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Office 2007

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Word

Mail Merge

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INTRODUCTION

These notes and exercises are aimed at those wanting to learn how to produce mail merged letters and labels.

Knowledge assumed

experience of using Windows a good working knowledge of Word some knowledge of Access would be useful some knowledge of Excel would be useful

Areas covered

creating a main document creating a data source merging the two to create form letters and labels merging data from different sources sorting data Document signposts

Instructions for you to type

Bold text

Shortcuts

Reminders



Notes

Exercises

Word2007MailMerge(010808)

MAIL MERGE OVERVIEW

Mail merge is a feature supported by many word processors that enables you to generate form letters, labels, envelopes, directories and mass email and fax distributions.

A form letter is one in which the body of the letter stays the same but specific information is inserted for or about several different individuals.

To produce a form letter, you first store a set of information, such as a list of names and addresses, in one file. In another file, you write a letter, substituting merge fields in place of names and addresses (or whatever other information will come from the first file).

There are several stages to completing the basic process:

• Create the main document

This contains the form letter that you intend to send to a number of people. Rather than having to personalise each one individually, you use special merge fields in place of, for example, the recipient's name and address. At this stage you simply enter the text and any graphics you want to include and save the file.

• Create the data source

The data source is the file that holds the information, for example names and addresses. It can be specific to the letter you are about to produce, or it can be a large file from which you filter the names that you want to use for this particular mailing.

Each recipient's information is contained in a record.

Each individual piece of information within that record, for example a recipient's job title, company name, or town, is called a **field**.

Data need not be names and addresses. It can be anything relating to the document you are producing (for example dates).

• Include the merge fields in the main document

Once the data source has been created, the merge fields can be included in the main document. Part of the process of creating the main document includes inserting the merge fields into the text.

3

• The merge

The main document and the data source are combined to produce individual personalised letters. While you can send the output directly to the printer, it may be wise to write it to a file to enable checking before printing.



GETTING STARTED

> Double click the Word 2007 icon on the desktop

or

- Click the Start button
- All Programs
- Microsoft Office
- Microsoft Office Word 2007

The opening window is displayed.



On the Office Ribbon:

> Click the Mailings tab



MAILINGS TAB

The Mailings tab is where you will find commands which enable you to create letters, envelopes, and labels for mass mailings.

The Mail Merge commands are found in the Start Mail Merge group.

	Home	Insert Page	Layout Reference	es Mailing	s Review	View D	eveloper			
Envelop	es Labels	Start Mail Se Merge * Recip	ject Edit ients → Recipient List	Highlight Merge Fields	Address Greetin Block Line	g Insert Merge Field ~	Rules * Match Fields	Preview Results	Find Recipient	Finish & Merge *
Create Start Mail Merge			Mail Merge	Write & Insert Fields			Preview Results		Finish	
Î I I I I I I I I I I I I I I I I I I I										
		Mail r comn	merge nands							

THE MAIL MERGE WIZARD

To help you to create form letters, labels, envelopes etc, Word provides a Mail Merge Wizard which takes you through the process step by step. You are going to use the wizard to produce a letter and labels.

CREATING A FORM LETTER

From the Start Mail Merge group on the Mailings tab:

- Click Start Mail Merge
- Select Step by Step Mail Merge Wizard



Mail Merge ▼ X Select document type What type of document are you working on? • Letters O E-mail messages The Mail Merge task pane is displayed. O Envelopes O Labels O Directory Letters Send letters to a group of people. You can personalize the letter that each person receives. Click Next to continue. Step 1 of 6 Next: Starting document

The wizard guides you through the mail merge process in a series of six steps - you are currently looking at Step 1.

As well as moving forward through the steps, you can, if necessary, return to a previous step.

Step 1 - Selecting the document type

You need to select the type of document you are working on.

You have a choice of five options, and an explanation of the currently selected option is displayed in the task pane.

Current choice

Explanation



> Click each of the options in turn to see the explanation

You are going to create mail merged letters.

> Ensure the Letters option is selected

Click Next: Starting document

Step 2 - Selecting the starting document

You are prompted to select the starting document and, again, an explanation of the currently selected choice is displayed.



You are going to use a letter file that has already been set up.

Select Start from existing document

The **Start from existing** section in the wizard shows you existing mail merge documents.



You are looking for the file named **Autumn Season** which is located in the WordMailMerge folder on drive C.

> If the document is shown in the list, select it and click Open

or

> If the document you want is not listed, select (More files....) and click Open

You can then locate and open the file you want.

The document opens.



> Click

Next: Select recipients

 Mail Merge
 × ×

 Select recipients

 Use an existing list
 Select from Outlook contacts
 Type a new list

 Use an existing list

 Use names and addresses from a file or a database.

 Image: Browse...

 Image: Cdit recipient list...

 Step 3 of 6

 Next: Write your letter

 Previous: Starting document

You are required to select the recipients of the letter.

You are going to use an existing list named Ticket, and so need to search for it.

Click Browse

The Select Data Source dialog box is opened.

Select Data Sou	ırce						? [
Look in:	🛅 WordMail	Merge			~	۰ 🕲	🔰 🗙 📬 🛄 ·
My Recent Documents	Name Autumn S	eason lass		Size 21 KB 19 KB	Type Microsoft Office Microsoft Office	Wor Exce	Date Modified 25/05/2007 15:15 25/05/2007 15:15 25/05/2007 15:15
My Documents My Computer	Holiday D Dunhill Ho Ticket	idays		92 KB 25 KB 40 KB	Microsoft Office Microsoft Office Microsoft Office	Acce Wor Wor	25/05/2007 15:15 25/05/2007 15:15 25/05/2007 15:15 25/05/2007 15:15
S My Network Places							
	<	r.) >
	File <u>n</u> ame: Files of <u>typ</u> e:	All Data Sources					New <u>S</u> ource
Tools -						Open	Cancel

> Locate the file named Ticket in the WordMailMerge folder on drive C

Click Open

The Mail Merge Recipients dialog box is displayed.

Jata Source	Г	Last_Name	▼ First_Name	▼ Title	✓ Address1	✓ Add
::\WordMailMerge	1	Coombes	Rachel	Ms	24 Barber Green	Leic
::\WordMailMerge		Martyn	Rebecca	Miss	160 Westland Avenue	Тор
:\WordMailMerge	~	Janes	Christopher	Mr	Kingston House	Sto
:\WordMailMerge	~	Wright	Peter	Rev	The Vicarage	Oal
::\WordMailMerge	~	Deneve	Lorraine	Ms	146 Long Road	Bur
::\WordMailMerge		Anstruther	Paul	Dr	Margaret's House	Lad
::\WordMailMerge	~	Dziaszyk	Gisella	Mrs	Easter Cottage	Eas
:\WordMailMerge	~	Pesendorfer	Johann	Mr	16 Lake View Terrace	Lak
:\WordMailMerge	~	Heine	Theodore	Mr	6 Feltham Green	Bur
:\WordMailMerge	~	Beckett	Esther	Miss	1 May Green	Тор
ata Source		Refine r	ecipient list			
	icket		aut			
C-\WordMailMerge\T	icroce.		<u>attan</u>			
C:\WordMailMerge\T						
C:\WordMailMerge\T		Уп Б	lter			
C:\WordMailMerge\T		<u> 1</u>	lter			
C:\WordMailMerge\T		1 E	l <u>ter</u> nd duplicates			
C:\WordMailMerge\T			Iter nd duplicates			
C:\WordMailMerge\T			l <u>ter</u> nd duplicates nd recipient			

Everyone listed in the Ticket file is to receive a letter. The tick against each record indicates that it is selected for inclusion in the merge.

