



Team 2506's "Everything You Need To Know About Mail Merge for Word 2007" Guide

Making a New Mail Merge List In An Existing File:

1. Open the word document you need the list in
2. Click on the "Mailings" tab at the top of the screen
3. Click on "Select Recipients"
4. Select "Type New List"
5. A window should pop up
6. Type information into appropriate columns
7. Click on when finished OK
8. The computer will prompt you to save the file
 - a. Find the location you want to save the file to
 - b. Enter the name for the file
 - c. Click save

Editing an Existing List:

1. Find the saved mail merge file as the Microsoft Access file
2. Open it
3. Double-click on "Office Address List" in the "Tables" column off to the right side
4. The list should come up
5. To enter new entries scroll to the bottom of the list
 - a. Enter information into the row with the asterisk to the side of it
6. To change an existing entry locate the entry on the list
 - a. Edit the cells that need to be changed
7. Save the file

Using Mail Merge for Address Blocks/Greeting Lines:

1. Open the word document you want to use the list in
2. Here you have some options...
 - a. If pop-ups come up go to step 3
 - b. If the document needs a new list refer to the **Making a New Mail Merge List** section of this guide then continue to step 5
 - c. If the document does not yet have a list linked to it, but the desired list exists jump to step 4
 - d. If the document opens without pop-ups and already has a list linked to it skip to step 5
3. Only use this if pop-ups came up
 - a. If pop-ups come up they may go away right after you click yes and go to step 5; otherwise just keep clicking yes until you have the option to "find data source", click it
 - b. Find the Microsoft Access file you want to use, select it and hit open

- c. Go to step 5
4. Only use this if the document does not yet have a list linked, but the desired list exists
 - a. Under the “Mailings” tab click “Select Recipients”
 - b. In the dropdown menu click “Use Existing List”
 - c. Locate the Microsoft Access file in your documents and click open
 - d. Go to step 5
5. Click on the “Mailings” tab at the top of the screen
6. To insert an address block click the Address Block button
 - a. Select all the stuff you want and click “ok”
7. To insert a greeting line click the Greeting Line button
 - a. Select all the stuff you want and click “ok”
8. To check how your entries look while still under the “Mailings” tab click on the Preview Results button

Printing Documents:

1. Open the word document you want to use the list in
2. Here you have some options...
 - a. If pop-ups come up go to step 3
 - b. If the document needs a new list refer to the **Making a New Mail Merge List** section of this guide then continue to step 5
 - c. If the document does not yet have a list linked to it, but the desired list exists jump to step 4
 - d. If the document opens without pop-ups and already has a list linked to it skip to step 5
3. Only use this if pop-ups came up
 - a. If pop-ups come up they may go away right after you click yes and go to step 5; otherwise just keep clicking yes until you have the option to “find data source”, click it
 - b. Find the Microsoft Access file you want to use, select it and hit open
 - c. Go to step 5
4. Only use this if the document does not yet have a list linked, but the desired list exists
 - a. Under the “Mailings” tab click “Select Recipients”
 - b. In the dropdown menu click “Use Existing List”
 - c. Locate the Microsoft Access file in your documents and click open
 - d. Go to step 5
5. To make sure you print documents to the right people...
 - a. Click “Edit Recipient List” under the “Mailings” tab
 - b. Make sure there is only a check mark in the box next to each of the recipients you want to send it to
 - c. Click “OK”
6. To print your document click the mouse over the “Finish and Merge” button on the top of the screen (The first option (a, b, and c) is preferred because it gives you a chance to double check your work)

- a. Select "Edit Individual Documents" from the drop down menu
- b. Select "all"
- c. Edit the documents then print to the appropriate printer (for envelopes manual feed is usually better, refer to **Loading the Printer**)

OR

- a. Select "Print Documents" from the drop down menu
- b. Select "all"
- c. Make sure the printer settings are right and print (for envelopes manual feed is usually better, refer to **Loading the Printer**)

Creating/Printing Envelopes:

1. Open a new document
2. Click on the "Mailings" tab
3. Click "Start Mail Merge"
4. Go down to and click "Envelopes" on the dropdown
5. Double check print settings and envelope options
6. Click "OK"
7. Type out the desired return address in the upper left hand corner of the envelope
8. Insert any desired logos where you want them
9. Click around the center of the envelope until you find the block in the middle
 - a. Refer to steps 2-8 of the **Using Mail Merge for Address Blocks/Greeting Lines** section of this guide to enter address blocks
10. Follow steps 5 and 6 of the **Printing Documents** section of this guide to print the envelopes