

Word 2007

Mail Merge

In this lesson you will learn how to:

- Use the Mail Merge Wizard to create a Mail Merge
- Complete each of the 6 steps
- Select Document Type
- Insert a Recipient List
- Add address block & Greeting Lines
- Write your Letter
- Preview Letters
- Merge

Print out this lesson so that you can work along side it, practising the techniques as we go on your own PC.

Mail Merge

Power up Word 2007

To create a mail merge in Word 2007, we need a document to merge to and a data source.

The data source can be an existing data source such as email contacts, an Access database, a table or a new list.

First we will create a document. On a new page type the letter you want to create a mail merge to or if you just want to practise type out the following letter. Do not add the name, address or salutation but make space for them.

Name

Address

Dear Salutation

Thank you for downloading a PDF from bytesizeoffice.co.uk, I hope you gained a new skill from the lesson.

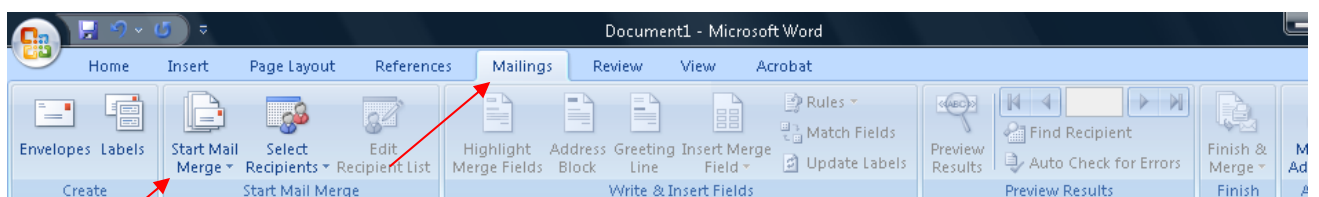
Please take the time to evaluate the lesson, so that I can continually improve my service.

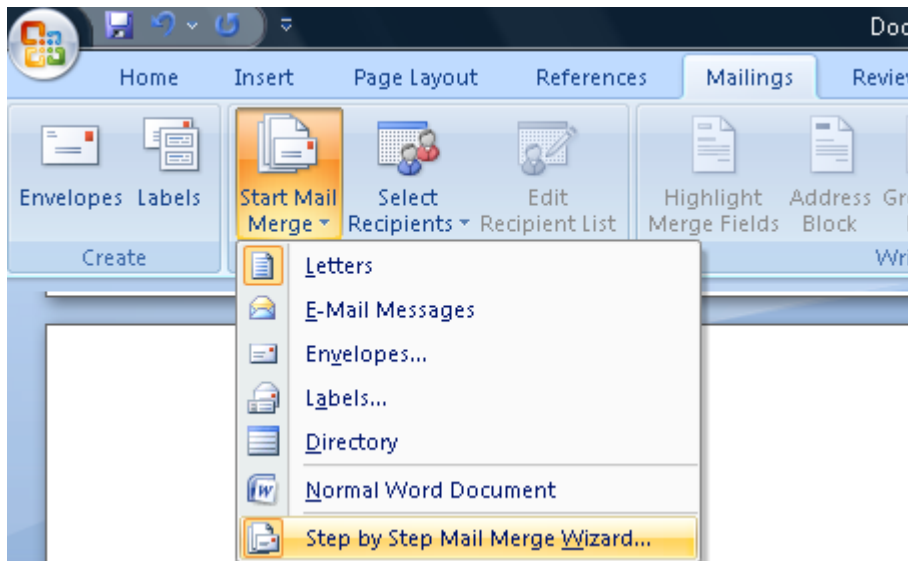
There is an evaluation form enclosed with this letter.

Sincerely

Christine/Trainer

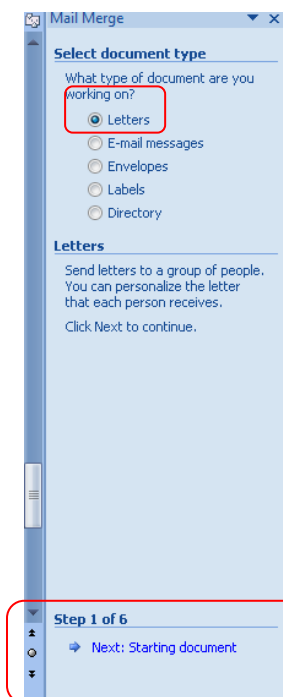
Save your letter, then we will start a mail merge. Go to Mailings at the top of your ribbon. The ribbon will then change to show the Mailing options. Choose Start Mail Merge.