Click OK

Click Next: Write your letter

The letter is already written. You are going to add the recipient information to it.

Position the insertion point in the document in the blank space between the date and "Dear"

You can use the **Address block** to automatically add the name and address to the letter.



Click Address block...

The Insert Address Block dialog box is displayed.

cify address elements	Preview
Insert recipient's name in this format:	Here is a preview from your recipient list:
Joshua Joshua Randall Ir	
Joshua Q. Randall Jr. Mr. Josh Randall Jr. Mr. Josh Randall Jr. Mr. Joshua Randall Jr.	Ms Rachel Coombes 24 Barber Green Leighton
Insert company name	Cragland CD5 6PJ
Insert postal address:	
O Never include the country/region in the address	
Always include the country/region in the address	
Only include the country/region if different than:	
United Kingdom 👻	Correct Problems
Format address according to the destination country/region	If items in your address block are missing or out of order, use Match Fields to identify the correct address elements from your mailing list. Match Fields

> Notice that a recipient's name format is already selected.

This dialog box allows you to select the way that the address elements will be presented. The Preview pane at the right shows you what to expect.

- > Do not make any changes
- Click OK

The address block field is added to the letter.

> Position the insertion point next to "Dear" and press the spacebar once

You are going to add the title and last name fields to the salutation.

Click More items...

The Insert Merge Field dialog box is displayed showing you the list of fields in the Ticket file.

Insert Merge Field	? 🛛
Insert: <u>A</u> ddress Fields <u>F</u> ields:	③ <u>D</u> atabase Fields
Title First_Name Last_Name Address1 Address2 City Postcode Subscription	
Match Fields	nsert Cancel

- > Notice that the Title field is already selected
- Click Insert

The dialog box does not allow you to pause to add spaces between fields, so it is quicker to insert all of the fields that you want, and then insert the spaces between them afterwards.

- Select Last_Name
- Click Insert
- Click Close
- Position the insertion point between <<Title>> and <<Last_Name>>>

Position the insertion point here

- > Press the spacebar once
- Position the insertion point before the word "subscription" in the first sentence of the second paragraph
- Click More items...
- Select the Subscription field

- Click Insert
- Click Close
- Press the spacebar once





You could save the file complete with its merged fields to use on another occasion. If you open it again in the mail merge wizard, the main document and the data source are already linked together.

Click

Next: Preview your letters

The letter file (Autumn Season) and the name and address file (Ticket) are merged and you see the result.

RefFT/MS	/AS070
17 April 20	08
Ms Rachel	Coombes
24 Barber C	ireen
Leighton	
CD5 6PJ	
Dear Ms Co	oombes
AUTUMN	SEASON
Our new Au from Pinter children wh	tumm programme offers something for everyone, from Shakespeare to Russell, to Sondheim. For the first time there's also a special fun-packed show for the ere audience participation isn't just encouraged, it's expected!
As a Standa booking. O programme	ard subscription member, you can take a dvantage of reduced prices and priority ur monthly planner and booking form are enclosed, together with the <u>Autumn</u> brochure.
Enjoy brow soon as pos	sing through the brochure, but don't take too long! Return your booking form as sible to ensure the dates and seats you require.
Happy thea	tre-going!
Vours since	7217

- To move through the letters, use the << Recipient: 1 >> buttons in the task pane
- Click Next: Complete the merge

You are ready to produce the letters - either to print them or to edit individual letters.

Mail Merge		×
Complete the merge		
Mail Merge is ready to produ your letters.	JCe	
To personalize your letters, "Edit Individual Letters." Thi open a new document with merged letters. To make ch- to all the letters, switch bac the original document.	click is will your anges k to	
Merge		_
🚱 Print		
Edit individual letter	s	
Step 6 of 6		
🗢 Previous: Preview your	letter	s

Notice that the status bar at the bottom of the window shows 'Page: 1 of 1', indicating that there is only one page in the file

If you choose to print, the letters are merged to the printer and you will see the Print dialog box.

If you want to check the letters before printing, or save the merged file as a new document so that you can return to it at a later date, you should choose to edit the letters.

Select Edit individual letters...

The Merge to New Document dialog box is displayed.

Merge to New Document 💦 🛛 🥐				
Merge records	record			
O Erom:		<u>I</u> o:		
(ОК		Cancel	

> Click OK

The letters are merged to a new file, and the status bar shows 'Page: 1 of 10', indicating that there are 10 pages in the file.

- Save the merged file in the WordMailMerge folder on drive C as Autumn Merged Letters
- Close the file

The underlying file containing the merge fields is still open.

Close the file without saving



Before continuing, let's just recap on the mail merge process.

- 1. Create and save a main document, or load a ready-prepared one.
- 2. Create a data source, or load a ready-prepared one.
- 3. Add merge fields to the main document. You can save the file at this stage which, if you are going to use the letter again, will allow you to merge with the same recipients' file or choose another.
- 4. Preview the result you see the first letter only (*Page: 1 of 1* on the status bar).
- 5. Complete the merge.
- 6. Print or edit if you choose to edit, a separate document is created showing all letters (*Page: 1 of n* on the status bar). You can save this document.

CREATING LABELS

Next you will create a set of labels for these letters.

> Open a new document

From the Start Mail Merge group on the Mailings tab:

- Click Start Mail Merge
- > Select Step by Step Mail Merge Wizard

From the Mail Merge task pane select:

- > Labels
- > Click
 - K 🔹 Next: Starting document

This time you see the options available for mailing labels.



Select Label options...

The Label Options dialog box is displayed.

Label Options	? 🛛
Printer information	
Page printers <u>T</u> ray: Default tray (Auto	matically Select)
Label information	
Product number:	I abel information
L7159 L7159X L7160 L7160X	Type: Address Label Height: 3.39 cm Width: 9.9 cm
L7161 L7162	Page size: 21 cm X 29.69 cm
Details New Label Delete	OK Cancel

Word has details of many of the commercially-available labels, but if the size that you want is not listed, you can create your own custom label.

- > In the Printer information section, select Page printers
- > In the Label information: section, select Avery A4/A5
- > In the Product number: section, select L7162
- ➢ Click OK

The gridlines of the labels are displayed.

÷	



If you do not see the gridlines:

> Select the Layout tab on the Ribbon

In the Table group:

Select View Gridlines

l≩ Select + Ⅲ View Gridlines Properties	Delete	Insert E Insert L Above	eft ight	Merge Cells Split Cells Split Table	3.39 cm 9.91 cm	; ⊞ ; ⊞		Text Cell	A Z↓ Sort	Repeat E Conver fx Formu	t Header Row rt to Text Ia
Table	R	ows & Columns	15	Merge	Cell Size	fa	Ali	gnment		Data	3



By default, Word uses the Normal paragraph style for labels.

