

Performing Mail Merges 11

LESSON SKILL MATRIX

Skill	Exam Objective	Objective Number
Setting Up Mail Merge		
Executing Mail Merge		
Merging a Document with a Different File Format		
Creating Envelopes and Labels		



KEY TERMS

- chevrons
- data source
- database
- field names
- main document



© kyoshino/iStockphoto

You are employed at Graphic Design Institute as an admissions officer in the Office of Enrollment Services. Because you frequently send out letters containing the same content to different recipients, it is essential that you know how to perform mail merges. In this lesson, you learn how to create merged documents and merge data into form letters.

SOFTWARE ORIENTATION

Mailings Tab

Commands on the Mailings tab are used to perform mail merges, as well as to create envelopes and labels for a group mailing (see Figure 11-1).

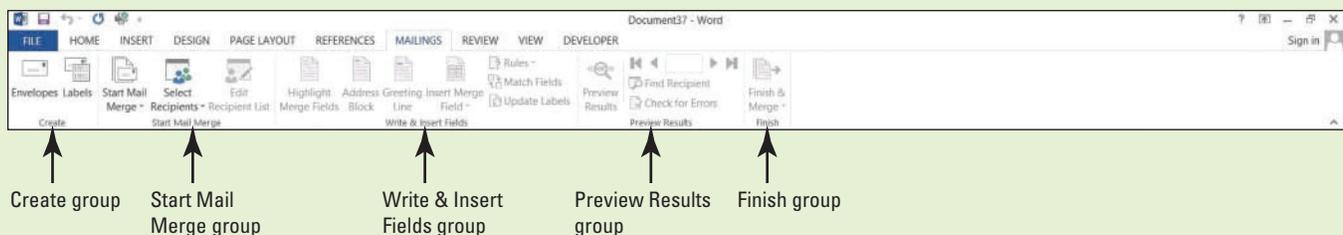


Figure 11-1
Mailings tab

SETTING UP MAIL MERGE

The Bottom Line

Mail merges are useful for creating multiple documents that have the same basic content and personalizing them with unique information from a data source—for example, a form letter sent to multiple customers using different recipient names and addresses. In essence, mail merges are used for internal and external correspondence such as memorandums, labels, invitations, and more. The mail merge document contains the same information that everyone will receive. The individuals receiving the document are created in a data source, which is the list of recipients, and contains information for each individual with variable data, such as the person's first and last name, address, city, state, zip code, phone number, and so on. The data source can be created as a table using Word where Word provides the fields and you type the data in them. You also customize the fields to fit your document. Other programs can be used for the data source such as an Excel worksheet, an Access table or query, or your Outlook contacts list.

Setting Up a Main Document Using the Mail Merge Wizard

To begin a mail merge, the main document is set up from a new or an existing document. The **main document** contains text and graphics that are the same for each version of the merged document. The Mail Merge Wizard is a step-by-step process in setting up a main document, and then creating or using an existing list that can be a database, spreadsheet, table, or other source; and taking these two sources of information and merging it into one document. In this exercise, you learn to set up a main document using the Mail Merge Wizard, set up mail merge manually, use the Check for Errors command, and preview and print the merge document.

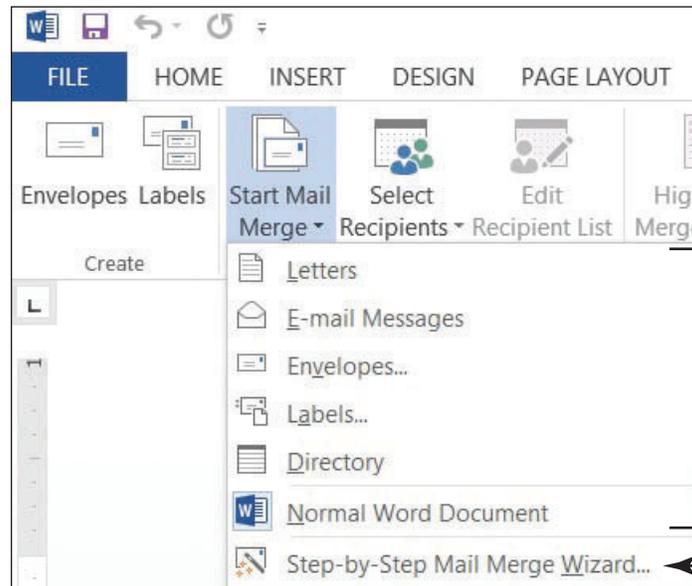
STEP BY STEP**Set Up a Main Document Using the Mail Merge Wizard**

GET READY. Before you begin these steps, be sure to launch Microsoft Word and open a blank document.

1. On the Mailings tab, in the Start Mail Merge group, click the **Start Mail Merge menu** drop-down arrow to display the Start Mail Merge menu as shown in Figure 11-2.

Figure 11-2

Start Mail Merge menu



Select main document type

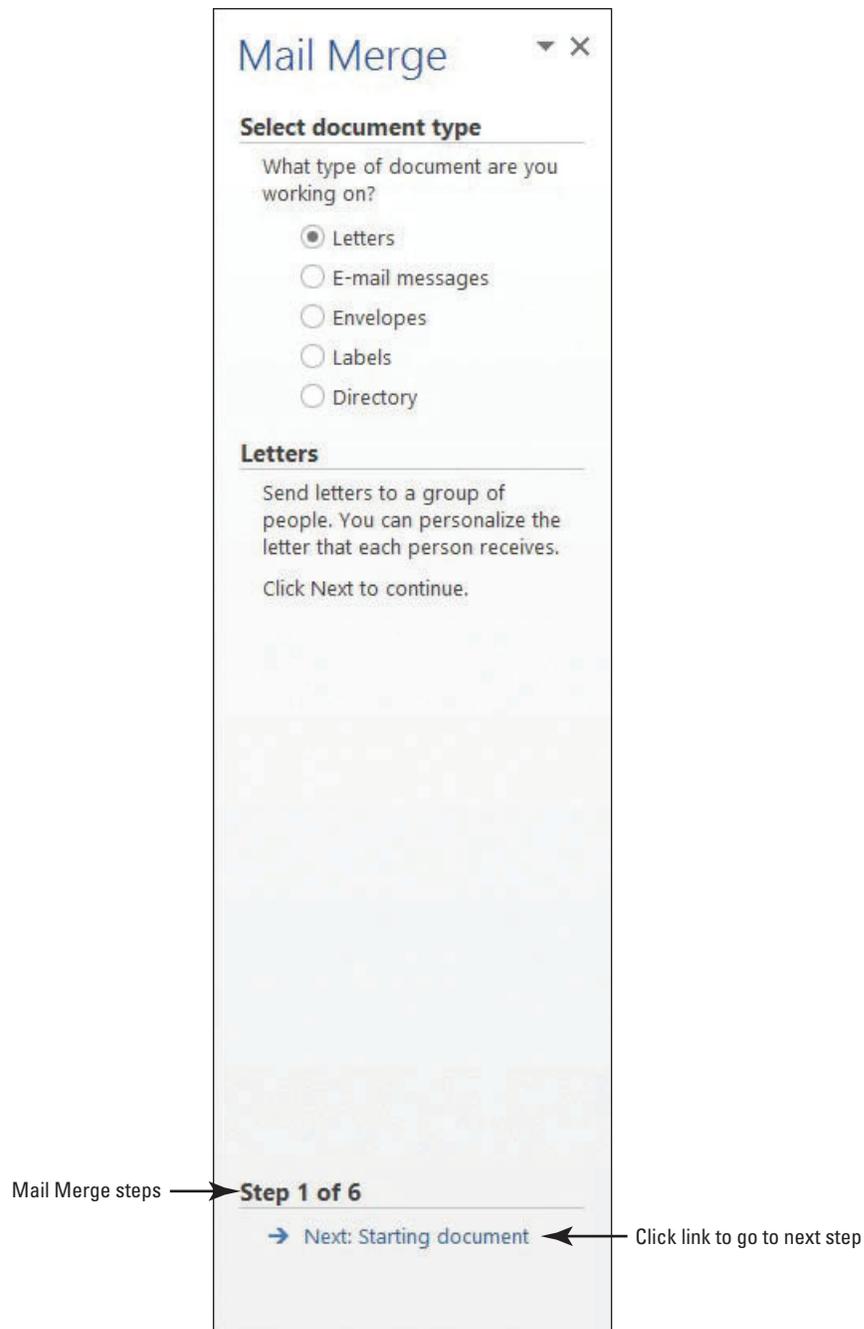
Step-by-Step
Mail Merge Wizard

2. Click **Step-by-Step Mail Merge Wizard**.

The Mail Merge pane opens as shown in Figure 11-3. The Mail Merge Wizard has six steps to complete.

Figure 11-3

Mail Merge pane Step 1 of 6

**STEP BY STEP****Step 1: Select the Document Type**

In the *Select document type* section, Letters is the default. You use the default for the main document.

1. Click the link at the bottom of the Mail Merge pane, **Next: Starting document**.

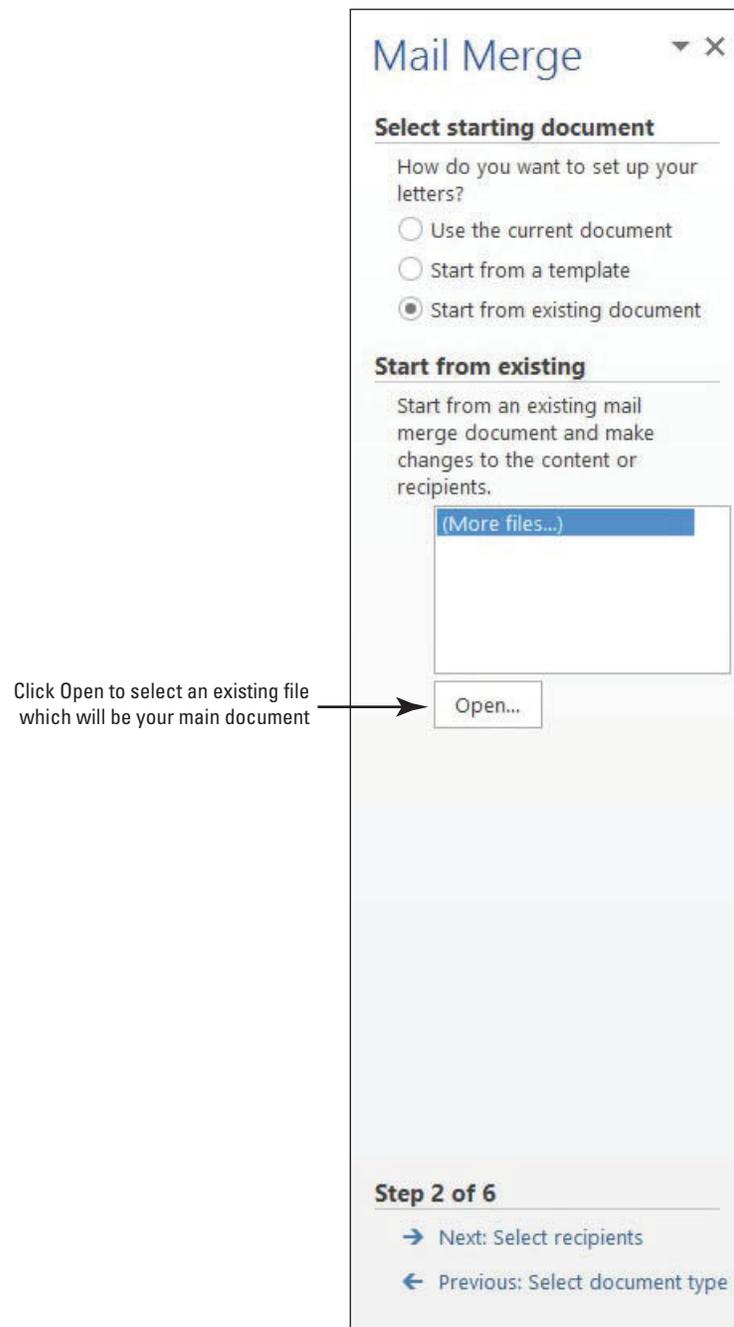
STEP BY STEP**Step 2: Select the Starting Document**

This step contains three options on setting up the letter. You open an existing document in the lesson folder.

1. Below the *Select starting document* section, click the **Start from existing document option button**.
2. Below the section, *Start from existing*, click the **Open button** as shown in Figure 11-4. The *Open* dialog box displays.

