

# Microsoft Word 2007: Comprehensive



## Lesson 5: Using Mail Merge

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# Understanding Mail Merge Concepts

- **How it works**

- ▲ Main document
- ▲ Data source
- ▲ Merge document

- **Benefits of using mail merge**

- ▲ Saves time
- ▲ Reduces errors



# Understanding Mail Merge Concepts

Robinson Financial Services  
899 Ramiro Street, Manhattan Beach, CA 90245

Main document

May 17, 2002

«AddressBlock»

«GreetingLine»

Thank you for your recent purchase of our Infinity Financial Services Package. In order for us to provide you with superior service, we must verify your phone number.

We currently have your phone number listed as «WorkPhone». Please contact us if this number is not accurate.

«Title» «LastName», thank you once again for your business.

Sincerely,

Linda Adams  
Chief Executive Officer

	▼	LastName	▼	FirstName	▼	Title	▼	Company	▼	Address1	▼	City	▼	State	▼	Zip	▼	WorkPhone
<input checked="" type="checkbox"/>		Armstrong		Bob		Mr.		Miners Products Company		900 C Street		Fort Worth		TX		76104		(817) 871-4040
<input checked="" type="checkbox"/>		Borton		James		Mr.		American Chemical Company		854 Whitmere Drive		Austin		TX		78752		(512) 483-7520
<input checked="" type="checkbox"/>		Brown		Richard		Mr.		Acme Products, Inc.		1240 Potrero Avenue		El Cerrito		CA		94530		(510) 216-7000
<input checked="" type="checkbox"/>		Carlton		Bruce		Mr.		Bedrock Building Supplies		3300 Maple Drive		Gainesville		FL		32601		(904) 330-0909
<input checked="" type="checkbox"/>		Springer		Jerry		Mr.		Caltron, Inc.		8900 West Fairmont Avenue		Plattsburgh		NY		12950		(518) 276-9091
<input checked="" type="checkbox"/>		Wilson		Fred		Mr.		RBJ, Inc.		132 Lake Street		Richmond		NY		12954		(518) 324-9845
<input checked="" type="checkbox"/>		Wineburgh		Albert		Mr.				3344 Culver Drive		Gainesville		FL		32601		(904) 336-3230

Data source

Merge document

May 17, 2002

Mr. Bob Armstrong  
Miners Products Company  
900 C Street  
Fort Worth, TX 76104

Dear Mr. Armstrong:

Thank you for your recent purchase of our Infinity Financial Services Package. In order for us to provide you with superior service, we must verify your phone number.

We currently have your phone number listed as (817) 871-4040. Please contact us if this number is not accurate.

Mr. Armstrong, thank you once again for your business.

Sincerely,

Linda Adams  
Chief Executive Officer

May 17, 2002

Mr. Richard Brown  
Acme Products, Inc.  
1240 Potrero Avenue  
El Cerrito, CA 94530

Dear Mr. Brown:

Thank you for your recent purchase of our Infinity Financial Services Package. In order for us to provide you with superior service, we must verify your phone number.

We currently have your phone number listed as (510) 216-7000. Please contact us if this number is not accurate.

Mr. Brown, thank you once again for your business.

Sincerely,

Linda Adams  
Chief Executive Officer

May 17, 2002

Mr. James Borton  
American Chemical Company  
854 Whitmere Drive  
Austin, TX 78752

Dear Mr. Borton:

Thank you for your recent purchase of our Infinity Financial Services Package. In order for us to provide you with superior service, we must verify your phone number.

We currently have your phone number listed as (512) 483-7520. Please contact us if this number is not accurate.

Mr. Borton, thank you once again for your business.

