

# Issuing an Employee Policy Manual



## LESSON OUTLINE

- 11.1 Introducing Mail Merge
- 11.2 Working with the Data Source
- 11.3 Working with Main Documents
- 11.4 Conducting a Merge
- 11.5 Working with Merge Problems
- 11.6 Using Envelopes and Labels with Mail Merge
- 11.7 Concepts Review

Reinforce Your Skills

Apply Your Skills

Critical Thinking & Work-Readiness Skills

## LEARNING OBJECTIVES

After studying this lesson, you will be able to:

- Create and modify a data source document
- Create and modify a main document
- Conduct a merge
- Understand merge problems and how to fix them
- Merge envelopes with a form letter
- Generate mailing labels with mail merge

**W**ord's Mail Merge is a fabulous time-saving feature. With Mail Merge, rather than typing one hundred letters to send to one hundred people, you type just one letter, then merge it with an address list. In this lesson, you will use Mail Merge to create a form letter, create envelopes, and set up mailing labels for envelopes. You will learn about some common merge problems and how to correct them. You will also use Mail Merge to create a form letter to send to employees and set up mailing labels for envelopes.

## CASE STUDY

## Distributing a Policy Manual

Jenna Mann is the administrative assistant for Green Clean, a successful, environmentally conscience janitorial service company. She has been tasked with the job of producing an employee policy manual to distribute to all Green Clean employees. When she's finished with the manual, Jenna will use Mail Merge to insert the employee's name into a form letter and create mailing labels. Mail Merge will save Jenna many hours that she would have otherwise spent addressing each letter individually.



Microsoft Word

719 Coronado Drive  
San Diego, California 92102

Today's Date

«AddressBlock»

«GreetingLine»

I want to take this opportunity to thank you for your continued dedication in the «Department» department. Some of you are new to us and some have been with us for many years. We hope that all of you have enjoyed your tenure with us thus far.

Enclosed is a copy of our revised Employee Policy Manual. Please read through it and if you have any questions or concerns, please contact your supervisor or Kenneth Hazell, Human Resources Director.

«First\_Name», thank you again for your company loyalty.

Sincerely,

Ahn Tran  
Office Manager

<input checked="" type="checkbox"/>	Last Name	First Name	Title	Address Line 1	City	State	ZIP Co...	Departm...
<input checked="" type="checkbox"/>	Bouras	Talos	Mr.	854 Whitmere Drive	San Diego	CA	92101	Sales
<input checked="" type="checkbox"/>	Romero	Nicole	Ms.	132 Lake Street	San Diego	CA	92101	Payroll
<input checked="" type="checkbox"/>	Chowdery	Michael	Mr.	146 Meadow Lane	La Jolla	CA	92103	Purchasing
<input checked="" type="checkbox"/>	Navarro	Derek	Mr.	3300 Maple Drive	La Jolla	CA	92103	Operations
<input checked="" type="checkbox"/>	Wright	Mary	Ms.	1240 Potrero Ave...	San Diego	CA	92101	Sales
<input checked="" type="checkbox"/>	Adams	D'Andre	Mr.	3344 Culver Drive	San Diego	CA	92102	Facilities

This is a data source document.

This is a main document.

719 Coronado Drive  
San Diego, California 92102

Today's Date

Mr. Talos Bouras  
854 Whitmere Drive  
San Diego, CA 92101

Dear Talos:

I want to take this opportunity to thank you for your continued dedication in the Sales department. Some of you are new to us and some have been with us for many years. We hope that all of you have enjoyed your tenure with us thus far.

Enclosed is a copy of our revised Employee Policy Manual. Please read through it and if you have any questions or concerns, please contact your supervisor or Kenneth Hazell, Human Resources Director.

Talos, thank you again for your company loyalty.

Sincerely,

Ahn Tran  
Office Manager

This is a finished merged document.

## 11.1 Introducing Mail Merge

### Video Lesson

[labyrinthelab.com/videos](http://labyrinthelab.com/videos)

Word's Mail Merge feature is most often used for generating personalized form letters, mailing labels, and envelopes. However, Mail Merge is a versatile tool that can be used with any type of document. Mail Merge can be a big time-saver and is invaluable for managing large mailings. When you perform a merge, you have the option to merge directly to a printer or to a new document.

### Components of a Mail Merge

Merging creates a merged document by combining information from two or more documents. The documents are known as the *main document* and the *data source*.

- **Main Document**—This document controls the merge. It contains the fixed information into which the variable information for each contact is merged. In a typical form letter, for instance, you will have a different name and address on each letter, while the rest of the text is the same for everyone receiving the letter.



Remember that whatever text is to be included in every letter should be typed in the main document.

- **Data Source**—This can be another Word document, a spreadsheet, a database file, or a contacts list in Outlook. When creating the data source, keep in mind how you want to use the data in the merge. For example, if you want the letter to be addressed informally using the first names, then in the data source, there must be a separate column (field) for the first name.
- **Merged Document**—This document is the result after you perform the merge. It contains all of the individual letters addressed to each individual in the data source you used. You can save this document, if you wish, or simply close it without saving after you print.

You can merge an existing main document with an existing data source, or you can create the main document and data source while stepping through the merge process.

719 Coronado Drive  
San Diego, California 92102

Today's Date

«AddressBlock»

«GreetingLine»

I want to take this opportunity to thank you for your continued dedication in the «Department» department. Some of you are new to us and some have been with us for many years. We hope that all of you have enjoyed your tenure with us thus far.

Enclosed is a copy of our revised Employee Policy Manual. Please read through it and if you have any questions or concerns, please contact your supervisor or Kenneth Hazell, Human Resources Director.

«First Name», thank you again for your company loyalty.

Sincerely,

Ahn Tran  
Office Manager

<input checked="" type="checkbox"/>	Last Name	First Name	Title	Address Line 1	City	State	ZIP Co...	Departm...
<input checked="" type="checkbox"/>	Bouras	Talos	Mr.	854 Whitmere Drive	San Diego	CA	92101	Sales
<input checked="" type="checkbox"/>	Romero	Nicole	Ms.	132 Lake Street	San Diego	CA	92101	Payroll
<input checked="" type="checkbox"/>	Chowdery	Michael	Mr.	146 Meadow Lane	La Jolla	CA	92103	Purchasing
<input checked="" type="checkbox"/>	Navarro	Derek	Mr.	3300 Maple Drive	La Jolla	CA	92103	Operations
<input checked="" type="checkbox"/>	Wright	Mary	Ms.	1240 Potrero Ave...	San Diego	CA	92101	Sales
<input checked="" type="checkbox"/>	Adams	D'Andre	Mr.	3344 Culver Drive	San Diego	CA	92102	Facilities

This is a sample of a data source document, which can be a table in a Word document, a spreadsheet in an Excel file, or a table in Access.

This is the main document, which contains the standard text and merge codes inserted where the variable text will be.

719 Coronado Drive  
San Diego, California 92102

Today's Date

Mr. Talos Bouras  
854 Whitmere Drive  
San Diego, CA 92101

Dear Talos:

I want to take this opportunity to thank you for your continued dedication in the Sales department. Some of you are new to us and some have been with us for many years. We hope that all of you have enjoyed your tenure with us thus far.

Enclosed is a copy of our revised Employee Policy Manual. Please read through it and if you have any questions or concerns, please contact your supervisor or Kenneth Hazell, Human Resources Director.

Talos, thank you again for your company loyalty.

Sincerely,

Ahn Tran  
Office Manager

This is a sample of a finished merged document where the merge fields have been replaced with actual data from the data source document.

## The Benefits of Using Mail Merge

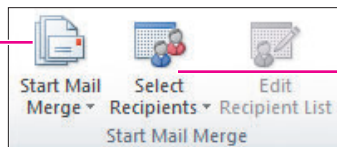
Mail Merge will save you a lot of time and can help reduce errors in large mailings. For example, say you want to send a letter to 100 customers. Without using Mail Merge, you would be typing the same text in all 100 letters (or copying and pasting 100 times). However, using Mail Merge for the job, you create only one main document containing the standard text and one data source document containing the 100 customer names. You will also really appreciate Mail Merge when you later decide you want to make a change. Using Mail Merge, you

can edit the main document once and remerge it with the data source to produce a new merged document. Without Mail Merge, you would need to edit each personalized letter individually.

## The Mailings Tab

The Mailings tab on the Ribbon provides guidance in setting up both the main document and data source and helps you conduct the merge. The Start Mail Merge command group on the Mailings tab is the beginning point.

The Start Mail Merge command is where you specify the type of main document you want to use, such as letters, envelopes, or labels.



Select Recipients is where you either identify an existing data source list or create a new data source.



If you happen to be familiar with mail merge in earlier versions of Word, you can display the Mail Merge Wizard by choosing Step by Step Mail Merge Wizard on the Start Mail Merge menu.

