Objectives

1. Explain the merge process
2. Use the Mail Merge task pane and the Mailings tab on the Ribbon
3. Use a letter template as the main document for a mail merge
4. Insert and format a shape on the drawing canvas
5. Create and edit a data source
6. Insert merge fields in a main document
7. Create a multilevel list
8. Merge and print form letters
9. Sort data records
10. Address and print mailing labels and envelopes
11. Merge all data records to a directory

People are more likely to open and read a personalized letter than a letter addressed as Dear Sir, Dear Madam, or To Whom It May Concern. Typing individual personalized letters though can be a time-consuming task. Thus, Word provides the capability of creating a form letter, which is an easy way to generate mass mailings of personalized letters. The basic content of a group of form letters is similar. Items such as name and address, however, vary from one letter to the next. With Word, you also easily can address and print mailing labels or envelopes for the form letters.

Identifying the Main Document for Form Letters

The first step in the mail merge process is to identify the type of document you are creating for the main document. Typical installations of Word support five types of main documents: letters, e-mail messages, envelopes, labels, and a directory. In this section of the chapter, you create letters as the main document. Later in this chapter, you will specify labels, envelopes, and a directory as the main document.

Be sure the main document for the form letter includes all essential business letter elements. All business letters should contain a date line, inside address, message, and signature blank. Many business letters contain additional items such as special mailing notation(s)m an attention line a salutation, a subject line, a complimentary close, reference initials, and an enclosure notation.

This project uses a letter template as the main document for the form letter.

1. Click the blue W on the dock to launch Word 2008 Mac.

2. Click File, Project Gallery to select a letter template for the form letter.

3. Click the New tab and scroll down the category list and click Stationary.

4. Click Formal Letter and OK.

5. Click Tools on the menu bar, and then click Mail Merge Manager.

6. Click the Create New button and choose Form Letters.

To Enter Text in the Form Letter Template

The letterhead for the form letter consists of the address, telephone number, fax number, e-mail address, and Web site information in a line below the user's name which is surrounded by a box border.

1. Edit the letterhead by double-clicking the address to open the header.

2. Click "Student" and type your first and last name.

3. Below your name, click [Street Address], and replace it with your home address. Make sure there is a blank space before and after the three bullets separating the different parts of the letterhead.

4. Click [City] and replace it with the name of the city, state, zip code that you live. Make sure a comma and space separates the city and state and a space separates the state and zip code.

5. Click [Your Phone] and replace it with your home telephone using (###) ###-#### format.

6. Delete **Fax:** and type **Mobile:**.

7. Click [Your Fax] and replace it with your mobile number using (###) ###-#### format.

8. Click [Your E-Mail] and replace it with your e-mail address.

9. Click [Web Address] and replace it with your personal address.

10. If you don't have a personal Web site, delete **Web: [Web Address]**.

Creating a Data Source

A data source is a file that contains the data that changes from one merged document to the next. A data source is often shown as a tale that consists of a series of rows and columns. Each row is called a record. The first row of a data source is called the header record because it identifies the name of each column. Each row below the header row is called a data record. Data records contain the text that varies in each copy of the merged document. The data source for this project contains five data records.. Each data record identifies a different club member. Thus, five form letters will be generated from this data source.
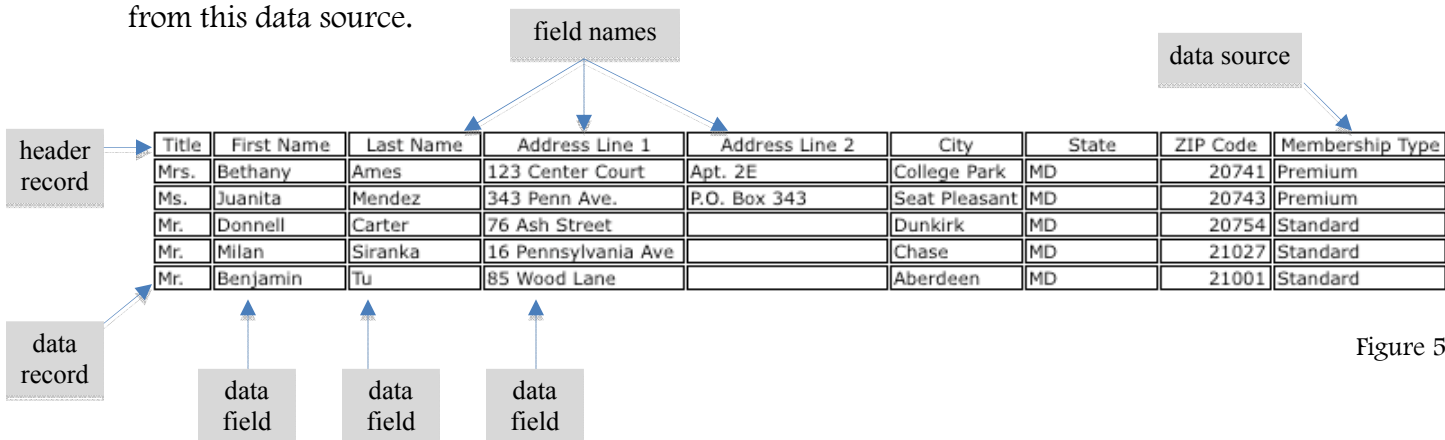
field names