However, in Word 2007, the Normal paragraph style has added spacing. In practice this means that there will be extra spacing between the lines of text on the labels.

The simplest way to get around this problem is to use the **No Spacing** paragraph style.

Applying the No Spacing paragraph style

With the cursor positioned in the first label:

> From the Styles group on the Home tab, select the No Spacing style



You are now ready to continue with the wizard.

➢ Click

Next: Select recipients

You have three choices.



You are going to use an existing list which you need to locate.

- > Click Browse...
- > Open the Ticket file in the WordMailMerge folder on drive C

The Mail Merge Recipients dialog box is displayed.

You do not want to make any changes.

➢ Click OK

		🗾 👸 Mail Merge 👻
		Select recipients
	«Next Record»	Select from Outlook contacts
		Use an existing list
		Currently, your recipients are selected from:
		[:\WordMailMerge\Ticket.do] in "T
«Next Record»	«NextRecord»	Edit recipient list
«Next Record»	«Next Record»	
«Next Record»	«Next Record»	
		Step 3 of 6
		INEXT: Arrange your labels Arrange your labels

- Click Next: Arrange your labels
- Click Address block...



➢ Click OK

The address block is added to the first label.

To copy the layout of the first label to the other labels on the sheet:

Click Update all labels

The address block is copied to the other labels.

«AddressBlock»	«Next Record»«AddressBlock»
«Next Record» «AddressBlock»	«Next Record»«AddressBlock»
«Next Record» «Address Block»	«Next Record»«AddressBlock»
«Next Record» «AddressBlock»	«Next Record» «AddressBlock»

> Click > Next: Preview your labels

		😽 Mail Merge 🔻 🛪
Ms Rachel Coombes 24 Barber Green Leighton Cragland CDS 6PJ	Miss Rebecca Martyn 160 Westland Avenue Top Scarr Scarr Hill SD22 4FG	Preview your labels Some of the merged labels are previewed here. To preview another label, click one of the following: C Recipient: 1 Find a recipient Make changes
Mr Christopher Janes Kingston House Stoneley Stoneford SD11 6JM	Rev Peter Wright The Vicarage Oakley Stoneford SD11 8VG	You can also change your recipient list: "" Edit recipient list When you have finished previewing your labels, click Next. Then you can print the merged labels or edit individual labels to add personal comments.
Ms Lorraine Deneve 146 Long Road Burkiston Bellwood CD2 3MF	Dr Paul Anstruther Margaret's House Lady Road Roydley CD4 4PB	
Mrs Gisella Dziaszyk Easter Cottage Easter Lane Cragland CD5 3NT	MrJohann Pesendorfer 16 Lake View Terrace Lakeside Loughton CD8 6PW	 Step 5 of 6 Next: Complete the merge Previous: Arrange your labels

The data from the Tickets file is merged to the labels.

Click Next: Complete the merge

The labels are ready to be printed, or you can choose to edit individual labels. You will remember that, if you want to save the labels to use again, you should choose to edit.

You are going to print and, therefore, would normally put labels stationery in the printer at this point. For this exercise, however, you will print the labels on paper.

➢ Click Print...

The Merge to Printer dialog box is displayed.

Merge to Printer	? 🛛
Print records	
	Io: Cancel

- Ensure that All is selected
- ➢ Click OK

The Print dialog box is displayed.

> Click OK

The labels are printed.

Close the file without saving

EDITING FIELDS

You are going to perform another mail merge and then learn how to edit the recipient information.

Instead of using the Mail Merge Wizard task pane to locate an existing file, you can instead open the file before starting the wizard.

> From the WordMailMerge folder on drive C, open the file Sunhill Holidays

_	
STPI L L	unhill Holidays O Elox 97 incoln N1 3EF
1	7 April 2008
D)ear
S	UNHILL HOLIDAYS - 10% DISCOUNT NOW AVAILABLE!
I i pi d	notice from our records that you travelled with <u>Sunhill</u> Holidays to, last year. I have great leasure in enclosing next year's <u>Sunhill</u> Holidays brochure, full of even more exciting estinations.
AHG	as a valued customer, I am sure that you already know that if you travel with <u>Sumhill</u> Iolidays you are guaranteed high quality and enjoyable holidays every time at a price you ag really afford. No marter which destination you choose, one of our highly trained apresentatives will always be on hand to help your holiday run smoothly.
If	f you book next year's holiday with <u>Sunhill</u> Holidays before 1 November, you will be ligible for a 10% discount.
H	lappy holidays!
S	UNHILL HOLIDAYS

- Start the Mail Merge Wizard
- Select Letters
- Select Use the current document

Locate the recipient information in the file Holiday Destination in the WordMailMerge folder on drive C.

Mail Merge Recipients							
This is the list of recipier checkboxes to add or re	nts th emov	nat will be used in e recipients from	your merge. the merge.	Use the options below to a When your list is ready, clicl	add to or change your list. L k OK.	lse the	
Data Source	7	Surname		✓ Address Line 1	✓ Address Line 2	👻 City 🔨	
Holiday Destination	~	Wain	Mr	13 Wycombe Road	Yardley	Birn	
Holiday Destination	~	Cottrell	Mr	Hilltop	72 Gateway Road	Wo	
Holiday Destination	~	Mistry	Mrs	8 Lane Close	Humberstone	Leic	
Holiday Destination	~	Fowler	Dr	Flat 4	102 Ivanhoe Street	Lee	
Holiday Destination	~	Henderson	Mrs	24 Dollys Hill Lane		Lon	
Holiday Destination	~	Howard	Ms	Station House	Station Street	Nor	
Holiday Destination	~	Jenkins	Mr	107 Eastfield Drive		Leic	
Holiday Destination	~	Hallam	Miss	Flat 7	Oriel House	Lon	
Holiday Destination	~	Singh	Mr	11 Cemetery Close	Bickley	Cov	
Holiday Destination	~	Gibbs	Mrs	2 Poole Close	Canwick	Linc	
Holiday Destination	~	Smith-Keble	Dr	The White House	Barsby Road	Lee	
Holiday Dectination	U	Topping	Me	23 Corce Lane	Halton	Live	
<	1111				10 - 10 - 10 - 10 - 10 - 10 - 10 -	>	
Data Source	Data Source Refine recipient list						
Holiday Destination.n	ndb	Ž↓	<u>5ort</u>				
		Va	Filter				
			ilcorrine				
		E 1	Find duplicate	<u>BS</u>			
		0=					
			-ina recipieni	Line			
			/alidate addr	esses			
Edit	Refre	sh					
						OK	

- Click OK
- > Insert the Address block between the date and "Dear"
- > Position the insertion point after "Dear" and insert a space
- Click More items
- > Insert Title and Surname and then insert a space between them
- In the first sentence, position the insertion point between "to" and "last" and click More items
- Insert Holiday Destination

> Preview the letters

Constitt Hatidaya
PO Box 07
Lincoln
INI 3EF
17.4 1 0000
17 April 2008
Mr Wain
12 Wysemba Boad
Vardlev
Birmingham
B13 3FD
Dear Mr Wain
SUNHILL HOLIDAYS - 10% DISCOUNT NOW AVAILABLE!
I notice from our records that you travelled with Sunhill Holidays to Menorca last year. I
have great pleasure in enclosing next year's Sunhill Holidays brochure, full of even more
exciting destinations.
As a valued customer. I am sure that you already know that if you travel with Sunhill
Holidays you are guaranteed high quality and enjoyable holidays every time at a price you
can really afford. No matter which destination you choose, one of our highly trained
representatives will always be on hand to help your holiday run smoothly.
If you book next year's holiday with Sunhill Holidays before 1 November, you will be
eligible for a 10% discount.