Go to the Step by Step Mail Merge Wizard. A task pane will then open up on the left hand side; this is the Mail Merge Wizard which will help you create a Mail Merge.

Mail Merge Wizard/Select Document Type



There is an option radio circle that you can check as to what kind of mail merge document you want to use. Ensure Letters is ticked off.

At the bottom of the Mail Merge Wizard you will see that there are 6 steps. The first step is starting a Document.

Click on Next: Starting a Document.

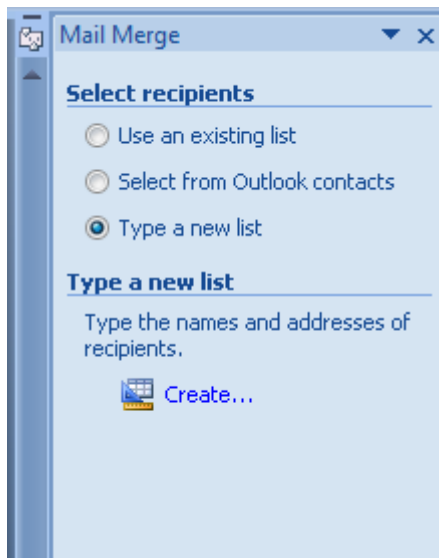
The next screen we see is Select a Document.

We will choose use the current document. Once we have checked that off, another task pane appears with the next step which is Select Recipients, click on

type a new list. We can use an existing list, select from Outlook contacts, or database,

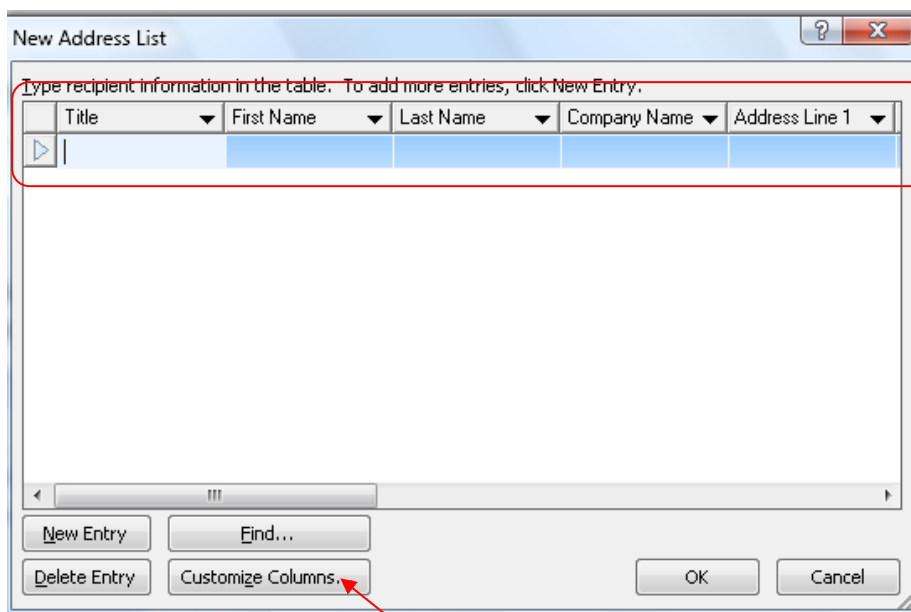
Create an Address List

Click on Create.

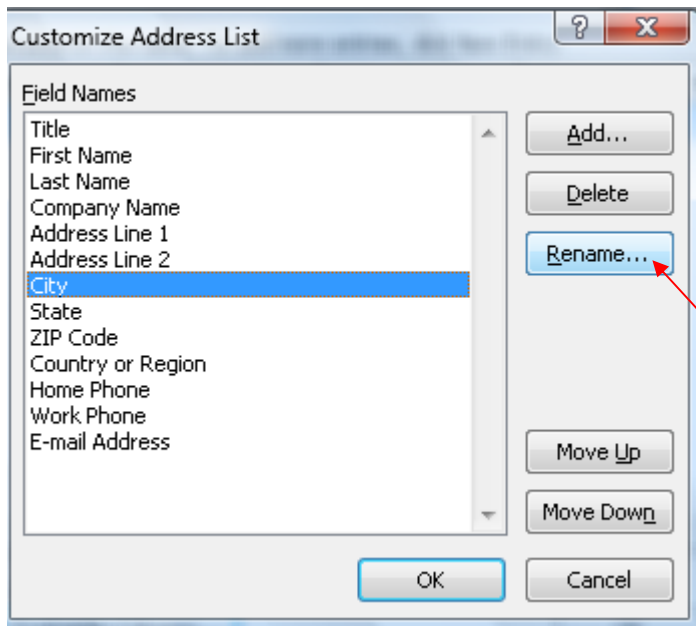


The next box that appears is the New Address List. Fill in the fields that you want to use and ignore the other fields.

