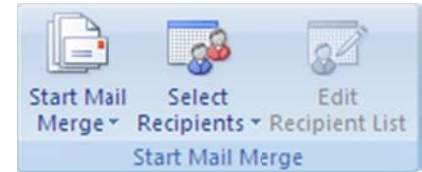



Microsoft Word 2007 Mini Skills

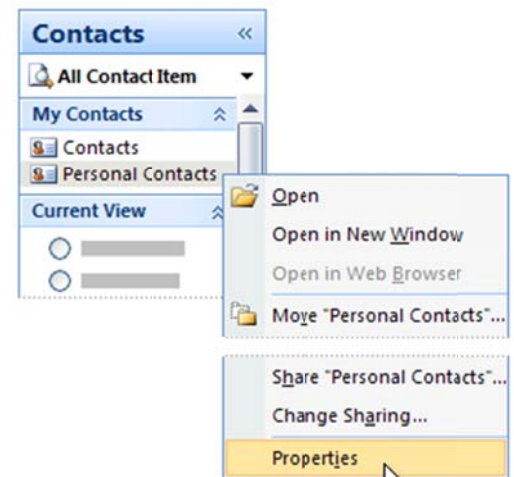
Set up the Email Message Main Document

- Start Word.
 - A blank document opens by default. Leave it open. If you close it, the commands in the next step are not available.
- On the **Mailings** tab, in the **Start Mail Merge** group, click **Start Mail Merge**.
- Click **E-Mail Messages**.



CHOOSE A DATA FILE

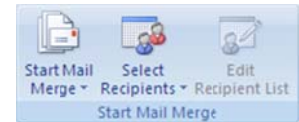
- On the **Mailings** tab, in the **Start Mail Merge** group, click **Select Recipients**.
- Do one of the following:
 - If you want to use your Contacts list in Outlook, click **Select from Outlook Contacts**.
- In Outlook, on the **Go** menu, click **Contacts**.
- Right-click the **Contacts** folder that contains the information that you want to use for a mail merge, and then click **Properties**.
- On the **Outlook Address Book** tab, make sure that the **Show this folder as an e-mail Address Book** check box is selected, and then click **OK**.
- If you have a Microsoft Office Excel worksheet, a Microsoft Office Access database, or another type of data file, click **Use Existing List**, and then locate the file in the **Select Data Source** dialog box.
 - Click the **Microsoft Office Button** , and then click **Word Options**.
 - Click **Advanced**.
 - Scroll to the **General** section, and select the **Confirm file format conversion on open** check box.
 - Click **OK**.
 - With the mail merge main document open, in the **Start Mail Merge** group of the **Mailings** tab, click **Select Recipients**, and then click **Use Existing List**.
 - Locate the Excel worksheet in the **Select Data Source** dialog box, and double-click it.
 - In the **Confirm Data Source** dialog box, click **MS Excel Worksheets via DDE (*.xls)**, and then click **OK**.
 - In the **Microsoft Office Excel** dialog box, for **Named or cell range**, select the cell range or worksheet that contains the information that you want to merge, and then click **OK**.



- If you don't have a data file yet, click **Type a new list**, and then use the form that opens to create your list. The list is saved as a database (.mdb) file that you can reuse.

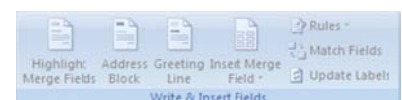
Refine the list of recipients or items

- On the **Mailings** tab, in the **Start Mail Merge** group, click **Edit Recipient List**.
- In the **Mail Merge Recipients** dialog box, do any of the following:
 - **Select individual records** This method is most useful if your list is short. Select the check boxes next to the recipients you want to include, and clear the check boxes next to the recipients you want to exclude.
 - If you know that you want to include only a few records in your merge, you can clear the check box in the header row and then select only those records that you want. Similarly, if you want to include most of the list, select the check box in the header row, and then clear the check boxes for the records that you don't want to include.
 - **Sort records** Click the column heading of the item that you want to sort by. The list sorts in ascending alphabetical order (from A to Z). Click the column heading again to sort the list in descending alphabetical order (Z to A).
 - If you want more complex sorting, click **Sort** under **Refine recipient list** and choose your sorting preferences on the **Sort Records** tab of the **Filter and Sort** dialog box.
 - **Filter records** This is useful if the list contains records that you know you don't want to see or include in the merge. After you filter the list, you can use the check boxes to include and exclude records.
 - To filter records, do the following:
 - Under **Refine recipient list**, click **Filter**.
 - On the **Filter Records** tab of the **Filter and Sort** dialog box, choose the criteria you want to use for the filter.