> Notice that the recipients' first names are missing from each letter

To find out what is causing this problem, and put it right, you need to edit the address block.
- Point to the address block in the letter and click the right mouse button to see the shortcut menu
- Select Edit Address Block...

Sunhill Holidays P.O.Box 97 Lincoln LN1 3EF				
17 April 2008				
Mr Wain 13 Wycombe Road				_
Yardley	*	Cut		
Birmingham		⊆ору		
B13 3FD	8	<u>P</u> aste		
	1	Update Field		
		Edit Address Block		
Dear Mr Wain		Toggle Field Codes		
SUNHILL HOLI	A	Font		VAILABLE!
	Ē	Paragraph		
1 30 OT 0 O TROMO OT 1 F		Dullate	1.0	Holidays to Menorca last year. I
have great pleasure	:=	Bullets		dave brochure full of even more

The Modify Address Block dialog box is displayed.

Modify Address Block	? 🛛
Specify address elements	Preview Here is a preview from your recipient list:
United Kingdom	Correct Problems
Format address according to the <u>d</u> estination country/region	If items in your address block are missing or out of order, use Match Fields to identify the correct address elements from your mailing list. <u>Match Fields</u> OK Cancel

Click Match Fields

The Match Fields dialog box is displayed.

Required for Address E	Block		^
Courtesy Title	Title	~	
First Name	(not matched)	*	
Last Name	Surname	*	
Suffix	(not matched)	~	
Address 1	Address Line 1	Y	
Address 2	Address Line 2	*	
City	City	*	
State	(not matched)	*	
Postal Code	Postcode	×	
Country or Region	(not matched)	~	
Optional information	61/34 27		
Unique Identifier	(not matched)	~	Y
Dptional information Unique Identifier lise the drop-down lists to hat corresponds to the ad isted on the left.)	(not matched) (not matched) choose the field from your d dress information Mail Merge	atabase expect:	

When you previewed the letters, the Wizard looked at the file containing the source data, in this case **Holiday Destination**, and attempted to match the field names in that file with the **Required for Address Block** merge fields.

You can see the results of the Wizard's work in the Match Fields dialog box.

For example the Wizard has correctly paired the Surname field in Holiday Destination with Last Name.

However, the First Name field is shown as **(not matched)**. This means that the Wizard was not able to identify a suitable field to match with First Name. You need to have a look at the fields that are available and select one that can be used for a first name.

> Click the down arrow in the First Name field

Match Fields		? 🛛
In order to use special features, Ma fields in your recipient list match to t drop-down list to select the appropr address field component	il Merge needs to kno :he required fields, U: iate recipient list field	w which se the for each
Required for Address Block		~
Courtesy Title	Title	~
First Name	(not matched)	
Last Name	Title	~
Suffix	Initials	~
Address 1	Surname	~
Address 2	Address Line 1	~
City	Address Line 2	~
State	Address Line 3	~
Postal Code	County	~
Country or Region	Postcode	~
Optional information	Home Phone	
Unique Identifier	E-mail Address	~ ~
Use the drop-down lists to choose t that corresponds to the address inf (listed on the left.)	Holiday Destination (not matched)	base pects
Remember this matching for this computer	set of data sources o	in this
	ок Са	ncel

All of the field names in the Holiday Destination file are displayed, and you can see that, although there is not a 'first name' field, there is an 'Initials' field.

Select Initials

Match Fields		? 🗙			
In order to use special features, Ma fields in your recipient list match to I drop-down list to select the appropr address field component	il Merge needs to kno the required fields, U iate recipient list field	w which se the for each			
Required for Address Block		~			
Courtesy Title	Title	~			
First Name	(not matched)				
Last Name	Title	~			
Suffix	Initials	~			
Address 1	Surname	~			
Address 2	Address Line 1	*			
City	Address Line 2	~			
State	Address Line 3	~			
Postal Code	Clubby	~			
Country or Region	Postcode	~			
Optional information	Home Phone				
Unique Identifier	E-mail Address	~ ~			
Use the drop-down lists to choose t that corresponds to the address inf (listed on the left.)	Holiday Destination (not matched)	base pects:			
<u>Remember this matching for this set of data sources on this computer</u>					
C	ОК Са				

Instructing the Wizard to use this field in place of a first name field will ensure that the recipients' initials are included in the mail merge.

Another field in the Holiday Destination file is **County**. Notice that the list of required information includes 'State'. You are going to specify that the County field is used where the Wizard expects to find the state.

> Click the down arrow in the State field and select County

Match Fields		? 🗙
In order to use special features, I fields in your recipient list match t drop-down list to select the appro address field component	Mail Merge needs to know o o the required fields. Use opriate recipient list field fo	which the r each
Required for Address Block		~
Courtesy Title	Title	/
First Name	(not matched)	/
Last Name	Surname	/
Suffix	(not matched)	/
Address 1	Address Line 1	/
Address 2	Address Line 2	/
City	City	1
State	County	1
Postal Code	Postcode	/
Country or Region	(not matched)	/
Optional information	25 SA	
Unique Identifier	(not matched)	~ ~
Use the drop-down lists to choose that corresponds to the address i (listed on the left.)	e the field from your datab nformation Mail Merge exp nis set of data sources on I	ase Jects this
computer	OK Canc	el

- Click OK
- Click OK

The address block in the letter now displays the recipient's initial(s) and the county.

Sunhill Holidays POBox 97 Lincoln LN1 3EF
17 April 2008
Mr J Wain 13 Wycombe Road Yardley Birmingham W Midlands B13 3FD
Dear Mr Wain
SUNHILL HOLIDAYS - 10% DISCOUNT NOW AVAILABLE!
I notice from our records that you travelled with <u>Sunhill</u> Holidays to Menorca last year. I have great pleasure in enclosing next year's <u>Sunhill</u> Holidays brochure, full of even more exciting destinations.



- Complete the merge
- Click Edit individual letters....
- > Click OK to merge all of the records
- > Browse through the letters to check them
- > Save the file in the WordMailMerge folder on drive C as Sunhill Merged Letters
- > Close the Sunhill Holidays file without saving

CREATING A MAIN DOCUMENT

During this training session you have used files that have been provided for you.

To reinforce what you have previously learned, you are going to use the Wizard to create your own main document and data source.

- > Open a new document
- Start the Mail Merge Wizard
- > Ensure Letters is selected
- > Ensure Use the current document is selected
- > Type the following letter:

Celebration Caterers Ltd Unit 10 Abbney Road East Kings Lynn Norfolk PE28 6KG

Insert today's date

PARTY BOOKING CONFIRMATION

I write to confirm receipt of your instructions regarding the office party is intending to provide for its staff.