data source

Title	First Name	Last Name	Address Line 1	Address Line 2	City	State	ZIP Code	Membership Type
Mrs.	Bethany	Ames	123 Center Court	Apt. 2E	College Park	MD	20741	Premium
Ms.	Juanita	Mendez	343 Penn Ave.	P.O. Box 343	Seat Pleasant	MD	20743	Premium
Mr.	Donnell	Carter	76 Ash Street		Dunkirk	MD	20754	Standard
Mr.	Milan	Siranka	16 Pennsylvania Ave		Chase	MD	21027	Standard
Mr.	Benjamin	Tu	85 Wood Lane		Aberdeen	MD	21001	Standard

header record

data record

data field

data field

data field

Figure 5-3

Each column in the data source is called a data field. A data field represents a group of similar data. Each data field must be identified uniquely with a name, called a field name. For example, First Name is the name of the data field (column) that contains the first names of club members. In this project, the data source contains nine data fields with the following field names: Title, FirstName, LastName, Address1, Address2, City, State, PostalCode (ZIPCode), and MembershipType.

Word provides a list of 13 commonly used field names. This project uses 8 of the 13 field names supplied by Word: Title, FirstName, LastName, Address1, Address2, City, State, and PostalCode. This project does not use the other five field names supplied by Word: CompanyName, Country or Region, HomePhone, WorkPhone, and E-mailAddress. Thus, you will delete these five field names. Then, you will add one new field name (MembershipType) to the data source.
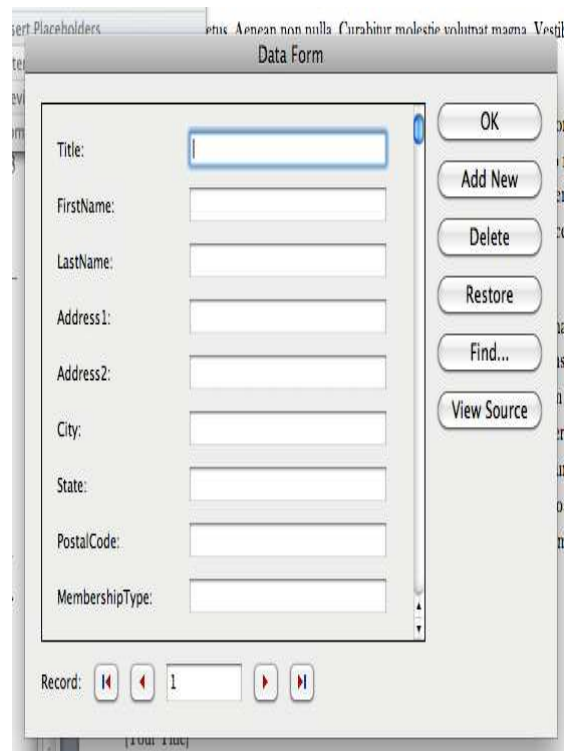
Figure 5-4

