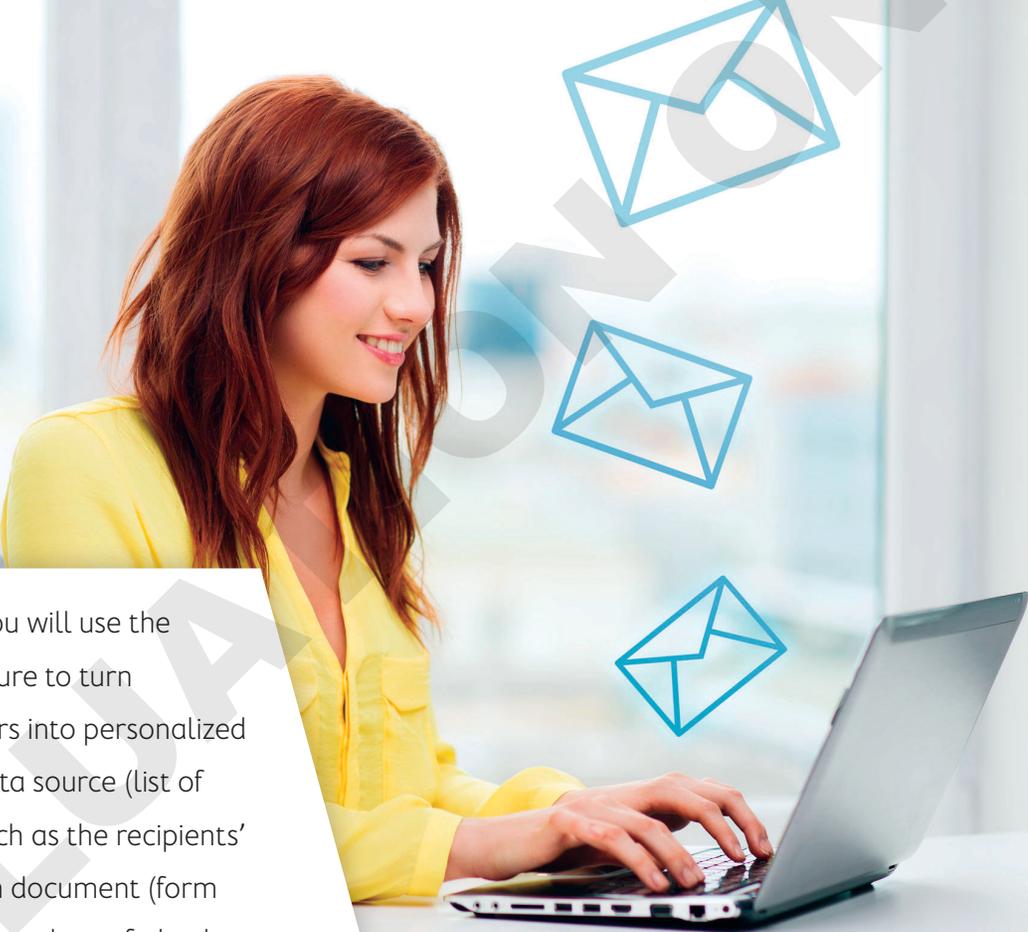


WORD

5

Using Mail Merge



In this chapter, you will use the Mail Merge feature to turn boilerplate letters into personalized correspondence. The data source (list of variable information, such as the recipients' addresses) and the main document (form letter) need to be set up and proofed only once. Then you can generate hundreds of letters without checking each one. And you can use Mail Merge for more than letters. You can generate envelopes, labels, legal documents, or just about any fixed-text document that requires variable information. A data source can be a Word document, an Excel worksheet, an Access database, or an Outlook contact list.

LEARNING OBJECTIVES

- ▶ Build data sources
- ▶ Create main documents
- ▶ Perform a mail merge
- ▶ Deal with merge problems
- ▶ Generate envelopes and labels

Project: Promoting Exercise Classes

Raritan Clinic East is a pediatric medical practice. The practice serves patients ranging in age from newborn to eighteen years. As the administrator who oversees the STAYFIT exercise classes at the clinic, once a week you receive the contact information for all new patients who would benefit from these classes. You will send a letter to the patients explaining the program. Once you set up the main document, you will be able to use it over and over for new patients. And once you design a flexible data source, you can use that same source layout for the exercise letters as well as other communications.

Introducing Mail Merge

Mail Merge is most often used for generating personalized documents, such as Word letters, mailing labels, and envelopes. But Mail Merge is a versatile tool that can be used with any type of document that combines boilerplate text with variable information, such as email, standard contracts, and legal verbiage. Mail Merge can be a big time-saver and is valuable for managing large mailings.

Components of Mail Merge

Merging creates a document that combines information from two files. They are known as the **main document** and the **data source**.

- ▶ **Main document:** This document controls the merge. It is a Word document that contains the fixed information and merge codes into which the variable information is merged. A typical form letter, for instance, has a different inside address and greeting line in each letter, while the rest of the text is the same for everyone receiving the letter.
- ▶ **Data source:** The data source can be another Word document, a spreadsheet, a database file, or contact list in Outlook. The data source contains field names that correspond with the merge codes in the main document.
- ▶ **Merged document:** This document is the result of the merge. It is basically multiple “copies” of your letter, with each copy replacing the merge codes with a different recipient’s name and information.

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.

| Last Name | First Name | Title | Address Line 1 | City | State | ZIP Code |
|-----------|------------|-------|---------------------|-----------|-------|----------|
| Adams | Andre | Mr. | 2224 Culver Drive | San Diego | CA | 92102 |
| Bouras | Talos | Mr. | 854 Whitmore Drive | San Diego | CA | 92101 |
| Chowdrey | Michael | Mr. | 146 Meadow Lane | La Jolla | CA | 92103 |
| Navarro | Derek | Mr. | 3300 Maple Drive | La Jolla | CA | 92103 |
| Romero | Nicole | Ms. | 132 Lake Street | San Diego | CA | 92102 |
| Wright | Mary | Ms. | 1240 Potrero Avenue | San Diego | CA | 92101 |

«AddressBlock»

«GreetingLine»

«First_Name», welcome to Raritan Clinic East, one of the finest clinics in the field of pediatric medicine. As part of our ongoing effort to provide the best patient care, we offer an extensive STAYFIT program. Being active helps you be healthier and stronger—and feel your best. And «Your_Doctor» wants the best for you!

In designing your fitness program, choose from the following offerings:

| Aerobic Exercise | Flexibility Training | Strength Training |
|--------------------|----------------------|-------------------|
| Dance and Movement | Qi Gong | Calisthenics |
| Water Aerobics | Tai Chi | Free Weights |
| Zumba | Yoga | Pilates |

Having trouble finding the right exercise program for you? Contact a health coach. Call 1-800-555-0101.

Classes are every evening from 7:00–8:00 p.m. Advanced registration is required. Call 1-800-555-0102.

Sincerely,

Molly Lincoln
STAYFIT Coordinator

The data source can be Mail Merge recipient list, a Word table, an Excel spreadsheet, or an Access database.

The main document contains standard text and merge codes where variables from the data source will be merged.



February 15, 2021

Mr. Andre Adams
2224 Culver Drive
San Diego, CA 92102

Dear Andre:

Andre, welcome to Raritan Clinic East, one of the finest clinics in the field of pediatric medicine. As part of our ongoing effort to provide the best patient care, we offer an extensive STAYFIT program. Being active helps you be healthier and stronger—and feel your best. And Dr. Bey wants the best for you!

In designing your fitness program, choose from the following offerings:

| Aerobic Exercise | Flexibility Training | Strength Training |
|--------------------|----------------------|-------------------|
| Dance and Movement | Qi Gong | Calisthenics |
| Water Aerobics | Tai Chi | Free Weights |
| Zumba | Yoga | Pilates |

Having trouble finding the right exercise program for you? Contact a health coach. Call 1-800-555-0101.