The details have been forwarded to the local branch of our company, and the manager will contact you shortly to finalise the plans.

May I take this opportunity to wish you all a very pleasant evening.

Yours sincerely

Margo Gough Corporate Entertainment

Save the document in the WordMailMerge folder on drive C with the filename Confirmation Letter

With the Main document prepared, you are ready to create the data source file.

Select the next step in the wizard

CREATING A DATA SOURCE

A data source may be any sort of file that contains the information to be merged into a document. For example you could use a Word table, an Excel worksheet, an Access database, or a Microsoft Outlook Contact List.

If the data source does not already exist, the Mail Merge Wizard offers you the option of creating a new list which is then saved as a database (.mdb) file.

- Select Type a new list
- > Click Create...

The New Address List dialog box is displayed.

Nev	v Address I	List						?	
Iype	e recipient inf	ormation	n in the table.	To ad	d more entries,	click M	New Entry.		
	Title	-	First Name	•	Last Name	•	Company Name 👻	Address Line 1	-
▷									
1									5
	ou Estru	_	Fied	-					
	ewentry	_	<u> </u>						_
De	lete Entry	Custo	mize Columns.				ОК		

Scroll across to view the default fields that are provided

You can use the fields that are offered, or you can customise them.

Notice that Title, First Name and Last Name are separate fields.

IMPORTANT TO REMEMBER

Inputting each section of a recipient's name into individual fields allows you flexibility when it comes to addressing him or her.

For example, if you have a record for Ms Natalie Wood, you can combine the first three fields to make 'Ms Natalie Wood', while using Title and Last Name together gives you 'Ms Wood'. As the First Name is a separate field, if you know her well, your letter can begin 'Dear Natalie'.

REMOVING A FIELD

The field State is not required.

Click Customize Columns...

The Customize Address List dialog box is displayed.

Select State

Customize Address List		? 🛛
<u>F</u> ield Names		
Title First Name Last Name Company Name Address Line 1 Address Line 2		Add Delete Rename
City State ZIP Code Country or Region Home Phone Work Phone		
E-mail Address		Move Up
	~	Move Down
	ОК	Cancel

Click Delete

A warning message is displayed.



Deleting a field might have repercussions if it already contains data.

You have not yet entered any data into the State field so it is safe to delete it.

Click Yes

The State field is removed from the New Address List dialog box.

Delete the ZIP Code, Country or Region and Home Phone fields

ADDING A FIELD

You are going to add a new field **County**, which will be positioned immediately below the City field.

From the Customize Address List dialog box:

Select the City field



Click Add

The Add Field dialog box is displayed.

> Type County



Click OK

The County field is added to the list of field names.

jeld Names Titlo		
First Name	0	<u>A</u> dd
Last Name		Delete
Company Name		Delece
Address Line 1 Address Line 2		Rename
City		<u> </u>
County		
Work Phone E-mail Addross		
E-mail Address		
		Move Up
		Move Dow

To reposition a field:
Select the field name and use the Move Up and Move Down buttons

- Add a new field Job Title and position it below Last Name
- > Add a new field Postcode and position it below County
- > Click OK

The New Address List dialog box is displayed with the amended field names.

Nev	v Address I	List							? 🛛
Iур	e recipient inf	ormation	n in the table. To	o ado	d more entries,	click f	New Entry.		
	Title	-	First Name	-	Last Name	•	Job Title	-	Company Name 👻
<		_	Ш	_					>
L	iew Entry		Eind						
De	elete Entry	Custo	omi <u>z</u> e Columns					OK	Cancel

ENTERING DATA

Enter the following record into the address list, remembering to input each part of the recipient's name, address, and other details (where available) into the relevant field

Title	Mr
First Name	Paul
Last Name	Banks
Job Title	Personnel Manager
Company Name	Bill Bloggs Jeans
Address Line 1	32-36 Oxford Road
Address Line 2	
City	Norwich
County	Norfolk
Postcode	NR2 6RT
Work Phone	01548 655455
E-mail Address	paul.banks@bbloggs.co.uk

> Click New Entry or press the Tab key to move to the next record

The result should look like this:

Nev	w Address List				? 🛛
Iур	e recipient informatio	n in the table. To ad	d more entries, click	New Entry.	
	Title 👻	First Name 🛛 👻	Last Name 🛛 👻	Job Title 🛛 👻	Company Name 👻 ,
	Mr	Paul	Banks	Personnel Manager	Bill Bloggs Jeans
\triangleright					
<		1111			>
	lew Entry	Eind			
De	elete Entry Cust	omize Columns		ОК	Cancel



Add the records below, clicking the New Entry button or the Tab key at the end of each record

			i	r
Ms Greta Pigg	Mrs Matilda Dawson	Ms Bhupinder	Mr Peter Piper	Mr Jon Szaja
Personnel Manager	Sales Manager	Patel	Personnel	Personnel
Atkins Machinery Co	Derris Construction	Assistant Manager	Manager	Manager
Wains Bridge Road	76-80 Flowerpot Lane	West End Flowers	Hotstuff Heating	Wordsmiths plc
Thetford	Middleton	25 Paisley Road	Perriwinkle Lane	Century House
Norfolk	Norwich	Norwich	Sproston	High Road
IP24 8KL	Norfolk	Norfolk	Norwich	Cromer
01543 875333	NR5 9NK	NR2 4HV	Norfolk	Norfolk
g.pigg@atkinsmc.co.uk	01546 876277	01548 675435	NR5 8MN	NR27 0AW
	mcd@derriscon.co.uk	eng@wend.co.uk	01546 367067	01549 874478
			piper@hots.co.uk	szaja@word.co.uk

The result looks like this:

	Title 👻	First Name 🛛 👻	Last Name 🛛 🛨	Job Title 🛛 👻	Company Name 👻
	Mr	Paul	Banks	Personnel Manager	Bill Bloggs Jeans
	Ms	Greta	Pigg	Personnel Manager	Atkins Machiner
	Mrs	Matilda	Dawson	Sales Manager	Derris Construction
	Ms	Bhupinder	Patel	Assistant Manager	West End Flowers
	Mr	Peter	Piper	Personnel Manager	Hotstuff Heating
	Mr	Jon	Szaja	Personnel Manager	Wordsmiths plc
1					

> Once you have input all of the records into the address list, click OK

The Save Address List dialog box is displayed.

Save in:	📴 My Data S	Sources			🕑 🕲 - 🖄 🗙 📷 -
My Recent Documents Desktop My Documents My Computer My Network Places	Name 🔺		Siz	е Туре	Date Modified
	<				
	File name:				*
	Save as type:	Microsoft Office Address List	s		~

Word automatically offers you the $\ensuremath{\text{My}}$ Data Sources folder in which to store the address list.

However, for the purpose of this course:

> Save the list in the WordMailMerge folder on drive C as Address List

The Mail Merge Recipients dialog box is displayed.