## 11.2 Working with the Data Source

### Video Lesson

[labyrinthelab.com/videos](http://labyrinthelab.com/videos)

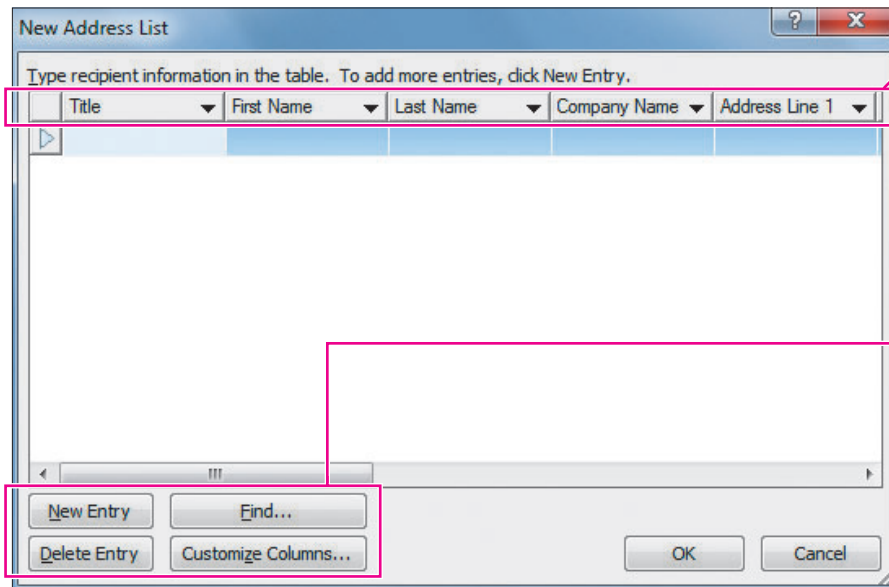
Data sources usually contain names, addresses, telephone numbers, and other contact information. However, you can include any information in a data source. For example, you may want to include inventory names, numbers, and prices of parts, if you are using Mail Merge to create a parts catalog. You can create a data source in Word, or you can use external data sources, such as an Access database or an Excel worksheet. Once a data source is created, it can be used as a source for many different main documents.

### Designing Effective Data Sources

It is very important that you design effective data sources. The most important consideration is the number of fields to use. The more fields, the more flexibility you will have in the merge. An important rule to remember is that you cannot merge a portion of a field. For example, if a field contains both a first name and last name, then you will never be able to merge only the last name into a main document. This would be a problem if you needed to merge only a last name to create salutations such as Dear Ms. Alvarez. In this example, you would need to use one field for the first name and a separate field for the last name. You would also need to use a title field for the titles Mr., Ms., and Mrs.

## Creating Address Lists

You can use the New Address List dialog box to set up address lists (data sources) for use in mail merges. This tool stores the addresses you enter in a table within a Microsoft Access database. This table, which becomes the data source for the merge, is linked to the mail merge main document. You can also use a Word table, an Excel worksheet, or an Access table as a data source for a mail merge. Each of these tools stores data in a table or worksheet structure.



The New Address List dialog box contains a set of predefined fields. When you're entering data, you use the **Tab** key to move forward to the next field. Use **Shift+Tab** to move backward to a previous field.

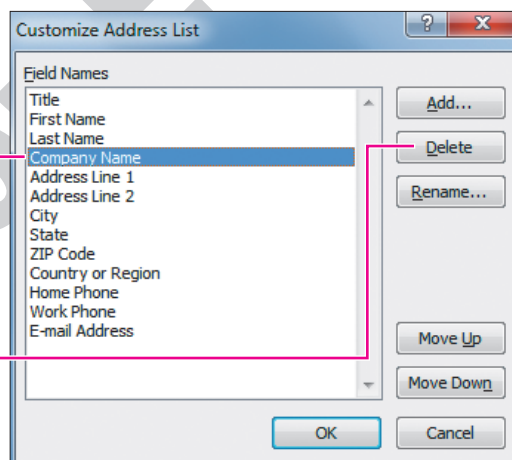
You can add a new entry, delete an entry, or find an existing entry. You can also customize the columns (fields) in the dialog box; you can add or remove fields, rearrange their order, or change their names.



The terms *fields* and *columns* are used interchangeably in this lesson. Each row of data is referred to as a *record*.

## Customizing an Address List

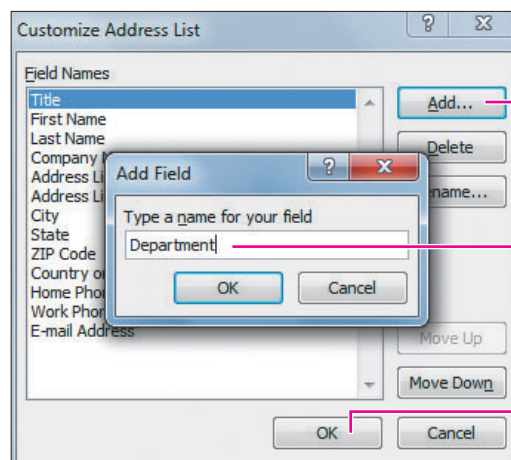
The Customize Address List dialog box makes it easy to set up the mailing list just as you want it. You can easily delete unnecessary fields and add your own custom fields to the list. You can also rename an existing field name and use the Move Up and Move Down buttons to reorder the list of fields.



Choose the field you want to delete.

Click the Delete button.

Delete a field from the list.



Click the Add button.

Type the new field name in the Add Field dialog box.

Click OK to add the new custom field.


Add a field to the list.

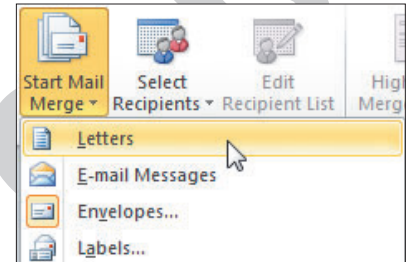


## DEVELOP YOUR SKILLS 11.2.1

## Specify the Main Document and Create a Data Source

*In this exercise, you will use the Start Mail Merge group on the Mailings tab to specify a letter as your main document, to customize the data source, and to enter data.*

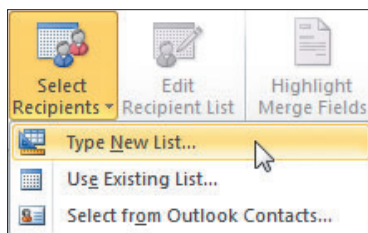
1. **Open** the Policy Manual Letter Main from the Lesson 11 folder.
2. Choose **Mailings**→**Start Mail Merge**→**Start Mail Merge**  from the Ribbon.
3. Choose **Letters** from the menu, as shown at right.  
*You are indicating here that the open document on the screen will be the main document.*



### Connect to the Data Source

*Next you will indicate what data source to connect the letter to. Since you don't have an existing data source, you will create one during the mail merge process.*

4. Choose **Mailings**→**Start Mail Merge**→**Select Recipients**  from the Ribbon.
5. Choose **Type New List** from the menu.



*The New Address List dialog box opens.*

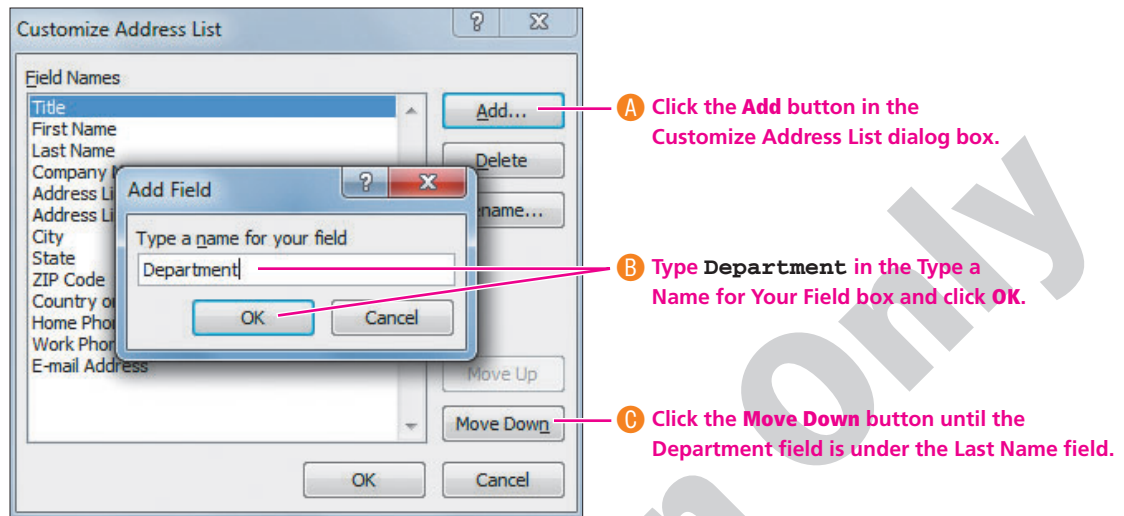
### Remove Fields

*You will remove unnecessary fields from the set of predefined fields.*

6. Click the **Customize Columns** button in the bottom-left corner of the dialog box to display the Customize Address List dialog box.
7. Choose the **Company Name** field.
8. Click the **Delete** button, and then click **Yes** when the message appears to verify the deletion.
9. **Delete** the Address Line 2, Country or Region, Home Phone, and E-mail Address fields; then, click on the **Title** field name at the top of the list.