Classes are every evening from 7:00–8:00 p.m. Advanced registration is required. Call 1-800-555-0102.

Sincerely,

Molly Lincoln
STAYFIT Coordinator

Here is a completed merge document with the variables from the data source.

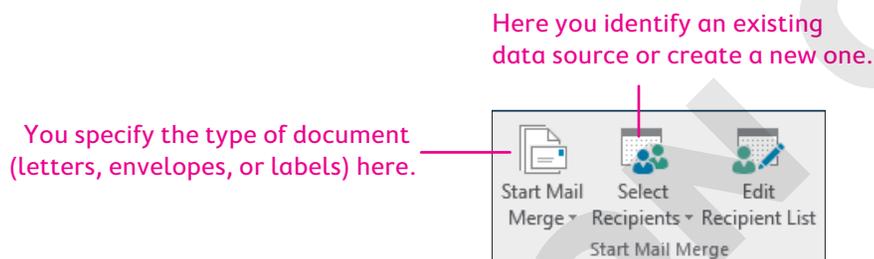
The Benefits of Mail Merge

Mail Merge saves a lot of time. Imagine you want to send a letter to 100 customers. Without Mail Merge, you would have to type the same text in all 100 letters (or copy and paste 100 times). However, with Mail Merge, you create one main document with the standard text and one data source containing customer names and addresses.

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 letter individually.

The Mailings Tab

The Mailings tab provides guidance in setting up the main document and data source, and it helps you conduct the merge. The Start Mail Merge group is the beginning point. Alternatively, you can use the Step-by-Step Mail Merge Wizard from the Start Mail Merge menu to walk you through the process.



Working with the Data Source

Data sources typically contain names, addresses, telephone numbers, and other contact information. However, you can include any information in a data source. For example, you could include part numbers and prices to create a parts catalog. You can create a data source in Word, or you can use an external data source, such as an Access database or Excel spreadsheet. Once a data source is created, it can be merged with many different main documents.



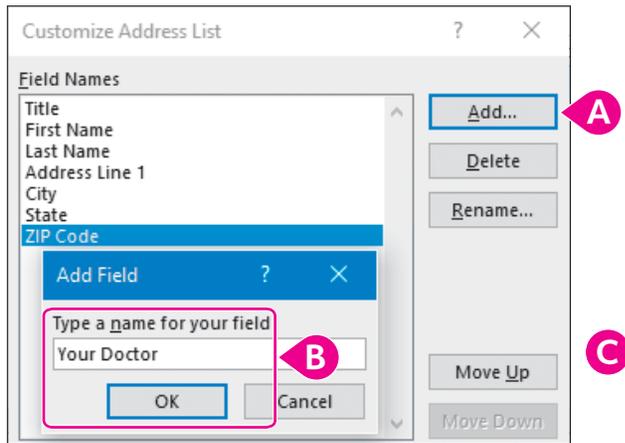
View the video “Creating a Data Source.”

DEVELOP YOUR SKILLS: W5-D1

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

1. Open **W5-D1-ExerciseLtr** from your **Word Chapter 5** folder and save it as: **W5-D1-ExerciseLtrRevised**
2. Choose **Mailings**→**Start Mail Merge**→**Start Mail Merge** →**Letters**.
You are indicating that the letter you just opened will be the main document. Now you will create your mailing list.
3. Choose **Mailings**→**Start Mail Merge**→**Select Recipients** →**Type a New List**.
The New Address List dialog box opens. Now you will remove unnecessary fields and add a new field.
4. Click **Customize Columns** to open the Customize Address List dialog box.

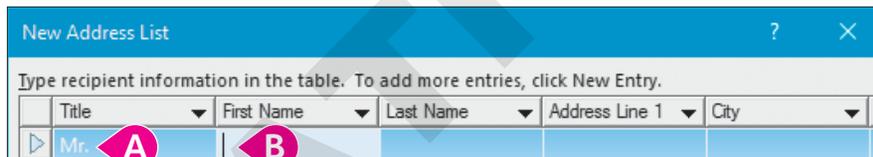
5. Choose **Company Name** and click **Delete**; click **Yes** to verify the deletion.
6. Delete **Address Line 2, Country or Region, Home Phone, Work Phone, and E-mail Address**.
7. Follow these steps to add a field:



- A Click **Add**.
- B Type **Your Doctor** and click **OK**.
- C Click **OK** to close the Customize Address List dialog box.

Enter Records

8. Follow these steps to begin the first record:
The insertion point should be in the Title field.



- A Type **Mr.** in the Title field.
- B Tap **[Tab]** to move to the next field.



Don't type spaces after entering information in a field; Word will take care of it. You can click a field and make editing changes if necessary.

9. Type **Talos** and tap **[Tab]** to move to the next field.
10. Finish entering the Talos Bouras data shown, tapping **[Tab]** between fields. The list of fields will scroll as you **[Tab]** and type:

| | | |
|---------------------------|---------------------------|-----------------------------|
| Mr. Talos Bouras | Ms. Nicole Romero | Mr. Michael Chowdrey |
| 854 Whitmore Drive | 132 Lake Street | 900 C Street |
| San Diego CA 92101 | San Diego CA 92102 | La Jolla CA 92103 |
| Dr. Gonzalez | Dr. Mansee | Dr. Kelly |

11. When you complete the first record, click **New Entry** or tap **[Tab]** to generate a new row for the next record; then enter the two remaining records shown.

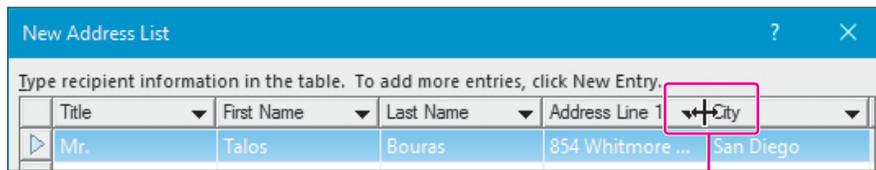


*If you accidentally tap **[Tab]** after the last record, just click Delete Entry to remove the blank record.*

12. Leave the New Address List dialog box open.

Reviewing Your Records

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 later.

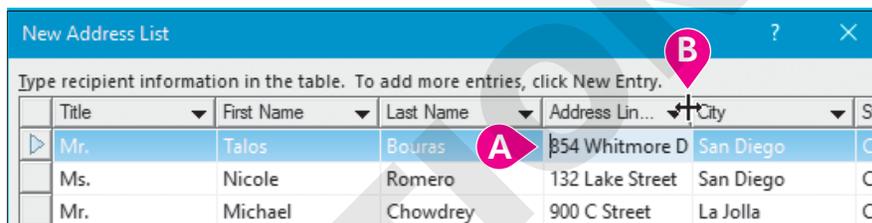


If an entry is wider than the field, position the mouse pointer between column headers and drag to widen (or use the arrow keys to scroll through the entry).

DEVELOP YOUR SKILLS: W5-D2

In this exercise, you will examine your records for accuracy and save your data source.

1. Position the mouse pointer on the scroll bar at the bottom of the dialog box and drag right and left to view all the fields.
2. Follow these steps to review your records:



- A Position the insertion point here and use the **arrow keys** to move through the entry.
 - B Position the mouse pointer here and drag to the right to display the entire entry.
3. Review your entry and correct any typos, and then click **OK** to open the Save Address List dialog box.
4. Save the data source file in your **Word Chapter 5** folder as: **W5-D2-ExerciseLtrData**
Your data source is now connected to the main document.

Managing the Address List

The Mail Merge Recipients dialog box lets you sort and filter address lists, choose records to include in the mail merge, and edit the data source. If you used a Word table, Excel spreadsheet, or other file for your data source, you can edit directly in that data source file. You can also use the New Address List dialog box to create, edit, or delete records and customize columns.