Data Source	~	Last Name	➡ First Name	▼ Title		▼ Addres
Address List.mdb	~	Banks	Paul	Mr	Bill Bloggs Jeans	32-36
Address List.mdb		Pigg	Greta	Ms	Atkins Machinery Co	Wains
Address List.mdb	\checkmark	Dawson	Matilda	Mrs	Derris Construction	76-80
Address List.mdb		Patel	Bhupinder	Ms	West End Flowers	25 Pais
Address List.mdb		Piper	Peter	Mr	Hotstuff Heating	Perriw
Address List.mdb	~	Szaja	Jon	Mr	Wordsmiths plc	Centur
						concar
Address List.mdb	~	11				
Address List.mdb	~	Refine	recipient list			
Address List.mdb		Refine ∧ 2↓ ≦	recipient list			
Address List.mdb Address List.mdb Address List.mdb		Refine	recipient list			
Address List.mdb		Refine 24 s	recipient list			
Address List.mdb		Refine 245 2000 E	recipient list			
Address List.mdb		Refine 2 4 s 2 f E E E E E	recipient list jort iilder iind duplicates iind recipient			

Click OK

Click Next: Write your letter

ADDING RECIPIENT INFORMATION TO THE LETTER

Once the data source file is ready, you can insert the recipient information into the appropriate places in the letter.

Word uses the Address block and Greeting line fields to insert the basic information for each recipient:

- Address block is a placeholder for the name and address
- Greeting line is a placeholder for your chosen salutation

Additionally you can use:

- Electronic postage, which is only available if you have installed an electronic postage program
- More items which shows you a list of all of the fields in the data source from which you can select the fields you want to insert



- Position the insertion point on a blank line between the date and 'PARTY BOOKING CONFIRMATION' and insert an Address block
- Press Enter three times

- Position the insertion point on a blank line before 'PARTY BOOKING CONFIRMATION' ready to add a salutation
- > Click Greeting line...
- Before you click OK and close the dialog box, click the down arrow next to the punctuation box and select None

Insert Greeting Line	
Greeting line format: Dear Mr. Randall Greeting line for invalid recipient names: Dear Sir or Madam, Preview Here is a preview from your recipient list: 1 D X	No punctuation — required so select (none)
Dear Mr Banks, Correct Problems If items in your greeting line are missing or out of order, use Match Fields to identify the correct address elements from your mailing list. Match Fields OK Cancel	

- Click OK
- Insert the Company Name field in the first sentence of the letter between "party" and "is"

Preview the letters

Calabaration Castrones Lad	
Celebration Caterers Ltd	
Unit 10	
Abbney Road East	
Kings Lynn	
Norfolk	
PE28 6KG	
28 April 2008	
Mr Paul Banks	
Bill Bloggs Jeans	
32-36 Oxford Road	
Norwich	
NR2 6RT	
Dear Mr Banks	
PARTY BOOKING CONF	IRMATION
write to confirm receip	of your instructions regarding the office party Bill Bloggs Jeans is intending to provide for i
staff.	
The details have been fo	rwarded to the local branch of our company, and the manager will contact you shortly to
finalise the plans.	승규가 이 집 집 집
May I take this opportur	ity to wish you all a very pleasant evening.
Value ciacach.	
rours sincer ery	
Margo Gougn	
corporate criter tainmen	

SELECTING RECORDS TO MERGE

Unless you instruct Word otherwise, all of the records from the data source file will be used when you merge it with the main document.

You may, however, want to select certain records to be printed, for example only those recipients who work for a particular company, or female recipients only.

Do bear in mind that if you want to use the latter criterion, you will need to ensure that you include a gender field in the data source. You can, of course select records by the Title field, but if you have titles which can be used by both men and women, such as Doctor or Professor, Mail Merge will not be able to distinguish which recipients are male and which female. Additionally, women may be referred to by several different titles: Ms, Miss or Mrs, and if you are using Title as the criterion, you will need to include all possibilities in your selection.

For this exercise, you are going to select the records for companies based in Norwich.

In the task pane:

Click Edit recipient list...

The Mail Merge Recipients dialog box is displayed.

Mail Merge Recipi	ients					? 🔀
This is the list of recipi checkboxes to add or	ients th remov	nat will be used in your e recipients from the r	r merge. Use the o merge. When your	ptions below to list is ready, cli	add to or change your list ck OK.	. Use the
Data Source		Last Name 🛛 👻	First Name	▼ Title ▼	Company Name	▼ Address
Address List.mdb	-	Banks	Paul	Mr	Bill Bloggs Jeans	32-36 O
Address List.mdb	~	Pigg	Greta	Ms	Atkins Machinery Co	Wains B
Address List.mdb	~	Dawson	Matilda	Mrs	Derris Construction	76-80 FI
Address List.mdb	~	Patel	Bhupinder	Ms	West End Flowers	25 Paisle
Address List.mdb	V	Piper	Peter	Mr	Hotstuff Heating	Perriwin
Address List.mdb	~	Szaja	Jon	Mr	Wordsmiths plc	Century
Address List.mdb	Ш	Refine recip	Dient list			>
Edit	Refre	sh	 duplicates recipient ate addresses			
					(ок

The recipients are listed and currently all selected (the checkboxes are ticked).

Notice that there are both Sort and Filter options available in the **Refine** recipient list section at the bottom of the dialog box.

However, you can also access these options by clicking the down arrow next to a column heading.

- Scroll across to the City field
- > Click the down arrow next to the City column heading
- Select Norwich from the list

Name	✓ Address Line 1	▼ Address Line 2	👻 City	 Postcode 	▼ E-mail Addres
s Jeans achinery Co	32-36 Oxford Road Wains Bridge Road 76-80 Flowerpot Lape	Middletop	Ž↓ Z∣	Sort Ascending	g.pigg@atkin
d Flowers Heating	25 Paisley Road Perriwinkle Lane	Sproston	A+	(A <u>I</u> I)	enq@wend.c piper@hots.c
ths plc	Century House	High Road		Norwich	szaja@word.
Cata Source	Refin	e recipient list		Cromer (<u>B</u> lanks) (<u>N</u> onblanks) (A <u>d</u> vanced)	
	M	Filter			

The list of recipients displays only those records where the City is 'Norwich'.

Data Source		Last Name		▼ Title		▼ Add
Address List.mdb	~	Banks	Paul	Mr	Bill Bloggs Jeans	32-3
ddress List.mdb	V	Dawson	Matilda	Mrs	Derris Construction	76-8
ddress List.mdb	V	Patel	Bhupinder	Ms	West End Flowers	25 P
ddress List.mdb	V	Piper	Peter	Mr	Hotstuff Heating	Perr
t Jata Source		Refine	recipient list			
t ata Source Address List.mdb		Refine	recipient list			
ata Source Address List.mdb		Refine 2↓ 2↓	recipient list Sort			
ata Source Address List.mdb		Refine Â↓: Â↓: Â↓: Â↓:	recipient list Sort Filter Find duplicates			
ata Source Address List.mdb		Refine	recipient list Sort Filter Find duplicates Find recipient			

You can narrow the selection further by including a filter in the Job Title field.