## Add a Field

10. Follow these steps to add a Department field to the list:

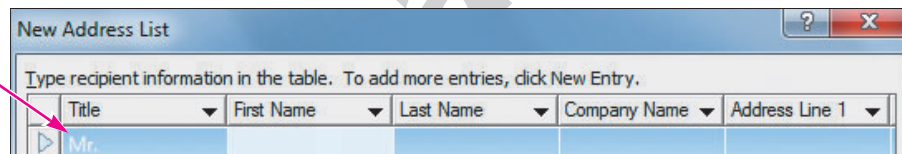


11. Click **OK** to complete the changes.

## Enter the First Record

*The cursor should be in the Title field.*

12. Type **Mr.**, and then tap **[Tab]** to move to the next field.



**TIP**

Do not type spaces after entering information in fields. Word will take care of adding the necessary spaces in the inside address and the salutation. You can always click in a field and make editing changes if necessary.

13. Type **Talos**, and then tap **[Tab]** to move to the next field.

14. Type **Bouras**, and then tap **[Tab]** to move to the next field.

15. Finish **entering** the Talos Bouras data shown in the following table, **tabbing** between fields. The list of fields will scroll as you continue to **[Tab]** and type.

16. When you complete the first record, click the **New Entry** button or tap **[Tab]** to generate a new blank row for the next record, and then **enter** the two remaining records shown in this table.

Mr. Talos Bouras	Ms. Nicole Romero	Mr. Michael Chowdery
Sales	Payroll	Purchasing
854 Whitmore Drive	132 Lake Street	900 C Street
San Diego, CA 92101	San Diego, CA 92101	La Jolla, CA 92103



**TIP**

If you accidentally tap **[Tab]** after the last record and add a blank record, just click the Delete Entry button.

17. Leave the New Address List dialog box **open**.



## Reviewing Your Records

**Video Lesson** [labyrinthelab.com/videos](http://labyrinthelab.com/videos)

It's a good idea to review your records for accuracy before saving the data source. However, if you miss an error, you can always edit it in the Edit Data Source dialog box, which you'll learn about later in this lesson.

If an entry is wider than the default field width, you can click the insertion point directly in the field and use the arrow keys to move through the entry.

New Address List

Type recipient information in the table. To add more entries, click New Entry.

First Name	Last Name	Department	Address Line 1	City
Talos	Bouras	Sales	854 Whitmere Drive	San Diego
Nicole	Romero	Payroll	132 Lake Street	Richmond
Michael	Chowdery	Purchasing	900 C Street	San Diego

Buttons: New Entry, Find..., Delete Entry, Customize Columns..., OK, Cancel

Alternatively, you can position the mouse pointer on the border between two columns, and when the mouse pointer looks like a double-headed black arrow, press and hold the mouse button and drag to the right to widen the column.

You can use the scroll bar to move back and forth in the dialog box.

### DEVELOP YOUR SKILLS 11.2.2

## Review and Save Your Work

In this exercise, you will take a moment to examine your records for accuracy, and then you will save your data source.

1. Position the **mouse pointer** on the scroll bar and drag left and right to view all the fields.
2. Click the **insertion point** in the Address Line 1 field for the first record, and use the **arrow keys** on the keyboard to move the insertion point through the entry.
3. Position the **mouse pointer** on the border between the Address Line 1 and City fields, and when the mouse pointer changes to a double-headed black arrow, **drag** to the **right** to display the entire *854 Whitmere Drive* entry.

New Address List

Type recipient information in the table. To add more entries, click New Entry.

First Name	Last Name	Department	Address Line 1	City
Talos	Bouras	Sales	854 Whitmere Drive	San Diego

4. Make any needed revisions.
5. When you finish reviewing your records, click **OK** to open the Save Address List dialog box.

6. **Save** the data source file as **Policy Manual Letter Data** in the Lesson 11 folder.  
*Your data source is now connected to the main document.*
7. Leave the current document **open**, and stay in the Mailings tab on the Ribbon for the next exercise.

## Managing the Address List

### Video Lesson

[labyrinthelab.com/videos](http://labyrinthelab.com/videos)

The Mail Merge Recipients dialog box lets you sort and filter address lists and choose records to include in a mail merge. To edit data, you click the Edit button in the Mail Merge Recipients dialog box to display the Edit Data Source dialog box, where you can add, delete, and edit entries.



If you used a Word table, Excel spreadsheet, or other document for your data source, you can edit directly in that data source document if you wish. Since the data source is connected to the main document, any changes made are automatically.

You choose→Mailings→Start Mail Merge→Edit Recipient List  from the Ribbon to access the Mail Merge Recipients dialog box.

If there are records that you do not want to include in your mailing, use the menu ▼ buttons to display a filter list allowing you to temporarily hide records based on filter criteria.

Only records that are checked are used in the mail merge. Individual records can be checked or unchecked by clicking their checkboxes. All records can be checked or unchecked at once using the checkbox at the top of the column.

Data Source	Last Name	First Name	Title	Address Line 1	City
<input checked="" type="checkbox"/> Policy Manual Let...	Bouras	Talos	Mr.	854 Whitmere Drive	San Die
<input checked="" type="checkbox"/> Policy Manual Let...	Chowdery	Michael	Mr.	900 C Street	San Die
<input checked="" type="checkbox"/> Policy Manual Let...	Romero	Nicole	Ms.	132 Lake Street	Richme

You can sort the list based on any field by clicking the desired field heading.

The Sort and Filter links display dialog boxes where you can further refine, sort, and filter criteria.

The Edit button displays the Edit Data Source dialog box, allowing you to enter new records and edit existing ones. You must click the name of the data source for the Edit button to be available.

The Edit Data Source dialog box looks and operates like the New Address List dialog box that you used to enter the original list.

## DEVELOP YOUR SKILLS 11.2.3

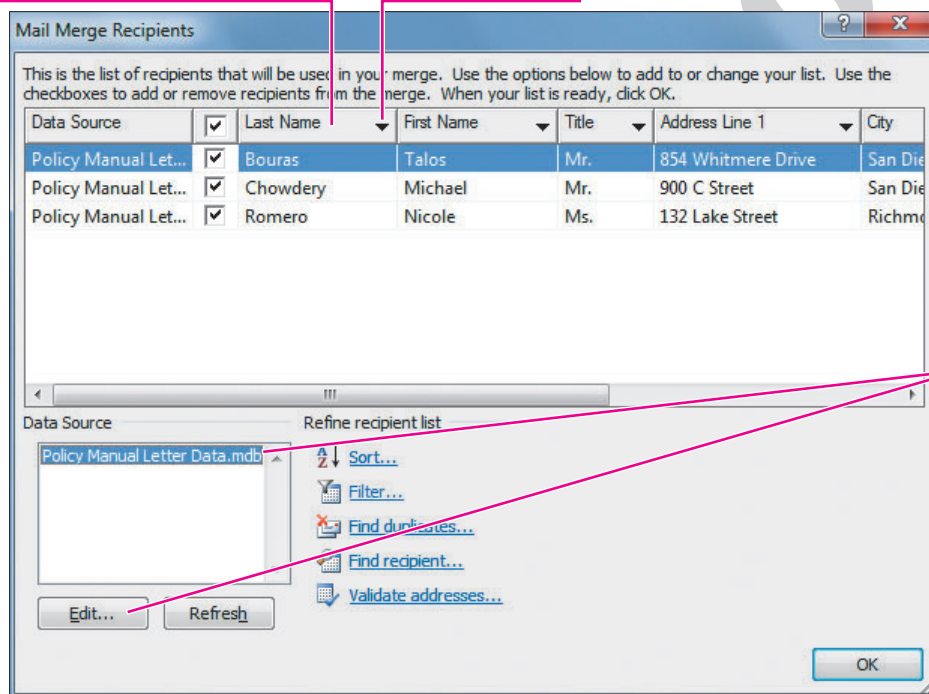
## Use Mail Merge Recipient Options and Edit Records

In this exercise, you will work with the Mail Merge Recipients dialog box, where you can sort, filter, and edit your mailing list.

1. Choose **Mailings**→**Start Mail Merge**→**Edit Recipient List**  from the Ribbon.
2. Follow these steps to sort and filter the list and open the Edit Data Source dialog box:

**A** Click the **Last Name** field heading to temporarily sort the list in ascending order by last name. Each time you click a field heading, the list toggles between ascending and descending order.

**B** Click the **Last Name** menu ▼ button and notice the filtering options. Choose **Chowdery** from the menu to filter out all other entries. Click the **Last Name** menu ▼ button again, and choose **(All)** to redisplay all records.