Figure 11-4

Mail Merge pane Step 2 of 6



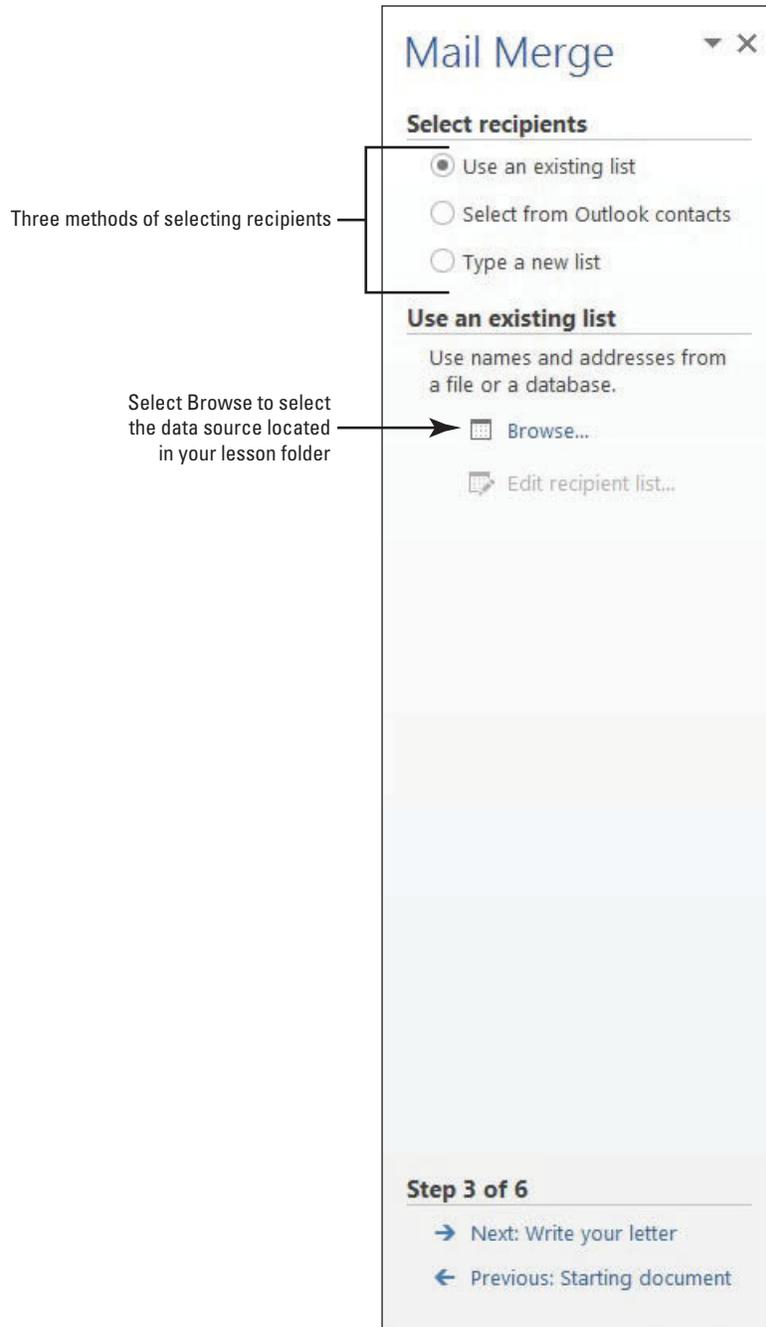
3. Use the scroll bar to locate your flash drive and open data files from your lesson folder.
4. Select the **Scholarship** document and **double-click** to open it or click the **Open button**. The document is opened in the document screen.
5. At the bottom of the Mail Merge pane, click the **Next: Select recipients link**.

STEP BY STEP Step 3: Select the Recipients

1. In the *Select recipients* section (see Figure 11-5), you use the default setting, Use an existing list. The existing list is located in the data lesson folder in your flash drive.

Figure 11-5

Mail Merge pane Step 3 of 6



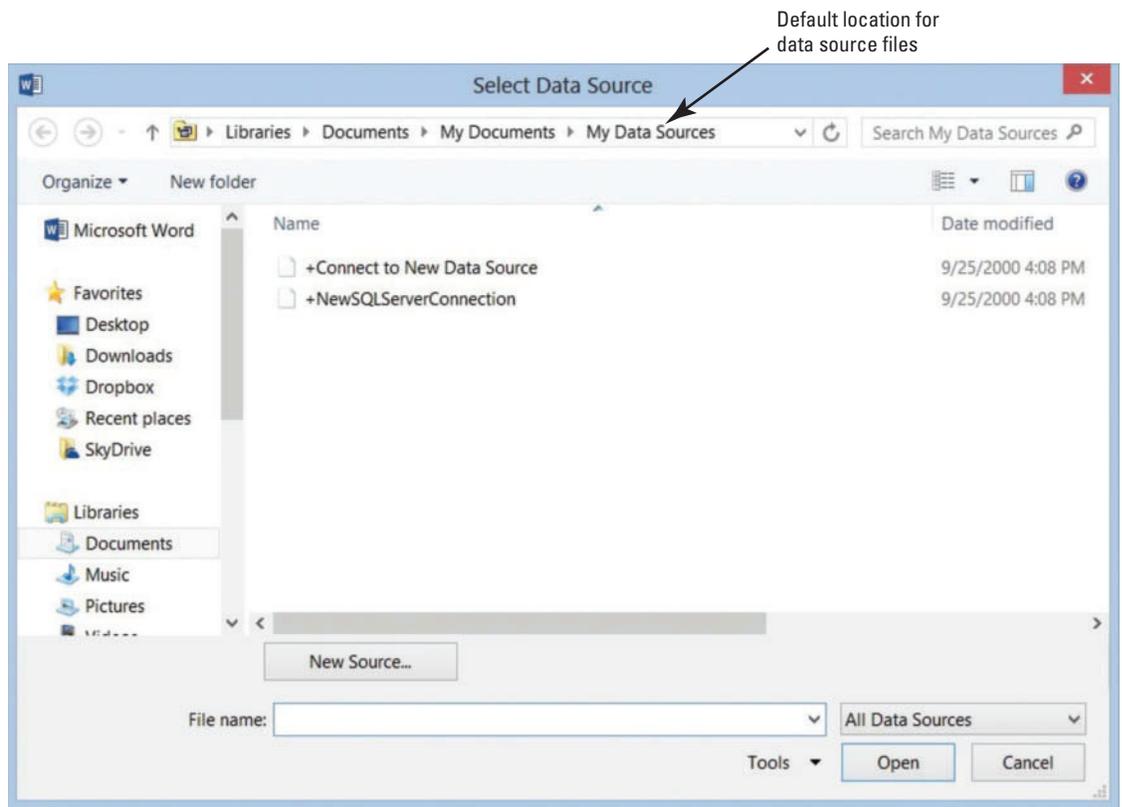
2. In the Use an existing list section, click the **Browse link**. The *Select Data Source* dialog box opens—this is the default location for data source files (see Figure 11-6).
3. Use the scroll bar to navigate to the location of your data lesson folder in your flash drive.

A **data source** is a file that contains information to be merged in the main document. A data source can be from an Excel spreadsheet, an Access database, or a Word document containing a single table, an electronic address book such as Outlook, or any text that has data fields. **Field names** provide a description for the specific data, such as a person's first name, last name, address, city, state, and zip code, to be merged from the data source. Fields usually correspond to the column headings in the data file.



Figure 11-6

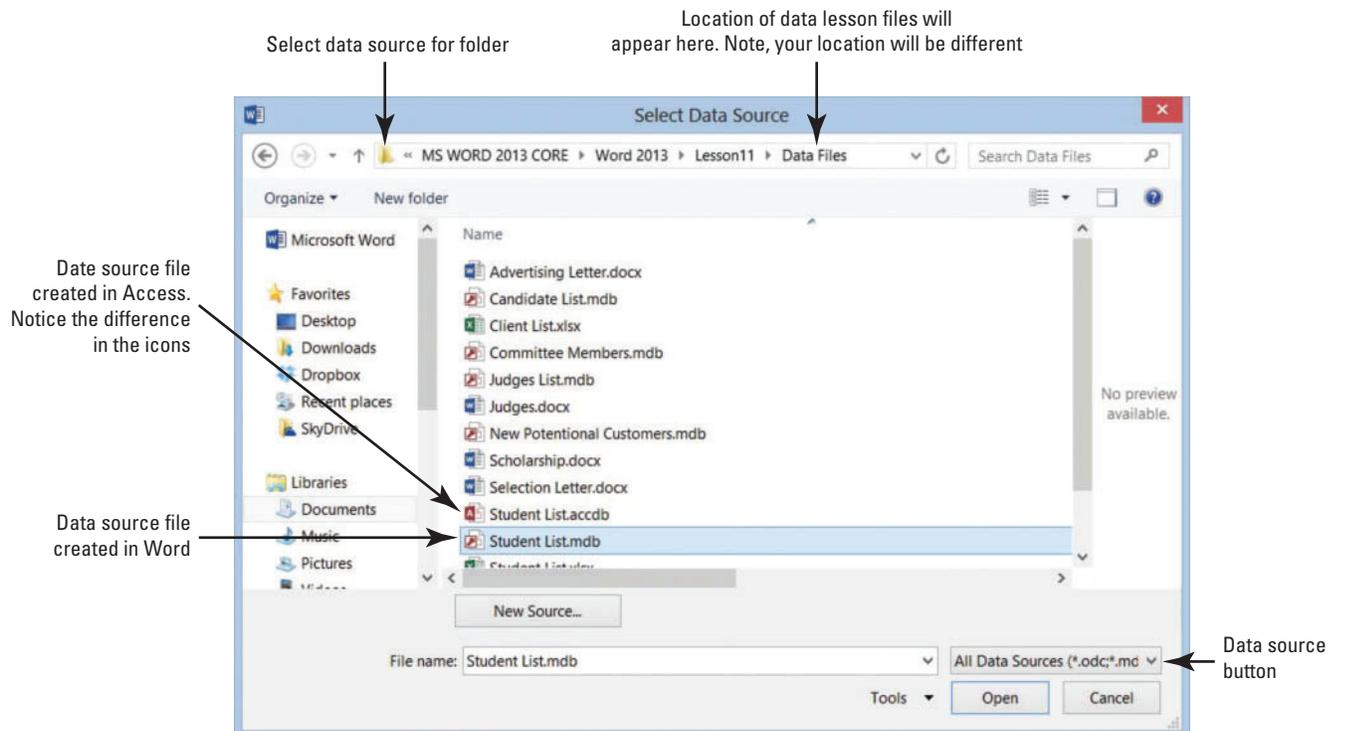
Select Data Source dialog box



4. Select the **Student List.mdb** as shown in Figure 11-7, and double-click or click the **Open** button.

Figure 11-7

Location for data file

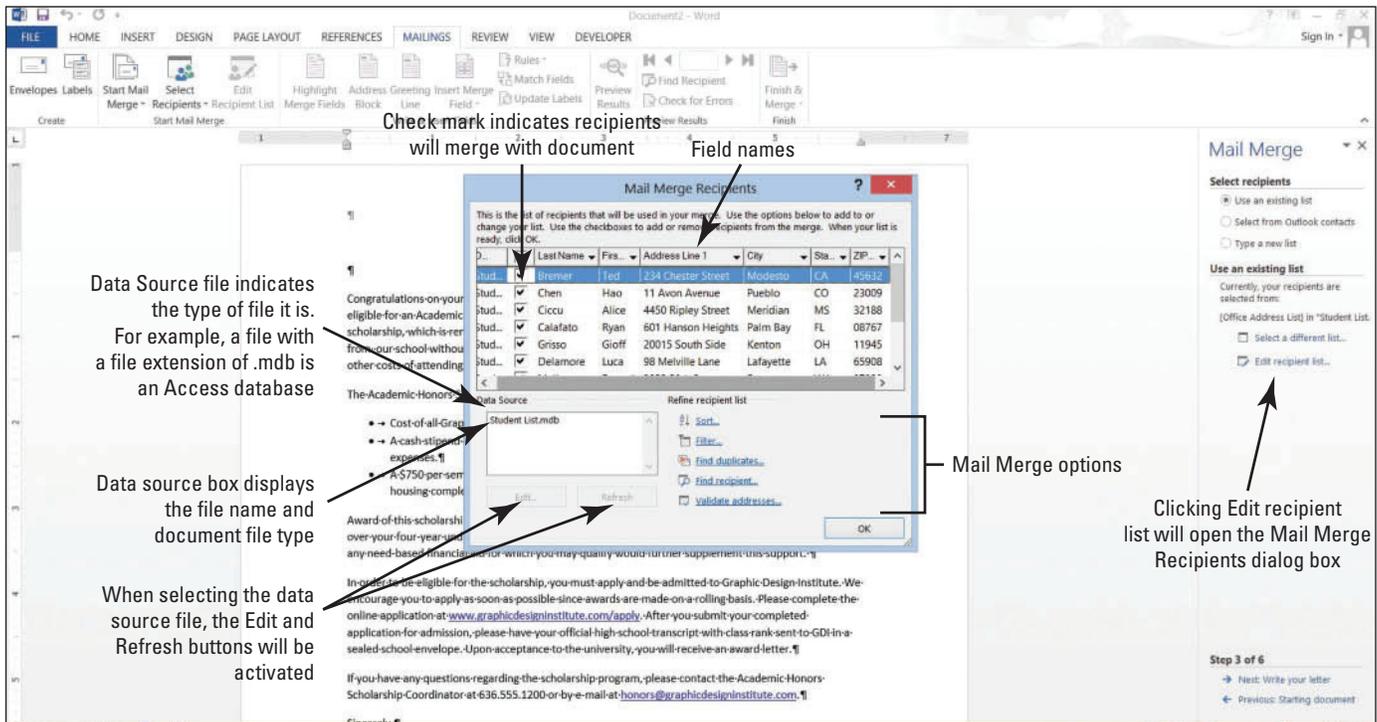


The icon listed for *Student List.mdb* is a database file created in Word—notice the difference in the icon between the database created in Word and Access (refer Figure 11-7). A **database** is a collection of information that is organized so that you can retrieve information quickly. The *Student List.mdb* file is the data source that will be merged with the letter in the document screen.

The *Mail Merge Recipients* dialog box opens as displayed in Figure 11-8. The check mark indicates that all recipients' fields will merge with the document. You can choose not to send a recipient a letter by unchecking the check box. When the document merges, all recipients with a check mark by their name will be merged with the document.