1. Display the Mail Merge Manager, if necessary.

2. Click the Get List button, then click New Data Source.

3. Click CompanyName in the Field Names list and then click the Remove Field Name button.

4. Click Country or Region in the Field Names list and then click the Remove Field Name button.

5. Click HomePhone in the Field Names list and then click the Remove Field Name button.

6. Use the same procedure to delete the Work Phone and E-mail Address fields.

7. Type MembershipType in the Placeholder List then click Add Placeholder.

8. Click OK and the Save Data Source dialog box appears.

9. Navigate the desktop and locate your personal folder.

10. In the Save As dialog box type Health Club Members and click Save.

11. The Data Form dialog box appears.

12. Create the first record:

   a. In the Title text box type Mrs. and press the ⇆Tab key.

   b. In the FirstName text box type Bethany and press the ⇆Tab key.

   c. In the LastName text box type Ames and press the ⇆Tab key.

   d. In the Address1 text box type 123 Center Court and press the ⇆Tab key.

_____

    e. In the Address2 text box type Apt. 2E and press the ⇧Tab key.

    f. In the City text box type College Park and press the ⇧Tab key.

    g. In the State text box type MD and press the ⇧Tab key.

    h. In the PostalCode text box type 20741 and press the ⇧Tab key.

    i. In the MembershipType text box type Premium and press the ⇧Tab key.

13. Click Add New to create the second record.

    a. In the Title text box type Ms. and press the ⇧Tab key.

    b. In the FirstName text box type Juanita and press the ⇧Tab key.

    c. In the LastName text box type Mendez and press the ⇧Tab key.

    d. In the Address1 text box type 343 Penn Ave. and press the ⇧Tab key.

    e. In the Address2 text box type P.O. Box 343 and press the ⇧Tab key.

    f. In the City text box type Seat Pleasant and press the ⇧Tab key.

    g. In the State text box type MD and press the ⇧Tab key.

    h. In the PostalCode text box type 20743 and press the ⇧Tab key.

    i. In the MembershipType text box type Premium and press the ⇧Tab key.

14. Click Add New to create the third record.

    a. In the Title text box type Mr. and press the ⇧Tab key.

    b. In the FirstName text box type Donnell and press the ⇧Tab key.

    c. In the LastName text box type Carter and press the ⇧Tab key.

    d. In the Address1 text box type 78 Ash Street and press the ⇧Tab key.

    e. Press the ⇧Tab key to leave this field blank.

    f. In the City text box type Dunkirk and press the ⇧Tab key.

    g. In the State text box type MD and press the ⇧Tab key.

    h. In the PostalCode text box type 20754 and press the ⇧Tab key.

    i. In the MembershipType text box type Standard and press the ⇧Tab key.

15. Click Add New to create the fourth record.

    a. In the Title text box type Mr. and press the ⇧Tab key.

    b. In the FirstName text box type Milan and press the ⇧Tab key.

    c. In the LastName text box type Siranka and press the ⇧Tab key.

    d. In the Address1 text box type 16 Pennsylvania Ave. and press the ⇧Tab key.

___

    e.   Press the ⇥Tab key to leave this field blank.

    f.   In the City text box type Chase and press the ⇥Tab key.

    g.   In the State text box type MD and press the ⇥Tab key.

    h.   In the PostalCode text box type 21027 and press the ⇥Tab key.

    i.   In the MembershipType text box type Standard and press the ⇥Tab key.

16. Click Add New to create the fifth record.

    a.   In the Title text box type Mr. and press the ⇥Tab key.

    b.   In the FirstName text box type Benjamin and press the ⇥Tab key.

    c.   In the LastName text box type Tu and press the ⇥Tab key.

    d.   In the Address1 text box type 85 Wood Lane and press the ⇥Tab key.

    e.   Press the ⇥Tab key to leave this field blank.

    f.   In the City text box type Aberdeen and press the ⇥Tab key.

    g.   In the State text box type MD and press the ⇥Tab key.

    h.   In the PostalCode text box type 21001 and press the ⇥Tab key.

    i.   In the MembershipType text box type Standard and press the ⇥Tab key.

