

Outline for Orange Grove Mail Merge and Forms with 2007

- I. Open Orange Grove Bike Rodeo Letter Without Data Source
 - a. To turn off comments select Review – Tracking – Show Markup and uncheck Comments
- II. Select Mailings – Start Mail Merge – Step by Step Mail Merge Wizard
 - a. This is very similar (exactly the same?) to the wizard in 2003
- III. When the task pane appears, go through the steps to create a merge by typing a new list.
 - a. Type a New List
 - b. Create
 - c. Fill in the blanks
 - d. Add a column for Child's Name
 - e. Save the data source (it will create an Access DB)
 - f. Insert the fields into the letter
 - g. Preview your letters
 - h. You are now ready to print your letters
- IV. Do it again using the tools on the ribbon.
 - a. Mailings – Start Mail Merge – Letter
 - b. Select Recipients (this time we will use an existing list, the one that we just created)
 - c. Edit Recipient List (select the recipients that you want to receive this letter)
 - d. Delete the Address Block place holder
 - e. In the Write and Insert Fields group click on Address Block. Select an option and click OK
 - f. Do the same for the Greeting Line
 - g. Find four instances of the text "child's name". In each instance delete it and in its place select Write and Insert Fields – Insert Merge Fields – Child's Name
 - h. In Preview Results select Preview Results and navigate through the letters
 - i. In the Finish group select Finish. Notice again that you can edit individual letters or you can simply send this to the printer
- V. Create a new data source in Word
 - a. Insert a table with a column for each field and only one row
 - b. The first row must contain field names such as First Name, Address, City, State, etc
 - c. Add a couple of records
 - d. Save the document.
 - e. Follow the steps above to create a mail merge using this new data source
- VI. Create a new data source in Excel
 - a. First rows must contain field names
 - b. Add a couple of records to the first sheet
 - c. Name the worksheet First Period
 - d. Go to the second sheet and name it Second Period

- e. Add field names and add some records
 - f. Save the document
 - g. Follow the steps above. Note that you can select individual worksheets as a data source.
- VII. Now let's do a mail merge to envelopes.
- a. New blank document
 - b. Mailings – Start Mail Merge – Start Mail Merge – Envelopes
 - c. Select you envelop size and click OK
 - d. Enter your return address. This is something that you will type because it is going to be the same on each envelope.
 - e. Let's put in a graphic too, do dress up the envelope.
 - i. Insert – Picture and find OG Bulldog
 - ii. It's too big so let's crop it down to just the bulldog
 - iii. Picture Tools Format – Size and click on the Crop tool
 - iv. Crop the image down to just the bulldog
 - v. Adjust the position of the picture
 - vi. Picture tools format – Arrange – Position and select one of the options to place the image on the right side of the envelope
 - f. Click in the lower middle section of the envelope until a placeholder appears. This is where the address will go.
 - g. Select Mailings – Write and Insert Fields – Address Block
 - h. Preview Results
 - i. You are ready to print the envelopes.
- VIII. Do a Merge to labels.
- a. Choose Avery US Letter #15163
 - b. Insert the Address block in the first label placeholder
 - c. There is one critical extra step when doing labels. You must select Mailings – Write and Insert Fields – Update Labels to get the labels to print with an individual address on each label.
 - d. You are now ready to merge and print.
- IX. In the last step you created peel and stick labels for adding to envelopes. If you do that, you will need a way to add a return address to the envelope. How would you go about that?
- a. On the mailings tab select Create – Envelopes. This is the option that you would choose if you wanted to print a single envelope or a bunch of envelopes with the same address.
 - b. Leave the recipient box empty and put a return address in.
 - c. Click Add to Document
 - d. Insert the picture like before
 - e. Resize the picture (don't crop it) and position it in the lower right hand corner of the envelope.
 - f. Reposition the address placeholder. (This is only necessary if you are going to actually use this envelope to print a merge. If you are going to use labels on it, you don't need to reposition it.)