Figure 11-8

Mail Merge Recipients dialog box



5. Click **OK** to close the *Mail Merge Recipients* dialog box and return to the document screen.

STEP BY STEP

Step 4: Write Your Letter

1. At the bottom of the Mail Merge pane, click the **Next: Write your letter link**.

Because you have already opened an existing document, the document is ready for fields to be inserted.

Your insertion point should already be positioned on the blank line above the first paragraph to insert the current date.

2. Click the **Insert** tab, and then in the Text group, click the **Date & Time button**.

The *Date and Time* dialog box opens.

3. Click the third option and click **OK**. The current date is inserted in the document.

4. Press **Enter** twice.

In the Mail Merge pane, in the *Write your letter* section, it shows four links (see Figure 11-9). The Address block link contains the fields from the recipient's list, the Greeting line link contains the salutation, the Electronic postage link inserts the electronic postage, and the More items link opens the *Insert Merge Field* dialog box, which provides an option to insert fields individually.

Figure 11-9

Mail Merge pane Step 4 of 6

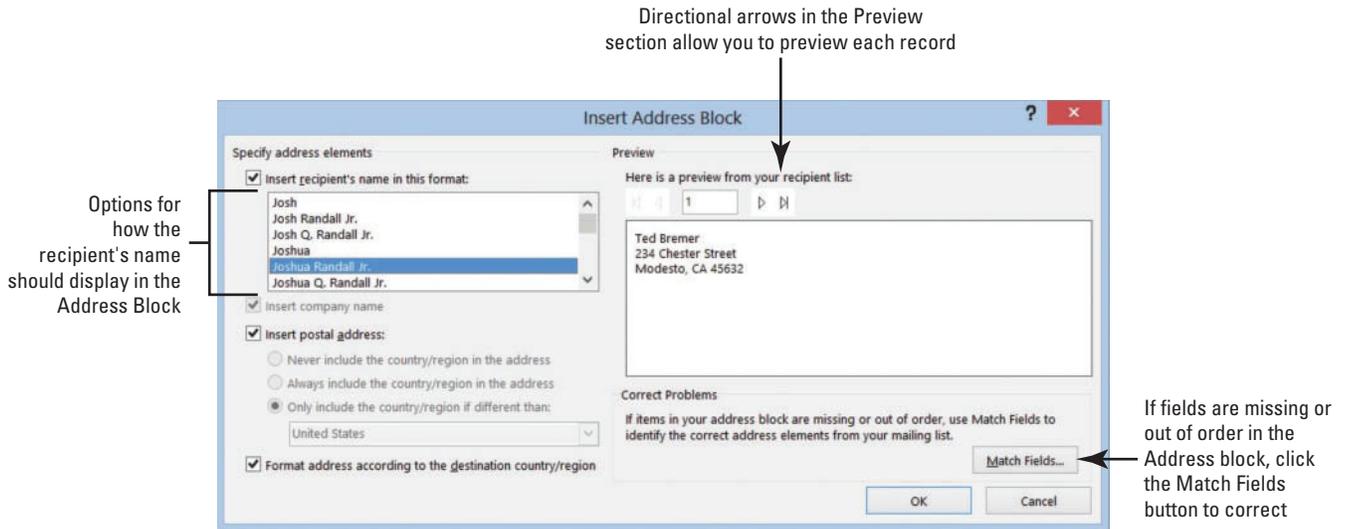


5. In the *Write your letter* section, click the **Address block link**.

The *Insert Address Block* dialog box opens as shown in Figure 11-10. Under *Specify address elements*, in the Insert recipient's name in this format list, the fifth option is selected with a specific format as displayed in the Preview section. On the Preview side, there are four arrows: First , Previous , Next , and Last . Notice that the First and Previous arrow buttons are grayed out. When these arrow buttons are shaded in gray, it indicates that these are not available because you are previewing the first record. The first recipient's name and address is displayed and when you click the Next or Last arrow, the First and Previous arrows will become available.

Figure 11-10

Insert Address Block
dialog box

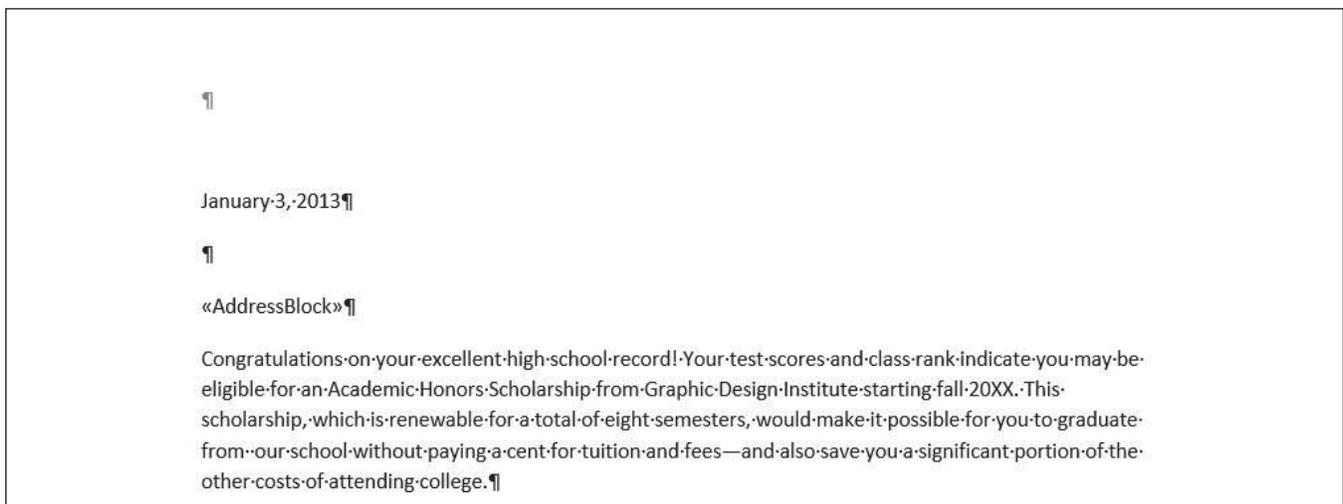


- Click the **Next arrow** and preview the ten records in the recipient list, and then click the **First** button to return to the first recipient.
- Click **OK**.

A field code <<Address Block>> is inserted in the document as shown in Figure 11-11. The field name is surrounded by **chevrons** (<< >>) which do not display in the merged document. When the document is merged, the *Address Block* will be replaced with the recipients' first and last name, address, city, state, and postal code.

Figure 11-11

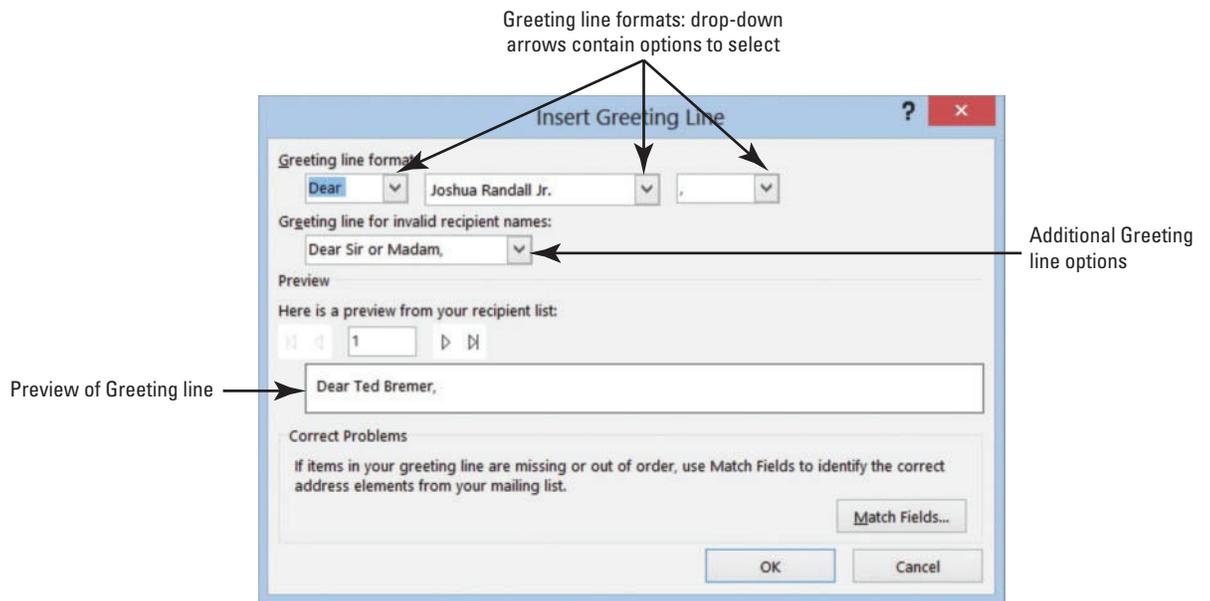
Address Block inserted in
document



- Press the **Enter key** once.
- Click the **Greeting line link** to open the *Insert Greeting Line* dialog box as shown in Figure 11-12. The drop-down arrows in the *Greeting line format* provide options to select the salutation, name, and punctuation. You use the salutation **Dear** for the letter.

Figure 11-12

Insert Greeting Line dialog box



10. Click the **drop-down arrow** next to *Joshua Randall Jr.* to view the options. Keep the default as the selection.

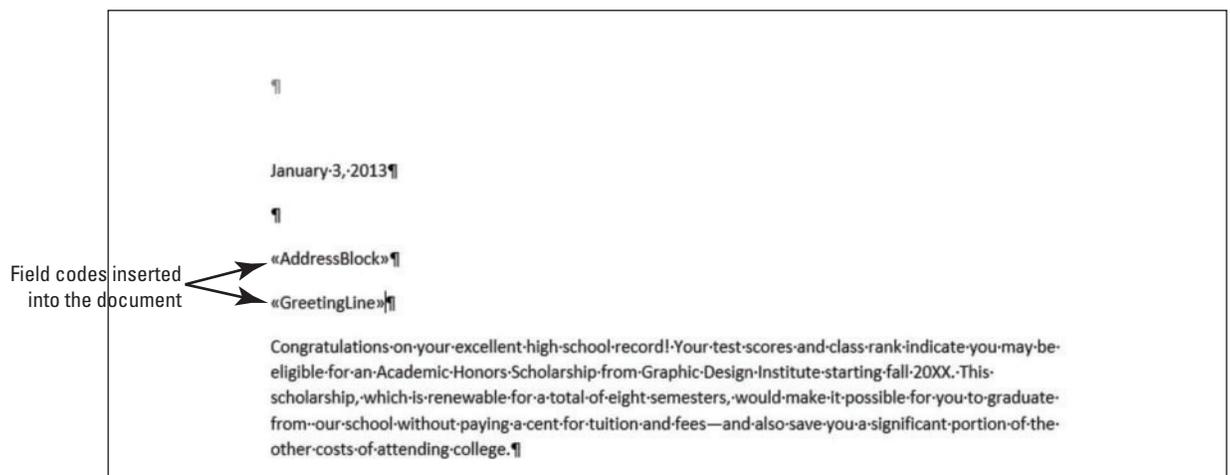
11. Click the **drop-down arrow** next to the comma and select the colon (:).

Take Note In the *Insert Greeting Line* dialog box, the comma is the default punctuation and is not used in most business letter formats.

12. Click **OK**. Your document should match Figure 11-13. You have inserted two field codes in your document.

Figure 11-13

Document with field codes

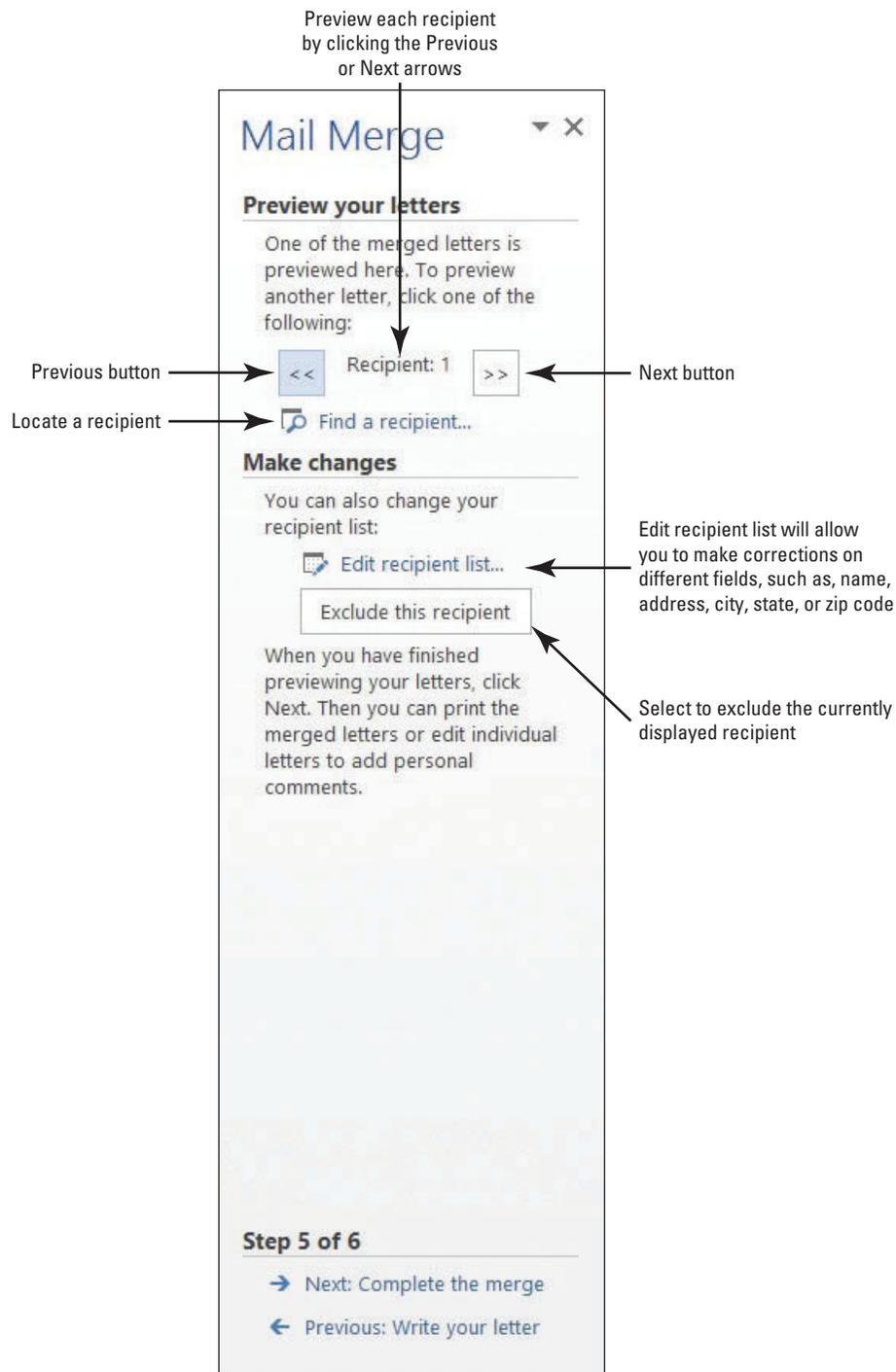


STEP BY STEP Step 5: Preview Your Letter

1. At the bottom of the Mail Merge pane, click the **Next: Preview your letters link**. Notice the first recipient, *Ted Bremer*, appears in the document. On the Mail Merge pane, preview each letter in the document screen by using the buttons as shown in Figure 11-14.