- > Click the down arrow next to the Job Title column heading
- > Select Personnel Manager from the list

Mail I	Merge Recipient	S				? 🛛
This is checkb	the list of recipients boxes to add or remo	that will be used in your mergove recipients from the merge	ge. Use the options bel . When your list is read	ow to a ly, clicl	add to or change your < OK.	list. Use the
-	Postcode 🛛 👻	E-mail Address 🛛 👻	Work Phone 🛛 👻	Job	Title 💌	County 👻
ich ich ich ich	NR2 6RT NR5 9NK NR2 4HV NR5 8MN	paul.banks@bblogqs.co.uk mcb@derriscon.co.uk enq@wend.co.uk piper@hots.co.uk	01548 655455 01546 876277 01548 675435 01546 367067	A Z↓ A↓	Sort <u>A</u> scending Sort Des <u>c</u> ending (A <u>I</u> I)	folk folk folk folk
					Personnel Manager	
Cata S	iource	Refine recipient l	ist ———		Sales Manager Assistant Manager (Blanks) (Nonblanks) (Advanced)	>
	Edit Ref	Z ↓ Soft Eilter Eilter Eind duplic Eind recipie Eind recipie Validate ac	ates ant Idresses			ОК

The resulting selection shows the recipients that fit the filtered criteria (records that have Norwich as the city and Personnel Manager as the job title).

	ients					? 🛽
This is the list of recip checkboxes to add or	bients th r removi	iat will be used e recipients froi	in your merge. Use the m the merge. When you	options below t ir list is ready, (to add to or change your li click OK.	ist. Use the
Data Source		Last Name		▼ Title		✓ Address
Address List.mdb		Banks	Paul	Mr	Bill Bloggs Jeans	32-36 C
Address List.mdb		Piper	Peter	Mr	Hotstuff Heating	Perriwin
<	Ш	Defin	ne recipient list			3
Address List mdb		Refir	ne recipient list			>
Cata Source Address List.mdb	Jui	Refir ▲ 2↓	he recipient list			3
Address List.mdb		Refir	ne recipient list			•
Address List.mdb		Refir	ne recipient list Sort] Filter] Find duplicates			6
Address List.mdb		Refir	he recipient list 5ort 1 Filter 2 Find duplicates 1 Find recipient			3
Address List.mdb Edit	Refre	Refir	he recipient list 5 ort 1 Filter 2 Find duplicates 3 Find recipient 4 Validate addresses			2
Address List.mdb Edit	Refre	Refir	he recipient list 5ort Filter Find duplicates Find recipient Validate addresses			

> Click OK



To remove a filter from a field, click the down arrow and select (AII).

- Click Next: Complete the merge
- Click Edit Individual Letters
- > Click OK

The merge takes place and the results are displayed in a file named Letters1.

> Select the View tab

In the Zoom group:

Click Two Pages

Celebration Caterers Ltd	Celebration Caterers Ltd
Unit 10	Unit 10
Apprev. Road East	Appres Road East
Kings Lynn	Kings Lynn
Norfolk	Nortolk
PE28 6KG	PE28 6KG
22	
17 April 2008	17 April 2008
Mr Paul Banks	Mr Peter Piner
Bill Bloggs Jeans	Hotstuff Heating
Table (where a second sec	Derrively lang
All and sense in the set	Constitute Const
NOTWICH .	sproston
NR2 GRT	Norwich
	NR5 BMN
Dear Mr Banks,	Dans Mr. Binas
PARTY BOOKING CONFIRMATION	beer wit riper,
	PARTY BOOKING CONFIRMATION
I write to confirm receipt of your instructions regarding the office party Bill Bloggs (egos, is intending	
to provide for its staff.	I write to confirm receipt of your instructions regarding the office party Hotstuff Heating is intended
	to provide for its staff.
The details have been forwarded to the local branch of our company, and the manager will contact	
you shortly to finalise the plans	The details have been forwarded to the local branch of our company, and the manager will contact
	una charter to finalize the stand
May I take this connectuality to wish you all a yeary pleasant evening	you shortly to make the plant.
and under the observation of an analysis because 6000080	May I take this opportunity to wish you all a very pleasant exching.
Yours sincerely	Yours sincerely
	1231131 24
Margo Gough Corporate Entertainment	Merga Gough
	Corporate Entertainment

Zoom	
Drag the Zoom slider to the left until all pages in the document are displayed.	



You can, if necessary, work your way back through the wizard to edit your selection, main document, or data source.

As you are going to edit your selection, you need to close the preview document currently displayed.

Close Letters1 without saving

EDITING A DATA SOURCE

You will probably want to edit your data source at some point, perhaps to add, amend, or delete a record.

If your data source is a Word table, an Excel worksheet, an Access database, or a Microsoft Outlook Contact List, you can simply open it up in the relevant application and make your amendments.

If you have created an Office Address List, the data is stored in a database format. You can either edit it using the tools in the Mail Merge Wizard, or by opening it in Access. We shall be using the Mail Merge Wizard to edit the Office Address list.

ADDING A RECORD

- Click Previous: Preview your letters
- Click Edit recipient list....

The Mail Merge Recipients dialog box is displayed showing the filtered records.

Data Source	~	Last Name	➡ First Name	▼ Title	-	Company Name	▼ Add
Address List.mdb		Banks	Paul	Mr		Bill Bloggs Jeans	32-3
vddress List.mdb	V	Piper	Peter	Mr		Hotstuff Heating	Perr
t ata Source		Refine re	ecipient list				
t Source Address List.mdb	111	Refine re	ecipient list ————————————————————————————————————				
t Jata Source Address List.mdb		Refine re 2↓ So 2↓ So	ecipient list				
t Jata Source Address List.mdb		Refine re ▲ \$ 50 ₩ ₩ ₩ ₩ ₩ ₩ ₩ ₩ ₩	ecipient list ort Iter nd duplicates				

> Remove the filters from the Job Title and City fields (see page 53)

In the Data Source section at the bottom of the dialog box:

Click Address List.mdb

- Click Edit
- Click into the blank record at the bottom of the list or, if there is not a blank record, click New Entry to create one
- > Add the following records

Mrs Patricia Smith	Ms Christine McDermott
Catering Manager	Manager
Jim's Big Buffets	Top Dog Grooming
Belmont Tower	87 Barking Lane
Bakewell Square	Cromer
Thetford	Norfolk
Norfolk	NR27 9XA
IP24 5JN	01546 772272
01543 876976	christine@tdgrooming.co.uk
psmith@jimsbb.co.uk	

When you have entered the two records:

➢ Click OK

Click Yes

Mail Merge Recipien	its					? 🔀
This is the list of recipient checkboxes to add or ren	ts th nov	nat will be used in your e recipients from the m	merge. Use the opt herge. When your lis	ions below to a st is ready, click	dd to or change your list、Us .OK.	e the
Data Source	~	Last Name 🛛 👻	First Name	🖌 Title 🛛 👻	Company Name 🛛 👻	Address
Address List.mdb	~	Banks	Paul	Mr	Bill Bloggs Jeans	32-36 O
Address List.mdb	~	Pigg	Greta	Ms	Atkins Machinery Co	Wains B
Address List.mdb	~	Dawson	Matilda	Mrs	Derris Construction	76-80 FI
Address List.mdb	~	Patel	Bhupinder	Ms	West End Flowers	25 Paisle
Address List.mdb	~	Piper	Peter	Mr	Hotstuff Heating	Perriwin
Address List.mdb	~	Szaja	Jon	Mr	Wordsmiths plc	Century
Address List.mdb	~	Smith	Patricia	Mrs	Jim's Big Buffets	Belmont
Address List.mdb	~	McDermott	Christine	Ms	Top Dog Grooming	87 Barki
Address List.mdb	7					
<	Ш	Refine recip	ient list			>
Address List.mdb	efre	 A Sort. Y Filter. Eind c A Find r A Find r A Find r A Yalida 	uplicates ecipient te addresses			
						ок

FINDING A RECORD

When there are more records in the Address List than can be viewed at one time in the Mail Merge Recipients dialog box, a vertical scroll bar is displayed so that you can move up and down the list.