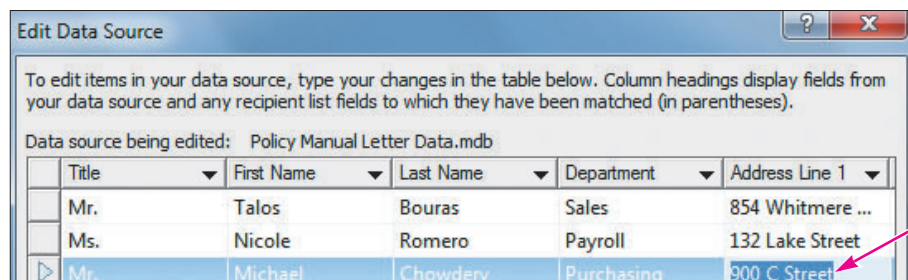


**C** Choose the **Data Source** to highlight it, and then click the **Edit** button to display the Edit Data Source dialog box.

### Edit a Record

Remember, the Edit Data Source dialog box looks and operates like the New Address List dialog box.

3. Click the *900 C Street* to highlight the text.
4. Type **146 Meadow Lane** in its place.



## Add Recipients

5. Follow these guidelines to enter the three records at right:

■ Use the **New Entry** button or **tap** **[Tab]** for each new record.

■ **Tap** **[Tab]** to move from one field to the next.

■ Notice that the third record does not include a department name. **Tap** **[Tab]** to pass through the department field and leave it empty.

■ Make sure to **enter** the data in the correct fields.

Ms. Mary Wright Sales 1240 Potrero Avenue San Diego, CA 90101	Mr. Derek Navarro Operations 3300 Maple Drive La Jolla, CA 92103	Mr. D'Andre Adams 3344 Culver Drive San Diego, CA 92102
--	---	---

6. Click **OK** to close the dialog box.

7. Click **Yes** when the message appears verifying your update, and then notice your changes in the Mail Merge Recipients dialog box.

*Notice that Word remembers that you wanted the list sorted in alphabetical order by last name.*

8. Click **OK** to close the Mail Merge Recipients dialog box.

*You will create the main document in the next exercise.*

## 11.3 Working with Main Documents

**Video Lesson** [labyrinthelab.com/videos](http://labyrinthelab.com/videos)

You accomplish a merge by combining a main document with a data source. Typical main documents include form letters, envelopes, and mailing labels. A main document is linked to a data source that includes one or more merge fields. Merge fields inserted into a main document correspond to fields in the attached data source. Some merge fields, such as the address block, are composite fields consisting of a number of fields grouped together. For example, Title, First Name, Last Name, Address, City, State, and Zip would be included in the address block merge field.

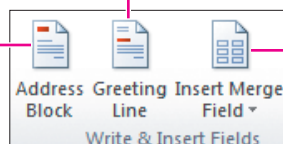


Though not a necessity, including the word “main” in the document’s name can be helpful in the future.

When you conduct a merge, a customized letter, envelope, or label is created for each record in the data source. After the merge is complete, you can save or print the merged document. The following figure shows the command buttons in the Write & Insert Fields group of the Mailings tab that you will use to insert merge fields into your letter.

This command allows you to insert an address block for an inside address in your letter.

This command lets you insert a greeting line.



Use this button to insert any of the fields from your data source.

The following illustration shows the form letter with the location of the merge fields you will insert.

719 Coronado Drive  
San Diego, California 92102

Today's Date

«AddressBlock»

«GreetingLine»

I want to take this opportunity to thank you for your continued dedication in the «Department» department. Some of you are new to us and some have been with us for many years. We hope that all of you have enjoyed your tenure with us thus far.

Enclosed is a copy of our revised Employee Policy Manual. Please read through it and if you have any questions or concerns, please contact your supervisor or Kenneth Hazell, Human Resources Director.

«First\_Name», thank you again for your company loyalty.

Sincerely,

Ahn Tran  
Office Manager

When you execute the merge, the main document and data source are merged; the address block, greeting line, and merge fields are replaced with data from the data source.


## Setting Up Main Documents

You can use any document as a mail merge main document. A document becomes a main document when you attach it to a data source and insert merge fields. In this lesson, you create a main document from the Policy Manual Letter Main document that is already open on your screen. Once a data source is attached, you can insert merge fields.


### DEVELOP YOUR SKILLS 11.3.1

## Set Up a Form Letter

*In this exercise, you will set up a form letter. The Policy Manual Letter Main document should still be open.*

1. If necessary, choose **Home**→**Paragraph**→**Show/Hide**  from the Ribbon to display formatting characters.

### Insert the Date

2. Using the left margin area, select the **Today's Date** line, and then tap **Delete**.
3. Choose **Insert**→**Text**→**Insert Date and Time**  from the Ribbon to display the Date and Time dialog box.



4. Choose the **third date** format on the list, check the **Update Automatically** checkbox in the bottom-right corner of the dialog box, and then click **OK**.

*Checking this option instructs Word to insert the current date when the letter file is opened on a later date. The date in your letter will always be the current date, which is a convenient option for form letters that you want to use again.*

5. Tap **[Enter]** three times after inserting the date.

### Insert the Address Block

6. Choose **Mailings**→**Write & Insert Fields**→**Address Block**  from the Ribbon.

*The Insert Address Block dialog box appears, allowing you to choose a format for the address block.*

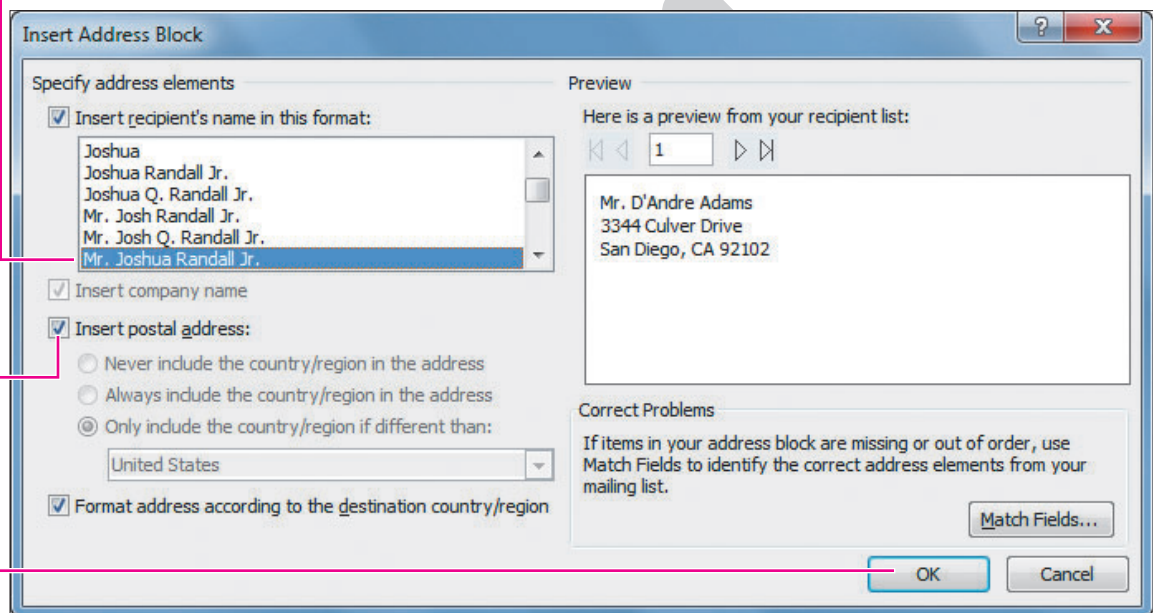
*Notice that the Preview window is displaying the address block format of the option that is highlighted at the left side of the dialog box.*

7. Follow these steps to insert an Address Block merge code:

**A** Click on the different formats for the recipient's name, viewing the changes in the Preview box, and then choose **Mr. Joshua Randall Jr.**

**B** Preview the results of removing the checkmark from the Insert Postal Address checkbox, and then click it again to reinsert the merge code into the document.

**C** Click **OK** to accept the Address Block options.




*An Address Block merge code appears in the document. During the merge, Word inserts address information from the data source at the location in the customized letters.*

8. Tap **[Enter]** twice.



## Insert the Greeting Line

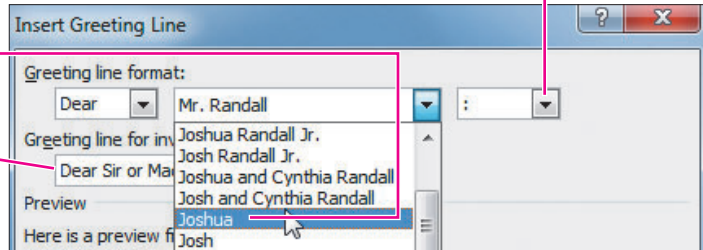
9. Choose **Mailings**→**Write & Insert Fields**→**Greeting Line**  from the Ribbon.
10. Follow these steps to modify and insert the greeting line:

A Click the **drop-down arrow** and change this option to a colon (:).