Figure 11-14

Mail Merge pane Step 5 of 6

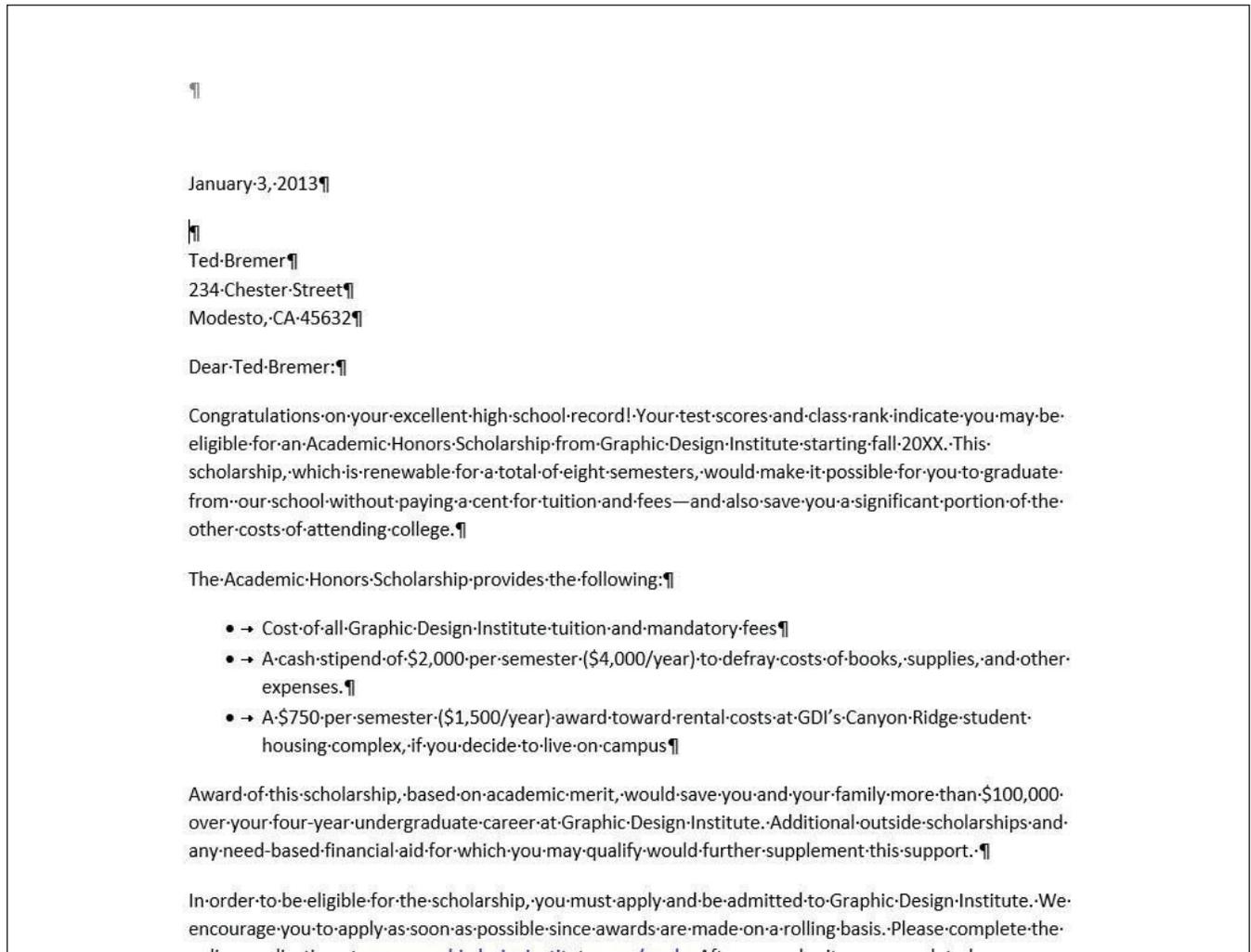


2. Click the **Next button**, preview each letter, and return to the first recipient. Before finalizing the merge, the mailing address contains extra spacing between the lines that need correction.

3. Select the text beginning with *Ted Bremer*, including the address through the zip code, 45632.
4. Now it is time to format the main letter with the correct spacing so that when you complete the merge, all letters will be updated. On the Home tab, in the Paragraph group, click the drop-down arrow to display the Line and Paragraph Spacing menu and select **Remove Space Before Paragraph**. This separates the Address Block from the salutation.
5. The document should display as shown in Figure 11-15. Preview each letter again by using the **Next** and **Previous** buttons on the Mail Merge pane and return to the first recipient. Each recipient should be in the correct format.

Figure 11-15

Formatted document

**STEP BY STEP****Step 6: Complete the Merge**

1. At the bottom of the Mail Merge pane, click the **Next: Complete the merge link** to advance to Step 6 as shown in Figure 11-16. The letter is already merged and ready to **Print** or you can edit each letter individually.

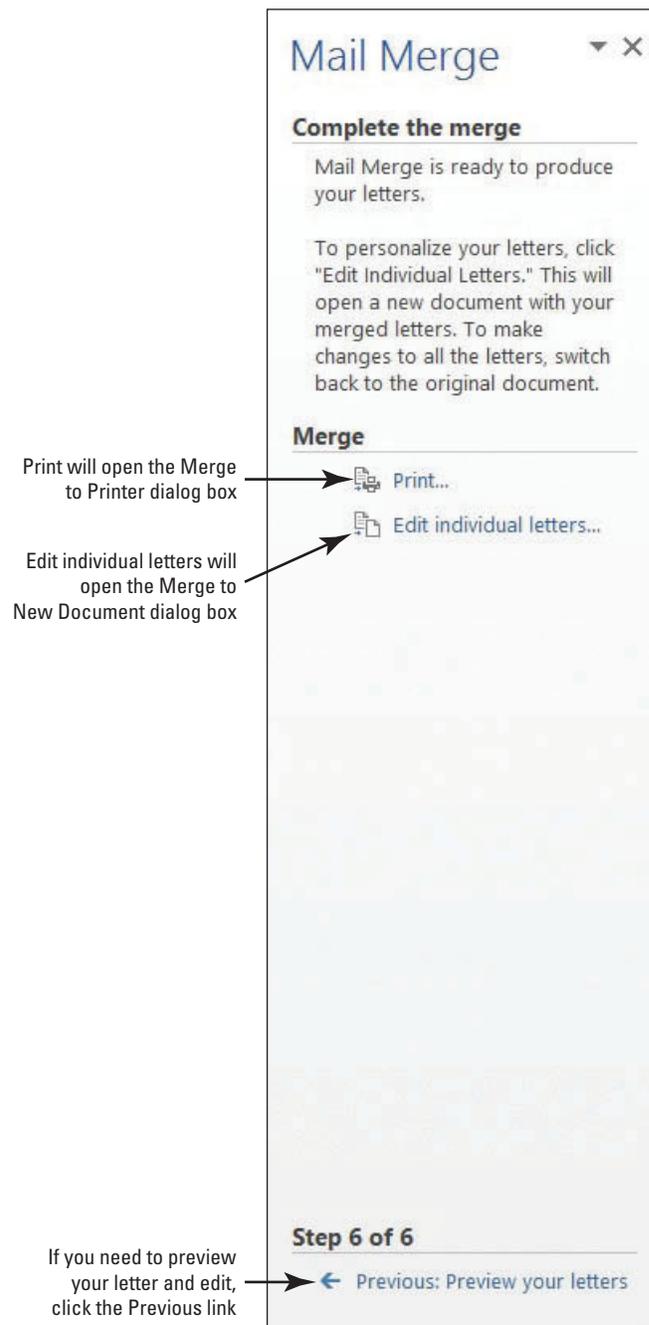
When you click the **Edit individual letters** link in the Merge section, the *Merge to New Document* dialog box opens. When you select the **All** option button, Word opens one new document with a copy of the main document for each record, and *Letters1* displays on the title bar. When you finish editing the letters, you are ready to save the letters—all letters will be saved as one document.

If your insertion point is on the third letter, and you click the **Edit individual letters** link in the Merge section of Step 6 and then select the option button for **Current Record**, only the third letter opens in a new screen as a new document and *Letters* followed by a number appears on the title bar. Edit the document and when you save the document, only the third letter will be saved with the changes made.

If you select the third option button **From** in the *Merge to New Document* dialog box, you type the beginning number to the ending number of the documents you want to merge. For example, if you want to merge letters 3 through 5, you type **3** in the From box and **5** in the To box.

Figure 11-16

Mail Merge pane Step 6 of 6



2. In the Mail Merge pane, in the Merge section, click **Print** to print each letter. The *Merge to Printer* dialog box opens with three options to select.
Selecting the **All option button** prints all letters, the Current record prints the record where your insertion point is located, and From is where you specify which records to print. For example, if you specify records 2 to 4, only those three records will print. Be careful, if you select the Print option for Step 6, you will not be given the opportunity to edit the letters.
3. Make sure the **All option button** is selected and click **OK** to print.
4. Now that you printed all letters, you now need to save the merged letter. Click the **Edit individual letters link** in the Merge section.
5. Click **OK** to open a new document with a letter to all recipients.
6. **SAVE** the merge document as **Merged Congratulation Letter** in the lesson folder on your flash drive, and then **CLOSE** the file.
7. **CLOSE** the Mail Merge pane.
8. The main document appears on the screen with the first record being displayed. In the Preview Results group on the Mailings tab, click the **Preview Results**  **button** to disable.
Disabling the **Preview Results button** displays the <<Address Block>> and <<Greeting Line>> field codes.
9. **SAVE** the main document as **Congratulation Letter** in the lesson folder on your flash drive, and then **CLOSE** the file.

PAUSE. LEAVE Word open to use in the next exercise.

Setting Up a Main Document Manually

You can begin working with Mail Merge by typing your letter, and then using an existing data source, creating your own data source list and typing your recipients' information, or using Outlook to get your contacts information. You don't need to have a database program installed on your computer because Word makes it easy to create your list of recipients. It is easy to create a table in Word because the fields are already identified for you and easy to customize. After setting up your document, the address block and greeting line are inserted the same way they were in the step-by-step Mail Merge Wizard. You can preview your results and check for errors using the tools available in the Preview Results group, and then perform the merge. In this exercise, you create a document, type information, insert an existing data source, insert the address block and greeting line, check for errors in the document, preview the letters, and merge.

STEP BY STEP

Set Up a Main Document Manually



1. Create a new blank document by selecting the **File tab**, and then click **New**, and click **Blank document**.
2. Click the **Mailings tab**, and in the Start Mail Merge group, click the **drop-down arrow** to display the Start Mail Merge menu.
3. Choose **Letters**.

PAUSE. LEAVE Word open to use in the next exercise.

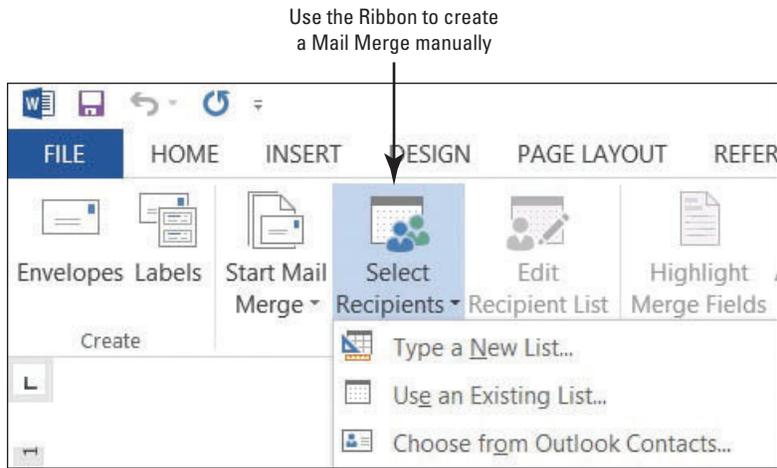
STEP BY STEP

Select Recipients

1. In the Start Mail Merge group, click the **Select Recipients**  **button** to display the menu as shown in Figure 11-17.

