

Word 2007 Advanced Features

Key Objectives:

- Setting up a mail merge: Document to print or email
- Setting up a mail merge: Creating address labels

If time allows, we'll also look at:

- Inserting and formatting a table
- Inserting a new and existing spreadsheet
- Inserting a chart
- Changing the page orientation for a whole document and for a single page within a document

Use mail merge to create and print letters and other documents

You use mail merge when you want to create a set of documents, such as a form letter that is sent to many customers. Each letter has the same kind of information, yet the content is unique. For example, in letters to your customers, each letter can be personalized to address each customer by name. The unique information in each letter comes from entries in a data source.

The mail merge process entails the following overall steps:

1. **Set up the main document.** The main document contains the text and graphics that are the same for each version of the merged document — for example, the return address or salutation in a form letter.
2. **Connect the document to a data source.** A data source is a file that contains the information to be merged into a document. For example, the names and addresses of the recipients of a letter.
3. **Refine the list of recipients or items.** Microsoft Office Word generates a copy of the main document for each item, or record, in your data file. If your data file is a mailing list, these items are probably recipients of your mailing. If you want to generate copies for only certain items in your data file, you can choose which items (records) to include.
4. **Add placeholders, called mail merge fields, to the document.** When you perform the mail merge, the mail merge fields are filled with information from your data file.
5. **Preview and complete the merge.** You can preview each copy of the document before you print the whole set.

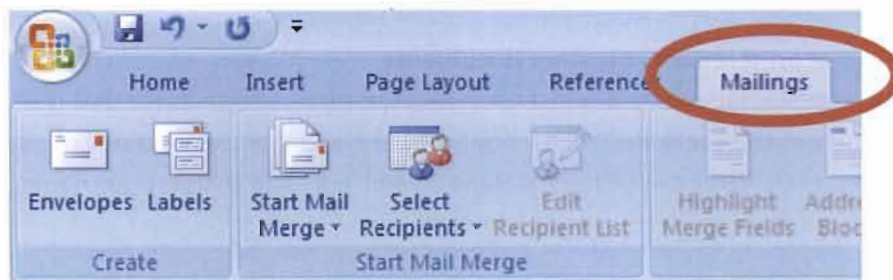
Source: <http://office.microsoft.com/en-us/word/HA100819761033.aspx>

Setting up a Mail Merge: Document to Print or Email

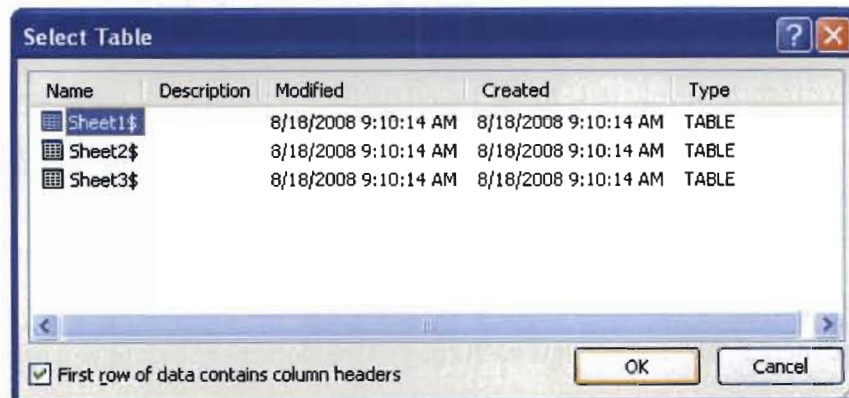
1. Open Microsoft Word 2007.
2. Open an existing document that you into which you'd like to merge data OR create a new document.
3. Open Microsoft Excel 2007.
4. Enter the data that will be merged into your Word document into the Excel spreadsheet.

TIP: It is best to enter one type of information per column (i.e. First name, Last name, Company, Address 1). This will simply the merge process to Word.

5. Once your spreadsheet is ready to go, be sure to save your work and close the document.
6. Return to your Word document.
7. Click the Mailings tab.



8. Click Select Recipients > Use Existing List...
9. Locate the spreadsheet containing your data. Select the appropriate worksheet. If your spreadsheet contains column headers, be sure that option is checked (lower-left corner of Select Table dialog box). Click OK.