Sincerely,

Linda Adams  
Chief Executive Officer

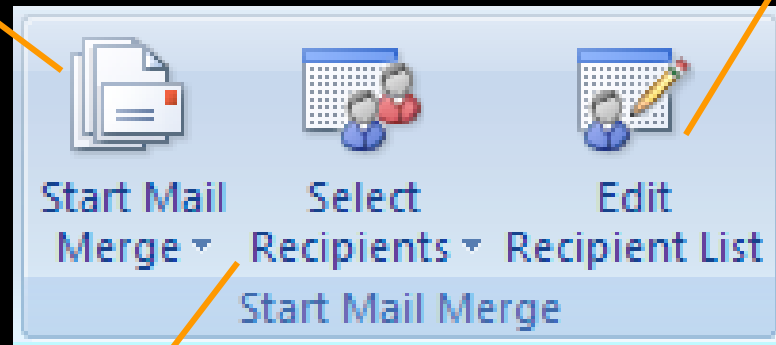


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# Working with Mail Merge

Specify the type of main document, such as letters, envelopes, and labels

Edit the data source



Either identify an existing data source or create a new data source


# Data Sources

Pre-defined fields  
Customize fields to meet your needs

**New Address List** [?] [X]

Type recipient information in the table. To add more entries, click New Entry.

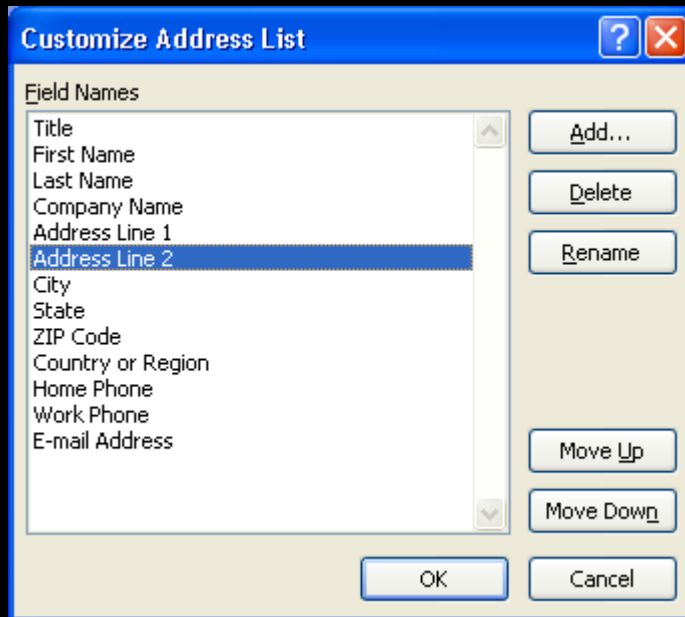
	Title ▼	First Name ▼	Last Name ▼	Company Name ▼	Address Line 1 ▼
	Ms.	Isabel	Alvarez	American Chemi...	854 Whitmere D...
	Mr.	Peter	Zantos	RBJ, Inc.	132 Lake Street
	Mr.	John	Hemmet	Farmers Product	900 C Street