Figure 11-17

Select Recipients menu



There are three options available. (You will open an existing data source file from your lesson folder. Notice some of the commands on the Ribbon are faded, therefore, not available until a data source file is opened.)

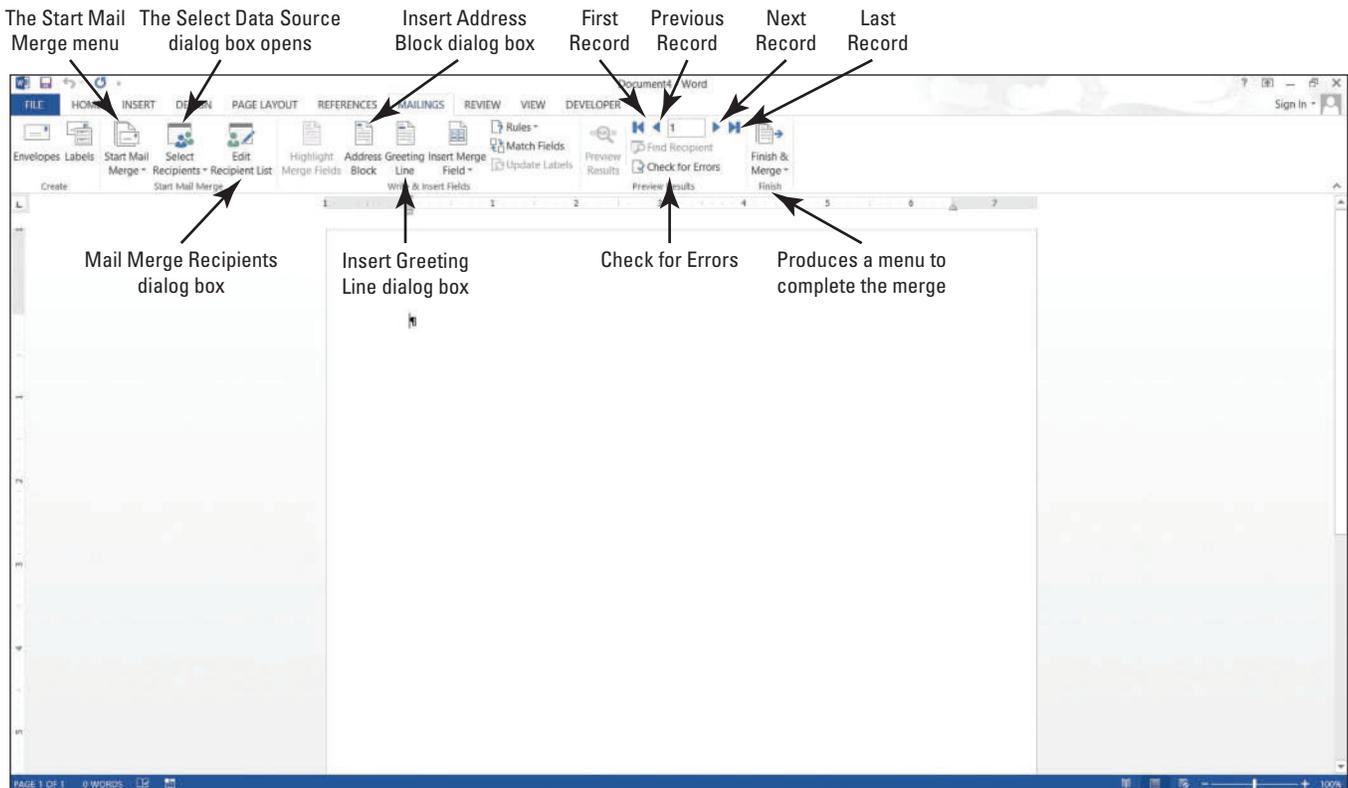
2. Select **Use an Existing List**. The *Select Data Source* dialog box opens. Use the scroll bar to locate your flash drive and navigate to your data files for the lesson folder.
3. **OPEN** the *Student List.accdb* data source file from the lesson folder. The *Student List* file is a database.



After opening the data source file, most of the commands on the Mailings tab on the Ribbon become active (see Figure 11-18). When selecting a data source file, this file can be a database, an Excel spreadsheet, a table in Word, or it can be opened from your Outlook contacts.

Figure 11-18

Mailings tab on the Ribbon



- At the insertion point, type **March 19, 20XX**. Press the **Enter** key twice. By default, the Spacing After is set to 8 pt and later you will format the document to an appropriate business format.

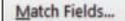
Take Note If the formatting of the date changes, press *Ctrl+Z* to Undo.

PAUSE. LEAVE the document open to use in the next exercise.

STEP BY STEP

Prepare Merge Fields

USE the document open from the previous exercise.

- On the Mailings tab, in the Write & Insert Fields group, click the **Address Block**  **button**. The *Insert Address Block* dialog box opens.
When using the Mail Merge Wizard or completing the Mail Merge manually, the same dialog boxes are opened.
- Notice that the street address is missing in the preview area. Click the **Match Fields**  **button**. To correct the error, select the **drop-down arrow** by Address 1 and select the **Address Line** field. Click **OK** to close the *Match Fields* dialog box.
- Click **OK** to accept the address settings with the correction (refer to Figure 11-10).
- Press **Enter** once.
- On the Mailings tab, in the Write & Insert Fields group, click the **Greeting Line**  **button**. The *Insert Greeting Line* dialog box opens.
- For the Greeting Line format, the salutation *Dear* will be used. You use the default where *Joshua Randall Jr.* is shown.
- Change the comma to a colon.
- Click **OK**. Press **Enter** once.

PAUSE. LEAVE the document open to use in the next exercise.

STEP BY STEP

Write the Letter

USE the document open from the previous exercise.

- Type the following letter:
The president of the college, Dr. Jose A. Torres, is extending an invitation to all students who received scholarships for the next academic semester. The Graphic Design Institute recognizes all students for their academic excellence. A reception is being held in your honor on March 29 at 12 noon in the President's Conference Room 19. [Press **Enter** once.]
Please confirm your attendance by calling 915-999-9999. [Press **Enter** once.]
Regards, [Press **Enter** twice.]
Jerry Wright [Press **Shift+Enter** to insert a line break.]
Scholarship Committee Chair

PAUSE. LEAVE the document open to use in the next exercise.

STEP BY STEP

Preview the Document

USE the document open from the previous exercise.

- In the Preview Results group, click the **Preview Results**  **button**. The first recipient appears. Click the **Next Record arrow**  **button** to preview the letters for each recipient.

2. Disable Preview Results by clicking the **Preview Results button** again.
3. Place the insertion point in the <<Address Block>> field. Click the **Home tab**, and then in the Paragraph group, click the **Line and Paragraph Spacing button**, and then click **Remove Space After Paragraph**.
4. Place the insertion point in the <<Greeting Line>> field and click the **Page Layout tab**. In the Paragraph group, click the **Spacing Before up arrow** until you see **6 pt**. The Spacing Before is increased by 6 pts and separates the address block and greeting line.
5. On the Page Layout tab, in the Page Setup group, click the **Margins button**, and then click **Custom Margins**. Type **2** in the Top box to change the top margin. Click **OK**.
Customized letterheads are used by organizations to print their letters. The top margin must be adjusted to avoid text printing over the organization's logo.
6. Click the **Mailings tab**, and then in the Preview Results group, click the **Preview Results button** to view the formatting changes made to the document. After you finish your review, disable **Preview Results**.
7. The main document is the document that contains the body of the letter as well as the Address Block and Greeting Line merge codes.
8. **SAVE** the main document as **Reception Letter** in the lesson folder on your flash drive.
Saving the main document as a separate document allows you to merge with a new data source file—when you need to use the same letter again but with a different recipient list. When you open a main document that contain field codes, Word asks you for the data source file.

PAUSE. LEAVE the document open to use in the next exercise.

Take Note Once the main document has been set up, you can format at the beginning of the mail merge process.

EXECUTING MAIL MERGE

The Bottom Line

The final steps in a mail merge are to check for errors, preview the merge, and finalize the merge. The Check for Errors feature mimics the merge before you complete the final merge and print process. If there is an error, you can correct it in the main document. For instance, if you used the Insert Merge Field button and forgot to insert the field for city, you would see the error in the document. To correct the error, make sure you do this in the main document.

STEP BY STEP

Check for Errors

USE the document open from the previous exercise.

1. On the Preview Results group, click the **Check for Errors button**. The *Checking and Reporting Errors* dialog box opens as shown in Figure 11-19.

Figure 11-19
Checking and Reporting
Errors dialog box



2. Select the first option, **Simulate the merge and report errors in a new document**.
3. Click **OK**.
4. A prompt appears indicating *No mail merge errors have been found in Reception Letter*. Click **OK**.

PAUSE. LEAVE the document open to use in the next exercise.

STEP BY STEP

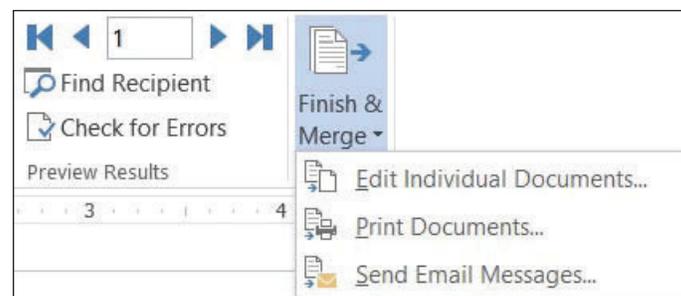
Complete the Merge

USE the document open from the previous exercise.

1. In the Finish group, click the **drop-down arrow** to display the Finish & Merge menu as shown in Figure 11-20.

Figure 11-20

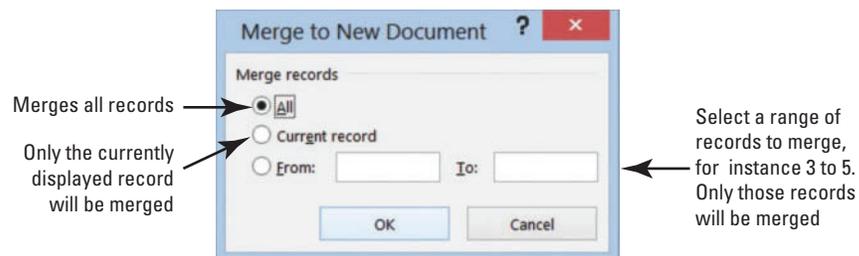
Finish & Merge menu



2. Select **Edit Individual Documents**. The *Merge to New Document* dialog box opens as shown in Figure 11-21.

Figure 11-21

Merge to New Document dialog box



The All option merges all letters to a new document, Current record merges only that record on which your insertion point is positioned, and in the From option, you type the first record and end record to merge. For instance, to merge only records 2 and 3, you type **2** to **3**.

3. For this exercise, in the From section, type **3** in the first box and in the To box, type **5**. Click **OK**. A new document is produced that displays letters for records 3 through 5 in one document. Scroll through the document to preview that the document is ready to print.
4. **SAVE** the merged document as **Merged Reception Letter** in the lesson folder on your flash drive, and then **CLOSE** the file.
5. **CLOSE** the main document **Reception Letter** and a prompt appears asking, *Do you want to save changes made to Reception Letter?* Click **SAVE**.

When you save the main document with the field codes, you will be able to return to your document and recipient list and use the tools available in the Mailings tab. You can also edit the list of recipients and open another data source to send the same letter to another group. When saving the main document, make sure you turn off the Preview Results.

PAUSE. LEAVE Word open for the next exercise.



Troubleshooting A document must be opened in Word for the mail merge commands to be available.

MERGING A DOCUMENT WITH A DIFFERENT FILE FORMAT

The Bottom Line

Previously in this lesson, you learn to use two different methods to merge an existing data source with a main document. One of the data sources was created in Word whereas the other data source was created using a database application; and the document was created in Word. Data sources can be used from other programs such as an Excel worksheet, an Access table or query, an Outlook contact list, or a table created in Word. Each of these different formats include fields—name, address, city, state, zip code, and so on. If the format does not match, then you can use the Match Fields button to correct any errors. In this exercise, you learn to merge an existing letter with different file formats using one of the two methods—using the Mail Merge Wizard or setting up a mail merge manually.

STEP BY STEP

Merge a Letter with a Table

1. **OPEN** the *Scholarship* document. (The same letter used in a previous exercise will be used.)
2. Click the **Mailings tab**, and in the Start Mail Merge group, click the **Start Mail Merge button**. Choose **Letters**.
3. In the Start Mail Merge group, click the **Select Recipients button** to display the menu. 
4. Select **Use an Existing List**. The *Select Data Source* dialog box opens. Use the scroll bar to locate your flash drive and navigate to your data files for the lesson folder.
5. **OPEN** the *Student Listing.docx* data source file from the lesson folder. The Student Listing file was created as a table in Word. The data source file is a table that contains fields as headers with the records displayed within the table.



Cross Ref

In Lesson 6, you learn to create tables using different methods.