B Click the **drop-down arrow** and choose **Joshua** from the list.

C Notice that this style greeting will be used for the records in the data source if they are missing last names.

D Click **OK** to insert the greeting line code, and then tap **Enter**.



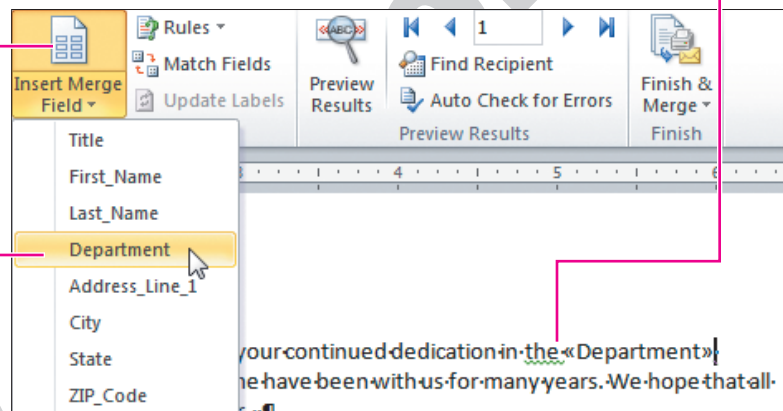
## Insert Another Merge Field


11. Follow these steps to insert the Department merge field code into the letter:

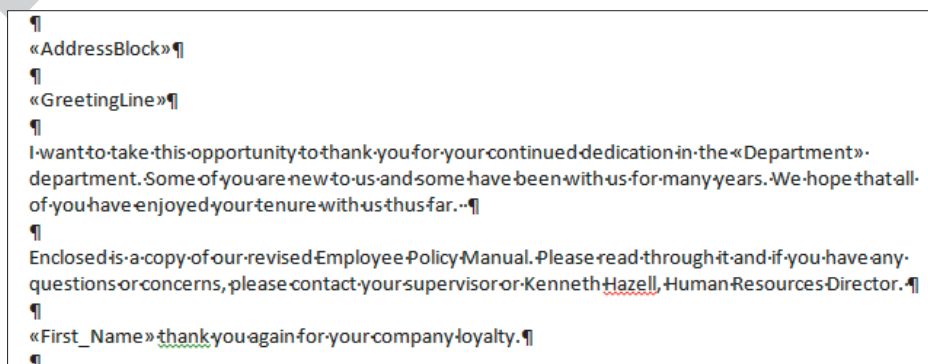
A Position the **insertion point** at the end of the word *the* in the first line and tap **Spacebar**.

B Choose **Mailings**→**Write & Insert Fields**→**Insert Merge Field** menu button from the Ribbon to display a list of merge fields in the Data Source document.



C Choose **Department** from the merge field list.



12. Position the **insertion point** at the beginning of the line beginning with *thank you again*.
13. Choose the **Mailings**→**Write & Insert Fields**→ **Insert Merge Field** menu button from the Ribbon.
14. Choose the **First\_Name** field from the drop-down merge field list.



## Review the Letter for Accuracy

15. Choose **Home**→**Paragraph**→**Show/Hide**  from the Ribbon to turn off the formatting marks.
16. Take a few moments to review your letter, making sure the merge fields match the preceding example. In particular, make sure you used the proper punctuation and spacing between fields and the text. Any punctuation or spacing errors that occur in your main document will appear in every merged letter.
17. **Save**  the letter in the Lesson 11 folder as **Policy Manual Letter Main**.

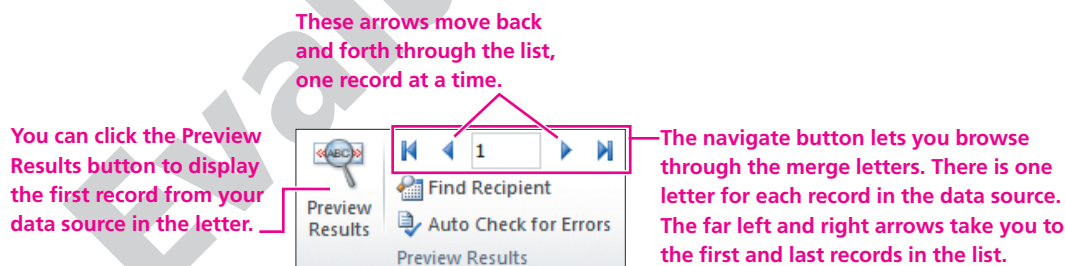
## 11.4 Conducting a Merge

**Video Lesson** [labyrinthelab.com/videos](http://labyrinthelab.com/videos)

Merging combines a main document with a data source to produce a merged document. If you are merging a form letter with a data source, Word produces a personalized copy of the form letter for each record in the data source. You can print one or all of the records and save the merged document if you wish. It's always a good idea to preview what the document will look like when it is merged so you can make corrections to the main document, if needed.

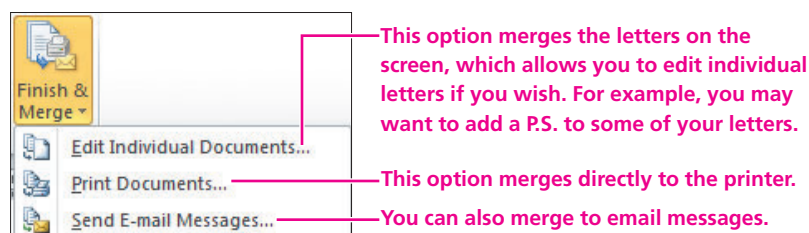
### Previewing the Results

The Preview Results group on the Mailings tab allows you to see how your letters will look before you complete the merge. If you notice an error that needs to be fixed in the main document, simply click the Preview Results button again to return to it.



### Finishing the Merge

When you feel confident that your letter and data source are accurate, you use the Finish & Merge command.




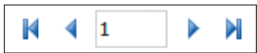

## To Save or Not to Save

Merged documents are rarely saved, because they can easily be reconstructed by merging the main document with the data source. A merged document is usually previewed, printed, and closed without saving. However, you can certainly save the merged document if you wish to save a record of it. If a merged document contains errors, you can close it without saving, edit the main document or data source, and then conduct the merge again.

### DEVELOP YOUR SKILLS 11.4.1

## Conduct the Merge

*In this exercise, you will use the Preview Results group on the Mailings tab to review your letters before you perform the merge. Then you will complete the merge on the screen.*

1. Choose **Mailings**→**Preview Results**→**Preview Results**  from the Ribbon to view the data from the first record.
2. Use the **navigation buttons** in the Preview Results group to scroll through all your merged documents. 
3. Choose **Mailings**→**Finish**→**Finish & Merge**  from the Ribbon.
4. Choose **Edit Individual Documents** from the menu to merge the letters on the screen.
5. Click **OK** to merge all records.
6. **Scroll** through the letters and scan their contents.  
*Notice that there is one letter for each record in the data source.*
7. **Close** the merged document without saving.
8. Choose **Mailings**→**Preview Results**→**Preview Results** again to display the main document instead of the preview.
9. Leave the main document **open** for the next exercise.

## 11.5 Working with Merge Problems

### Video Lesson

[labyrinthelab.com/videos](http://labyrinthelab.com/videos)

Several common errors can cause a merge to produce incorrect results. The merged document (or preview) will usually provide clues as to why a merge fails to produce the intended results. Once you identify an error in the merged document, such as leaving out a comma or space before or after a merge field, you can make changes to the main document or the data source. You can then conduct the merge again to determine if the error was fixed. Repeat this process until the merge works as intended.

## Common Merge Problems



Several problems are common in merges. These problems and their solutions are described in the following Quick Reference table.

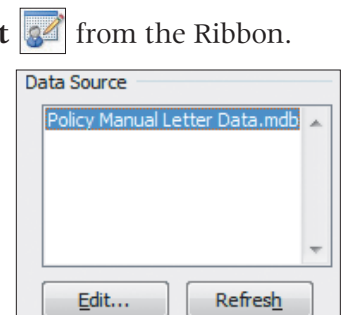
**QUICK REFERENCE****DEALING WITH COMMON MERGE PROBLEMS**

Problem	Solution
The exact same error appears in every merge letter.	The problem is in the main document, since it occurs in every merge letter. Correct the error in the main document and perform the merge again.
Some letters in the merged document are missing data.	This occurs because some records in the data source are missing data. Add data to the necessary fields in the data source, or modify the main document or merged letters to account for the missing data.
Some letters in the merged document have incorrect data.	The problem is in the data source, since it does not affect every letter in the merged document. Correct the data errors in the data source and perform the merge again.