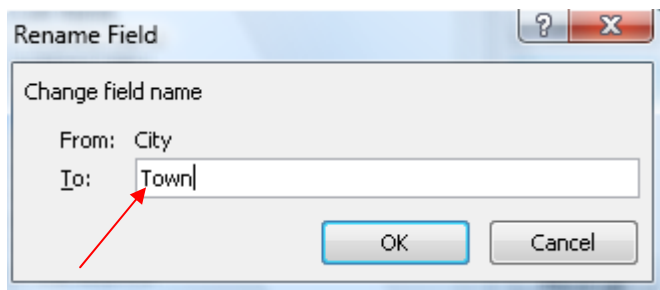
Type in Susan in the first box then Baker in the second, miss the company name and type in the address in Address Line 1 14 Mount Road, and miss the second Address Line 2 until you get to City, which we do not want to use at all.



So click on Customise Columns



Click on City and then
Rename

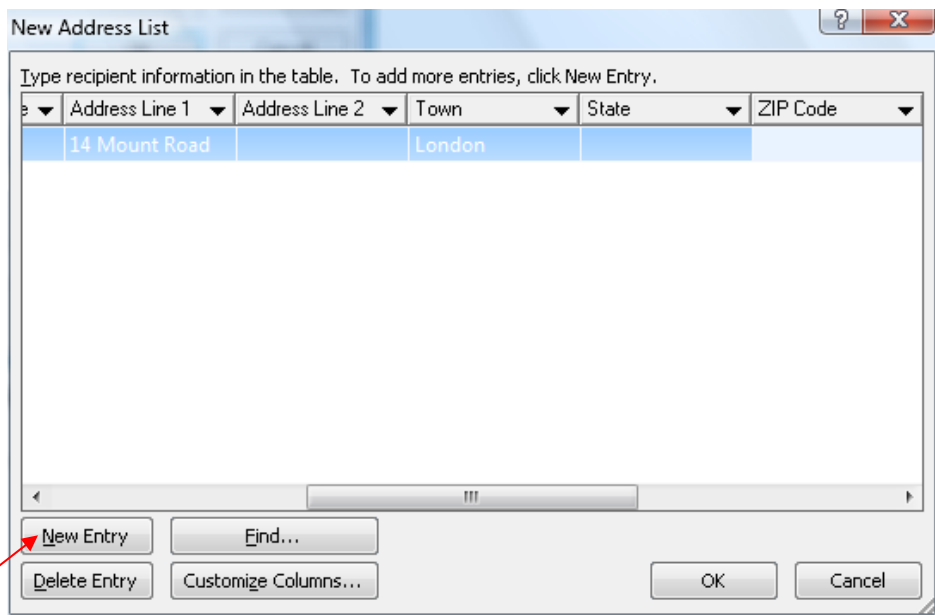


Change City to Town, do the same for all of your fields that you want to change, just ignore the ones you do not want to use.

Continue adding in the information you need: Town – London and rename the Zip to Post Code if it is an English address. The Post Code is SE1 2TP.