17. Click OK to save your changes to the data source.

Editing Records in the Data Source

All of the data records have been entered in the data source and saved with the file name, Health Club Members. To add or edit data records in the data source you would click the Edit Data Source button on the Mail Merge Manage dialog box to display the Data Form dialog box. Click the next button to scroll through the recipient and select the record you want to edit or add.

To delete a record, select it using the same procedure described in the previous paragraph. Then, click the Delete button on the Data Form dialog box. When finished, click OK to save the changes.

Composing the Main Document for the Form Letters

The next step is to enter and format the text and fields in the main document for the form letters. With the letterhead for the form letters complete, you will follow these steps to compose the remainder of the main document for the form letter.

1. Format the date line and enter the date.

2. Delete the company content controls

3. Edit the greeting line (salutation).

4. Enter text and insert merge fields

5. Create a multilevel list

6. Merge the letters

To Change Spacing Before Paragraphs

The default amount of space above (before) the date line paragraph is 36 points. In this project, it is reduce to 24 points to be sure the entire letter fits on a single page.

1. Click the date content control to select it.

2. On the Toolbox's Formatting Palette, open the Alignment and Spacing menu, and change the Paragraph Spacing's before to 24.

To Enter the Date

The next step is to enter the date. You can click the date content control and type the correct date, or you can use the Date and Time field.

1. Click the date content control and click Insert, Date and Time…

2. In the Available formats list, select the date similar to the July 21, 2012 format.

3. Make sure the Update automatically box is checked so the date changes whenever you re-open this document in the future.

4. Click OK.

To Delete Content Controls

Earlier in this chapter, you created the letterhead for the main document for the form letter. Thus, the letter does not require the company content controls below the date.

1. Select the six lines of company control by dragging through them.

2. Press the Del key to delete the selected content control.

Merge Fields

In this form letter, the inside address appears below the date line, and the salutation is below the inside address. The contents of the inside address and salutation are located in the data source. To link the data source to the main document, you insert the field names from the data source in the main document.

In the main document, field names linked to the data source are called merge fields because they merge, or combine, the main document with the contents of the data source. When a merge field is inserted in the main document. Word surrounds the field name with the merge field is inserted in the main document. Word surrounds the field name with merge field characters (<< >>). The merge field characters which are chevrons mark the beginning and ending of a merge field. Merge field

characters are not on the keyboard; therefore, you cannot type them directly in the document. Word automatically displays them when a merge field is inserted in the main document.

Most levels contain an address and salutation. For this reason, Word provides an AddressBlock merge field and a greeting Line merge field. The AddressBlock merge field contains several fields related to an address: title, first name, middle name, last name, suffix, company, street address 1, street address 2, city, state, and ZIP code. When Word uses the Address Block merge field, it automatically looks for any fields in the associated data source that are related to an address and then formats the address block properly when you merge the data source with the main document. For example, if your inside address does not use a middle name, suffix, or company, Word omits these items from the inside address and adjusts the spacing so that the address prints correctly. If your version of Word does not use an AddressBlock merge field, you will need to insert the merge fields into the document.

1. Click Insert Placeholders and the data source fields should be visible.

2. Drag the FirstName field below the date line, press the SPACEBAR, and drag LastName after FirstName and press ↵Enter.

3. Drag Address1 to the next line and press ↵Enter.

4. Drag Address2 to the next line and press ↵Enter.

5. Drag City, followed by a comma and space, drag state, press the SPACEBAR, and drag PostalCode.
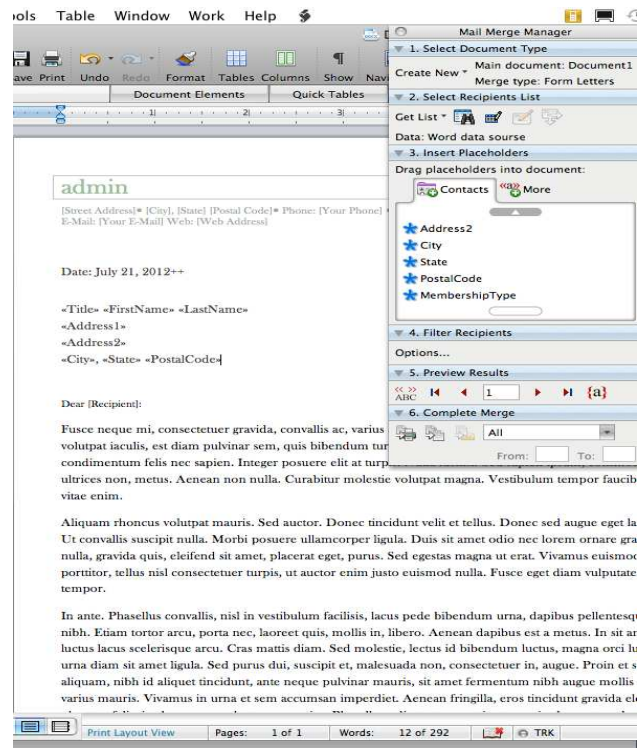
Figure 5-5