**TIP**  You can't merge a portion of a field:  
*More Fields = More Flexibility*

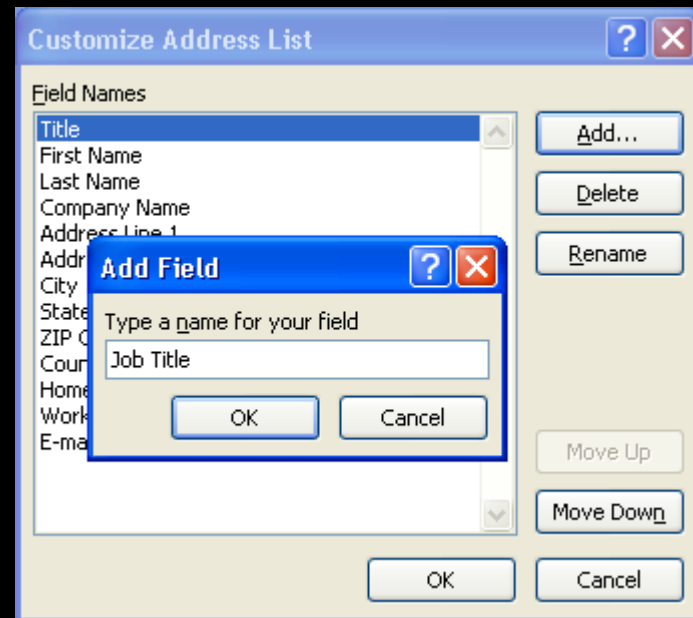


# Data Sources

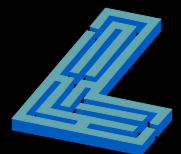
- Customize an address list



Choose fields to delete or move to a new location in the list

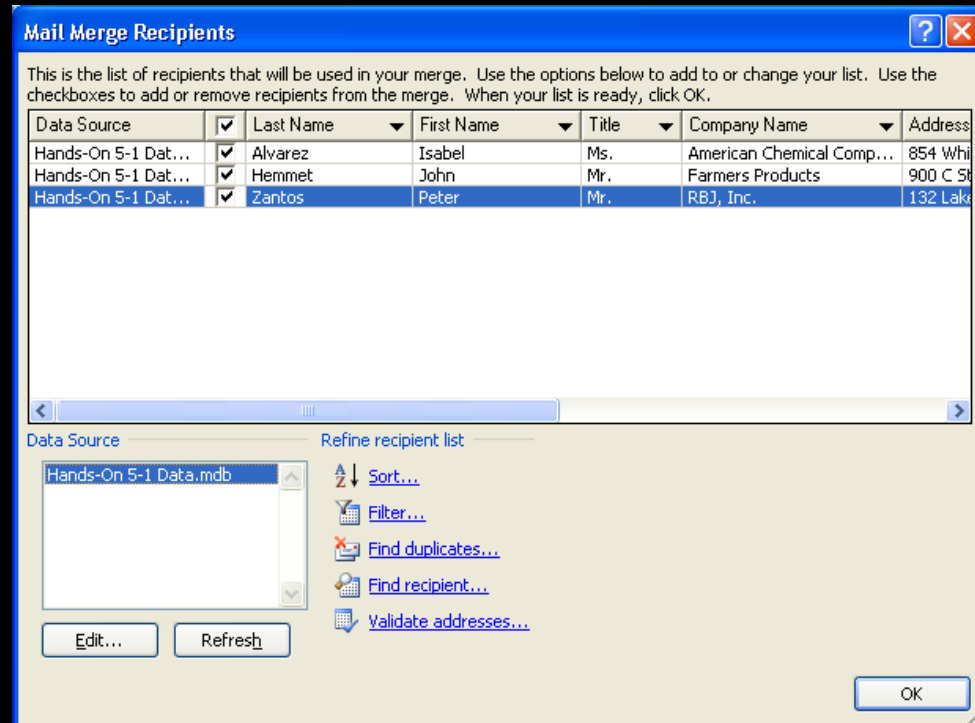


Add new fields to the list



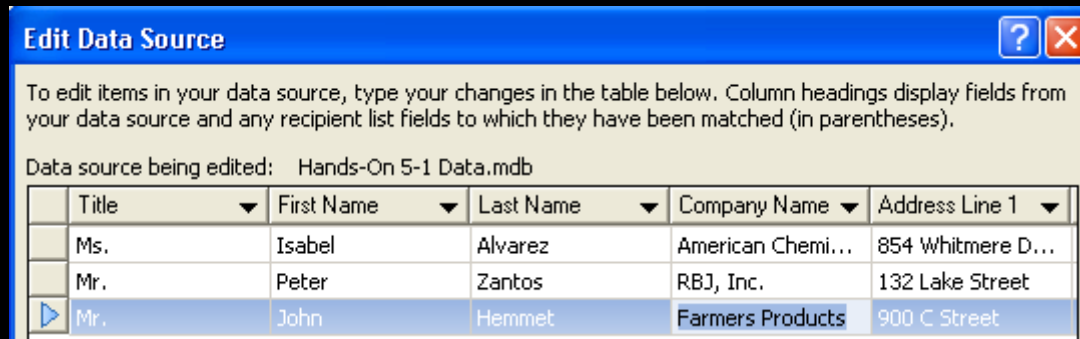
# Data Sources

- Manage your address list
  - ▲ Sort
  - ▲ Filter
  - ▲ Check
  - ▲ Edit



# Data Sources

- Edit records




**Edit Data Source** ? X

To edit items in your data source, type your changes in the table below. Column headings display fields from your data source and any recipient list fields to which they have been matched (in parentheses).