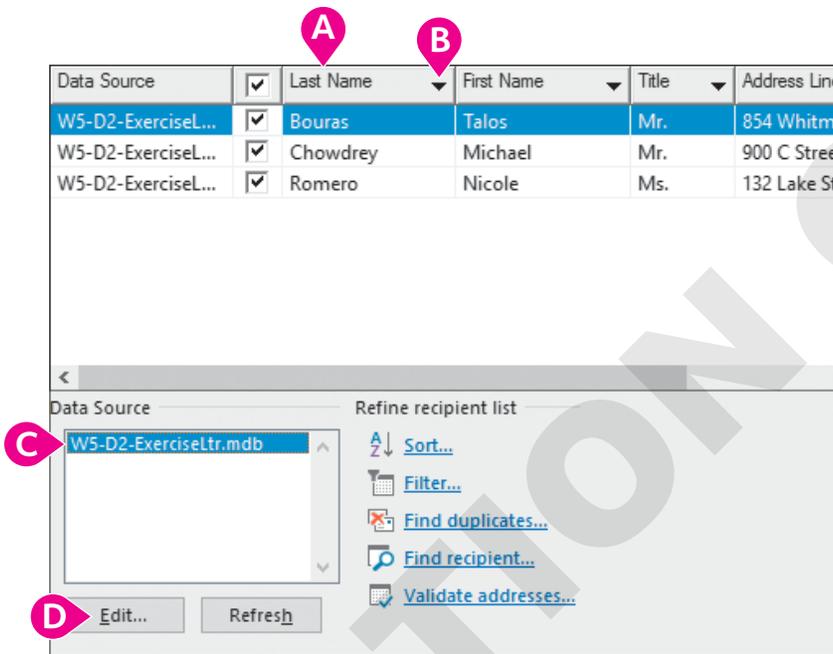


View the video "Working with the Address List."

DEVELOP YOUR SKILLS: W5-D3

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

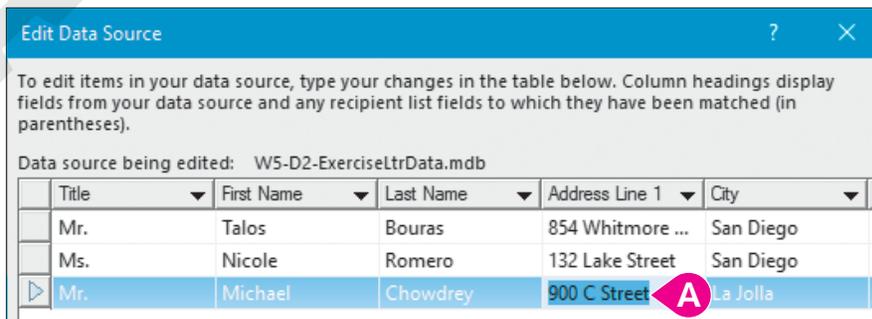
1. Choose **Mailings**→**Start Mail Merge**→**Select Recipients** →**Use an Existing List**.
2. Navigate to your **Word Chapter 5** folder and double-click **W5-D2-ExerciseLtrData**.
3. Choose **Mailings**→**Start Mail Merge**→**Edit Recipient List** .
4. Follow these steps to sort and filter the list and open the Edit Source dialog box:



- A Click this **field header** to sort the list in ascending order by Last Name.
- B Click the drop-down arrow and choose **Chowdrey** to filter out other entries. Click the arrow again and choose **(ALL)** to redisplay all records.
- C Click the **data source** to activate the Edit button.
- D Click **Edit** to open the Edit Data Source dialog box.

The Edit Data Source dialog box looks and operates like the New Address List dialog box. The entries appear in the order in which they were originally entered.

5. Follow these steps to edit a record:



- A Click this address to select it.
- B Type **146 Meadow Lane** in its place.

6. Follow these guidelines to enter the three records in the following illustration:
 - Click the **New Entry** button or tap **Tab** at the end of the row for each new record.
 - Tap **Tab** to move from one field to the next.
 - If you accidentally tap **Tab** after the last record, use **Delete Entry** to remove the blank record.

| | | |
|---|--|--|
| Ms. Mary Wright 1240 Potrero Avenue San Diego CA 92101 Dr. Gonzalez | Mr. Derek Navarro 3300 Maple Drive La Jolla CA 92103 Dr. Storm | Mr. Andre Adams 2224 Culver Drive San Diego CA 92102 Dr. Bey |
|---|--|--|

7. Review the entries for accuracy and then click **OK** to close the dialog box.
8. Click **Yes** when the message appears verifying your update.
9. Click **OK** to close the Mail Merge Recipients dialog box.

Working with the Main Document

You accomplish a merge by combining a main document with a data source. **Merge fields** in a main document correspond to fields in the data source. Some merge codes, such as the Address Block code, are composite codes consisting of a number of grouped fields. For example, the Address Block code includes Title, First Name, Last Name, Address, City, State, and Zip.

Merge fields are replaced with the corresponding data from your data source. They appear exactly as you typed them into your data source and exactly where you placed them in your main document.

«Title» «First_Name» «Last_Name» can be contacted at «Home_Phone».

becomes

Ms. Alexia Lopez can be contacted at 831-555-0132.



View the video “Inserting Merge Fields in the Main Document.”

DEVELOP YOUR SKILLS: W5-D4

In this exercise, you will set up a form letter. The exercise letter main document should still be open.

1. If necessary, choose **Home**→**Paragraph**→**Show/Hide**  to display formatting characters.
2. Select the **Today’s Date** line and tap **Delete**.
3. Choose **Insert**→**Text**→**Date & Time** .
4. Choose the third date format, check **Update Automatically**, if necessary, and click **OK**.

Checking the Update Automatically option means 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.

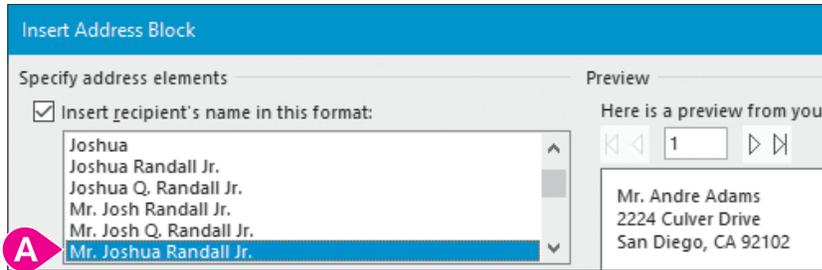
5. Tap **Enter** four times after inserting the date.

Now you will insert the Address Block code.

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

The Insert Address Block dialog box allows you to choose a format for the address block.

- Follow these steps to insert an Address Block code:



- Choose different formats and view the preview on the right; then choose **Mr. Joshua Randall Jr.**

- Leave the remaining options as shown and click **OK**.

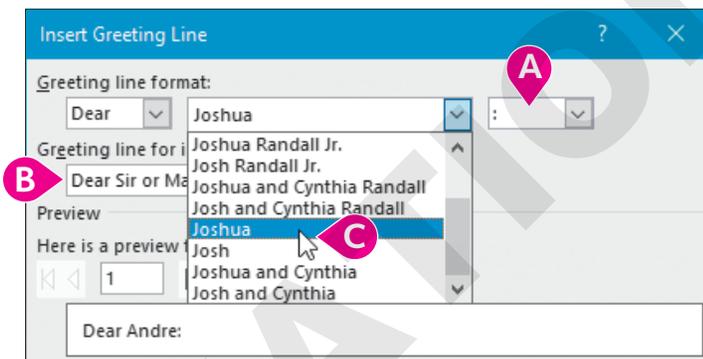
The <<AddressBlock>> code appears in the letter. During the merge, the information from the data source will be inserted at the Address Block code location.

- Tap **Enter** twice.

Now you will insert the Greeting Line code.

- Choose **Mailings**→**Write & Insert Fields**→**Greeting Line** .