To Edit the Greeting Line

The greeting line contains text and fields related to a salutation. The default greeting for he salutation is in the format, Dear Joshua, followed by a comma. In this letter, you want a more formal ending to the salutation—a colon. Also, the salutation deserves a title, such as Mr. Mrs., or Ms.

1. Click [Recipient] on the greeting line.

2. Drag the Title field from the Contacts list after Dear in the letter template, and press the SPACEBAR.

3. Drag the FirstName field after the Title field, press the SPACEBAR, and drag LastName after FirstName. Do not press ↵Enter.

To Begin Typing the Body of the Form Letter

The next step is to begin typing the message, or body of the letter, which is to be located two lines below the Greeting Line. Type the body of the letter.

1. Click the Body content control and the text should disappear.

2. Type We would like to thank you, and then press the Spacebar.

3. Drag the FirstName field to the body.

4. At the insertion point, type a comma, and press the SPACEBAR, and then type for being a member of our health club. We hope you are pleased with our state-of-the-art cardiovascular and resistance training equipment and top-notch staff.

5. Press the enter key. Type Starting today, your experience at Total Fitness Health Club will include several additional amenities to make your visit more complete: and then press the Enter key.

To create a Multilevel List

The next step is to enter a multilevel list in the form letter. A multilevel list is a list that contains several levels of items, with each level displaying a different numeric, alphabetic or bullet symbol.

To make sure that no existing formatting will affect the multilevel list, the first step in creating the list is to clear formatting.

1. Display the Formatting Palette and click the Styles drop-down arrow.

2. Click the Clear Formatting button to remove any existing formatting.

3. Click Format on the Menu bar and click Bullets and Numbering.

Figure 5-6

4. Click the Outline Numbered tab and click the list style selected in Figure 5-6.

5. Type Enhanced Facilities and then press the Enter key to enter this first-level list item.

6. Press the Tab key to demote the current list item to a second-level list item that is indented below the first list item.

7. Type Now open 24 hours a day, 7 days a week and then press the Enter key to enter a second-level list item.

8. Type New supervised child play center and then press the Enter key to enter a second-level list item.

9. Type New 46" climbing wall and then press the Enter key to enter a second-level list item.

10. Press Shift + Tab to promote the current list item.

11. Type Expanded Instructional Programs and then press the Enter key.

12. Press the Tab key to demote the current list item.

13. Type Wellness seminars and then press the Enter key.

14. Type Yoga and Pilates classes and then press the Enter key.

15. Type Nutrition education and then press the Enter key three times to end the numbered list.

To Enter More text and a Merge Field.

The next paragraph states the member's membership type, which is a merge field.

1. Type We strive to provide the highest quality amenities to our members. To continue to achieve this service level, we must raise our monthly fees effective July 1. As a member of the and then press the Spacebar.

2. Drag and insert the MembershipType field at the insertion point.

3. Press the Spacebar and then type Plan, your new monthly rate will be and then press the Spacebar.

IF Fields

In addition to merge fields, you can insert Word fields that are designed specifically for a mail merge. An **IF** Field is an example of a Word field. One form of the IF field is called an **IF…Then:** If a condition is true, then perform an action. For example, If Mary owns a house, then send her information about homeowner's insurance. Another form of the IF field is called the **IF…Then…Else:** If a condition is true, then perform an action; else perform a different action. For example, If John has an e-mal address, then send him an e-mail message; else send him the message via the postal service.

In this project, the form letter checks the club member's membership type. If the membership type is Standard, the new monthly rate is $75; else if the MembershipType is Premium, then the new monthly rate is $105. Thus, you will use an **IF…Then…Else:** If the membership sty[e is equal to Standard, the print $75 on the form letter, else print $105.

The phrase that appears after the word If is called a rule or a condition. A condition consists of an expression, followed by a comparison operator, followed by a field expression.

Expression The expression in a condition can be a merge field, a number, a series of characters or a mathematical formula. Word surrounds a series of characters with quotation marks ("). To indicate an empty or null expression, Word places two quotation marks together ("").

Comparison Operator The comparison operator in a condition must be one of six characters = (equal to or matches the test), <> (does not equal test), < (less than), <= (less than or equal to), > (greater than), >=(great than or equal to).

If the result of a condition is true, then Word evaluates the true text. If the result of the condition is false, Word evaluates the false test if it exists. In this project the first expression in the condition is a merge field (MembershipType); the comparison operator is equal to (=); and the second expression is the text "Standard". The true text is "$75". The false text is "$105". The complete IF field is as follows:

IF "MembershipType = "Standard"   "$75"   "$105"

                Condition   true text   false text
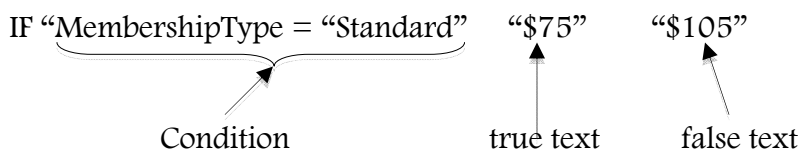
1. At the insertion point, click the More button on the Mail Merge Manager's Insert Placeholders box to display additional merge fields.

2. Scroll and click **IF…Then…Else…** to display the Insert Word Field: If dialog box.

3. Click the Field name box arrow to display te list of fields in the data source.

4. Scroll through the list of fields in the field name list and then click MembershipType.

5. Position the insertion point in the Compare to text box and then type Standard as the comparison text.

6. Press the Tab key and then type $75 s the true text.

7. Press the Tab key and then type $105 as the false text.

8. Click the OK button to insert the IF field at the location of the insertion point.

To Enter More Text in Content Controls

The following steps enter the text in the remainder of the form letter.

1. Type a period and then press the Spacebar. Type We appreciate your business and hope you enjoy your club.

2. If necessary, scroll to display the signature block in the document window.

3. Double-click the s[Your Name] content control.

4. Type your first and last name as the sender name.

5. Double-click the [Your Title] content control and then type Fitness Manager as the sender title.

6. Press ⬛Shift + ⬛Enter key and type Total Fitness Health Club as the send company name.

7. Save your document again by pressing [Control] + [S].

To Print Field Codes in the Main Document

When you merge or print a document, Word automatically converts field codes that show on the screen to field results. You may want to print the field codes version of the form letter, however, so that you have a hard copy of the field codes for future reference. When you print field codes, you must remember to turn off the field codes option so that merged documents print field results instead of field codes.

1. Click Word on the Menu bar and then click Preferences to display the Word Preferences dialog box.

2. Click View under the Authoring and Proofing Tools section.

3. Check the Field Codes option and clock OK.

4. Click the Print button on the Ribbon to print the main document with all field codes showing.

5. After getting your print out, uncheck the Field Codes option.

To Merge the Form Letters to the Printer

The data source and main document for the form letter are complete. The next step is to merge them to generate the individual form letters. The following steps merge the form letters, sending the merged letters to the printer.

1. Click the Merge to New Document button on the Mail Merge Manager's Complete Merge section.

2. In your personal folder, save the merged version of the letter as Health Club Letter Merged – your First and Last name.

Correcting Errors in Merged Documents.

If you notice errors in the merged letters, edit the main form letter the same way you edit any other document. Then, save the changes and merge again. If the wrong field results print, Word may be mapping the fields incorrectly.

Assignments

Green Grove Nursery

Far Horizons Travel

Make it Right

Diamond Eye Care