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.

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

![Image of Microsoft Word Mail Merge interface]

6. Preview your Results.

![Image of Microsoft Word Mail Merge interface with Preview Results selected]

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

![Image of Mail Merge Recipients dialog box]

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.