6. At the insertion point, type **November 28, 20XX**. Press **Enter** twice.

Take Note

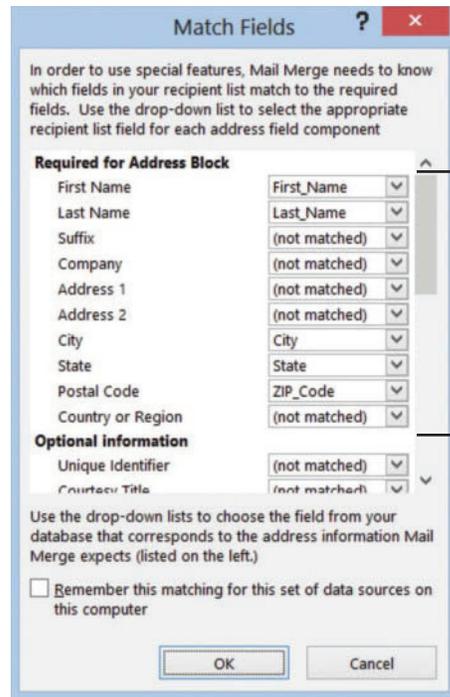
If the formatting of the date changes, press **Ctrl+Z** to **Undo**.

7. Click the **Address Block button** to open the *Insert Address Block* dialog box. Notice that the preview area does not display the street address.
8. Click the **Match Fields** button to correct the problem. The *Match Fields* dialog box opens as shown in Figure 11-22.

Under *Required for Address Block*, Address 1 displays *Not Matched* because the field heading in the table is listed as Address Line and does not directly match the Address Block in Word.

Figure 11-22

Match Fields dialog box



If a field does not match, Word identifies it and allows you to correct the error. Notice Address 1 indicates that it does not match. Click the drop-arrow and select the field

9. Click the **drop-down arrow** next to Address 1, select **Address_Line**, and then click **OK** to close the dialog box.
10. Review the preview area and notice that the problem has been corrected and the address is now displayed correctly.
11. Click **OK** to close the *Insert Address Block* dialog box.
12. Insert the Greeting line and change the punctuation to a colon.
13. Click the **Preview Results button** and notice the spacing in the Address Block needs to be formatted correctly. Click the **Preview Results** button again to see the field codes.
14. Select the **<<Address Block>>** and on the Page Layout tab, decrease the Spacing Before to **zero**.
15. Change the top margin to **2"** and the left and right margins to **1"**.
16. Preview the results before finishing the merge.
17. Click the **Finish & Merge button**, and then click **Edit Individual Documents**.
18. In the *Merge to New Document* dialog box, keep the defaults and click **OK**. The document opens a new screen with the merged document displaying all records.
19. **SAVE** the document as **Merged Academic Honors Scholarship** in the lesson folder on your flash drive, and then **CLOSE** the file.
20. Make sure you turn off the Preview results so that the field codes are displayed in the main document. **SAVE** the main document as **Academic Honors Scholarship Letter** in the lesson folder on your flash drive, and then **CLOSE** the file.

PAUSE. LEAVE Word open for the next exercise.

STEP BY STEP

Merge a Letter with Excel

In this exercise, you learn to merge a letter with Excel using the wizard, Ribbon, and insert field codes to complete the mail merge process.

OPEN the **Scholarship** document from the lesson folder.

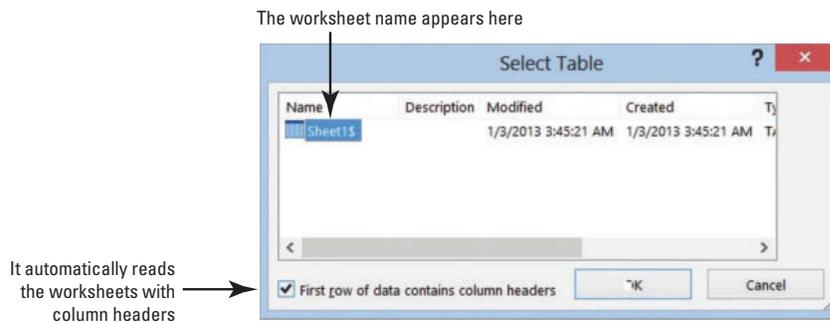
1. Click the **Start Mail Merge button** from the Mailings tab and select the **Step-by-Step Mail Merge Wizard** to open the Mail Merge pane.



2. In the *Select document type* section, Letters is the default. Click **Next: Starting document**.
3. Select the **Use the current document option button**.
4. Click **Next: Select recipients** from the Mail Merge pane to advance to the next step.
5. In the *Select recipients* section, the defaults will be used. Click the **Browse button** and locate the **Student List.xlsx** file. The format for this document is a Microsoft Excel file. In the *Select Data Source* dialog box, locate the Student List from the lesson folder—use the scroll bar to view the Type—it should read *Microsoft Excel Worksheet*. Click **Open**.
6. The *Select Table* dialog box opens as shown in Figure 11-23. The selected First row of data contains column headers check box indicates that Word automatically recognizes the headings in the worksheet. Click **OK**.

Figure 11-23

Select Table dialog box

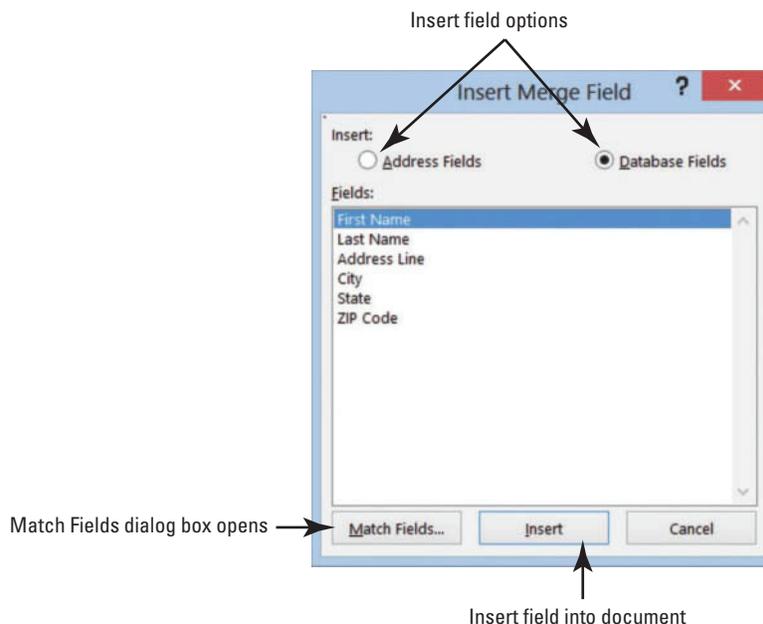


The *Mail Merge Recipients* dialog box opens. Notice that under the Data Source heading, it shows the file data source as **Student List.xlsx**.

7. Click **OK** to close the dialog box.
8. Close the Mail Merge pane.
9. Position the insertion point at the beginning of the document and insert the current date.
10. Press **Enter** twice.
11. Click the **Insert Merge Field button** to open the *Insert Merge Field* dialog box (see Figure 11-24).

Figure 11-24

Insert Merge Field dialog box



12. With the *First Name* selected, click the **Insert button** to insert the <<First_Name>> field code in the document.
13. Click the **Close button** to close the *Insert Merge Field* dialog box. Press the **spacebar** once.
14. Click the **Insert Merge Field drop-down arrow** to display the fields. This is another way to also insert field codes in a document.
15. Select *Last_Name* to insert the <<Last_Name>> field code in the document.
16. Press **Enter** to create a blank line.
17. Click the **Insert Merge Field drop-down arrow** and select *Address_Line* to insert the <<Address_Line>> field code in the document.
18. Press **Enter** to create a blank line.
19. Click the **Insert Merge Field drop-down arrow** and select **City** to insert the <<City>> field code in the document.
20. Type a comma after <<City>> and press the **spacebar** once.
21. Click the **Insert Merge Field drop-down arrow** and select **State** to insert the <<State>> field code in the document; press the **spacebar** once.
22. Click the **Insert Merge Field drop-down arrow** and select **ZIP_Code** to insert the <<ZIP_Code>> field code in the document.
23. Press **Enter** once to create a blank line.
24. Type **Dear** and press the **spacebar** once.
25. Click the **Insert Merge Field drop-down arrow** and select *First_Name* to insert in the document.
26. Press the **spacebar** once.
27. Click the **Insert Merge Field drop-down arrow** and select *Last_Name* to insert in the document.
28. Type a colon after <<Last_Name>>.

Notice the spacing between the lines of the field codes.
29. Select <<First_Name>> through <<ZIP_Code>>.
30. On the Page Layout tab, decrease the Spacing Before to **zero** and change the top margin to **2"** and the left and right margins to **1"**. Preview the results before finishing the merge.
31. Click the **Finish & Merge button**, and then click **Edit Individual Documents**.
32. In the *Merge to New Document* dialog box, keep the defaults and click **OK**. A new document appears, with the merged document displaying all records.
33. **SAVE** the document as **Merged Academic Scholarship** in the lesson folder on your flash drive, and then **CLOSE** the file.

Make sure you turn off the Preview Results so that the field codes are displayed in the main document and close the Mail Merge pane.
34. **SAVE** the main document as **Academic Scholarship Letter** in the lesson folder on your flash drive, and then **CLOSE** the file.

PAUSE. LEAVE Word open for the next exercise.

STEP BY STEP

Merge a Letter with Access

In this exercise, you reinforce what you learned in merging a document with a different file type.

OPEN the **Scholarship** document from the lesson folder.

1. Click the **Start Mail Merge button** from the Mailings tab and select the **Step-by-Step Mail Merge Wizard** to open the Mail Merge pane.
2. In the *Select document type* section, Letters is the default. Click **Next: Starting document**.
3. Select the **Use the current document option button**.
4. Click **Next: Select recipients** from the Mail Merge pane to advance to the next step.



5. In the *Select recipients* section, the defaults will be used. Click the **Browse button** and locate the *Student List.accdb* file. The format for this document is a Microsoft Access database (refer to Figure 11-7 to review the database icon). In the *Select Data Source* dialog box, locate the *Student List.accdb* file from the lesson folder—use the scroll bar to view the Type—it should read *Microsoft Access Database*.
6. Click **Open**.
The *Mail Merge Recipients* dialog box opens. Notice that under the *Data Source* heading and preview area, the file data source displays as *Student List.accdb*.
7. Click **OK** to close the *Mail Merge Recipients* dialog box.
8. Click **Next: Write your letter**.
9. Position the insertion point at the beginning of the document and insert the current date.
10. Press **Enter** twice.
11. Insert the Address Block and notice that the street address is missing in the preview area.
12. Click the **Match Fields** **button** (refer to Figure 11-22). To correct the error, select the drop-down arrow and select the **Address Line** field. Click **OK**.
13. Click **OK** again.
14. Press **Enter** once.
15. Insert the Greeting line, accept the default settings, and click **OK**.
16. Click the **Preview Results button** and notice the spacing in the Address Block needs to be formatted correctly. Select the **<<Address Block>>** and in the Page Layout tab, decrease the Spacing Before to **zero** and change the top margin to **2"** and the left and right margins to **1"**. Preview the results before finishing the merge.
17. Click the **Finish & Merge button**, and then click **Edit Individual Documents**.
18. In the *Merge to New Document* dialog box, keep the defaults and click **OK**. A new document appears, with the merged document displaying all records.
19. **SAVE** the document as *Merged Academic Scholarship Letter* in the lesson folder on your flash drive, and then **CLOSE** the file.
20. Make sure you turn off the Preview Results so that the field codes are displayed in the main document and close the Mail Merge pane. **SAVE** the main document as *Academic Scholarship Main Letter* in the lesson folder on your flash drive, and then **CLOSE** the file.

PAUSE. LEAVE Word open for the next exercise.

CREATING ENVELOPES AND LABELS

The Bottom Line

After a document has been merged, the next step is to create envelopes using the same data source. The process is similar; the difference is selecting the type of document to be merged. Businesses usually have their own preprinted envelopes that have their company address on it. Check with your instructor for your school address so that you can type your school address in the return address area. In this exercise, you create envelopes and labels.

STEP BY STEP

Create an Envelope

OPEN a blank document.

1. Click the Mailings tab, and in the Start Mail Merge group, click the **Start Mail Merge button**.
2. Choose **Envelopes**.

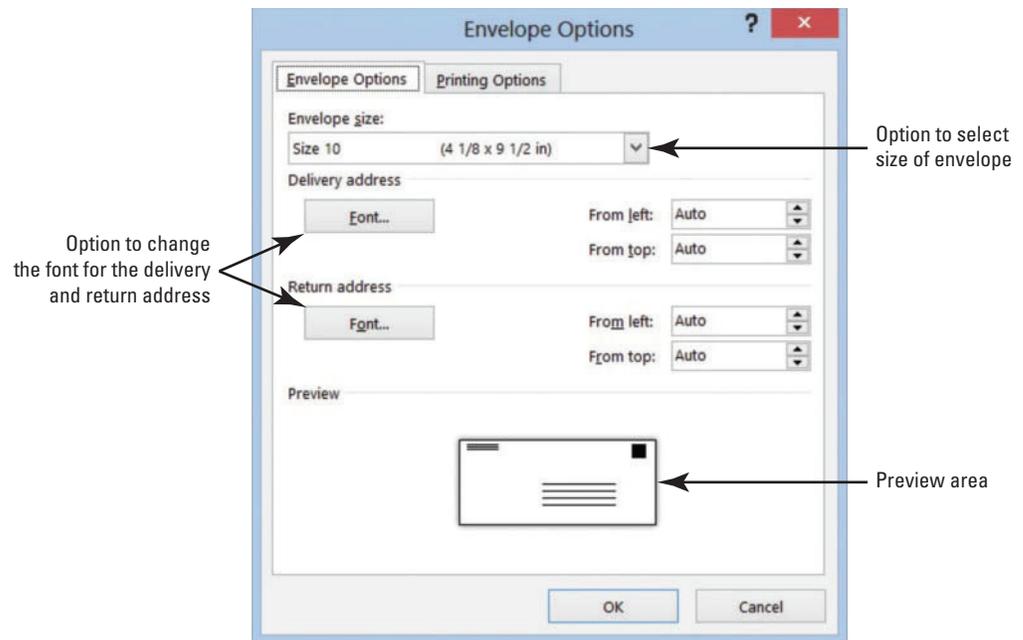
The *Envelope Options* dialog box opens as displayed in Figure 11-25.