**DEVELOP YOUR SKILLS 11.5.1****Fix Merge Problems**

*In this exercise, you will examine your document for merge problems. Refer to the previous table if you need help solving them. The following steps are a guide to assist you. They do not address all the possible problems that you may encounter; they do, however, address one specific error that was made intentionally. You will insert a comma after the First Name field.*


1. Position the **insertion point** after the <<First Name>> merge field, and then **type** a comma.
2. Conduct the **Finish & Merge** process again to review and fix problems in the merged document.
3. Browse through the entire document, from beginning to end, and look for any errors. Note errors in a separate Word document or on a piece of paper. Indicate how often the errors occur (in every merged letter or just one).
4. If you find an error that occurs in *every merged letter*, such as the one you corrected with the missing comma, **close** the merged document without saving and **edit** the main document, and then **save** it.
5. If you find a data error in *just one letter*, such as the missing *Facilities* department name for Mr. Adams, close the merged document without saving it.
  - Choose **Mailings**→**Start Mail Merge**→**Edit Recipient List**  from the Ribbon.
  - When the Mail Merge Recipients dialog box appears, highlight the **Data Source** in the bottom-left corner of the dialog box, and click the **Edit** button.
  - After you fix any errors, click **OK**, and then click **Yes** when the message appears asking if you want to update the data.
  - Click **OK** to close the Mail Merge Recipients dialog box.
6. When you have corrected any errors, execute the **merge** again.
7. **Close** the merged document without saving it.
8. **Save**  and **close** Policy Manual Letter Main.



## 11.6 Using Envelopes and Labels with Mail Merge

### Video Lesson

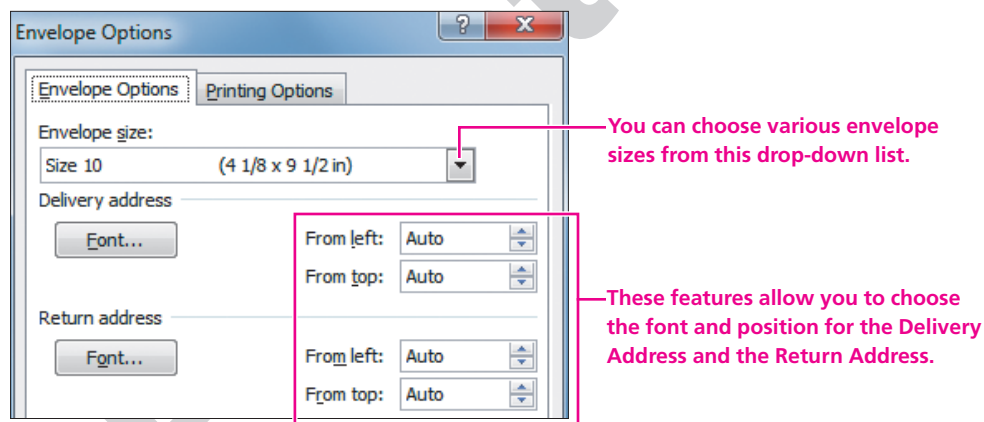
[labyrinthelab.com/videos](http://labyrinthelab.com/videos)

When you choose Mailings→Start Mail Merge→Start Mail Merge  from the Ribbon, Word presents you with options for the type of main document you want to create. In addition to form letters, you can use envelopes, labels, and other types of documents as main documents. The merged document's title bar reflects the type of merge performed. For example, when you conduct the merge for envelopes the first time, the name of the merged document is Envelopes1; you may change the name and save it if you wish.

You can use the same data source for various main documents. For example, you can use the same data source for envelopes and mailing labels that you used for the form letter.

### Generating Envelopes with Mail Merge

You can use Mail Merge to generate an envelope for each record in a data source. Mail Merge lets you choose the envelope size and formats. The standard business (Size 10) envelope is the default. You will check your printer to see how to place the envelopes in it for printing. For example, you may need to know which side should be facing up and which way the flap is facing.



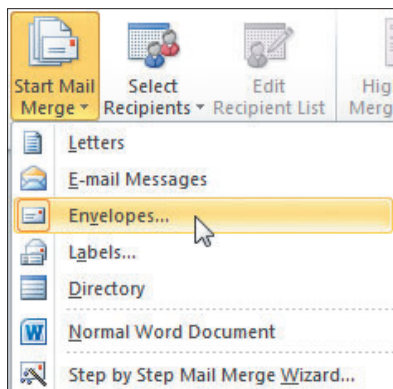
If you are using envelopes with the company name and address preprinted, then you will not use any Return Address options here.

## DEVELOP YOUR SKILLS 11.6.1

**Choose an Envelope Size and Attach a Data Source**

*In this exercise, you will choose an envelope as the main document and connect the Policy Manual Letter Data file to the envelope.*

1. Start a **new** blank document.
2. Choose **Mailings**→**Start Mail Merge**→**Start Mail Merge**  from the Ribbon, and then choose **Envelopes** from the menu.




3. When the Envelope Options dialog box appears, if necessary, choose **Size 10** from the Envelope Size list.

*This is the standard envelope size for business correspondence.*

4. Click **OK** to apply the settings to the document.

*The envelope main document appears in the Word window although right now, it doesn't look any different. You will set up the envelope main document in a moment, and you will see the envelope layout on the screen.*

**Connect the Data Source**

5. Choose **Mailings**→**Start Mail Merge**→**Select Recipients**  from the Ribbon, and then choose **Use Existing List** from the menu.
6. When the Select Data Source dialog box appears, navigate to your file storage location and **open** Policy Manual Letter Data from the Lesson 11 folder.
7. Stay in the **Mailings** tab for the next topic.



## Arranging the Envelope

**Video Lesson** [labyrinthelab.com/videos](http://labyrinthelab.com/videos)

You can insert an address block in the envelope main document. An envelope main document can be saved like any other main document, allowing you to use it over and over to generate envelopes from a data source. The following illustration shows the envelope main document that you will set up in the next exercise.

The return address is typed in the top-left corner of the envelope main document. Remember, if you have preprinted business envelopes, skip this step.


The envelope has a rectangular placeholder for the address block. You must click the placeholder before inserting the address block.

### DEVELOP YOUR SKILLS 11.6.2

## Merge to Envelopes


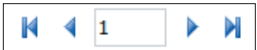


In this exercise, you will position the return address and the address block on the envelope, and then you will merge the envelope main document with the data source.

### Set Up the Envelope

1. If necessary, turn on the **formatting marks**, and then **type** the return address, starting at the first paragraph symbol in the upper-left corner of the envelope, as shown here.
2. Position the **insertion point** next to the paragraph symbol toward the center bottom half of the envelope to display the address block placeholder.
3. Choose **Mailings**→**Write & Insert Fields**→**Address Block**  from the Ribbon.
4. Click **OK** to accept the default address block settings.

*This is the same Insert Address Block dialog box you used to insert the address block in the form letter. An Address Block field is inserted in the placeholder box. Word will merge the address information from the data source into this location when the merge is conducted.*

## Preview the Merge

5. Choose **Mailings**→**Preview Results**→**Preview Results**  from the Ribbon to display the first record from the data source in the envelope.
6. Use the **navigation buttons** in the Preview Results group to scroll through all your merged envelopes. 
7. Choose **Mailings**→**Finish**→**Finish & Merge**  from the Ribbon.
8. Choose **Edit Individual Documents** from the menu, and then click **OK** to merge all the records.
9. Turn **off** the formatting marks from the Ribbon.
10. **Scroll** through the envelopes, and notice that there is one envelope for each record in the data source.  
*You could use the envelopes for mailing the letters created in the previous exercises, because they are generated from the same data source.*
11. If necessary, fix any problems with the mail merge.
12. When you finish, **save**  the merged document as **Policy Manual Envelopes** in the Lesson 11 folder, and then **close** it.
13. Turn **off** the Preview Results button, and then **save** the envelope in the Lesson 11 folder as **Policy Manual Envelope Main** and **close** it.

## Generating Labels with Mail Merge

### Video Lesson

[labyrinthelab.com/videos](http://labyrinthelab.com/videos)

You can use Mail Merge to generate mailing labels for each record in a data source. Mail Merge lets you choose the label format, sheet size, and other specifications. It also lets you insert an address block and other fields in the main document. Like other main documents, a labels main document, as well as the merged document, can be saved for future use. The following illustration shows a portion of the labels main document that you will set up in the next exercise.