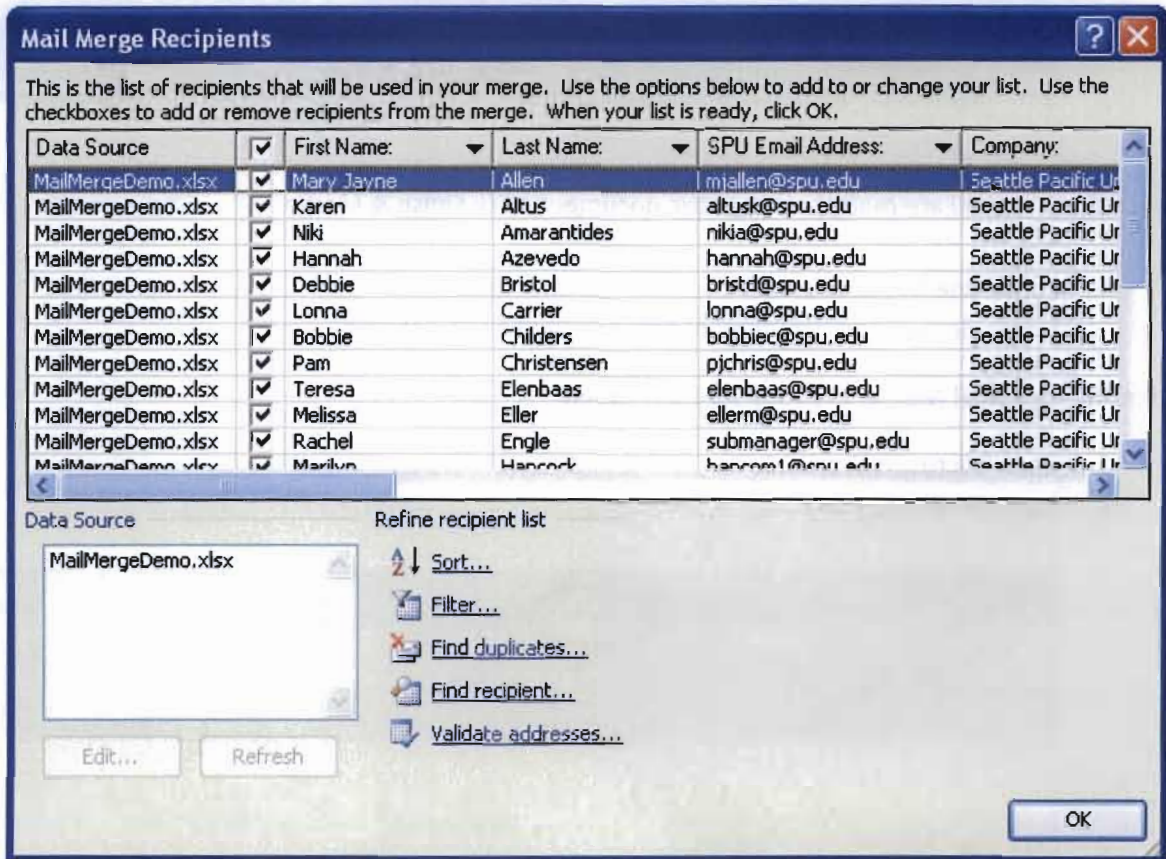


10. At this point you can edit your recipient list. Click Edit Recipient List.

You can use the checkboxes to add or remove recipients from the merge.

You can filter your recipients by clicking the dropdown arrow for a given column.

You can filter your recipients by clicking Filter... and setting parameters.



11. Click in your document where you'd like to insert a merge field.

12. Click Insert Merge Field, and select the appropriate field.



13. Repeat the Insert Merge Field process, as needed.
14. To preview the results before the final merge process, click Preview Results...



15. Once you are ready to merge the document, click Finish & Merge.

Print: One document will be printed for each recipient.

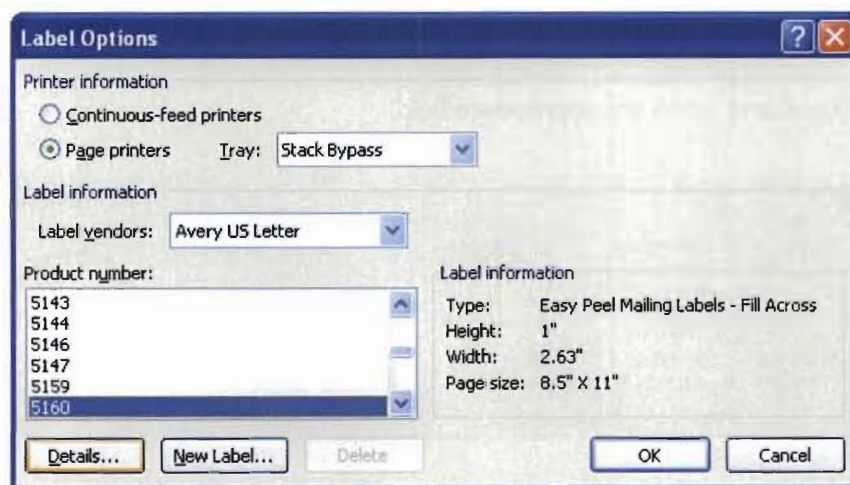
Email: Be sure to select the To: field and type a Subject Line.