Create a new entry

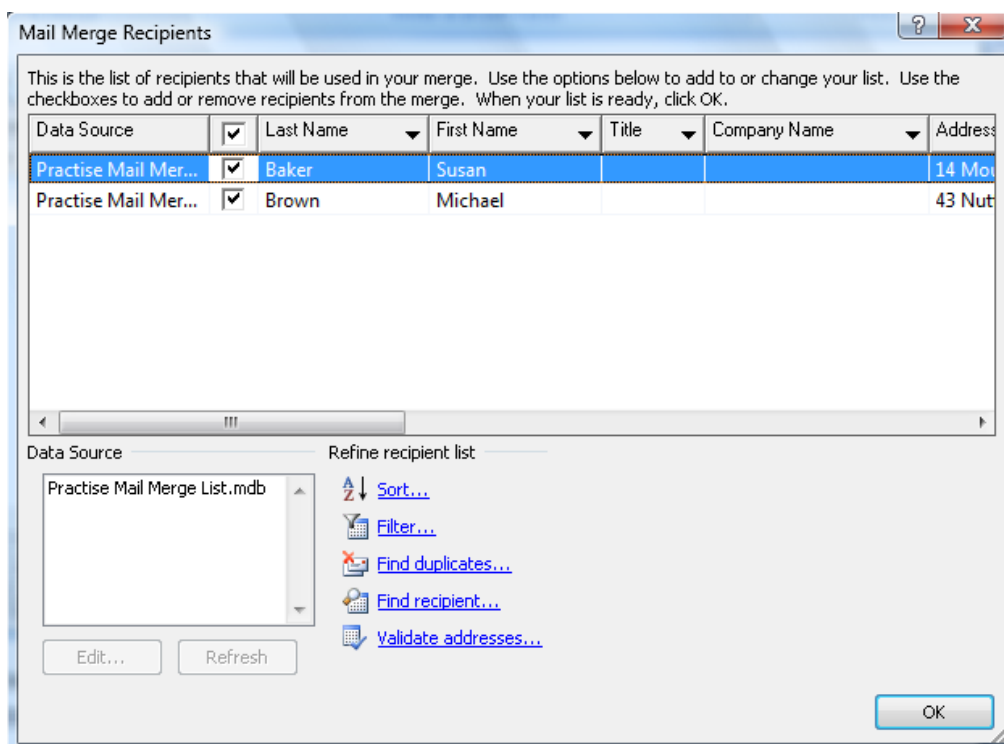
Click on new entry.



Add the following: Michael Brown 43 Nutfield Close London SE23 4TU with two entries added that is enough to practise a Mail Merge, so click on OK.

You will then be prompted to save your list, call it practise mail merge list, note that the document will be saved as a data source if you look at the top of your save box.

You will then see this list



Note all of the fields that we ignored such as State have simply not appeared.

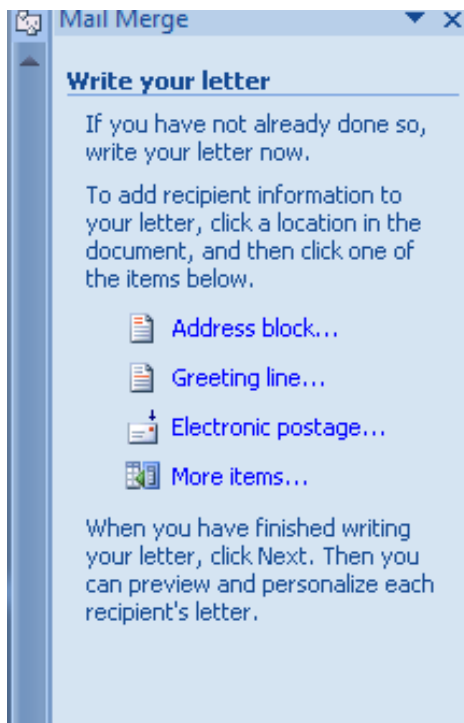
The boxes are ticked because they are the entries on our Address list that will be used, you can customise and un-tick the boxes if you need to later on when you create your own mail merges when you do not want to use all the entries.

The next step, if we look at the bottom of the Mail Merge Wizard is:

Write your letter.

Click on Write your letter now. If you have not already done so, write the letter.

Do not add the name and address details. But you will need to make room for them on your letter.



