Microsoft Word 2007—Mail Merge Letter

The information below is devoted to using Mail Merge to create a letter in Microsoft Word. Please note this is an advanced Word function, you should be comfortable in Microsoft Word before attempting this tutorial.

Open Microsoft Word: click the Start button, click Programs>Microsoft Office>Microsoft Office Word 2007.

Beginning the Merge

Click the Mailings tab, click Start Mail Merge, and click Step by Step Mail Merge Wizard.
You will now see a **Mail Merge task pane** appear on the right side of your screen.

**Step 1: Select Document Type**

Since this handout is for doing a mail merge with a letter, **make sure that the circle next to Letters is filled in.** Then click **Next: Starting document**.
Step 2: Select Starting Document

In this tutorial we are going to use a current blank document, so make sure that the circle next to Use the current document is filled in. Then click Next: Select recipients. Please note that in the image below that, as you proceed through the Mail Merge Task Panes, you can go back and forth at any time you desire by using the Next and Previous buttons.

Step 3: Select Recipients

You are now in Task Pane 3. In this task pane you will select the source list for your mail merge. We’ll be using an Excel spreadsheet for this tutorial that was previously created. Make sure that the circle next to Use an existing list is filled in. Then click Browse. Please note that you can also use an Access database, Outlook Mail Contacts, or several other sources.

You are now in Task Pane 3. In this task pane you will select the source list for your mail merge. We’ll be using an Excel spreadsheet for this tutorial that was previously created. You can use an Access database, Outlook Mail Contacts, or several other sources. Make sure that the circle next to Use an existing list is filled in. Then click Browse.
Navigate to where you have the Excel spreadsheet saved. Then **click on the spreadsheet’s name** and **click Open**.

Choose the name of the **sheet** that your information is located on and **click OK**. *Please note that you should only have "First row of data contains column headers" if your spreadsheet has column headers. If you have this checked and your spreadsheet does not have column headers, the first row of information will not be included for your mail merge.*
The Excel document information will appear. Click OK if the information is correct. If the information is incorrect, you can use the options to add to or change your list.

Click Next: Write your letter to go to the next step.
Step 4: Write Your Letter

Click the Address Block link to insert an Address block into the letter.

The following Insert Address Block menu screen will appear. Please note that if there isn’t an example in the Preview box of what the address block would look like if inserted (or if you have fields that are different, or in addition to those shown), then you will need to click the Match Fields button and match the fields with the appropriate headings. Check the Preview section to make sure that the example of what is being shown is what you want your address block to look like. Then when finished, click OK.
Your document should look like the image below with <<AddressBlock>> in the upper left corner.

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Tap the Enter key a couple of times to make a couple empty lines below the <<AddressBlock>>. Your document and cursor should look similar to the one below.

Tap the Enter key a couple of times to make a couple empty lines below the <<AddressBlock>>. Your document and cursor should look similar to the one below.
Type the word Dear with a space after it onto the line.

Click the More items link to manually insert merge fields into your document. Please note that you can also manually insert merge fields by clicking the Insert Merge field button in the Write & Insert Fields section of the Mailings tab.
An **Insert Merge Field box will open** with all of your database choices for inserting merge fields manually.

Choose the field you want to insert into your document and **click the Insert button**.

This inserts the merge field into your document where you had your cursor set. You can continue to add fields with this. When you are finished, **click the Close button**.
After inserting all of your merge fields into your document, **click Next: Preview your letters** to go to the next step.

**Step 5: Preview Your Letters**

Your document should look similar to the one below. It will show the information of your recipients. You can **browse through your addresses and greeting** by clicking the arrows on the right and left of Recipient.
If you find that you have **made a mistake with your merge fields**, you can **click the Previous button** to go to previous steps to make the necessary corrections.

As you browse through your documents, if you **see one you wish to remove**, you can **click the Exclude this recipient button**.
When you are **satisfied with your documents**, click **Next: Complete the merge** to go to the next step.

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**Step 6: Complete the Merge**

To print your letters, you can either click Print… or Edit individual letters… If you **click the Print link**, all of your letters will be sent to the printer.

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To print your letters, you can either click Print… or Edit individual letters… If you **click the Print link**, all of your letters will be sent to the printer.
Choose which letters to print and then click OK.

Then your printing preferences screen will appear. Choose your preferences and then click OK.

If you click the Edit individual letters link, your letters will merge to a new document.
Choose which letters that you want to have in your new merged document and then **click OK**.

Your **letters are now in a new document. Notice that it has a new default name.** From here you can change your letters individually, print them, etc.