

MICROSOFT WORD 2007 – BOOK 3

MICROSOFT WORD 2007

3.1 MAIL MERGE

Page 99 - 100

GENERAL COMMENTS:

The mail merge procedure in Word 2007 differs very little from that in Word 2002/3. The only real difference lies in the menu system, i.e. knowing where to look in the Word 2007 Ribbon for the old familiar toolbar and the six-step wizard. If you can do a simple mail merge in Word 2002/3, you will discover that Word 2007 makes things even easier! It will help if you bear the following in mind:

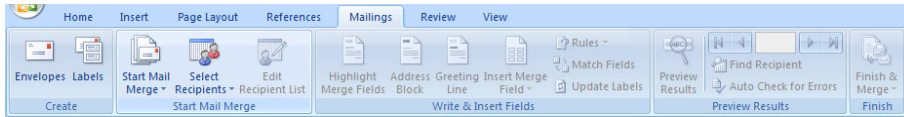
- The old Mail Merge toolbar has been replaced by the **Mailings** tab. Click it ...
- The commands in the old Mail Merge toolbar have been assembled into logical groups in the **Mailings** tab:
 - Start Mail Merge
 - Write & Insert Fields
 - Preview Results
 - Finish
- Following page 100 in the textbook: the data source can be selected by clicking on **Select Recipients**, and the main document type (letter etc) by clicking on **Start Mail Merge**. Both these commands are in the **Start Mail Merge** group.
- The old Mail Merge wizard can be activated by clicking on **Start Mail Merge**, then selecting **Step by Step Mail Merge Wizard** at the bottom of the drop-down list.
- When you get to inserting your merge fields, the 'More items...' option (in step 4 of the wizard) corresponds on the Ribbon with the **Insert Merge Field** command in the **Write & Insert Fields** group.
- The remainder of the mail merge steps (previewing the documents and completing the merge) are intuitively indicated in the **Preview Results** group and the **Finish** group in the **Mailings** tab.

And that's all there is to it! Here follows a step-by-step approach:

STEPS THAT MUST BE FOLLOWED

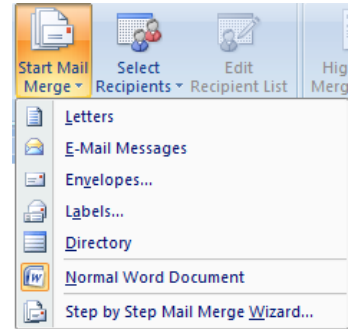
Open the **Mailings** tab.

Click on **Start Mail Merge**:

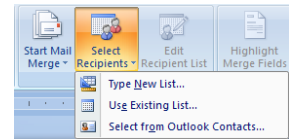


Main document setup:

Select the type of document that you wish to create (e.g. a letter).



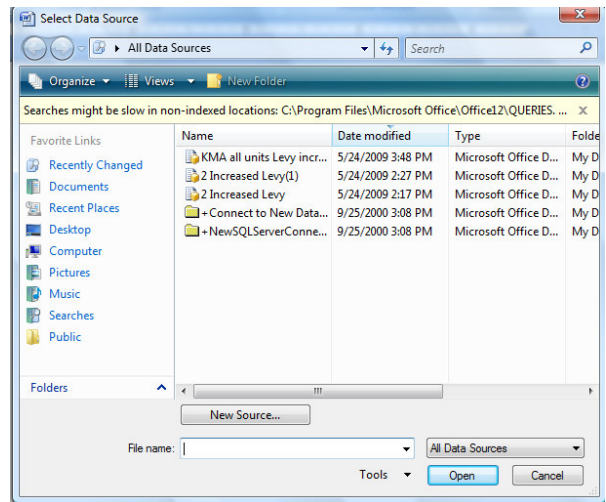
Next, click on **Select recipients**.



From here you can open an existing list (*Word, Excel or Access*), or type a new list of recipients.

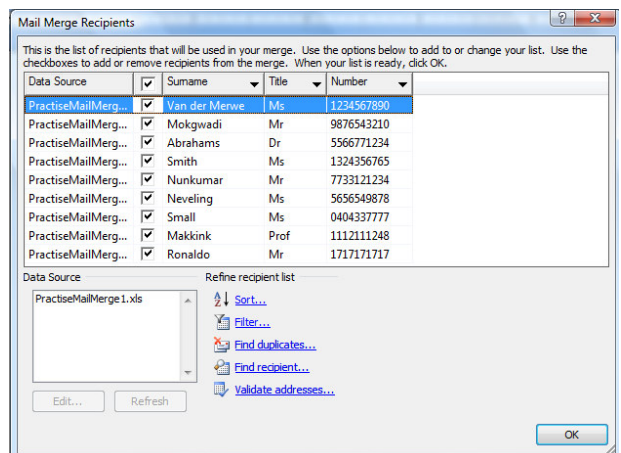
Select **Use an existing list** (if you already have a data source) and navigate to the existing table in *Word, Excel or Access*.

Select the correct path (drive, folder and file) and click **Open**.



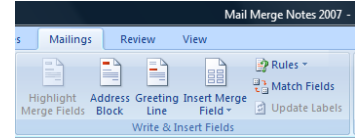
View the contents of the table which you selected in the previous step.

You will see the records and all their fields.

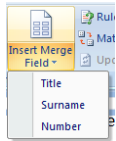


Here you can select which recipients must receive a copy of the letter.

Use the group **Write & Insert Fields** in order to select the fields that must appear in the letter / document.



A list of all the available fields can be found in the drop-down menu when you click on **Insert Merge Field**.



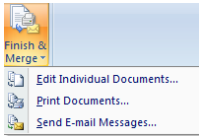
Write the letter (or edit an existing letter), and insert the correct fields as explained above.



To preview the merged data, go to the **Preview Results** group and click on the **Preview results** instruction.



To perform the actual merge, go to the **Finish** group and click on the **Finish & Merge** instruction.



Here you can select to merge either all the records, or only certain ones.

If you choose to 'Edit Individual Documents...', the letters to the recipients can be saved in a new document, which can then be printed later. The other two options are:



Merge to the printer ('Print Documents...'). The letters will be sent to the printer.



Merge to an e-mail address ('Send E-mail Messages...'). The letters will be sent electronically. (If you wish to send the letters electronically, make sure that the e-mail addresses of the recipients are stored in one of the fields of the table.)