Setting up a Mail Merge: Creating Address Labels

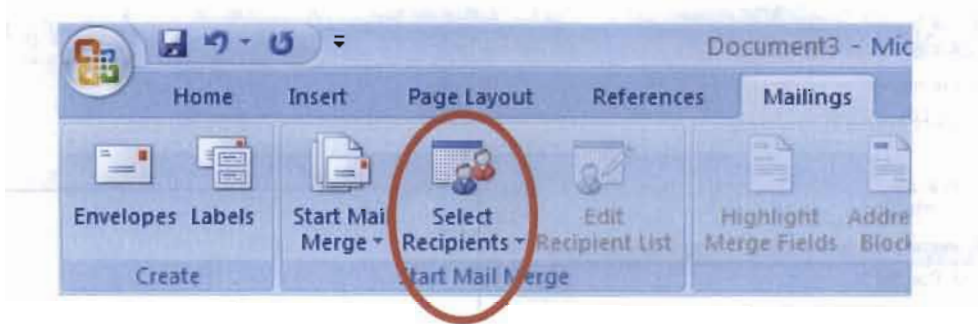
1. Open Microsoft Word 2007
2. Click the Mailings tab



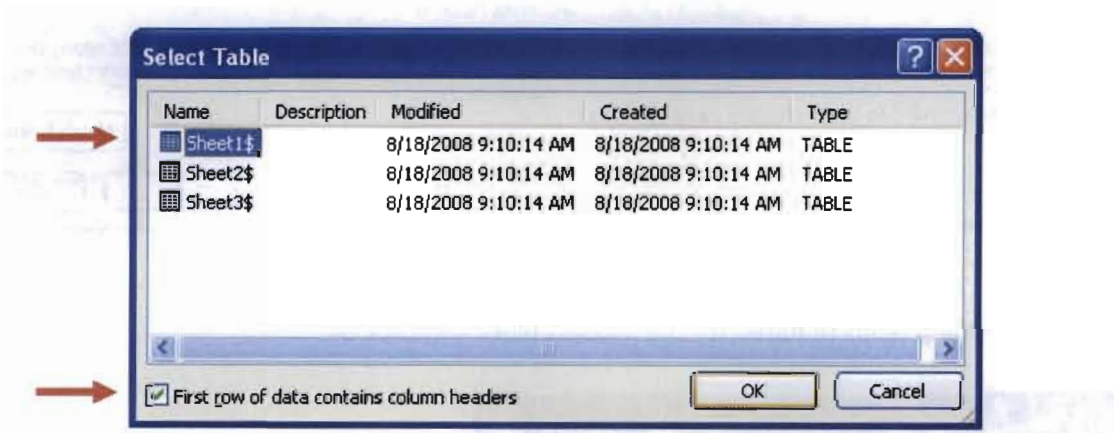
3. Click Start Mail Merge > Labels...
4. In the Label Options dialog box, select the Label vendors and Product number. Click OK.



