MAILMERGE WORD 2007

It is recommended that Excel spreadsheets are used as source files and created with separate columns for each field, e.g. FirstName, LastName, Title, Address1, Address2, City, State, etc. Field names should be in the top Header row, with nothing above that row. Any blank rows or columns should first be removed.

To begin the Mailmerge process:

1. Click the Mailings Tab
2. Compose your message, or use an existing document
3. Click the Start Mail Merge button on the ribbon to begin > select type, e.g. Letter, Email Message, Labels

EMAIL MESSAGES

1. Click E-Mail Messages in the Start Mail Merge list
2. Create your message or use an existing document
3. Click Select Recipients > browse to your Existing list, e.g Excel spreadsheet (recommended format) - be sure to select correct worksheet (if more than one)
4. Click Edit Recipient List to view the list and make any needed changes
5. Be certain to UNcheck any lines for blank spaces, or users who are not to receive the email.

6. Insert the Merge Fields into the document:
   a. Place the cursor at the position the field should be entered,
   b. Click on the name of the Field > click Insert > Close

7. Click Preview Results to view that fields are filling in correctly:

8. Click Finish & Merge to send the email message to all selected recipients. In the Merge to Email window:
   a. Select email address field in the TO line
   b. Enter a subject
   c. Select Plain Text in the Mail Format field
   d. Select which records are to be sent

NOTES:
- If GroupWise is not open, the program will ask you to first log in.
- If GroupWise prompts for your signature, it will prompt for each recipient. It is recommended that this either be turned off, or that your signature is automatically added to every email.
LETTERS

1. Click Letters in the Start Mail Merge list

2. Create your message or use an existing document

3. Click Select Recipients > browse to your Existing list, e.g Excel spreadsheet (recommended format) - be sure to select correct worksheet if more than one

4. Click Edit Recipient List to view the list

5. Be certain to UNcheck any lines for blank spaces, or users who are not to receive the email.

6. Insert the Merge Fields into the document:
   a. Place the cursor at the position the field should be entered,
   b. Click on the name of the Field > click Insert > Close

7. Click Preview Results to view that fields are filling in correctly:

8. Click Finish & Merge > then select Print Documents to send letters to the default printer.
1. Click Labels in the Start Mail Merge list

2. In the Label Options window > select your label number > click OK

3. Click Select Recipient > Use Existing List > Browse for your Excel list

4. Click Insert Merge Field > insert desired fields on the first label

5. IMPORTANT! After inserting all fields on the first label > click Update Labels to fill in the same fields on ALL labels

6. Click Preview Results to view that fields are filling in correctly

7. Click Finish & Merge > Print Documents to send labels to the default printer

Remember that you can press the F1 key any time for online help:
DIRECTORIES

1. Open a new Word document

2. Under the Mailings Tab > click Directory in the Start Mail Merge list

3. Click Select Recipients > browse to your Existing list, e.g Excel spreadsheet (recommended format) - be sure to select correct worksheet if more than one

4. Click Edit Recipient List to view the Mail Merge Recipients list

5. Be certain to UNcheck any lines for blank spaces, or users who are not to receive the email.

6. Insert the Merge Fields into the document:
   a. Place the cursor at the position the field should be entered,
   b. Click on the name of the Field > click Insert > Close

7. Press the Enter Key twice to move the cursor to the next field where the next Directory item will be entered. (Note: Do not use the Rules > Next Record command here as that can cause mail merge to skip records.)

8. Click Preview Results to view that fields are filling in correctly

9. Click Finish and Merge > Edit Individual documents

10. Select All in the Merge to New Document Window > this will allow you to view the Directory with selected fields filled in

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