



Your Short Cut to Knowledge

# Mail and Data Merges Using Word 2007

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## What Is a Mail Merge?

**M**ail merge is a term that can strike fear into the heart of many Word users. Once a tedious and frustrating procedure, it has become a very efficient tool for creating mass mailings like those you probably get in your mailbox every day. The process itself is fairly simple—a form letter (main document) is combined with a source (data file) that contains all of the necessary information to produce a personalized letter for each person in the source.

Mail merge combines a main document with a list of database records to create customized copies of the main document for each record. The most common type of mail merge, of course, is a mailing. Mail merging was originally developed to create form letters, like the kind you probably get in your mailbox every day that address you by name and suggest that you buy some can't-live-without product.

Word 2007's mail merge feature can actually do much more than generate form letters, however. You can use it to generate personalized addresses for envelopes and labels, personalized copies of business reports or children's stories, auction catalogs—just about anything that combines fixed text with variable text.

## What's in a Mail Merge?

Let's start by looking at the files involved in a mail merge. A mail merge uses two files:

- The **main document** is a Word document. It contains all the text that doesn't change in whatever you are generating, whether it is a form letter, report, catalog page, and so on.
- The **data file** contains the variable data that is merged with the main document. It can be a Word document (with the data in a table), an Excel worksheet, an Outlook contact list, a Windows Mail address book, a delimited text file, or any of several other data types. See "Selecting a Data Source" later in this Shortcut for more information about data types.

The next thing you need to create a merge file is *merge fields*. Merge fields represent the information in your source (data file). To set up a mail merge, you insert the merge fields that reference the data file into the main document. For example, if the data file has a `FirstName` field, you might have a greeting line in the main document that looks like this:

Dear <<**FirstName**>>:

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