5. Click Select Recipients > Use Existing List...



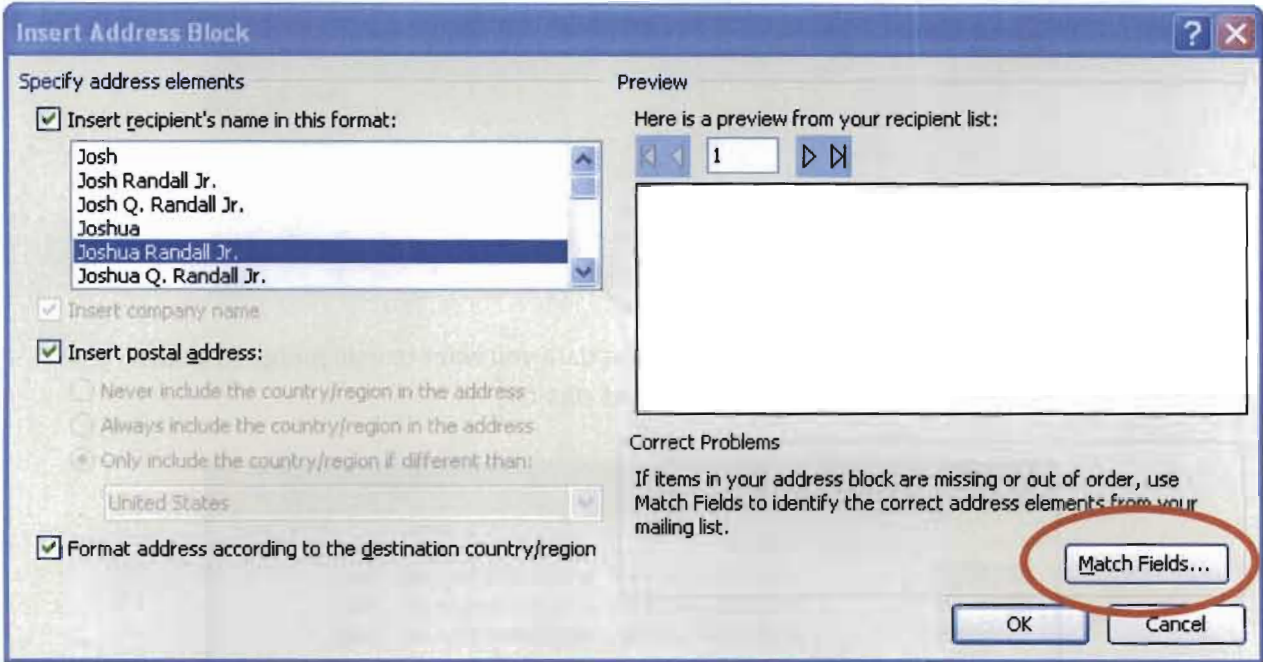
6. Locate the spreadsheet containing the data you want to mail merge to labels. Select the appropriate worksheet, and click OK.



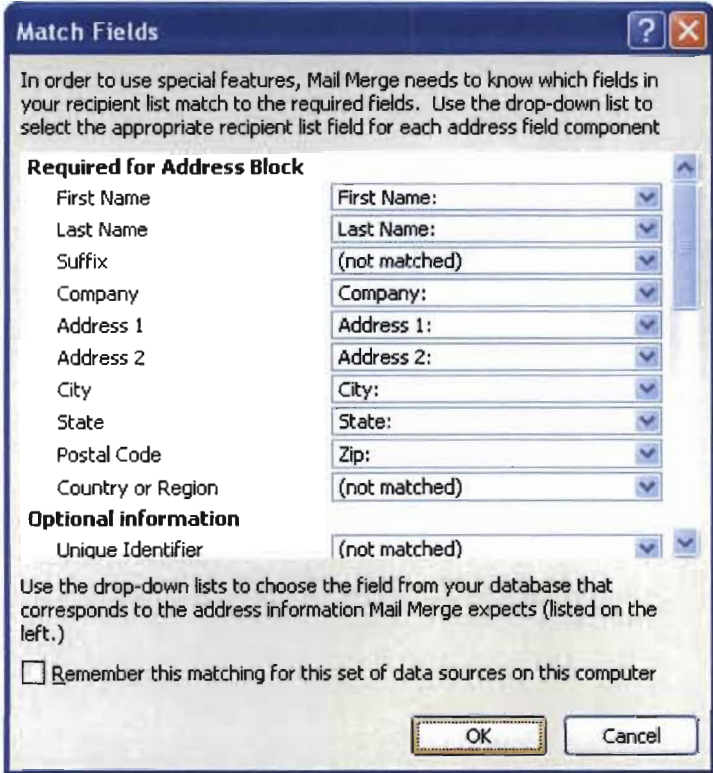
7. You can edit your recipient list, if needed.
8. To create mailing labels, click Address Block.



9. Click Match Fields...



10. Match the appropriate fields required for the address block and click OK.



11. To have this same address block format applied to the remaining labels to be created, click Update Labels.



12. To preview your results before sending them to the printer, click Preview Results.
13. You may need to alter the text font, text size, and line spacing to fit the data onto a label. Select the text, click the Home tab for text font and size formatting options. Select Page Layout for line spacing options.
14. Once your labels are ready to print, return to the Mailings tab. Click Finish & Merge > Print Documents...

Inserting a Table

1. Click the Insert tab.
2. Click Table and select a table of choice.
3. To modify your table, use the Table Tools tab options.

Inserting a Spreadsheet

- Click the Insert tab > Table > Excel Spreadsheet
- Click the Insert tab > Object > Create from File

Inserting a Chart

- Click the Insert tab > Chart

Changing the Page Orientation

- For the whole document: Page Layout > Orientation
- For a page within a document:
 - Page Layout > Page Setup dialog box
 - Select the Margins tab
 - Set the orientation and set Apply to:

