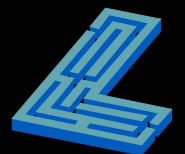


Microsoft Word 2007: Level 1 of 3



Lesson 5: Using Mail Merge

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Understanding Mail Merge Concepts

- **How it works**
 - ▲ Main document
 - ▲ Data source
 - ▲ Merge document
- **Benefits of using mail merge**
 - ▲ Saves time
 - ▲ Reduces errors



Understanding Mail Merge Concepts

Robinson Financial Services
899 Ramiro Street, Manhattan Beach, CA 90245

Main document

May 17, 2002

«AddressBlock»

«GreetingLine»

	LastName	FirstName	Title	Company	Address1	City	State	Zip	WorkPhone
<input checked="" type="checkbox"/>	Armstrong	Bob	Mr.	Miners Products Company	900 C Street	Fort Worth	TX	76104	(817) 871-4040
<input checked="" type="checkbox"/>	Borton	James	Mr.	American Chemical Company	854 Whitmere Drive	Austin	TX	78752	(512) 483-7520
<input checked="" type="checkbox"/>	Brown	Richard	Mr.	Acme Products, Inc.	1240 Potrero Avenue	El Cerrito	CA	94530	(510) 216-7000
<input checked="" type="checkbox"/>	Carlton	Bruce	Mr.	Bedrock Building Supplies	3300 Maple Drive	Gainesville	FL	32601	(904) 330-0909
<input checked="" type="checkbox"/>	Springer	Jerry	Mr.	Caltron, Inc.	8900 West Fairmont Avenue	Plattsburgh	NY	12950	(518) 276-9091
<input checked="" type="checkbox"/>	Wilson	Fred	Mr.	RBJ, Inc.	132 Lake Street	Richmond	NY	12954	(518) 324-9845
<input checked="" type="checkbox"/>	Wineburgh	Albert	Mr.		3344 Culver Drive	Gainesville	FL	32601	(904) 336-3230

Thank you for your recent purchase of our Infinity Financial Services Package. In order for us to provide you with superior service, we must verify your phone number.

We currently have your phone number listed as «WorkPhone». Please contact us if this number is not accurate.

«Title» «LastName», thank you once again for your business.

Sincerely,

Linda Adams
Chief Executive Officer

Data source

Merge document

Robinson Financial Services
899 Ramiro Street, Manhattan Beach, CA 90245

May 17, 2002

Mr. Bob Armstrong
Miners Products Company
900 C Street
Fort Worth, TX 76104

Dear Mr. Armstrong:

Thank you for your recent purchase of our Infinity Financial Services Package for us to provide you with superior service, we must verify your phone number.

We currently have your phone number listed as (817) 871-4040. Please contact us if this number is not accurate.

Mr. Armstrong, thank you once again for your business.

Sincerely,

Linda Adams
Chief Executive Officer

Robinson Financial Services
899 Ramiro Street, Manhattan Beach, CA 90245

May 17, 2002

Mr. Richard Brown
Acme Products, Inc.
1240 Potrero Avenue
El Cerrito, CA 94530

Dear Mr. Brown:

Thank you for your recent purchase of our Infinity Financial Services Package for us to provide you with superior service, we must verify your phone number.

We currently have your phone number listed as (510) 216-7000. Please contact us if this number is not accurate.

Mr. Brown, thank you once again for your business.

Sincerely,

Linda Adams
Chief Executive Officer

Robinson Financial Services
899 Ramiro Street, Manhattan Beach, CA 90245

May 17, 2002

Mr. James Borton
American Chemical Company
854 Whitmere Drive
Austin, TX 78752

Dear Mr. Borton:

Thank you for your recent purchase of our Infinity Financial Services Package. In order for us to provide you with superior service, we must verify your phone number.

We currently have your phone number listed as (512) 483-7520. Please contact us if this number is not accurate.

Mr. Borton, thank you once again for your business.

Sincerely,

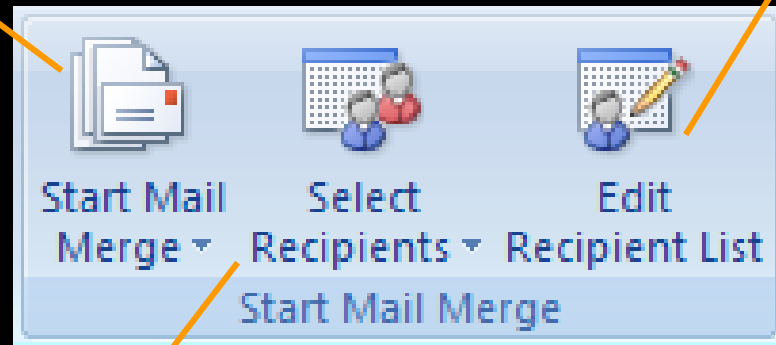
Linda Adams
Chief Executive Officer



Working with Mail Merge

Specify the type of main document, such as letters, envelopes, and labels

Edit the data source

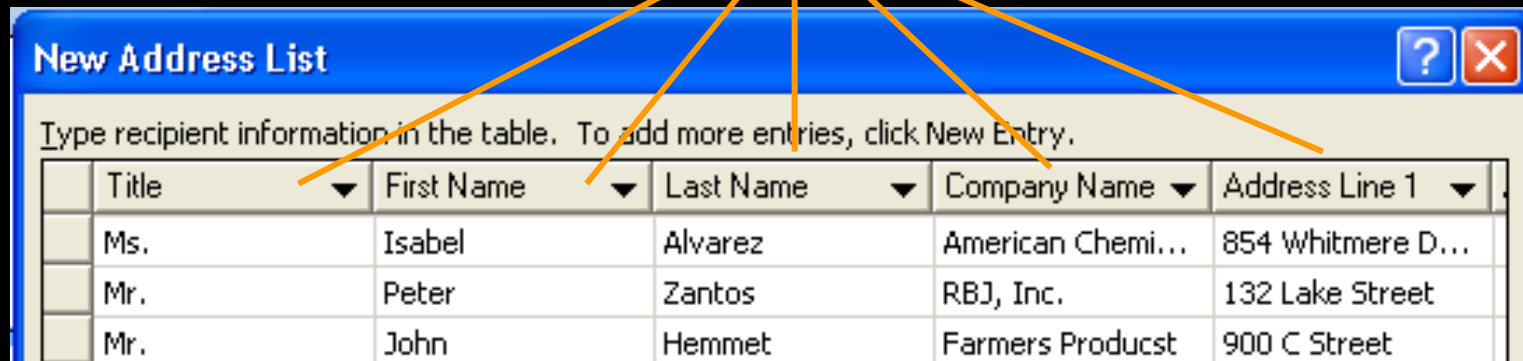


Either identify an existing data source or create a new data source




Data Sources

Pre-defined fields
Customize fields to meet your needs



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

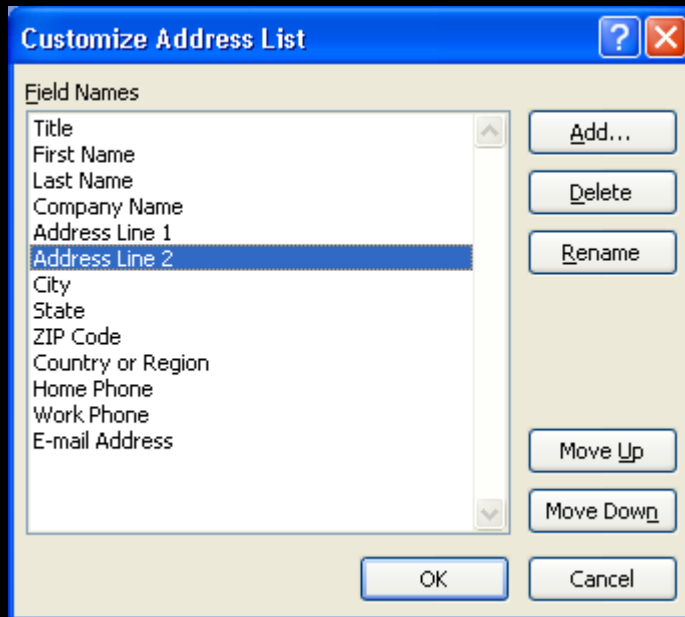
	Title ▼	First Name ▼	Last Name ▼	Company Name ▼	Address Line 1 ▼
	Ms.	Isabel	Alvarez	American Chemi...	854 Whitmere D...
	Mr.	Peter	Zantos	RBJ, Inc.	132 Lake Street
	Mr.	John	Hemmet	Farmers Product	900 C Street

TIP  You can't merge a portion of a field:
More Fields = More Flexibility

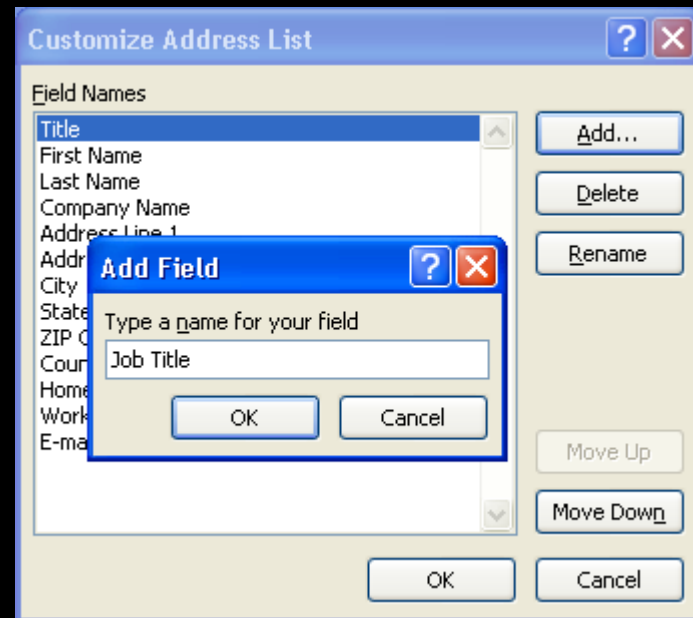


Data Sources

- Customize an address list



Choose fields to delete or move to a new location in the list

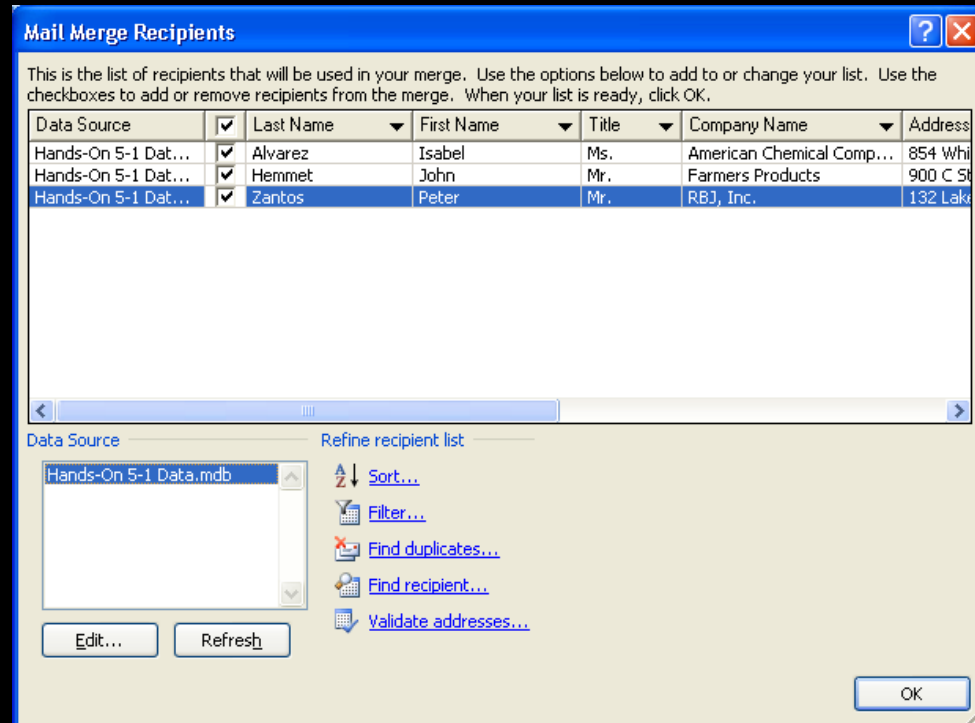


Add new fields to the list



Data Sources

- Manage your address list
 - ▲ Sort
 - ▲ Filter
 - ▲ Check
 - ▲ Edit



Data Sources


- Edit records

Edit Data Source [?] [X]

To edit items in your data source, type your changes in the table below. Column headings display fields from your data source and any recipient list fields to which they have been matched (in parentheses).

Data source being edited: Hands-On 5-1 Data.mdb

	Title ▼	First Name ▼	Last Name ▼	Company Name ▼	Address Line 1 ▼
	Ms.	Isabel	Alvarez	American Chemi...	854 Whitmere D...
	Mr.	Peter	Zantos	RBJ, Inc.	132 Lake Street
▶	Mr.	John	Hemmet	Farmers Products	900 C Street

TIP  *This dialog box looks and operates like the New Address List dialog box.*

Main Documents

■ Set up your main document

- ▲ Address block
- ▲ Greeting line
- ▲ Fields

Insert Greeting Line [?] [X]

Greeting line format:
Dear [v] Mr. Randall [v] [v]

Greeting line for invalid recipient names:
Dear Sir or Madam, [v]

Preview

Here is a preview from your recipient list:
[v] 1 [v]

Dear Ms. Alvarez:

Robinson Financial Services
899 Ramiro Street, Manhattan Beach, CA 90245

May 17, 2002

««AddressBlock»»

««GreetingLine»»


Thank you for your recent purchase of our Infinity Financial Services Package. In order for us to provide you with superior service, we must verify your phone number.

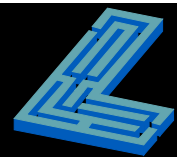
We currently have your phone number listed as «WorkPhone». Please contact us if this number is not accurate.

«Title» «LastName», thank you once again for your business.

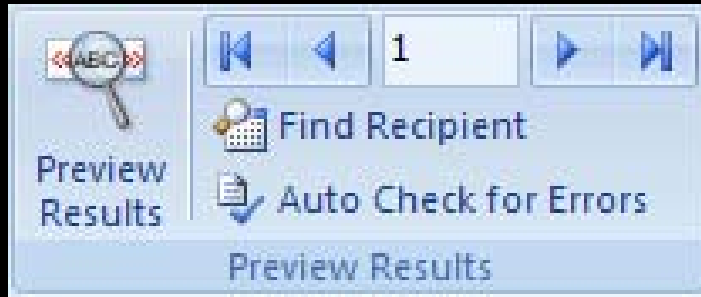
Sincerely,

Linda Adams
Chief Executive Officer

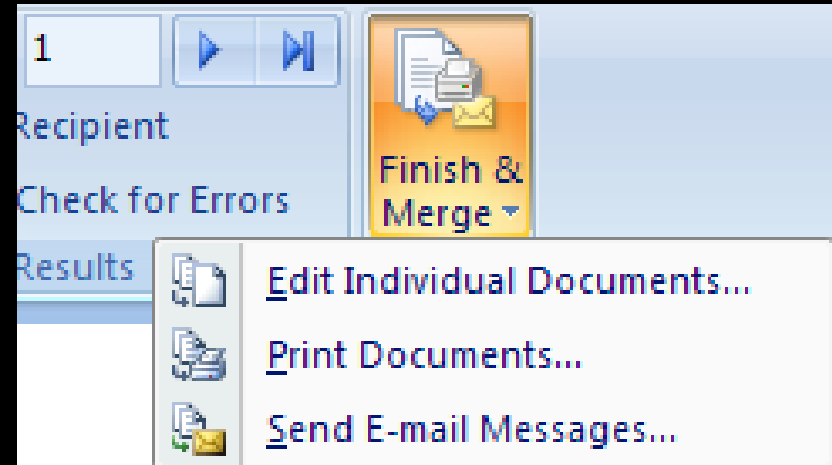
TIP  You can customize the address block and greeting line.



Conducting a Merge



Preview results before executing the merge




Several options for completing the merge

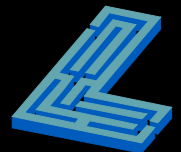
TIP  *Merged documents are rarely saved.*

Merge Problems

- Common problems

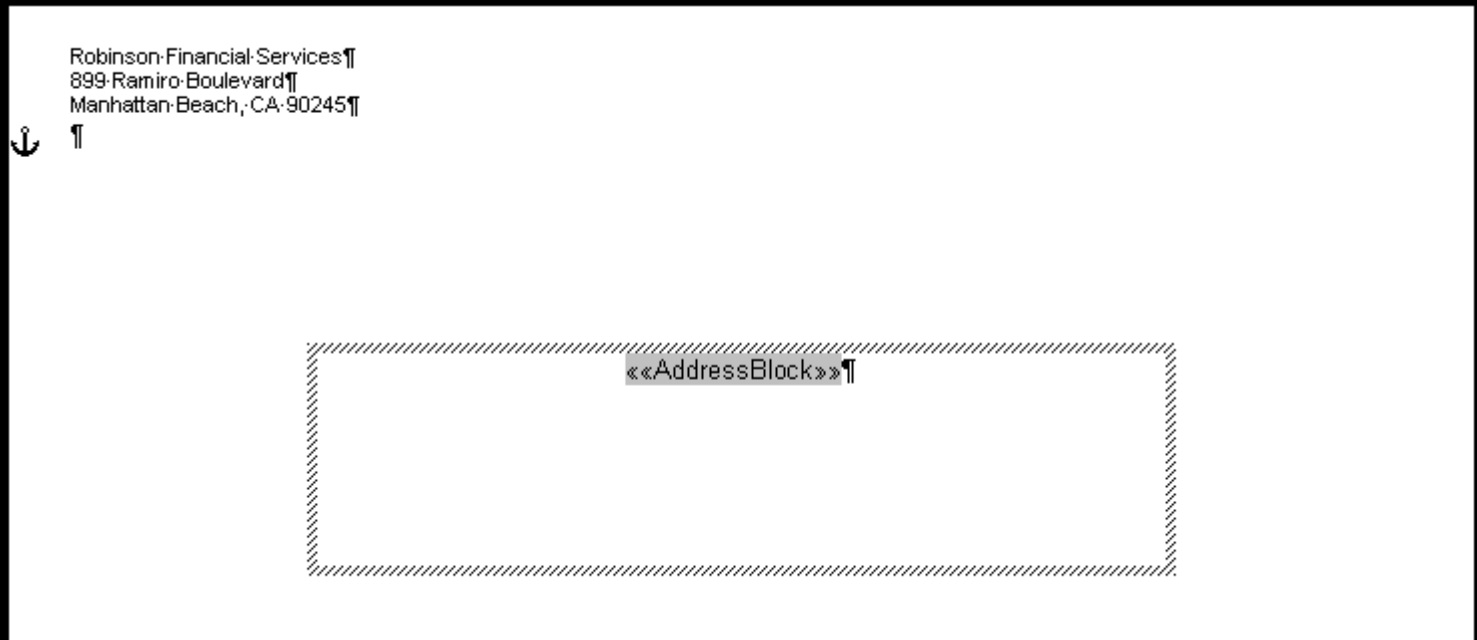
Problem	Solution
Typo, punctuation mistake, or formatting inconsistency	Fix the Main Document
Missing data	Fix the Data Source
Incorrect data in fields	Fix the Data Source


TIP  Try the solution then remerge the document.



Using Envelopes with Mail Merge

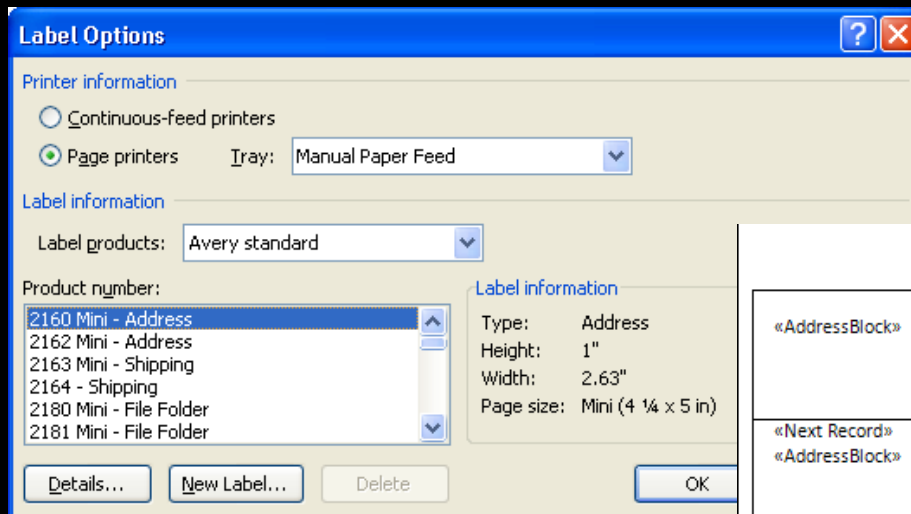
- Generate envelopes with Mail Merge



TIP  Choose the size of envelope in Envelope Options

Using Labels with Mail Merge

- Generate labels with Mail Merge



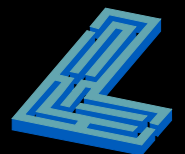
«AddressBlock»	«Next Record» «AddressBlock»	«Next Record» «AddressBlock»
«Next Record» «AddressBlock»	«Next Record» «AddressBlock»	«Next Record» «AddressBlock»
«Next Record» «AddressBlock»	«Next Record» «AddressBlock»	«Next Record» «AddressBlock»

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Lesson 5: Using Mail Merge

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