Data source being edited: Hands-On 5-1 Data.mdb

	Title ▼	First Name ▼	Last Name ▼	Company Name ▼	Address Line 1 ▼
	Ms.	Isabel	Alvarez	American Chemi...	854 Whitmere D...
	Mr.	Peter	Zantos	RBJ, Inc.	132 Lake Street
▶	Mr.	John	Hemmet	Farmers Products	900 C Street

**TIP**  *This dialog box looks and operates like the New Address List dialog box.*



# Main Documents

## ■ Set up your main document

- ▲ Address block
- ▲ Greeting line
- ▲ Fields



**Insert Greeting Line**

Greeting line format:  
Dear ▼ Mr. Randall ▼


Greeting line for invalid recipient names:  
Dear Sir or Madam, ▼

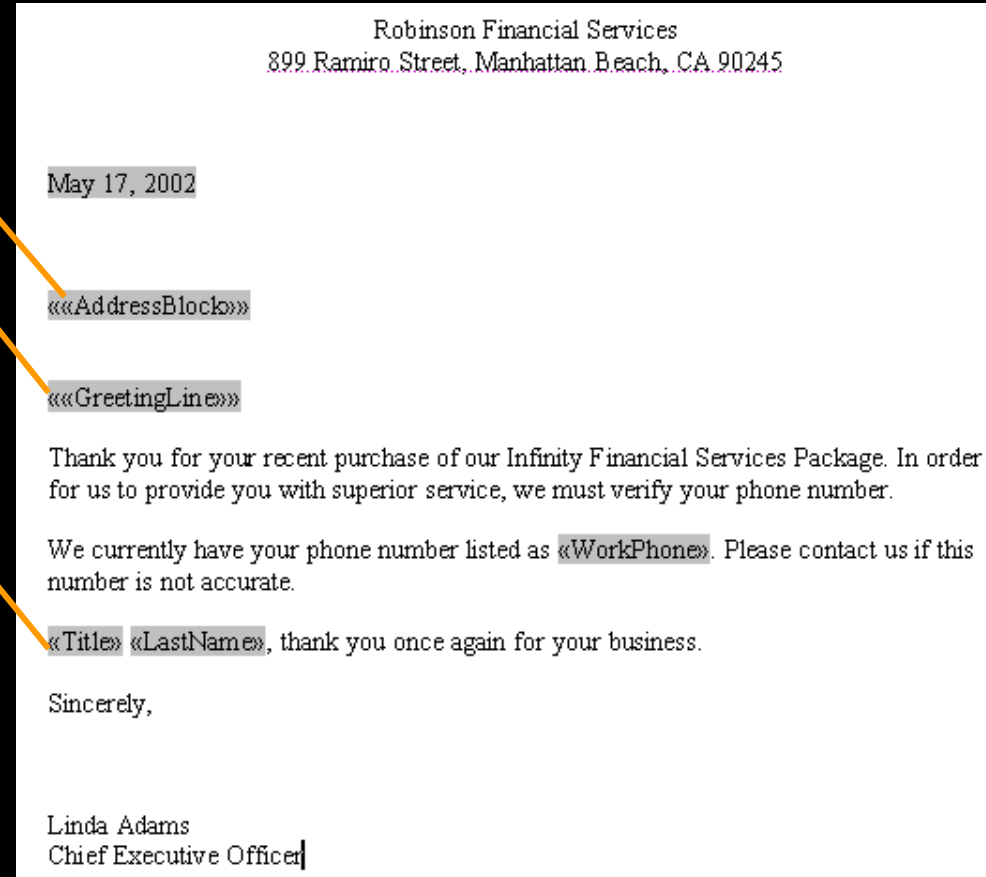
Preview

Here is a preview from your recipient list:

1

Dear Ms. Alvarez:

**TIP**  You can customize the address block and greeting line.



Robinson Financial Services  
899 Ramiro Street, Manhattan Beach, CA 90245

May 17, 2002

««AddressBlock»»

««GreetingLine»»

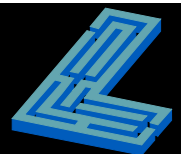
Thank you for your recent purchase of our Infinity Financial Services Package. In order for us to provide you with superior service, we must verify your phone number.

We currently have your phone number listed as «WorkPhone». Please contact us if this number is not accurate.

«Title» «LastName», thank you once again for your business.

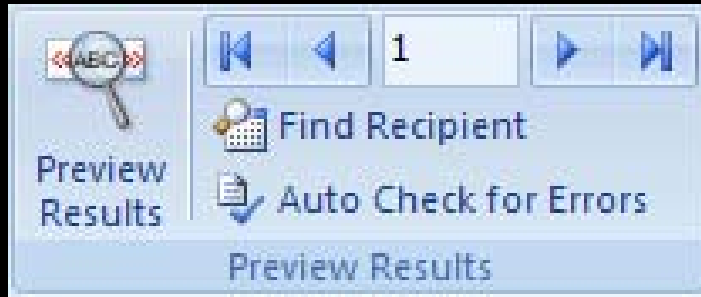
Sincerely,

Linda Adams  
Chief Executive Officer

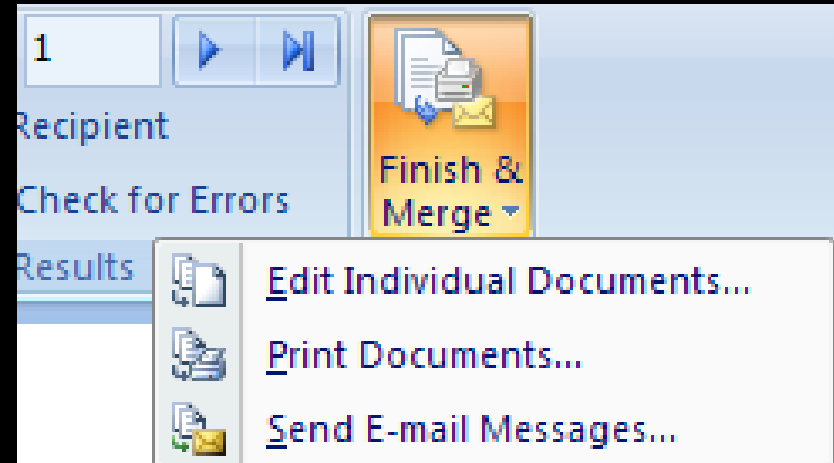


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# Conducting a Merge



Preview results before  
executing the merge



Several options for completing the merge

**TIP**  *Merged documents are rarely saved.*

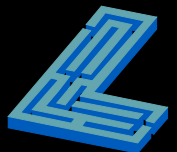
# Merge Problems

- Common problems

Problem	Solution
Typo, punctuation mistake, or formatting inconsistency	Fix the Main Document
Missing data	Fix the Data Source
Incorrect data in fields	Fix the Data Source