- Follow these steps to modify and insert the Greeting Line code:



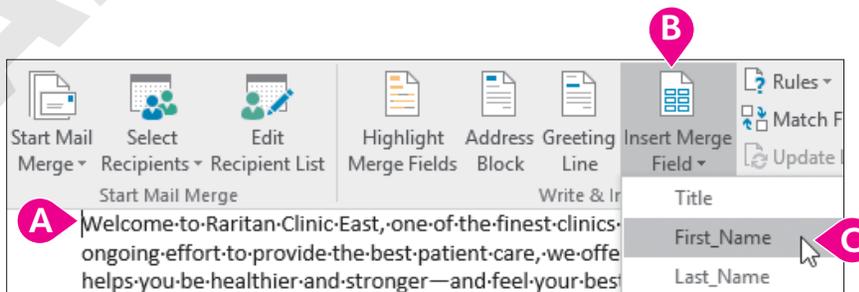
- Change this option to a colon (:).

- Note the generic greeting that will be used for data records if they are missing last names.

- Choose **Joshua** from the list and then click **OK**.

- Tap **Enter** twice.

- Follow these steps to insert the First Name code into the letter:



- If necessary, position the insertion point to the left of *Welcome*.

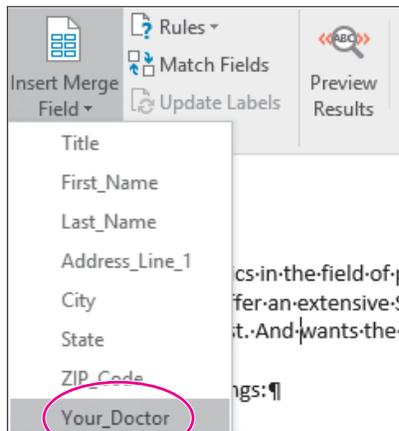
- Click the **Insert Merge Field** menu button .

- Choose **First_Name**.

13. Type a comma and tap **Spacebar**, then delete the uppercase *W* and replace it with a lowercase *w*.
14. Position the insertion point to the left of *wants* as shown:

«First_Name», welcome to Raritan Clinic East, one of the finest clinics in the field of pediatric medicine.
As part of our ongoing effort to provide the best patient care, we offer an extensive STAYFIT program.
Being active helps you be healthier and stronger—and feel your best. And wants the best for you!

15. Choose **Mailings**→**Write & Insert Fields**→**Insert Merge Field**  menu button ▼, choose **Your_Doctor**, and then tap **Spacebar**.



16. Take time to review your letter, making sure the merge fields match this example. In particular, make sure you use the proper punctuation between fields and the text.

The merge fields are highlighted in this figure to help you locate them; your merge fields do not need to be highlighted. (The Highlight Merge Fields button is in the Write & Insert Fields group.)

«AddressBlock»

«GreetingLine»

«First_Name», welcome to Raritan Clinic East, one of the finest clinics in the field of pediatric medicine.
As part of our ongoing effort to provide the best patient care, we offer an extensive STAYFIT program.
Being active helps you be healthier and stronger—and feel your best. And «Your_Doctor» wants the best for you!

Note!

Any punctuation or spacing errors that occur in your main document will appear in every merged letter.

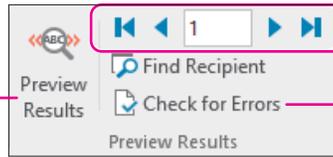
17. Choose **Home**→**Paragraph**→**Show/Hide**  to turn off formatting marks.
18. Save your file.

Conducting a Merge

Merging combines a main document with a data source 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.

It's always a good idea to preview the merge results before you complete the merge so you can make any corrections. If you notice an error that needs to be fixed in the main document, simply click Preview Results again to return to the main document.

Use this button to display the first record from your data source in the letter.

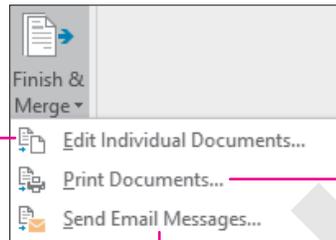


Navigate through the letters with these buttons.

You can click here to have Word check for errors, such as an invalid field code.

When you feel confident that your letter and data source are accurate, you are ready to complete the merge.

This option merges letters on the screen so you can edit individual letters, if desired.



This choice merges directly to the printer.

You can also merge to email messages.

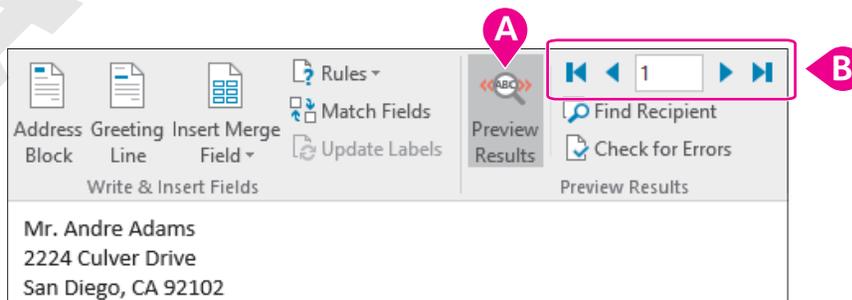
To Save or Not to Save?

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

DEVELOP YOUR SKILLS: W5-D5

In this exercise, you will use the Preview Results command to review your letters; then you will complete the merge on the screen.

1. If necessary, switch to the **Mailings** tab.
2. Follow these steps to preview the merge:



- A Click **Preview Results** to display the first inside address.
- B Use the navigation buttons to scroll through all your merged documents.

3. Choose **Mailings**→**Finish**→**Finish & Merge** →**Edit Individual Documents**.
4. Click **OK** to merge all records.
5. Scroll through the letters and scan their contents.
Notice that there is one letter for each record in the data source.
6. Close the merged document without saving.
7. Choose **Mailings**→**Preview Results**→**Preview Results**  again to display the main document instead of the previews.

Working with Merge Problems

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 then conduct the merge again to determine whether the error was fixed. Repeat this process until the merge works as intended.

COMMON MERGE PROBLEMS

| Problem | Solution |
|---|--|
| The same error appears in every merge letter. | The problem is in the main document. Correct the error and perform the merge again. |
| Some letters are missing data. | Some records in the data source are missing data. Add data and perform the merge again. |
| Some letters have incorrect data. | Some records in the data source are incorrect. Correct the errors and perform the merge again. |

DEVELOP YOUR SKILLS: W5-D6

In this exercise, you will examine your document for merge problems. This exercise does not address all possible merge problems; it does, however, address one specific error that you will make intentionally. You will insert a colon after the Greeting Line code.

1. Position the insertion point after <<GreetingLine>> and type a colon (:).
2. Choose **Mailings**→**Finish**→**Finish & Merge** →**Edit Individual Documents**.
3. Click **OK** to merge all records.
4. Browse through the merged document and notice there are two colons following the greeting line in every letter.
Because the error occurs in every letter, you know the error is in the main document.
5. Locate any other errors and notice how often the errors occur (in every merged letter or just one).
Next you will correct the double colon error and any other errors you discovered that occurred in all letters.