3. Use the default settings, and click **OK**.

In this dialog box you have the option to change the size of the envelope and font for the delivery and return address.

Figure 11-25

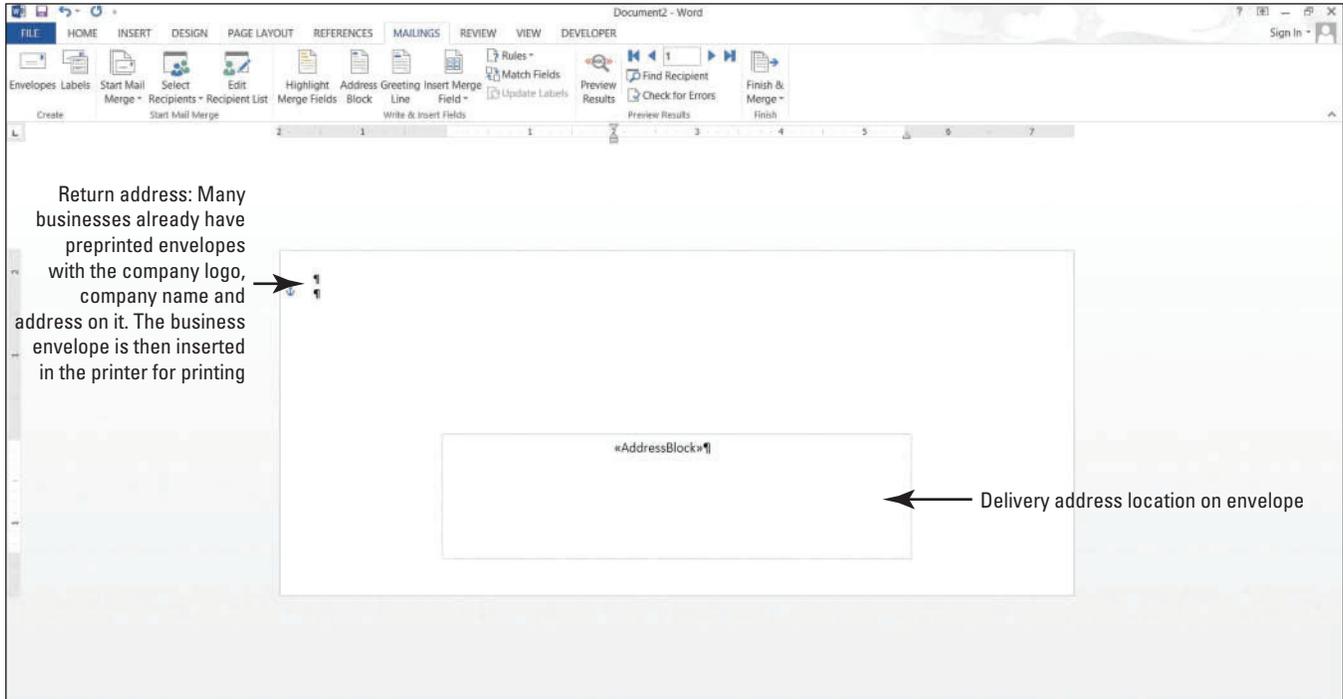
Envelope Options dialog box



4. Click the **Select Recipients** button and select **Use an Existing List**. The *Select Data Source* dialog box opens. Navigate to your data files for the lesson folder.
5. **OPEN** the *Student List.accdb* (database) data source file from the lesson folder. Each time you open a data source file, the commands on the Ribbon become active.
6. Place the insertion point in the delivery address location in the envelope, and then click the **Address Block** button.
As shown in the preview area, the fields do not match and the address needs to be corrected.
7. Click the **Match Fields** button.
8. To correct the Address 1 field, click the **drop-down arrow** and select **Address Line**. Click **OK**. The address has been corrected and is ready to be merged.
9. Click **OK** again to close the *Insert Address Block* dialog box.
10. Preview the envelopes by clicking the **Preview Results** button, and then review each record in the envelope and return to the first record. Turn off the Preview Results. The envelope should match Figure 11-26.

Figure 11-26

Sample envelope displaying field code



11. Complete the merge by clicking the **Finish & Merge** button.
12. Select **Edit Individual Documents**, and then click **OK**.
Each record has its own envelope and you are ready to print. Check with your instructor before printing.
13. **SAVE** the merged envelopes document as **Merged Scholarship Envelope** in the lesson folder on your flash drive, and then **CLOSE** the file.
Make sure you turn off the Preview Results so that the field codes are displayed in the main document.
14. **SAVE** the main document as **Scholarship Main Envelope** in the lesson folder on your flash drive, and then **CLOSE** the file.

PAUSE. LEAVE Word open for the next exercise.

STEP BY STEP

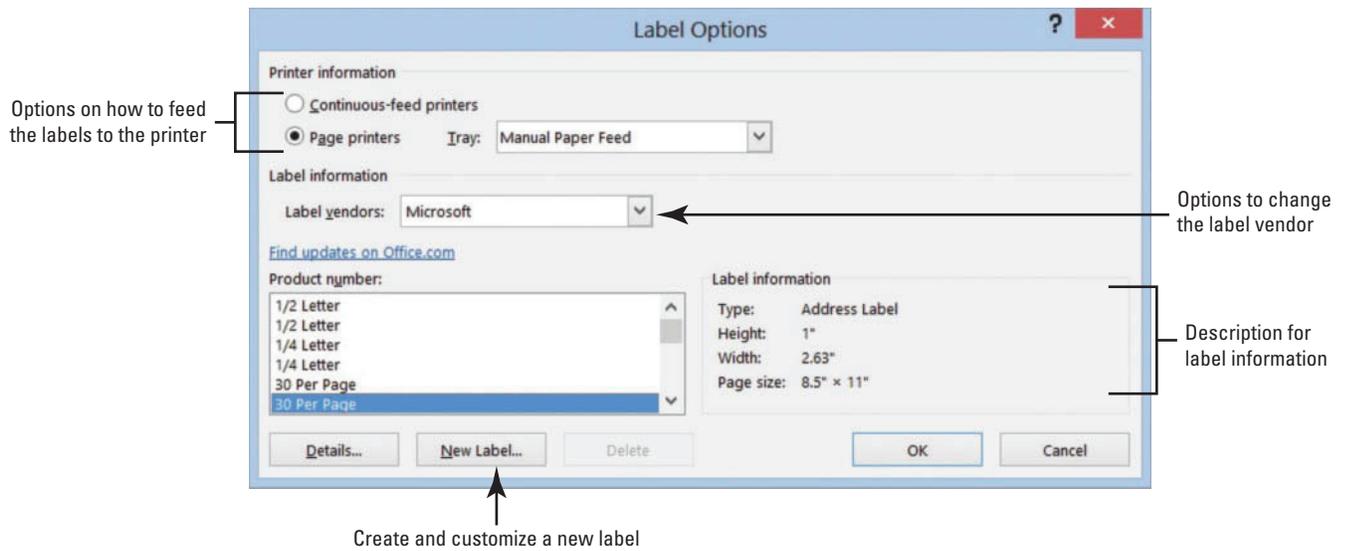
Create Labels

OPEN a blank document.

1. From the Mailings tab, in the Start Mail Merge group, click the **Start Mail Merge** button. Choose **Labels**.
The *Label Options* dialog box opens as displayed in Figure 11-27. You have options to change vendors and product number.
2. Change the Label vendors option to **Microsoft**. Change the Product number to **30 Per Page** with the dimensions of Type: **Address Label**, Height: **1"**; Width: **2.63"**; Paper size: **8.5" x 11"** as shown in Figure 11-27. Click **OK**.
3. Click the **Select Recipients** button and select **Use an Existing List**. The *Select Data Source* dialog box opens. Navigate to your data files for the lesson folder.
4. **OPEN** the **Student List.accdb** (database) data source file from the lesson folder.
As discussed, each time you open a data source file the commands on the Ribbon become active. The first label appears blank whereas the remaining labels display <<Next Record>>.

Figure 11-27

Label Options dialog box



5. Click the **Address Block** button to begin inserting the Address Block. Notice that the fields do not match.
6. Correct the address by clicking the **Match Fields** button.
7. To correct the Address 1 field, click the **drop-down arrow** and select **Address Line**.
8. Click **OK**.

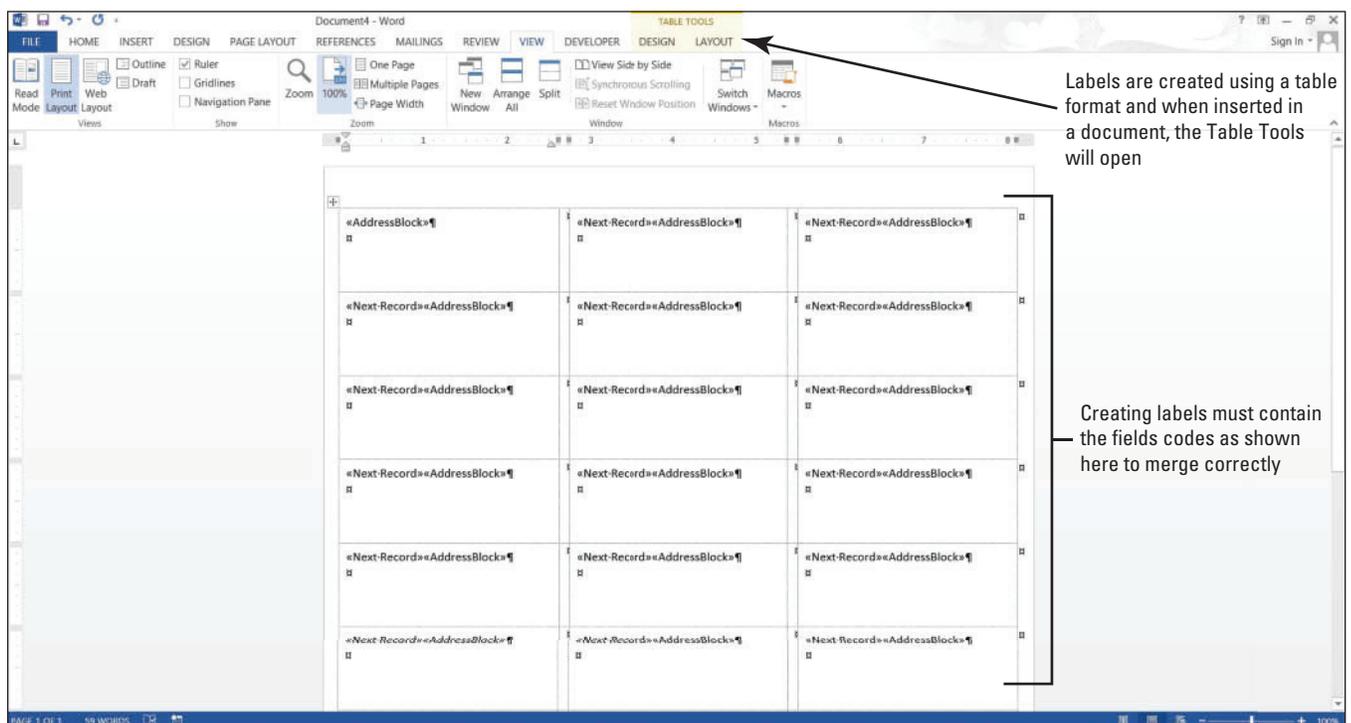
The address line has been corrected as shown in the preview area.

9. Click **OK** again to close the *Insert Address Block* dialog box.
10. Click the **Update Labels** button in the Write & Insert Fields group. The Address Block field appears on each label as shown in Figure 11-28.

Labels are created using the table format and when opened, the Table Tools opens. The skills that you learn in Lesson 6 can be applied to format labels.

Figure 11-28

Sample label document displaying field codes



11. Preview the labels by clicking the **Preview Results button**. Each record appears on the label. Turn off the Preview Results.
12. The next step is to complete the merge. Click the **Finish & Merge button**. Select **Edit Individual Documents**, and then click **OK**.
13. **SAVE** the merged labels document as **Merged Scholarship Label** in the lesson folder on your flash drive, and then **CLOSE** the file.
14. **SAVE** the main labels document as **Scholarship Main Label** in the lesson folder on your flash drive, and then **CLOSE** the file.

CLOSE Word.



Workplace Ready

USING MAIL MERGE

Every business creates correspondence as part of its business transaction. It personalizes these by inserting its names, company name, address, city, state, and zip code. The business letters can be standardized and each individual receives an original copy. Learning mail merge saves time from having to type each individual letter separately. By using the mail merge command, you can save time and money from having to sort manually or typing the information manually.

SKILL SUMMARY

In this lesson you learned to:	Exam Objective	Objective Number
Set Up Mail Merge		
Execute Mail Merge		
Merge a Document with a Different File Format		
Create Envelopes and Labels		

Knowledge Assessment

Multiple Choice

Select the best response for the following statements.

