Choices are:

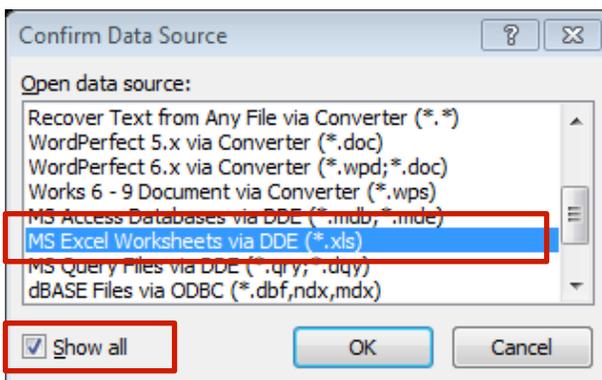
- Letters: Printed form letters.
- Email Messages: Form letters to be emailed.
- Envelopes: Standard layout or custom.
- Labels: Many, many label layouts provided, or define custom.
- Directory: For a phone directory style of listing



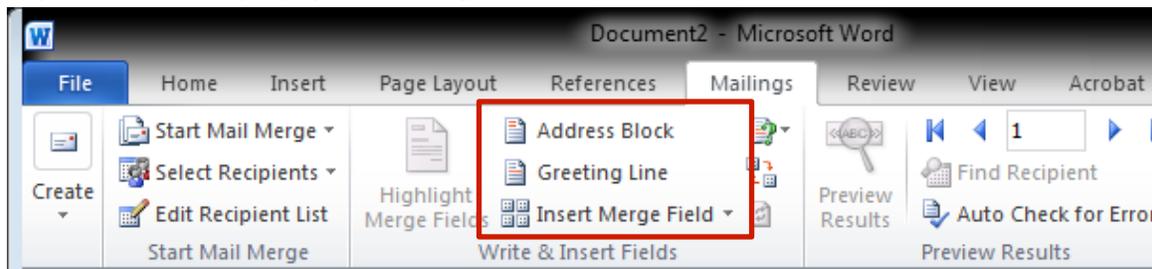
4. Select your recipient list, usually an Excel document, but may be typed in as you go.



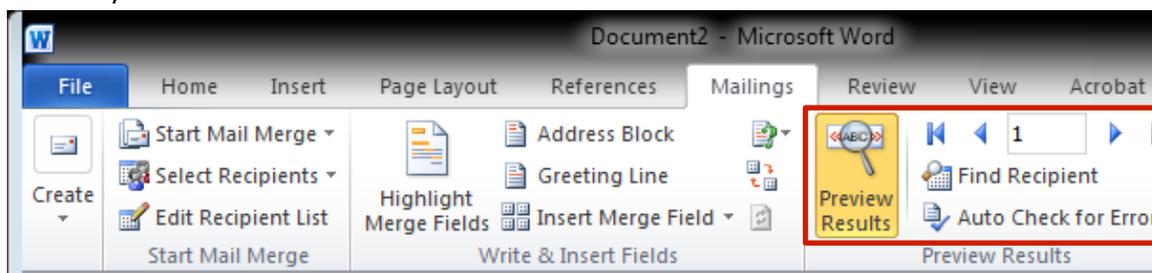
To preserve formatting you should open it via DDE, which means checking the "Show all" option and selecting "MS Excel Worksheets via DDE (*.xls)" from the available options.



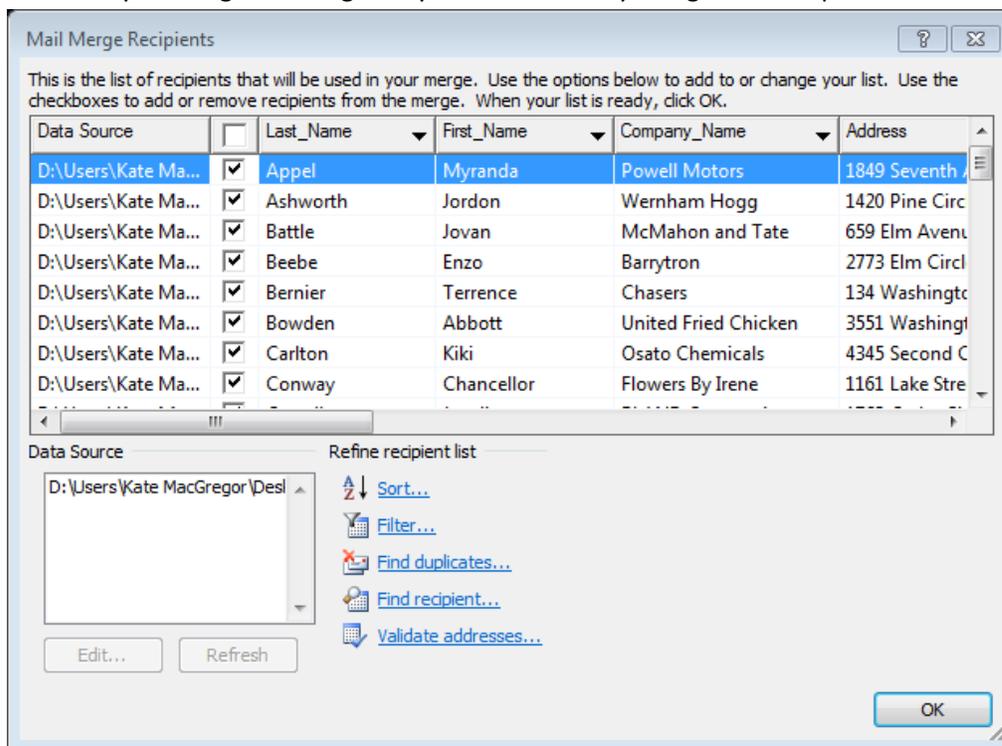
5. Create your document, inserting Address Block, Greeting Line, or Merge Fields as appropriate. If you are creating labels you should create a layout that works for the first label, and then use "Update Labels" to propagate it through.s



6. Preview your Results.



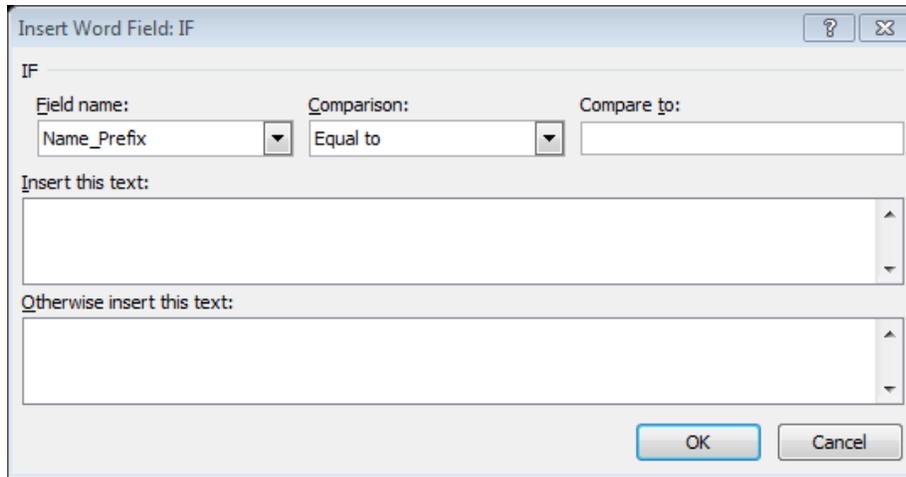
7. Define any filtering or sorting that you need to do by using "Edit Recipient List."



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:



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.