MAP MAIL MERGE FIELDS TO YOUR DATA FILE

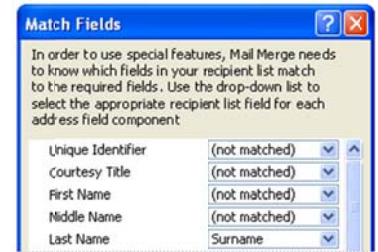
To map the fields, click **Match Fields** in the **Write & Insert Fields** group of the **Mailings** tab.



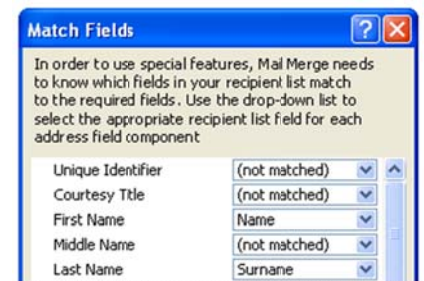
The **Match Fields** dialog box opens.

The elements of an address and greeting are listed on the left. Column headings from your data file are listed on the right.

Word searches for the column that matches each element. In the illustration, Word automatically matched the data file's **Surname** column to **Last Name**. But Word was unable to match other elements. From this data file, for example, Word can't match **First Name**.



In the list on the right, you can select the column from your data file that matches the element on the left. In the illustration, the **Name** column now matches **First Name**. It's okay that **Courtesy Title**, **Unique Identifier**, and **Middle Name** are not matched. Your e-mail merge message doesn't need to use every field. If you add a field that does not contain data from your data file, it will appear in the merged document as an empty placeholder — usually a blank line or a hidden field.

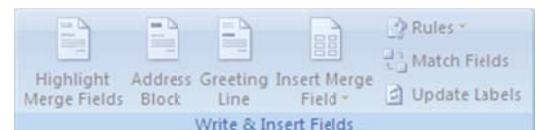


TYPE CONTENT AND ADD FIELDS

1. In the e-mail message main document, click where you want to insert the field.
2. Use the **Write & Insert Fields** group on the **Mailings** tab.
3. Add any of the following:

+Greeting line

1. Click **Greeting line**.
2. Select the greeting line format, which includes the salutation, name format, and following punctuation.
3. Select the text that you want to appear in cases where Word can't interpret the recipient's name, for example, when the data source contains no first or last name for a recipient, but only a company name.
4. Click **OK**.
5. If the **Match Fields** dialog box appears, Word may have been unable to find some of the information that it needs for the greeting line. Click the arrow next to **(not matched)**, and then select the field from your data source that corresponds to the field that is required for the mail merge.
 1. On the **Mailings** tab, in the **Write & Insert Fields** group, click **Insert Merge Field**.
 2. In the **Insert Merge Field** dialog box, do one of the following:
 - To select address fields that will automatically correspond to fields in your data source, even if the data source's fields don't have the same name as your fields, click **Address Fields**.
 - To select fields that always take data directly from a column in your data file, click **Database Fields**.
 3. In the **Fields** box, click the field you want.

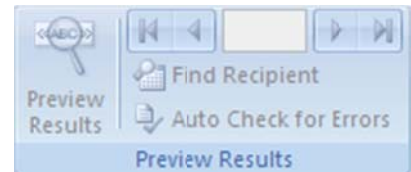


4. Click **Insert**, and then click **Close**.
5. If the **Match Fields** dialog box appears, Word may have been unable to find some of the information it needs to insert the field. Click the arrow next to **(not matched)**, and then select the field from your data source that corresponds to the field required for the mail merge.

PREVIEW THE MERGE.

To preview, do any of the following in the **Preview Results** group of the **Mailings** tab:

- Click **Preview Results**.
- Page through each e-mail message by using the **Next Record** and **Previous Record** buttons in the **Preview Results** group.
- Preview a specific document by clicking **Find Recipient**.



COMPLETE THE MERGE

Send the e-mail messages

1. On the **Mailings** tab, click **Finish & Merge**, and then click **Send E-mail Messages**.
2. In the **To** box, select the name of the field that stores recipients' e-mail address.
2. In the **Subject line** box, type a subject line for the message.
3. In the **Mail format** box, click **HTML** or **Plain text** to send the document as the body of the e-mail message, or click **Attachment** to send the document as an attachment.