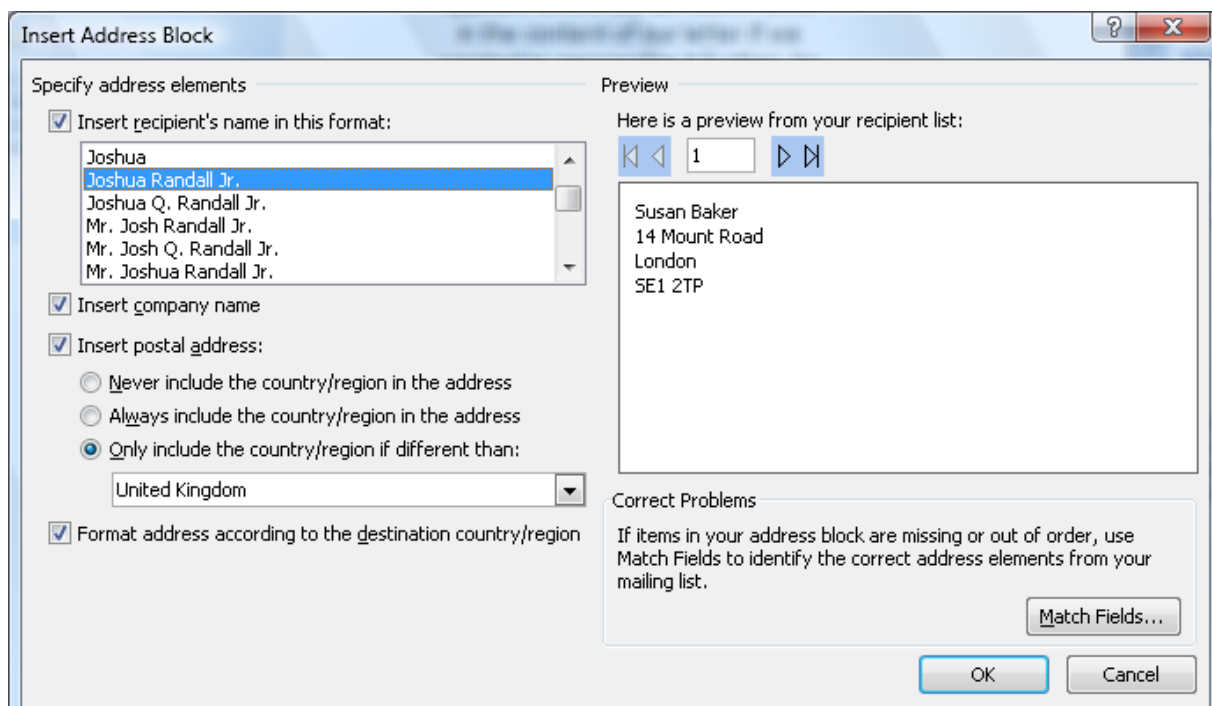
Here we have a line for the Address Block, which would include the Name, Greeting Line, Electronic Postage, More items.

If we click on More items. A box appears where we can add a name in the content of our letter if we wanted to personalise it further.

Insert Fields

For now, we want to add the address block to our letter.

Click on address block.



There is a preview of our Address block, which we can change if we want to.

In the first elements box, we can choose how we want to present the name.

We must un-tick insert company name.

We need to tick on Insert Postal address.

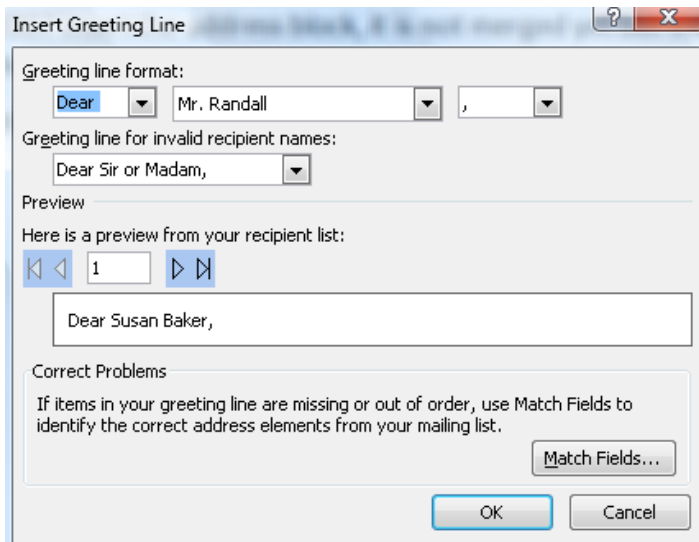
You can choose the Country if different to UK, and in the new country you can format the address according to that country's style. As this is set up as we like it we can click on OK.

Click OK and then Word 2007 insert the address block, it is not merged yet but the address block has been inserted.

Do the same for the Greeting Line.

Click in the space where you want the Greeting line to go.

Click on the arrow next to the Greeting line name, to choose a format that you like for your letter.



Click on OK and your letter will be prepared for you.



The letter I have prepared now looks like this. With the Address Block and Greeting Line added. If your does not go back and practise again.

The next step is to Preview the letters. Step 4 of 6.

Preview Letters

Click on Preview your letters at the bottom of the Mail Merge Wizard. Here you can check that everything is OK, if it is click on the next step:

Complete the Merge.

You are then given the option to print your letters or to Edit individual letters.

Choose Print your letters to print or edit to edit. That is a mail merge.

Do not save your letters, if you do the source list you created will be lost to you.
Close the file and choose the option - do not save.