1. Which tab contains the commands used to perform mail merges?
 - a. Merge
 - b. Mailings
 - c. Mail Merge
 - d. Insert
2. What do you do first when performing a mail merge?
 - a. Set up the main document.
 - b. Add merge fields.
 - c. Preview the results.
 - d. Choose the recipients.
3. Which type of document can be merged with a data source file?
 - a. Letter
 - b. Label
 - c. Envelope
 - d. All of the above

4. Which is NOT an option for selecting a list of recipients for the mail merge?
 - a. Download from an online directory
 - b. Type a new list
 - c. Use an existing list
 - d. Use your Outlook contacts
5. To merge information into your main document, you must first connect the document to a(n):
 - a. address validator.
 - b. form letter.
 - c. data source.
 - d. website.
6. When mail merge fields have been inserted into a document, Word will automatically replace them with information from a data source when the:
 - a. main document is saved.
 - b. recipients are selected.
 - c. merge fields are inserted.
 - d. mail merge is performed.
7. Mail merge fields are enclosed by:
 - a. quotation marks (" ")
 - b. chevrons (<< >>)
 - c. apostrophes (' ')
 - d. brackets ([])
8. When previewing the mail merge document, Word replaces the merge fields with:
 - a. sample data.
 - b. blank spaces.
 - c. actual data.
 - d. highlighted headings.
9. When a user selects Current Record using the Finish & Merge menu, which document appears in a new document window?
 - a. All documents
 - b. Only the document where the insertion point is placed while previewing
 - c. Records 1 and 3
 - d. It will not appear in a new document window
10. When you save the main document, you also save:
 - a. all the data in an Excel spreadsheet.
 - b. any other open file.
 - c. the default return address for Word.
 - d. its connection to the data source.

True/False

Circle **T** if the statement is true or **F** if the statement is false.

- T F** 1. In a merge, the main document does not contain the same text or graphics for each merged document.
- T F** 2. The data source is a file that contains the information to be merged into the main document (for example, names and addresses).
- T F** 3. Mail merge fields are inserted in a document using a data source file.
- T F** 4. It is a good practice to check for errors before completing the merge process.
- T F** 5. Word makes the process easy to use an existing list of recipients in a new mail merge document.
- T F** 6. The Address Block also includes the Greeting Line.
- T F** 7. The edit recipient's list allows you to make changes to the list of recipients and decide which one will receive your letter.
- T F** 8. Fields correspond to the column heading in the data source.
- T F** 9. Word generates a copy of the main document for each record when you perform a mail merge.
- T F** 10. You cannot preview a document before merging.

Competency Assessment

Project 11-1: Creating a Mail Merge Letter for the Contest Judges

As the director of business and marketing education at the School of Fine Arts, you have recruited professional members of the local business community to serve as volunteers to judge a state contest for high school business students. You are sending a mail merge letter that contains necessary information to the judges and want to set up the main document.



GET READY. LAUNCH Word if it is not already running.



1. **Open** the *Judges* document from the lesson folder.
2. Click the **Mailings** tab, and then the Start Mail Merge group, click the **Start Mail Merge drop down arrow** and select the **Step-by-Step Mail Merge Wizard**.
3. Accept the default document type of Letters. At the bottom of the Mail Merge pane, click the **Next: Starting document link**.
4. In the *Select starting document* section, *Use the current document* is already selected. At the bottom of the pane, click the **Next: Select recipients link**.
5. In the *Select recipients* section, you will use the default settings, *Use an existing list*. Click the **Browse link** in the *Use an existing list* section.
6. Navigate to the data files in the lesson folder. Select *Judges List*, and click **Open**.
7. The *Mail Merge Recipients* dialog box opens. Click the check box for **Houston, Peter** to remove the check from the check box and click **OK**. Turning off the check mark for Peter Houston removes him as a recipient; therefore, he will not receive a letter. His name will still remain in the data source file.
8. Advance to the next step, by clicking the **Next: Write your letter link** at the bottom of the Mail Merge pane. The letter is the current document.
9. The insertion point should be resting in front of the *T* in *Thank* in the first line of text in the letter. Press **Enter** twice, and move your insertion point to the first blank line.
10. Type **March 29, 20XX**. Press the **Enter key** twice.
11. On the Mail Merge pane, click the **Address block link**.
12. Keep the default settings and click **OK**.
13. Move the insertion point to the blank line below Address Block.
14. On the Mail Merge pane, click the **Greeting line link**.
15. In the Greeting line format, keep the first options the same and change the comma to a **colon**. Click **OK**.
16. At the bottom of the Mail Merge pane, click the **Next: Preview your letters link**.
17. Beginning with the first recipient, select **Ms. Karen Archer** through the zip code, **44501**. The whole address is now selected; on the Home tab, in the Paragraph group, click the **Line and Paragraph Spacing button** and select **Remove Space After Paragraph**.
18. Place your insertion point in the salutation, *Dear Ms. Archer*. In the Paragraph group, click the **Line and Paragraph Spacing button** and select **Add Space Before Paragraph**.
19. At the bottom of the Mail Merge pane, click the **Next: Complete the merge link**. The Mail Merge is ready to produce your letter.
20. Change the top margin to **2"**.
21. **SAVE** the main document as **11-1 Judges Main Letter** in the lesson folder on your flash drive.

LEAVE the document open for the next project.

Project 11-2: Judges for Business Student's Contest

You are ready to complete the mail merge to the list of professional members of the local business community volunteering to judge a state contest for high school business students.

GET READY. USE the document that is open from the previous exercise.

1. In the Merge section of the Mail Merge pane, click **Edit individual letters**. The default option *All* is selected.
2. Click **OK**.
3. A new document (Letters1) opens; it is comprised of all four merged letters opens.
4. **SAVE** the merged document as **11-2 Judges Merged** in the lesson folder on your flash drive, and then **CLOSE** the file.
5. **SAVE** the main document as **11-1 Judges Main Letter** in the lesson folder on your flash drive, and then **CLOSE** the file.

LEAVE Word open for the next project.

Proficiency Assessment

Project 11-3: Advertising Letter

The marketing representative, Isabel Diaz, has asked you to prepare a short letter to the committee reminding it of a deadline. Use the Step-by-Step Mail Merge Wizard to create the merge document.



GET READY. OPEN the **Advertising Letter** document from the lesson folder.



1. Set up the letter as the main document for a mail merge.
2. Select the **Committee Members** file as the recipient's list from the lesson folder.
3. Type **May 29, 20XX** under the image and then press **Enter**.
4. Insert the **Address Block** and **Greeting Line**. Use the **colon** in place of the comma.
5. Place your insertion point in the Address Block, and click the **Home tab**. In the Paragraph group, click the **Line and Paragraph Spacing button** and select **Remove Space After Paragraph**.
6. Place your insertion point in the Greeting Line. In the Paragraph group, click the **Line and Paragraph Spacing button** and select **Add Space Before Paragraph**.
7. Click **Check for Errors** and select the first option.
8. Click the **Preview Results button**.
9. Click **Finish & Merge** and **Edit Individual Documents**, and then click **OK**.
10. **SAVE** the merged document as **11-3 Advertising Merged Letter** in the lesson folder on your flash drive, and then **CLOSE** the file.
11. **SAVE** the main document as **11-3 Advertising Main Letter** in the lesson folder on your flash drive, and then **CLOSE** the file.

LEAVE Word open for the next project.

Project 11-4: Welcome Letter

You are the marketing manager at one of the local home improvement stores. Every month a selected group of customers are invited to receive special promotions and offers. Open an existing letter and data source and merge.



GET READY. LAUNCH Word if it is not already running.



1. **OPEN** the **Welcome Letter** file located in your lesson folder and set it up as the main document in a mail merge.
2. **OPEN** the **New Potential Customers** file as the recipient list.
3. Press **Enter** to create two blank lines after the date.
4. Insert the **Greeting Line** to display only the first name. Use the default salutation and comma in the Greeting Line format.
5. Check and correct any errors, and then preview the document before printing.
6. **SAVE** the merged document as **11-4 Potential Customers Merged Letter** in the lesson folder on your flash drive, and then **CLOSE** the file.
7. **SAVE** the main document as **11-4 Welcome Customers Mainltr** in the lesson folder on your flash drive, and then **CLOSE** the file. Make sure the field codes are displayed before saving.

LEAVE Word open for the next project.

Mastery Assessment

Project 11-5: Office Manager Position

As the assistant to the office manager at Tech Terrace Real Estate, you have been asked to set up a main document. There were many candidates who applied for the office manager's position.



GET READY. LAUNCH Word if it is not already running.



1. **OPEN** the **Selection Letter** and set it up as the main document in a mail merge.
2. **OPEN** the **Candidate List** file as the recipient list.
3. Insert the **Address Block** and **Greeting Line**. Use the colon in the Greeting Line format.
4. Change the top margin to **2"** and the left and right margins to **1"** to accommodate the logo on the company's letterhead. Correct any formatting errors if necessary.
5. **SAVE** the main document as **11-5 Selection Mainltr** in the lesson folder on your flash drive.

LEAVE the document open for the next project.

Project 11-6: Merging the Office Manager Position Letters

You are continuing with the previous project and are ready to complete the merge process.

GET READY. USE the document that is open from the previous exercise.

1. Edit the recipient's list and remove the check mark from **Ted Bremer** and **Eric Rothenberg**. Removing the check mark by the recipient's name excludes them from the merge document. Their names remain in the recipient's data source file.
2. Check and correct any errors then preview the document before printing.
3. **SAVE** the merged document as **11-6 Selection Merged Letter** in the lesson folder on your flash drive, and then **CLOSE** the file.
4. **SAVE** the main document in the lesson folder on your flash drive.

CLOSE Word. **Circling Back 3**

Circling Back 3

As a fourth-grade writing teacher at a private elementary school, you have been asked to present a research paper at a national conference. You use Word to write and edit the research paper.

Project 1: Adding Bookmarks

While working on the research paper, you often refer to the same places in the document. Insert bookmarks to help you jump to specific text more quickly. You will also apply styles to the headings to view when using the Navigation Pane or Bookmark commands.

GET READY. LAUNCH Word if it is not already running.



1. **OPEN** *Research* from the data files for this lesson.
2. Format the document according to the *MLA* style guidelines. Your instructor's name is **Jerry Wright**, the date for submission is **May 2, 20XX**; and the class is **IT 1301: Computer-Mediated Literature Circles**; the title of the paper is **Getting On-board with Being Online**.
3. **SAVE** the document as *Research Paper MLA* in the lesson folder on your flash drive.
4. Select **Introduction** and apply the **Heading 1** style.
5. Apply the **Heading 1** style to the remaining headings in the document: **Community in the Classroom**, **Technology within Literature Circles**, **Computer-Mediated Discussion Groups**, and **Conclusion**.
6. Modify the *Heading 1* style and change the spacing before from *30 pt* to *12 pt*. Apply only to this document—make sure you remove the check mark by *Add to the Styles gallery*.
7. Open the Navigation Pane and click **Introduction** to take you back to the beginning of the document. Then close the Navigation Pane.
8. Select the **Introduction** heading again.
9. Insert a Bookmark, and then type the same name for the bookmark.
10. Create a bookmark for each of the remaining headings in the document. Use the following abbreviated headings as bookmark names: **Community**, **Technology**, **Discussion**, and **Conclusion**.
11. Insert a comment by *Conclusion* and type **Test each bookmark**.
12. Select any word in the document and use the **Define** command.
13. **SAVE** the document in the lesson folder on your flash drive.

PAUSE. LEAVE Word and the document open for the next project.

Project 2: Table of Contents

A table of contents helps readers quickly locate topics of interest quickly as well as enabling the Navigation Pane. Because your research paper is a long document, both of these are helpful. Insert a table of contents in your document. Change the style of the paper to *APA*.

GET READY. LAUNCH Word if it is not already running.

USE the document that is open from the previous project.

1. **SAVE** the document as *Research Paper APA* in the lesson folder on your flash drive.
2. Format the document using the *APA* style.
3. Remove the comment by *Conclusion*.
4. Insert a blank page at the beginning of the document.
5. Select the **Automatic Table 2** style to insert a table of contents on its own page.
6. **SAVE** the document in the lesson folder on your flash drive, and then **CLOSE** the file.

PAUSE. LEAVE Word open for the next project.

Project 3: Main Document

Insert merge fields to create a main document.

GET READY. LAUNCH Word if it is not already running.



1. **OPEN** *Speaker Thank You Letter* from the lesson folder.
2. Select recipients from an existing list—the *Speaker List* document is located in the lesson folder on your flash drive.
3. Delete text beginning with **Jo Berry** through **64163**.
4. Insert the **Address Block** in the appropriate location on the letter. Use the default settings.
5. Insert the **Greeting Line** and apply the format of *Dear Mr. Randall* and change the punctuation to a colon.
6. Position the insertion point at the end of the first sentence, after the blank space following the word *on* and type **September 30**.
7. **SAVE** the main document as *Speaker Thank You LTR-Main*.
8. Click the **Check for Errors** button. Preview each letter for errors then close.
9. Preview each letter, and then click the **Finish & Merge** button.
10. Click **Edit Individual Documents**.
11. In the *Merge to New Document* dialog box, select **All** and click **OK**.
12. **SAVE** the merged document as *Thank You Merged LTR*, and then **CLOSE** the file.
13. **CLOSE** the main document without saving.

PAUSE. CLOSE Word.