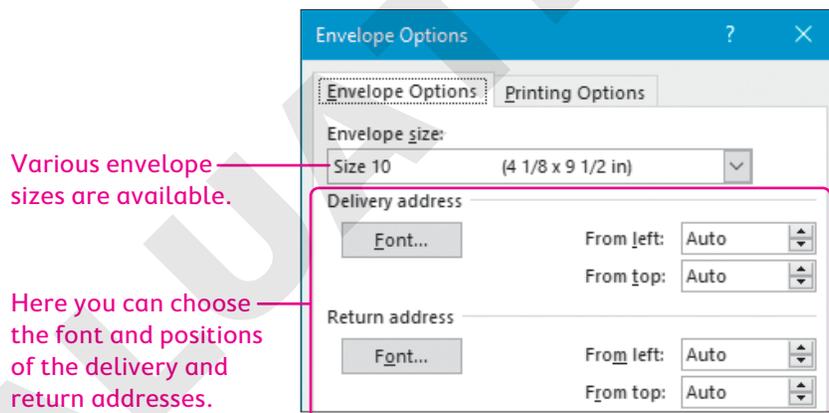
6. Close the merged document without saving; then remove the colon following <<GreetingLine>> and save the main document.
7. Follow these guidelines if you find a data error in just one letter:
 - Choose **Mailings**→**Start Mail Merge**→**Edit Recipient List** .
 - In the Mail Merge Recipients dialog box, highlight the **data source** in the bottom-left corner and click **Edit**.
 - Fix any errors and click **OK**; click **Yes** to update the data.
 - Click **OK** to close the dialog box.
8. When you have corrected any errors, execute the merge again.
9. Close the merged document without saving it and then save and close the exercise letter main document.

Merging Envelopes and Labels

When you begin a mail merge, you are presented with options for the type of main document you can create. In addition to form letters, you can choose envelopes, labels, and other types of documents. 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

Mail Merge lets you choose the envelope size and formats. The standard business (Size 10) envelope is the default. Check your printer manual for instructions on loading envelopes.



DEVELOP YOUR SKILLS: W5-D7

In this exercise, you will choose an envelope as the main document and connect the exercise letter data file to the envelope.

1. Start a new, blank document.
2. Choose **Mailings**→**Start Mail Merge**→**Start Mail Merge** →**Envelopes**.
3. In the Envelope Options dialog box, if necessary, choose **Size 10** as the envelope size and click **OK**.
Now you will attach the same data source that you used for your letter.

4. Choose **Mailings**→**Start Mail Merge**→**Select Recipients** →**Use an Existing List**.
5. In the Select Data Source dialog box, navigate to your **Word Chapter 5** folder and open **W5-D2-ExerciseLtrData**.

Arranging the Envelope

You can insert an Address Block code in the envelope main document just as you do for form letter main documents. If you are not using envelopes with preprinted return addresses, you can type your return address. You save an envelope main document like any other main document.

DEVELOP YOUR SKILLS: W5-D8

In this exercise, you will place the return address and the Address Block code on the envelope. Then you will merge the envelope main document with the data source.

1. If necessary, display formatting marks.
2. Type this return address, starting at the first paragraph symbol in the upper-left corner of the envelope:

Raritan Clinic East
719 Coronado Drive
San Diego, CA 92102
3. Position the insertion point next to the paragraph symbol toward the center of the envelope.
4. Choose **Mailings**→**Write & Insert Fields**→**Address Block** .
5. Click **OK** to accept the default address block settings.

The address information from the data source will appear in this location. Now you will preview the merge.
6. Choose **Mailings**→**Preview Results**→**Preview Results**  to display a record from the data source in the envelope.
7. Use the navigation buttons in the Preview Results group to scroll through all of your merged envelopes.
8. Choose **Mailings**→**Finish**→**Finish & Merge** →**Edit Individual Documents** and click **OK** to merge all records.
9. Turn off formatting marks and then 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. Each letter would have a corresponding envelope because they are generated from the same data source.
10. If necessary, fix any problems with the mail merge and merge the envelopes again.
11. Close the merged document without saving it.
12. Choose **Mailings**→**Preview Results**→**Preview Results**  to turn off the preview.
13. Save the main document envelope in your **Word Chapter 5** folder as **W5-D8-ExerciseLtrEnv** and then close it.

Generating Labels with Mail Merge

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 code and other codes in the main document. Like other main documents, a label main document can be saved for future use.



View the video “Using Label Options.”

DEVELOP YOUR SKILLS: W5-D9

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

1. Start a new, blank document and, if necessary, display formatting marks; also, if necessary, set the zoom back to 100%.
2. Choose **Mailings**→**Start Mail Merge**→**Start Mail Merge** →**Labels**.
3. Follow these steps to choose a printer option and a label:

- A Choose **Default Tray**. The text in parentheses may vary based on the printer model.
- B Choose **Avery US Letter**.
- C Choose **5160 Address Labels** and click **OK**.

The labels main document appears in the window. Labels are contained in a Word table, but don't worry. You don't have to be a table expert to create labels.

Connect the Data Source

4. Choose **Mailings**→**Start Mail Merge**→**Select Recipients** →**Use an Existing List**.
5. In the Select Data Source dialog box, navigate to your **Word Chapter 5** folder and open **W5-D2-ExerciseLtrData**.

6. Make sure the insertion point is next to the paragraph symbol in the first address label.
Notice that the space for the first label is blank and all the rest have a Next Record code in them. Now you will add the Address Block code.
7. Choose **Mailings**→**Write & Insert Fields**→**Address Block**  and click **OK**.
8. Choose **Mailings**→**Write & Insert Fields**→**Update Labels**  to place the Address Block code in all labels.
Your address will fit the labels better if you remove the additional spacing.
9. Select the table and choose **Layout**→**Paragraph**; then type **0** in the Before field and tap **Enter**.
10. Choose **Mailings**→**Preview Results**→**Preview Results**  to see how the labels will look when you print them.
11. Turn off Preview Results when you are finished.

Conduct the Merge

12. Choose **Mailings**→**Finish**→**Finish & Merge** →**Edit Individual Documents**.
 13. Click **OK** to merge all the records.
 14. Close your merged document without saving it.
 15. Save the labels main document in your **Word Chapter 5** folder as: **W5 -D9 -MergeLabels**
 16. Close the document and then exit Word.
-

Self-Assessment



Check your knowledge of this chapter's key concepts and skills using the Self-Assessment in your ebook or online (eLab course or Student Resource Center).

Reinforce Your Skills

REINFORCE YOUR SKILLS: W5-R1

Create a Data Source and Main Document

In this exercise, you will create a data source and main document for a Kids for Change mailing. The kids are holding a fundraiser for a microlending project that focuses on providing economic opportunities for entrepreneurs in India. They will conduct a mailing to announce the upcoming project and canvass their neighborhoods for donations.

1. Start Word, open **W5-R1-Fundraiser** from your **Word Chapter 5** folder, and save it as: **W5-R1-FundraiserRevised**
2. Choose **Mailings**→**Start Mail Merge**→**Start Mail Merge** →**Letters** to identify the fundraising letter as the main document.
3. Choose **Mailings**→**Start Mail Merge**→**Select Recipients**→**Type a New List**.
4. Click **Customize Columns**.
5. Click **Address Line 2** and click **Delete**; click **Yes** to confirm the deletion.
6. Also delete the following fields:
 - Country or Region
 - Home Phone
 - Work Phone
 - E-mail Address
7. Click **Add**, type **Member First Name**, and then click **OK**.
8. Also add a field called **Member Last Name** and then click **OK** twice.
9. With the insertion point in the Title field, type **Ms .** and tap **Tab**.
10. Follow these guidelines to complete the data source list:
 - Continue typing and tabbing to complete the first record shown.
 - Be sure to include the member first name, *Eric*, and last name, *Speck*, in the first record.
 - Tap **Tab** to begin a new record and then continue typing and tabbing to enter the next three records.
 - Note that there is no company information for the third record; **Tab** through that field.
 - If you accidentally tap **Tab** following the last record, use the **Delete Entry** button to remove the blank record.

| |
|---|
| Ms. Loretta Morales Morales Super Market 311 Ocean Street Miami FL 33130 Member: Eric Speck |
|---|

| |
|---|
| Mr. Tony D'Agusto Tony's Trattoria 675 Miller Ave. Miami FL 33129 Member: Wendy Chang |
|---|

| |
|--|
| Mr. Allan Morgan 951 4th Street Miami FL 33136 Member: Stella Hopkins |
|--|

| |
|---|
| Ms. Margarita Elizondo Elan Fashions 307 Dolphin Way Miami FL 33136 Member: Diego Cantero |
|---|

11. Review your records for accuracy; click **OK** when you are satisfied with your work.
12. Save the data source in your **Word Chapter 5** folder as: **W5-R1-FundraiserData**

Set Up the Main Document

13. In the fundraiser letter, select **[Inside Address]** (but not the paragraph symbol at the end of the line) and tap **Delete**.
14. Choose **Mailings**→**Write & Insert Fields**→**Address Block**  and then click **OK** to accept the default address block settings.
15. Delete **[Name]** in the greeting line but not the paragraph symbol at the end of the line.
16. Choose **Mailings**→**Write & Insert Fields**→**Greeting Line**.
17. Choose **Joshua** and **colon** in the Greeting Line Format area as shown and click **OK**.



18. In the last sentence of the first paragraph, delete **[Member Name]**.
19. Choose **Mailings**→**Write & Insert Fields**→**Insert Merge Field** menu button ▼→**Member_First_Name**.
20. Tap **Spacebar** and insert the **Member_Last_Name** field.
21. Save and close the letter.

REINFORCE YOUR SKILLS: W5-R2

Merge a Letter, Envelopes, and Labels

Kids for Change is starting an after-school tutoring program. The tutoring supervisor will send form letters to parents announcing the program. In this exercise, you will merge a data source with a letter. You will also merge the data source with envelopes and labels.

1. Open **W5-R2-ParentLtr** from your **Word Chapter 5** folder and save it as: **W5-R2-ParentLtrRevised**
Notice the merge fields in the letter, including four merge fields in the body of the letter, and that <<Child_Name>> appears twice.
2. Choose **Mailings**→**Start Mail Merge**→**Start Mail Merge** →**Letters**.
3. Choose **Mailings**→**Start Mail Merge**→**Select Recipients**→**Use an Existing List**.
4. Navigate to your **Word Chapter 5** folder and open **W5-R2-ParentData**.
5. Choose **Mailings**→**Preview Results**→**Preview Results**.
6. Navigate through the records and then turn off Preview Results.
7. Choose **Mailings**→**Finish**→**Finish & Merge** →**Edit Individual Documents** and then click **OK** to merge all records.
8. Scroll through the merged letters; close the file without saving it.
9. Save and close the parent letter main document.

Generate Envelopes

10. Start a new, blank document.
11. Choose **Mailings**→**Start Mail Merge**→**Start Mail Merge**→**Envelopes**.
12. Click **OK** to accept the envelope defaults.
13. Choose **Mailings**→**Start Mail Merge**→**Select Recipients**→**Use an Existing List**.
14. Navigate to your **Word Chapter 5** folder and open **W5-R2-ParentData** to attach the data source to the envelope.
15. If necessary, display formatting marks; then type this return address at the first paragraph symbol in the upper-left corner of the envelope:
Kids for Change
726 Throckmorton Ave.
Sacramento, CA 95613
16. Position the insertion point next to the paragraph symbol toward the center of the envelope.
17. Choose **Mailings**→**Write & Insert Fields**→**Address Block**; click **OK** to accept the address block defaults.
18. Choose **Mailings**→**Preview Results**→**Preview Results**.
19. Navigate through the records and then turn off Preview Results.
20. Save the envelope as **W5-R2-ParentEnv** and close the envelope file.

Generate Mailing Labels

21. Start a new, blank document.
22. Choose **Mailings**→**Start Mail Merge**→**Start Mail Merge**→**Labels**.
23. If necessary, choose **Avery US Letter** as the Label Vendor and **5160 Easy Peel Address Labels** as the Product Number, and then click **OK**.
24. Choose **Mailings**→**Start Mail Merge**→**Select Recipients**→**Use an Existing List**.
25. Navigate to your **Word Chapter 5** folder and open **W5-R2-Parent Data**.
26. Display formatting marks, if necessary, and then make sure the insertion point is next to the paragraph symbol in the first label.
27. Choose **Mailings**→**Write & Insert Fields**→**Address Block**; click **OK** to accept the address block defaults.
28. Choose **Mailings**→**Write & Insert Fields**→**Update Labels**  to insert the Address Block code on all labels.
29. Choose **Mailings**→**Preview Results**→**Preview Results** to verify all labels will print correctly.
Because the addresses are three lines, they fit on the Avery 5160 labels without removing extra spacing.
30. Turn off Preview Results to return to the labels main document.
31. Save the labels file in your **Word Chapter 5** folder as: **W5-R2-ParentLabels**
32. Close the file.

REINFORCE YOUR SKILLS: W5-R3

Merge Letters and Envelopes

Kids for Change is sponsoring a walkathon fundraiser to buy musical instruments for the local elementary school. The walkathon supervisor will be contacting Kids for Change members and encouraging their participation. In this exercise, you will designate a letter as the main document and create a data source. Then you will preview the results and correct any merge problems before conducting the merge. Finally, you will generate envelopes for the letters.

1. Open **W5-R3-Walkers** from your **Word Chapter 5** folder and save it as: **W5-R3-WalkersRevised**
2. Choose **Mailings**→**Start Mail Merge**→**Start Mail Merge**→**Letters** to designate the Walkers letter as the main document.
3. Choose **Mailings**→**Start Mail Merge**→**Select Recipients**→**Type a New List**.
Now you will customize the data source columns.
4. Click **Customize Columns** to display the Customize Address List dialog box.
5. Click **Company Name** and click **Delete**; click **Yes** to confirm the deletion.
6. Delete the following fields and then click **OK**:
 - **Address Line 2**
 - **Country or Region**
 - **Work Phone**
 - **E-mail Address**
7. In the Title field, type **Mr.** and tap **Tab** to move to the next field.
8. Type **Sean** in the First Name field, tap **Tab**, and type **Corn** in the Last Name field.
9. Continue tabbing and typing to complete the *Sean Corn* record as shown, tap **Tab** to begin the next record, and then enter the remaining records:

| | | |
|--|---|---|
| Mr. Sean Corn 308 Alhambra Avenue Monterey CA 93940 831-555-0134 | Mr. Craig Dostie 31200 Erwin Street Monterey CA 93940 831-555-0167 | Ms. Alexia Lopez 2134 Harbor Blvd. Monterey CA 93942 831-555-0132 |
| Ms. Margaret Wong 1308 West Ramona Blvd. Monterey CA 93940 831-555-0198 | Ms. Phyllis Coen 4745 Buffin Avenue Monterey CA 93943 831-555-0178 | Mr. Winston Boey 263 East Howard Street Monterey CA 93944 831-555-0196 |

10. Review your records for accuracy and make any necessary corrections.
Now you will sort your list by Last Name.
11. Click the **Last Name** column header to sort the list alphabetically in ascending order and then click **OK**.
12. Navigate to your **Word Chapter 5** folder and save the file as: **W5-R3-WalkersData**

Set Up the Main Document and Correct Merge Problems

13. Follow these guidelines to insert the merge codes:
 - Replace *INSIDE ADDRESS* with the **Address Block** code using the default formats.
 - Replace *GREETING LINE* with the **Greeting Line** code, changing the Greeting Line Format name to **Joshua**.
 - In the last paragraph, replace *HOME PHONE* with the **Home_Phone** code.
14. Use the Preview Results feature to review your letters, correct any errors in the main document, and then turn off Preview Results.

Phyllis Cohen's name is misspelled in the data source. You will make that correction now.
15. Choose **Mailings**→**Start Mail Merge**→**Edit Recipient List** .
16. Click the **data source** in the bottom-left corner and click **Edit**.
17. Change the spelling from *Coen* to **Cohen** and then click **OK**.
18. Click **Yes** to verify the update and then click **OK** to close the Mail Merge Recipients dialog box.
19. Turn on Preview Results and use the navigation buttons to verify the change to the data source and any changes you made to the main document; then turn off Preview Results.
20. Choose **Mailings**→**Finish**→**Finish & Merge** →**Edit Individual Documents** and then click **OK**.
21. Scroll through your letters and then close the merged document without saving it; save and close the main document letter.

