

# Word 2007 — Mail Merges

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## Overview

The mail merge feature in Microsoft Word can be used to create letters, envelopes, labels, or e-mail messages. Each document will have the same standard content and format; however, the mail merge process will insert customized information into the document for each recipient. The unique information in each document comes from entries in a separate data source.

Training Date	Employee	Greeting	E-Mail Address
25-Jun	Schmidt, Bob	Bob	<a href="mailto:schmidtb@xavier.edu">schmidtb@xavier.edu</a>
25-Jun	Wilson, Jennifer	Jennifer	<a href="mailto:wilsonj@xavier.edu">wilsonj@xavier.edu</a>
25-Jun	Hudson, Dave	Dave	<a href="mailto:hudsond@xavier.edu">hudsond@xavier.edu</a>
25-Jun	Brown, Debbie	Debbie	<a href="mailto:brownd@xavier.edu">brownd@xavier.edu</a>
25-Jun	Dunn, Nancy	Nancy	<a href="mailto:dunnn@xavier.edu">dunnn@xavier.edu</a>
25-Jun	Hampton, Patty	Patty	<a href="mailto:hamptonp@xavier.edu">hamptonp@xavier.edu</a>

Dear «Greeting»,

You are confirmed for the training class to be held on «Training\_Date», at 1:30 pm in room B-11 of Alter Hall. The focus of this session will be to familiarize you with Outlook 2007, which is the new e-mail and calendaring system Xavier has chosen. The training also includes information and instructions on several new policies and procedures, including archiving your emails, backing up the data stored on your C: drive, and changing your password. Several reminders from the pre-migration sessions:

- Your computer will be migrated after the training, beginning at 4:30 p.m. on Monday evening. Please remember to turn off any firewalls and leave your computer on before you leave for the day.
- The new e-mail system has a limit of 300 MB. Warning messages will start when you reach 250 MB. At 275 MB you will no longer be able to send e-mail, and at 300 MB

In this example, the document could be sent individually to each of the e-mail addresses listed in the spreadsheet using the mail merge.

## Mail Merge Steps



The mail merge commands can be found on the **Mailings** tab. Most mail merge documents can be created using the following steps:

### 1. Set up the main document.

The main document contains the text and graphics that are the same for each version of the merged document. In the example above, the main document is the content of the e-mail message.



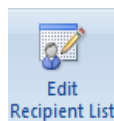
### 2. Connect the document to a data source.

A data source is a file that contains the information to be merged into a document. In the above example, the data source is the Excel spreadsheet containing the training date, employee name, greeting and e-mail address for each of the attendees.



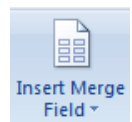
### 3. Refine the list of recipients or items.

Microsoft Office Word generates a copy of the main document for each item, or record, in your data file. If your data file is a mailing list, these items are probably recipients of your mailing. If you want to generate copies for only certain items in your data file, you can choose which items (records) to include.



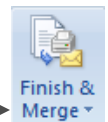
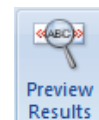
### 4. Add placeholders, called mail merge fields, to the document.

When you perform the mail merge, the mail merge fields are filled with information from your data file.



### 5. Preview and complete the merge.

You can preview each copy of the document before you print the whole set.



You can also perform a mail merge by using the Mail Merge Wizard, which leads you step by step through the process. To start the Wizard, click on the down arrow on the **Start Mail Merge** icon on the **Mailings** tab, then click the **Step by Step Mail Merge Wizard** option at the bottom of the drop-down list.