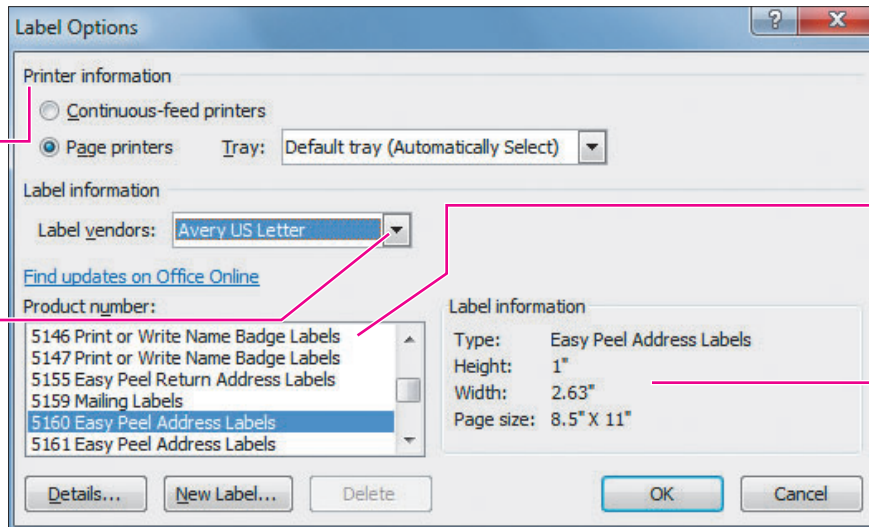
«AddressBlock»	«Next Record»«AddressBlock»	«Next Record»«AddressBlock»
«Next Record»«AddressBlock»	«Next Record»«AddressBlock»	«Next Record»«AddressBlock»
«Next Record»«AddressBlock»	«Next Record»«AddressBlock»	«Next Record»«AddressBlock»

## Using Label Options

The Label Options dialog box allows you to choose printer options and the type of label you will use for your merge. You will find a number on the package of labels you purchase that may correspond to the Product Number in the Label Options dialog box. If you buy a brand name not included in the Label Vendors list, you can match your label size with the label size in the Label Information section.

Choose the appropriate printer information in this area.

Choose the product brand from this drop-down list.





Choose the type of label from this list. If you're not sure what your label type is, you'll find it printed on the box the labels come in.

This area shows label type and the relevant measurements.

### DEVELOP YOUR SKILLS 11.6.3

## Use Mail Merge to Generate Mailing Labels

*In this exercise, you will set up a labels main document, and then you will merge the labels main document with the data source used in the previous exercises.*

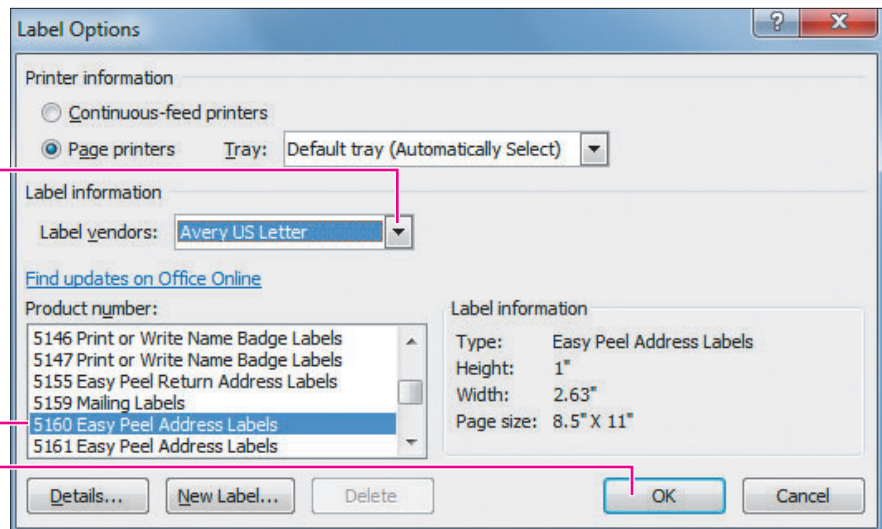
1. Start a **new** blank document.
2. If necessary, choose **Home**→**Paragraph**→**Show/Hide**  from the Ribbon to display formatting marks.
3. Choose **Mailings**→**Start Mail Merge**→**Start Mail Merge**  from the Ribbon, and then choose **Labels** from the menu.

4. Follow these steps to choose a label:

A Scroll through the options and choose **Avery US Letter** from the **Label Vendors** drop-down list.

B Scroll through the list options and then choose **5160 Easy Peel Address Labels** from the **Product Number** list.





C Click **OK**.





The labels main document appears in the Word window.

Labels are contained in a Word table, but don't worry. You don't have to be a table expert to create labels. By default, table grid lines don't appear when you create labels.

## Connect the Data Source

5. Choose **Mailings**→**Start Mail Merge**→**Select Recipients**  from the Ribbon, and then choose **Use Existing List** from the menu.
6. When the Select Data Source dialog box opens, navigate to your file storage location and **open** Policy Manual Letter Data. Make sure the insertion point is in the first address label position.  
*Notice that the space for the first label is blank and all the rest have a <<Next Record>> code in them. You will add the Address Block merge fields with the next few steps.*
7. Choose **Mailings**→**Write & Insert Fields**→**Address Block**  from the Ribbon.
8. Click **OK** to insert the address block code in the first label.
9. Choose **Mailings**→**Write & Insert Fields**→**Update Labels**  from the Ribbon to place the address block in all of the labels.  
*Your addresses will fit the labels better if you remove Word's additional spacing.*
10. Press **[Ctrl] + [A]** to select the entire document.
11. Choose **Home**→**Styles** from the Ribbon.
12. Choose the **No Spacing** style from the Quick Styles gallery.
13. Choose **Mailings**→**Preview Results**→**Preview Results**  from the Ribbon to see how the labels will look when you print them, and then turn off the Preview Results command.

### Conduct the Merge

14. Choose **Mailings**→**Finish**→**Finish & Merge**  from the Ribbon.
15. Choose **Edit Individual Documents** from the menu.
16. When the Merge to New Document dialog box appears, click **OK** to merge all the records.
17. **Close** your merged document without saving it.
18. **Save**  the labels main document in the Lesson 11 folder as **Merge Labels**, and then **close** it.

## 11.7 Concepts Review

**Concepts Review** [labyrinthelab.com/oe10](http://labyrinthelab.com/oe10)

*To check your knowledge of the key concepts introduced in this lesson, complete the Concepts Review quiz by going to the URL listed above. If your classroom is using Labyrinth eLab, you may complete the Concepts Review quiz from within your eLab course.*





# Reinforce Your Skills

## REINFORCE YOUR SKILLS 11.1

### Set Up a New Mail Merge

*In this exercise, you will set up a main document and a data source. You will remove unnecessary fields from the data source, sort the data, and execute the merge.*

#### Set Up the Data Source

1. **Open** the rs-Fundraiser Main document from the Lesson 11 folder.
2. Choose **Mailings**→**Start Mail Merge**→**Start Mail Merge**  from the Ribbon, and then choose **Letters** from the menu.
3. Choose **Mailings**→**Start Mail Merge**→**Select Recipients**  from the Ribbon, and then choose **Type New List** from the menu.
4. Click the **Customize Columns** button in the New Address List dialog box to display the Customize Address List dialog box.
5. Use the **Delete** button in the dialog box to remove the following fields (You must select the field names on the list before clicking Delete.):
  - Address Line 2
  - Country or Region
  - Home Phone
  - E-mail Address
6. Click **OK** to complete the changes to the data source.

#### Enter Data


7. **Enter** the following data into your new data source:

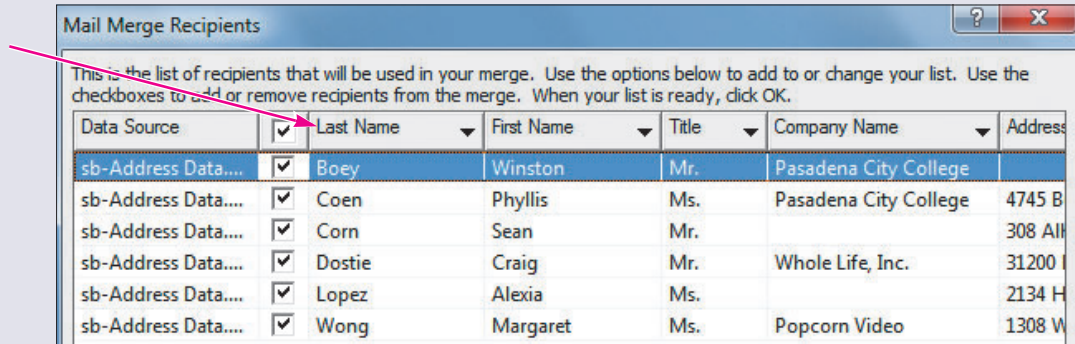
Mr. Sean Corn 308 Alhambra Avenue Monterey Park, CA 91754 626-555-9876	Mr. Craig Dostie Whole Life, Inc. 31200 Erwin Street Woodland Hills, CA 91367 818-555-1711	Ms. Alexia Lopez 2134 harbor Blvd. Costa Mesa, CA92626 714-555-9855
Mr. Winston Boey Pasadena City College 263 East Howard Street Pasadena, CA 91104 626-555-1234	Ms. Phyllis Coen Pasadena City College 4745 Buffin Avenue Fremont, CA94536 408-555-4950	Ms. Margaret Wong Popcorn Video 1308 West Ramona Blvd. Alhambra, CA 91803 818-555-8883

8. Click **OK** when you finish entering the data.
9. Use the **Save Address List** box to navigate to your exercise files.
10. **Save** the data source in the Lesson 11 folder as **rs-Address Data**.