Merge Envelopes

22. Start a new, blank document.
23. Choose **Mailings**→**Start Mail Merge**→**Start Mail Merge**→**Envelopes**.
24. Make sure the envelope is **Size 10** and click **OK**.

Now you will attach the data source to your envelope.
25. Choose **Mailings**→**Start Mail Merge**→**Select Recipients** →**Use an Existing List**.
26. Navigate to your **Word Chapter 5** folder and open **W5-R3-WalkersData**.
27. If necessary, turn on formatting marks; then type this return address at the top paragraph symbol in the upper-left corner of the envelope:

Kids for Change
456 Bayside Road
Monterey, CA 93943
28. Position the insertion point next to the paragraph symbol toward the middle of the envelope.
29. Choose **Mailings**→**Write & Insert Fields**→**Address Block** and then click **OK**.
30. Choose **Mailings**→**Preview Results**→**Preview Results**.
31. Use the navigation buttons to view all envelopes and then turn off the preview.
32. Choose **Mailings**→**Finish**→**Finish & Merge**→**Edit Individual Documents** and then click **OK**.
33. Scroll through the envelopes and then close the file without saving it.
34. Save the envelope main document in your **Word Chapter 5** folder as **W5 - R3 - WalkersEnv** and close the document.

Apply Your Skills

APPLY YOUR SKILLS: W5-A1

Create a Data Source and Main Document

Universal Corporate Events is announcing a new affordable and flexible program for its small-business clients. In this exercise, you will create a small-business client data source, and you will review the records and sort the list. Then you will specify a letter as a main document and insert merge fields in the letter.

1. Open **W5-A1-SmallBiz** from your **Word Chapter 5** folder and save it as: **W5-A1-SmallBizRevised**
2. Specify the Small Biz letter as the main document.
Now you will customize the columns for your new data source.
3. Delete and add columns as needed to create the following fields in your data source:
 - Title
 - First Name
 - Last Name
 - Company Name
 - Address Line 1
 - City
 - State
 - Zip Code
 - Agent Name
4. Add these records to your data source:

| | | |
|---------------------------------------|---------------------------------|-----------------------------------|
| Mr. Tony Simpson | Mr. Jason Jones | Ms. Debbie Thomas |
| Bigger Time Video Distributors | Move It Distribution | Barker Books |
| 312 York Lane | 2233 Crystal Street | 497 Tennessee Street |
| Richmond CA 94804 | San Mateo CA 94403 | Richmond CA 94804 |
| Agent Name: David Roth | Agent Name: Tammy Nelson | Agent Name: Jacob Williams |

5. Sort the data source in ascending alphabetic order by **Company Name**.
6. Save the data source in your **Word Chapter 5** folder as: **W5-A1-SmallBizData**
7. Delete the *Today's Date* placeholder, choose **Insert**→**Text**→**Date & Time** , choose the third date format, and make sure **Update Automatically** is checked.
8. Follow these guidelines for inserting merge codes in the main document:
 - Replace *INSIDE ADDRESS* with the **Address Block** code using the default formats.
 - Replace *GREETING LINE* with the **Greeting Line** code and change the ending punctuation to a colon.
 - In the last paragraph, replace *AGENT NAME* with the **Agent_Name** code.
9. Preview the letters and check that the spacing is correct, and then turn off the preview and make any needed changes.
10. Save and close the letter.

APPLY YOUR SKILLS: W5-A2

Complete a Merge

Universal Corporate Events is conducting a seminar on visa requirements for United States citizens. It is sending a form letter invitation to its clients' in-house travel agents. In this exercise, you will merge letters, envelopes, and labels. You will also correct merge problems.

1. Open **W5-A2-VisaLtr** from your **Word Chapter 5** folder and save it as:
W5-A2-VisaLtrRevised
2. Designate the letter as the main document and **W5-A2-VisaData** from your **Word Chapter 5** folder as the data source.
3. Preview the merge and notice that there is an error in the greeting line.
4. Close the preview and then edit the main document and preview the letters again, checking that the greeting line is correct.
5. Close the preview; save and close the main document.

Merge Envelopes and Labels

6. Start a new, blank document and create a **Size 10** envelope as the main document with this return address:
Suzanne Frost, Sales Manager
Universal Corporate Events
129 Potter Road
Middlefield, CT 06455
7. Attach **W5-A2-VisaData** as the data source for the envelopes.
8. Insert an **Address Block** code in the middle of the envelope using the default formats.
9. Preview the envelopes.
10. Save the envelope main document in your **Word Chapter 5** folder as **W5-A2-VisaEnv** and then close it.
11. Start a new, blank document and create a label main document using **Avery US Letter** as the Label Vendor and **5160 Address Labels** as the Product Number.
12. Attach **W5-A2-VisaData** as the data source.
13. Insert the **Address Block** code in the first label using the default formats and use the **Update Labels** command to replicate the Address Block code on all labels.
14. Preview the results and notice that the addresses don't fit well on the labels.
15. Close the preview, select the labels table, and remove Word's extra spacing by entering **0** in the Before field.
Hint: The Before field is at Layout→Paragraph.
16. Preview the results again to ensure that the labels fit correctly.
17. Close the preview and save the labels main document in your **Word Chapter 5** folder as:
W5-A2-VisaLabels
18. Close the labels main document.

APPLY YOUR SKILLS: W5-A3

Create a Mail Merge for Trip Winners

A Universal Corporate Events client is rewarding its top sales performers with a trip to Tokyo. It will send an itinerary letter to the company's winners. In this exercise, you will create a data source using customized columns and add merge codes to main documents. You will preview and merge the main documents with the data source, make an editing change to a record, and sort the data source.

1. Open **W5-A3-TokyoLtr** from your **Word Chapter 5** folder and save it as: **W5-A3-TokyoLtrRevised**
2. Specify the letter as the main document and then start a new data source list.
3. Customize the columns by deleting some fields and keeping the fields shown here:
 - Title
 - First Name
 - Last Name
 - Company Name
 - Address Line 1
 - City
 - State
 - Zip Code
4. Create the data source using these three records and save it as: **W5-A3-TokyoData**

| | | |
|-------------------------------------|-------------------------------------|-------------------------------------|
| Ms. Jasleen Mahal | Mr. George Iverson | Mr. Anthony Waldek |
| Superior Storage Devices | Superior Storage Devices | Superior Storage Devices |
| 951 Industrial Way | 951 Industrial Way | 951 Industrial Way |
| Trenton NJ 08601 | Trenton NJ 08601 | Trenton NJ 08601 |

5. Follow these guidelines to insert merge codes in the letter:
 - Replace *INSIDE ADDRESS* with **Address Block** code using the default formats.
 - Replace *GREETING LINE* with **Greeting Line** code using the default formats.
 - In the first paragraph, replace *COMPANY NAME* with the **Company_Name** code.
 - In the last paragraph, replace *FIRST NAME* with the **First_Name** code.

Preview the Merge Results

6. Preview the merge, make sure the spacing is correct, and then close the preview.
7. Modify the spacing in the main document, if necessary.

You want the greeting line to be less formal, so you will change the format to the recipient's first name.
8. Right-click the **Greeting Line** code and choose **Edit Greeting Line** from the menu.
9. In the Greeting Line Format area, click the drop-down arrow next to *Mr. Randall*, choose **Joshua** from the list, and click **OK**.
10. Preview the letters again to ensure the change was made and then turn off the preview.

11. Merge the letter with the data source, choosing **Edit Individual Documents**, and then scroll through the letters.
12. Close the merged document without saving it; save and close the main document.