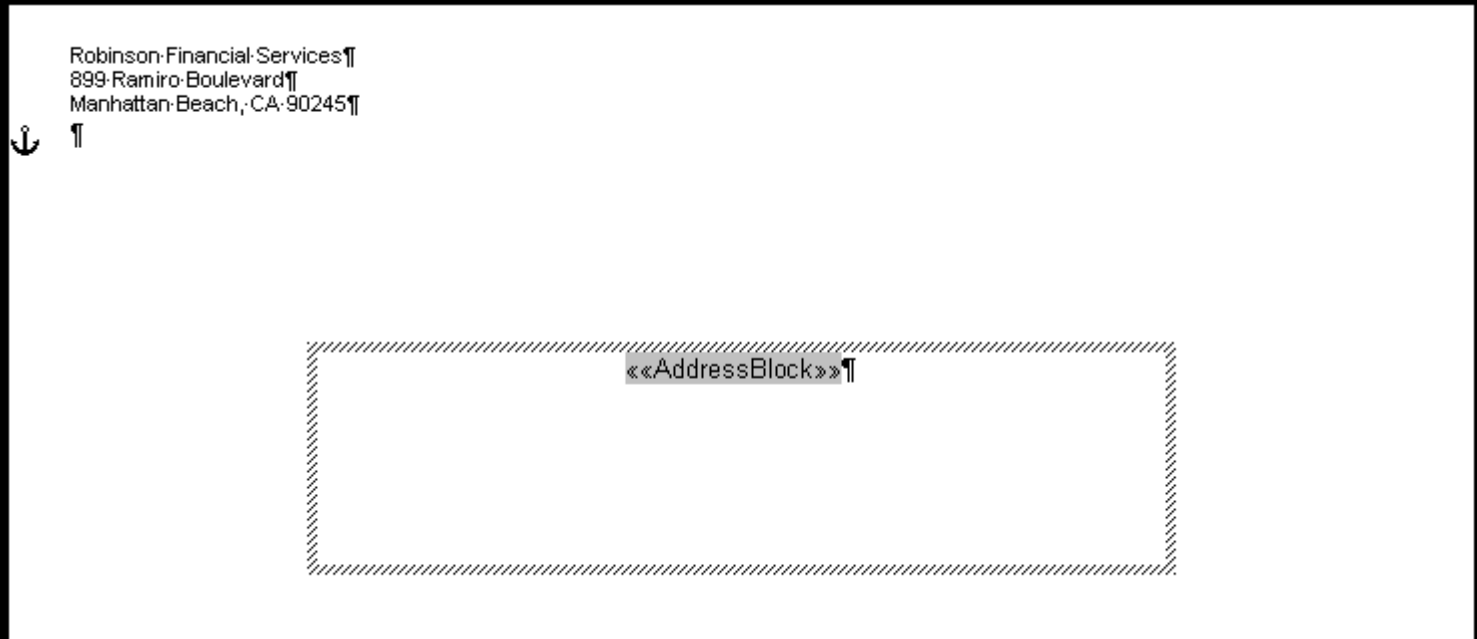
**TIP** *Try the solution then remerge the document.*




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# Using Envelopes with Mail Merge

- Generate envelopes with Mail Merge



TIP  Choose the size of envelope in Envelope Options

# Using Labels with Mail Merge

- Generate labels with Mail Merge

**Label Options** [?] [X]

**Printer information**

☐ Continuous-feed printers

☒ Page printers    Tray: Manual Paper Feed [v]

**Label information**

Label products: Avery standard [v]

Product number:

- 2160 Mini - Address
- 2162 Mini - Address
- 2163 Mini - Shipping
- 2164 - Shipping
- 2180 Mini - File Folder
- 2181 Mini - File Folder

**Label information**

Type: Address  
Height: 1"  
Width: 2.63"  
Page size: Mini (4 1/4 x 5 in)

[Details...] [New Label...] [Delete] [OK]

«AddressBlock»	«Next Record» «AddressBlock»	«Next Record» «AddressBlock»
«Next Record» «AddressBlock»	«Next Record» «AddressBlock»	«Next Record» «AddressBlock»
«Next Record» «AddressBlock»	«Next Record» «AddressBlock»	«Next Record» «AddressBlock»

# Microsoft Word 2007: Comprehensive



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