## Sort the List

11. Choose **Mailings**→**Start Mail Merge**→**Edit Recipient List**  from the Ribbon.
12. Click the **Last Name** column heading to sort the records on the Last Name field, as shown here.



This is the list of recipients that will be used in your merge. Use the options below to add to or change your list. Use the checkboxes to add or remove recipients from the merge. When your list is ready, click OK.

Data Source	<input checked="" type="checkbox"/>	Last Name ▾	First Name ▾	Title ▾	Company Name ▾	Address
sb-Address Data....	<input checked="" type="checkbox"/>	Boey	Winston	Mr.	Pasadena City College	
sb-Address Data....	<input checked="" type="checkbox"/>	Coen	Phyllis	Ms.	Pasadena City College	4745 B
sb-Address Data....	<input checked="" type="checkbox"/>	Corn	Sean	Mr.		308 All
sb-Address Data....	<input checked="" type="checkbox"/>	Dostie	Craig	Mr.	Whole Life, Inc.	31200 I
sb-Address Data....	<input checked="" type="checkbox"/>	Lopez	Alexia	Ms.		2134 H
sb-Address Data....	<input checked="" type="checkbox"/>	Wong	Margaret	Ms.	Popcorn Video	1308 W


13. Click **OK** to return to the main document.

## Set Up the Form Letter

14. Use the following guidelines to insert codes as shown in the following main document:
  - Replace **Today's Date** with a date code that will update automatically, using the date format of your choice.
  - Insert the **Address Block** merge field below the date (as shown in the following illustration), using the first and last name only format.
  - Insert an **informal greeting** line followed by a colon.
  - Insert the **Work\_Phone** merge field as shown in the last paragraph.

<p><b>West Coast Youth Services</b>          2500 Ocean Avenue          Monterey Park, CA 91753          310-555-6459</p> <hr/> <p>Today's Date</p> <p>«AddressBlock»</p> <p>«GreetingLine»</p> <p>We have decided to hold the annual fundraiser on July 15 in Los Angeles. As you know, last year's fundraiser was a huge success. We hope to make this year's fundraiser equally successful. This will require early planning and effective advertising.</p> <p>Please RSVP as soon as possible. I must know if you can participate in the event. I would truly appreciate your support and commitment.</p> <p>Also, I have your updated address. But I may need an updated telephone number. I currently have your telephone number listed as «Work_Phone». Please contact me and let me know if your number has changed.</p> <p>Sincerely,</p> <p>Cynthia Thompson          Fundraising Director</p>
--


## Conduct the Merge

15. **Preview** your letters and **correct** any errors you find in the main document or data source.
16. Now **complete** the merge, using the **Edit Individual Documents** option.
17. When you finish, **close** the merged document without saving it.
18. **Save**  the form letter in the Lesson 11 folder as **rs-Fundraiser Main**, and then **close** it.


## REINFORCE YOUR SKILLS 11.2

### Generate Mailing Labels



*In this exercise, you will create a labels main document. You will merge the labels document with rs-Address Data.*

1. Start a **new** Word document.
2. Choose **Mailings**→**Start Mail Merge**→**Start Mail Merge**  from the Ribbon.
3. Choose **Labels** from the menu.
4. If necessary, choose **5160** from the Product Number box.
5. Click **OK** to apply the settings to the document.



### Attach the Data Source

6. Choose **Mailings**→**Start Mail Merge**→**Select Recipients**  from the Ribbon.
7. Click **Use Existing List** from the menu.
8. Choose rs-Address Data from the Lesson 11 folder.

### Arrange the Labels

9. Choose **Mailings**→**Write & Insert Fields**→**Address Block**  from the Ribbon.
10. Click **OK** to insert the address block code in the first label.
11. Choose **Mailings**→**Write & Insert Fields**→**Update Labels**  from the Ribbon.  
*This populates the sheet with codes, ensuring that labels can be positioned at all locations on the sheet.*
12. Press **Ctrl** + **A** to select the entire document.
13. Choose **Home**→**Styles** from the Ribbon.
14. Choose the **No Spacing** style from the Quick Styles gallery to remove Word's extra spacing.

### Merge the Main Document and Data Source

15. Choose **Mailings**→**Preview Results**→**Preview Results**  from the Ribbon.
16. **Preview** your labels, and then **complete** the merge using the **Edit Individual Documents** option from the menu.
17. Click **OK** to merge all records.
18. Observe your labels. You should see one label for each record.
19. When you finish, **close** the merged document without saving it.
20. **Save**  the labels main document in the Lesson 11 folder as **rs-Labels Main**, and then **close** it.

# Apply Your Skills



## APPLY YOUR SKILLS 11.1

### Merge a Form Letter with a Data Source

*In this exercise, you will create a new main document letter. Then you will create a new address list, but you will remove any unnecessary fields first. Finally, you will execute the merge.*

1. Use the **Mailings** tab and the following guidelines to set up a form letter and data source:
  - Use the **as-Health Club Main** document from the Lesson 11 folder.
  - Your data source should contain only the **three records** shown after the letter below. Remove any **unused fields** from the data source.
  - **Save** the data source document as **as-Health Club Data** in the Lesson 11 folder.
  - Insert the **date** in the form letter as a field that updates automatically.
  - Insert an **address block** and **greeting** of your choice.
  - Insert the **work phone number** field in the appropriate location.

Today's Date

«AddressBlock»

«GreetingLine»

The purpose of this letter is to inform you that your health club membership is about to expire. You have been an excellent member for some time, so we would like to offer you a low renewal rate of just \$99 per year.

Please contact me as soon as possible. This offer will expire on March 31. Also, we currently have your phone number listed as «Work\_Phone». Please return the enclosed change of phone number card and let me know if this number is still valid.

Sincerely,

Dave Nelson  
Renewal Manager

Enclosure

Mr. David Roth  
760 Maple Avenue  
Fremont, CA 94538  
510-555-9090

Mrs. Tammy Simpson  
Barkers Books  
312 Tennessee Street  
Richmond, VA 94804  
510-555-2233

Mr. Jason Williams  
2233 Crystal Street  
San Mateo, CA 94403  
415-555-2312

2. **Merge** the form letter with the data source.
3. **Close** the merged document without saving it.
4. If necessary, **save** any changes to your main document, and then **close** it.

## APPLY YOUR SKILLS 11.2

### Generate Envelopes

---

*In this exercise, you will create a new main envelope document and execute the merge.*

1. Use the **Mailings** tab on the Ribbon and these guidelines to set up an envelope main document:
  - Use a **standard size 10** envelope.
  - Use as-Health Club Data as the **data source**.
  - Use the **return address** of your choice.
  - Position the **insertion point** in the placeholder toward the center bottom half of the envelope and insert the **default address block**.
2. **Save** the envelope main document in your Lesson 11 folder as **as-Health Club Envelope**.
3. **Merge** the envelope main document with the data source.
4. **Close** the merged document without saving it.
5. If necessary, **save** any changes to the envelope main document, and then **close** it.

# Critical Thinking & Work-Readiness Skills

*In the course of working through the following Microsoft Office-based Critical Thinking exercises, you will also be utilizing various work-readiness skills, some of which are listed next to each exercise. Go to [labyrinthlab.com/oe10](http://labyrinthlab.com/oe10) to learn more about the work-readiness skills.*



## 11.1 Use Mail Merge

Jenna decides to ask for help from some outside consultants who are experts in employee policy documentation. Create a mail merge data source from the **ct-Consultants** file in your Lesson 11 folder and save it as **ct-Consultant Data Source**. Next, create a form letter thanking the consultants for help and asking them to send you feedback at their earliest convenience. Insert the appropriate address block and greeting line, using the data source, and save the form letter to your Lesson 11 folder as **ct-Dear Consultants Merged**.

### WORK-READINESS SKILLS APPLIED

- Exercising leadership
- Using computers to process information
- Writing

## 11.2 Merge Envelopes

Jenna now wants you to generate envelopes to go with the letters you created. Set up an envelope main document using the **ct-Consultant Data Source** document you created in the previous exercise. You decide which address to use for the return address on the envelope. Save the complete main document in the Lesson 11 folder as **ct-Consultant Envelopes Main**.

### WORK-READINESS SKILLS APPLIED

- Using computers to process information
- Organizing information
- Evaluating information

## 11.3 Create Mailing Labels

Jenna thinks it might a good idea to have a set of address labels on hand so she can send additional documents to one or more consultants without going to the trouble of opening a file to print an envelope. Use the label style of your choice. Set up the labels, using the **ct-Consultant Data Source** document you created in Critical Thinking 11.1. Save the completed label main document as **ct-Consultant Label Main** and save the merged document as **ct-Consultant Labels**.

### WORK-READINESS SKILLS APPLIED

- Showing responsibility
- Using computers to process information
- Organizing information