Merge Envelopes and Labels

13. Start a new, blank document, designate it as a mail merge envelope, and use a **Size 10** envelope.
14. Insert this return address on the envelope:
Ms. Tasha Reynolds
Universal Corporate Events
456 Riverview Road
Trenton, NJ 08601
15. Attach the Tokyo data source to the envelope and insert the **Address Block** code using defaults.
16. Merge the envelopes and check them for accuracy; if necessary, correct any errors and conduct the merge again.
17. Close the merge document without saving it.
18. Save the envelope main document as **W5-A3-TokyoEnv** and then close it.
19. Start a new, blank document and designate it as **Labels**.
20. Choose **Avery US Letter** as the Label Vendor and **5160 Address Labels** as the Product Number.
21. Attach the Tokyo data source, insert the **Address Block** code with default settings in the first label, and update the labels to replicate the **Address Block** code in all labels.
22. Preview the labels and notice the addresses don't fit well because of Word's extra spacing.
23. Close the preview, select the labels table, and remove the extra spacing.
24. Preview the labels again to verify the change in spacing and then close the preview.
25. Save the labels main document as **W5-A3-TokyoLabels** and then close it.

Project Grader

If your class is using eLab (labyrinthelab.com), you may upload your completed Project Grader assignments for automatic grading. You may complete these projects even if your class doesn't use eLab, though you will not be able to upload your work.

PROJECT GRADER: W5-P1

Taylor Games New Items Letter

Taylor Games wants to track customer purchases, storing that information in a data source. In this exercise, you will set up a prototype data source and a letter that will be sent to existing customers promoting new items.

- Download and open your Project Grader starting file.
 - Using eLab: Download **W5_P1_eStart** from the Assignments page. You must start with this file or your work cannot be automatically graded.
 - Not using eLab: Open **W5_P1_Start** from your **Word Chapter 5** folder.

You'll now set up a mail merge using *W5_P1_eStart* as your mail merge main document.
- Create a new Address List for your main document using these guidelines:
 - Delete these field names from the Field Names list: **Title, Company Name, Address Line 2, Country or Region, Home Phone, Work Phone,** and **E-mail Address.**
 - Add a field named **Item Type** to the end of the Field Names list.
- Add these three customer entries to your Address List:

| First Name | Last Name | Address Line 1 | City | State | ZIP Code | Item Type |
|------------|-----------|-----------------|------------|-------|----------|-----------|
| Curt | Smith | 555 Rock Lane | Danville | CA | 94506 | Dice |
| Fred | Parker | 664 Park Road | Scottsdale | AZ | 85258 | Games |
| Kim | Price | 1775 Pine Place | Elmira | NY | 14901 | Books |

- Save your address list to your **Word Chapter 5** folder as: **W5_P1 Address List.mdb**
- In the main document on the second empty paragraph below *Today's Date*, insert an **Address Block** using the **Joshua Randall Jr.** format.

Today's Date¶

¶

¶

¶

Dear·FIRSTNAME:¶

- Replace the **FIRSTNAME** and **ITEMTYPE** placeholder text with merge fields as follows. Make sure the spacing between the merge fields and surrounding text is the same as the current spacing between the placeholders and text.
 - Replace the two occurrences of *FIRSTNAME* with the **First_Name** merge field.
 - Replace *ITEMTYPE* in the first body paragraph with the **Item_Type** merge field.

7. Replace the *Today's Date* text by typing the current date in whatever format you like best. Maintain the current one empty paragraph spacing between the date and address block.
8. Finish & merge all records, creating editable individual documents. If necessary, review your merge results, make corrections in your source document, and remerge.
9. Save the merged letters to your **Word Chapter 5** folder as **W5_P1 Merged Letters** and then close the document.
10. Save your main document.
 - *Using eLab:* Save it to your **Word Chapter 5** folder as **W5_P1_eSubmission** and attach the file to your eLab assignment for grading.
 - *Not using eLab:* Save it to your **Word Chapter 5** folder as: **W5_P1_Submission**

PROJECT GRADER: W5-P2

Generating Mail Merge Envelopes

You've been asked to generate envelopes from an existing Classic Cars Club database. In this exercise, you will set up the necessary main document and conduct a merge to produce the desired envelopes.

1. Download and open your Project Grader starting file.
 - *Using eLab:* Download **W5_P2_eStart** from the Assignments page. You *must* start with this file or your work cannot be automatically graded.
 - *Not using eLab:* Open **W5_P2_Start** from your **Word Chapter 5** folder.

You'll now set up a mail merge using the empty W5_P2_eStart as your mail merge main document.
2. Start your mail merge by changing the document type to **Envelope, Size 10**.
3. Enter the following return address in the top-left corner:

Lisa Rowling
Classic Cars Club
356 Maple Lane
Renton, WA 98056
4. Use the existing list **W5_P2 Addresses** from your **Word Chapter 5** folder as your data source and use the table **Sheet1\$**.
5. Insert an **Address Block** in the rectangular box near the bottom-center of the envelope using the **Joshua Randall Jr.** format.
6. Finish and merge all records, creating editable individual envelopes. If necessary, review your merge results, make corrections in your source document, and remerge.
7. Save the merged envelopes to your **Word Chapter 5** folder as **W5_P2 Merged Envelopes** and then close the document.
8. Save your main document.
 - *Using eLab:* Save it to your **Word Chapter 5** folder as **W5_P2_eSubmission** and attach the file to your eLab assignment for grading.
 - *Not using eLab:* Save it to your **Word Chapter 5** folder as: **W5_P2_Submission**

Extend Your Skills

These exercises challenge you to think critically and apply your new skills in a real-world setting. You will be evaluated on your ability to follow directions, completeness, creativity, and the use of proper grammar and mechanics. Save files to your chapter folder. Submit assignments as directed.

W5-E1 That's the Way I See It

You are planning a field trip for the fifth-grade class you teach. Create a permission letter informing parents of the trip and how it relates to students' school work (e.g., visiting an aquarium after studying about ocean life). Include a request for parents to sign and return the letter. Save the letter as: **W5-E1-FieldTripLtr**

Create a three-record data source of parent names and addresses and any other variables you choose. Customize the data source with only the column headings you need. Save the data source as **W5-E1-FieldTripData** and insert merge codes in the form letter. Merge the main document and data source. Save the merged document as: **W5-E1-FieldTripLtrMerged**

Create an envelope main document with your return address, merge it with your data file, and save it as: **W5-E1-FieldTripEnvMerged**

W5-E2 Be Your Own Boss

You are introducing a rewards program for Blue Jean Landscaping customers. Create a form letter of two to three paragraphs describing how customers can accumulate points toward purchases. Mention three other benefits (make them up) for program members. Save the letter as: **W5-E2-RewardsLtr**

Create a data source of three customers' names and addresses and any other fields you want to use. Customize the data source for only those columns needed. Save it as **W5-E2-RewardsData** and insert merge field codes in the letter. Conduct the merge, saving the merged document as: **W5-E2-RewardsLtrMerged**

Finally, create a labels document named **W5-E2-RewardsLabels** and merge it with the data source. Save the merged labels as: **W5-E2-RewardsLabelsMerged**

W5-E3 Demonstrate Proficiency

Stormy BBQ has added brisket of beef to its menu! It offered a free beef brisket meal and a \$20 gift certificate to the first five customers who visited its restaurant on New Year's Day. It plans to mail the certificates to the qualifying customers. As a Stormy BBQ employee, you have been asked to compose a congratulatory letter to go with the certificates. Compose an appropriate letter of two or three paragraphs saved as: **W5-E3-CertLtr**

Create a name and address data source for five winners. Customize the data source by adding any fields you want to use in your letter; delete any fields you don't intend to use. Save the data source as **W5-E3-CertData** and merge the letter and the data source. Save the merge document as: **W5-E3-CertLtrMerged**

Finally, create an envelope main document to go with the mailing and include Stormy BBQ's return address and the Address Block code on a Size 10 envelope. Save the envelope main document as **W5-E3-CertEnv** and preview the envelopes to verify that they will print correctly. Make corrections if necessary, merge the envelope with your data source, and then save the merged document as: **W5-E3-CertEnvMerged**