However, you can also use Find to help locate the record that you want.

You are going to search for Patricia Smith's record.

> Ensure that the Mail Merge Recipients dialog box is still open

In the Refine recipient list section at the bottom of the dialog box:

Select Find recipient....

The Find Entry dialog box is displayed.

Find Entry	? 🛛
Fing: Look in: <u>I</u> his field:	~
	Find Next Cancel

In the **Find** window you enter text that is unique to the record you are searching for.

> Type smith

The Look in: All fields option is selected by default, and this will search every field in the data source for 'smith'.

To narrow the search:

- Select the option This field
- Click the down arrow and select Last Name

Find Entry		? 🗙
Fin <u>d</u> : smith Look in: <u>A</u> ll fields		
• This field:	Title	~
	Title First Name	^
	Last Name	
	Job Title Company Name Address Line 1	~

Click Find Next

The first record that matches your criterion is displayed.



If the record is not the one that you want - say there are several Smiths in the data source file - click the **Find Next** button to select the next record that matches your criterion.

As there is only one record with 'smith' in the Last Name field:

Click Cancel

AMENDING A RECORD

Next you are going to find a record and edit it, so need to open the data source.

In the Data Source section at the bottom of the dialog box:

- Click Address List.mdb
- Click Edit

The Edit Data Source dialog box is displayed.

Notice that there is a Find button which you could use but, while writing this training guide, it has been our experience that you need to be vigilant if you do.

If you use the 'Look in: This Field:' option to locate, for example, specific text in the Last Name field, you may discover that when you close the dialog box you have inadvertently replaced the last name you have found with the last name in the previously highlighted record. The advice, therefore, is to use this facility with caution.

Instead of using the Find option, you will filter the Last Name field.

- > Click the down arrow next to the Last Name column heading
- Select (Advanced)

Edi	t Data Source						? 🛛
To e you Dat	edit items in your data r data source and an a source being edited	a source, type your c y recipient list fields t I: Address List.mdb	hange o whic	s in the table be th they have be	elow. C en mat	olumn headin ched (in parer	gs display fields from htheses).
	Title 👻	First Name 🛛 👻	Last	Name 👻	Job Ti	tle 🔻	Company Name 👻
	Mr Ms Mrs Ms Mr Mr Mr Mrs Ms Ms lew Entry Custo	Paul Greta Matilda Bhupinder Peter Jon Patricia Christine		Sort <u>A</u> scendir Sort Des <u>c</u> end (A <u>I</u> I) Banks Pigg Dawson Patel Piper Szaja Smith McDermott (<u>B</u> lanks) (<u>N</u> onblanks)	ing	el Manager nel Manager nt Manager nel Manager g Manager g Manager r	Bill Bloggs Jeans Atkins Machiner Derris Construction West End Flowers Hotstuff Heating Wordsmiths plc Jim's Big Buffets Top Dog Grooming
				(A <u>d</u> vanced)			

The Filter and Sort dialog box is displayed.

Field:	Comparisor	n: Compare t	to:
	×	×	
×	~	×	
~	~	~	
*	×	~	
*	× .	×	
~	~	~	

- > Click the down arrow in the Field column and select Last Name
- > Leave the Comparison field as 'Equal to'
- > In the Compare to field type dawson

ilter Re	ecords	Sort Records					
		Field:		Comparison:		Compare to:	_
		Last Name	*	Equal to	*	dawson	1
And	*		*		~		
	~		~		~		
	~		~		~		
	~		*		*		
	4		~		~		

> Click OK

The record that fits your criteria is displayed.

T	Title	✓ First Name	-	Last Name	-	Job Title	Company Name
>	Mrs	Matilda		Dawson		Sales Manager	Derris Construction

Once you have located the record that you want, you can then edit it.

- Change the name of the company that Matilda works for from Derris Construction to Harris Construction
- ➢ Click OK

You are asked if you want to save the amendment.

Microsoft Office	e Word			
Do you want to u	update your recipie	ent list and save	e these changes to Ac	ldress List.mdb?
	Yes	No	Cancel	

Click Yes

a alla a compa		Last Name	-	First Name	-	Title	▼ Co	mpany Name	•	Addr
ddress List.mdb	~	Dawson		Matilda		Mrs	Ha	rris Construction		76-80
T										
ta Source	1111	Defi	ne recipi	ent lict						
ta Source	1111	Refi	ne recipi	ent list	-					
ta Source Address List.mdb	HU	Refi	ne recipi	ent list	2					
ta Source	Ш	Refi	ne recipi	ent list	2					
ta Source Address List.mdb		Refit	ne recipi , <u>Sort</u>] Filter.	ent list						
ta Source Address List.mdb		Refit	ne recipi , <u>Sort</u>] <u>Filter.</u>	ient list	2					
ta Source Address List.mdb		Refi	ne recipi , <u>Sort</u>] Filter.] Find d	ent list						
ita Source Address List.mdb	1111	Refi	ne recipi , <u>Sort</u>] Filter.] Find d	ent list						
ata Source Address List.mdb		Refit	ne recipi , <u>Sort</u>] Filter.] Find d	ent list						

To see all of the records again, click the down arrow next to the Last Name column heading and select (All)

ADDING FIELDS

Fields may be added to the data source at any time.

- > Ensure the Mail Merge Recipients dialog box is still open
- Click Address List.mdb
- Click Edit
- Click Customize Columns...

You are asked if you want to save any changes you have made to the data source.



Click Yes

The Customize Address List dialog box is displayed.

> Add a new field named Vegetarian and position it below Postcode

Customize Address List		? 🛛
Field Names		
Title First Name Last Name Job Title Company Name Address Line 1 Address Line 2 City County Postcode		Add Delete Rename
Vegetarian Work Phone E-mail Address	~	Move Up Move Down
	ОК	Cancel

> Click OK

If you scroll across you will see that the Vegetarian field has been added to the existing records.

-	County 🗖	Postcode 🗸 🗸	Vegetarian 🛛 👻	Work Phone 🛛 👻	E-ma
	Norfolk	IP24 8KL		01543 875333	g.pig
	Norfolk	NR5 9NK		01546 876277	mcb(
	Norfolk	NR2 4HV		01548 675435	enq@
	Norfolk	NR5 8MN		01546 367067	piper
	Norfolk	NR27 0AW		01549 874478	szaja
	Norfolk	IP24 5JN		01543 876976	psmi
	Norfolk	NR27 9XA		01546 772272	chris

➤ Input the following data:

Name	Vegetarian
Mr Paul Banks	No
Ms Greta Pigg	Yes
Mrs Matilda Dawson	Yes
Ms Bhupinder Patel	No
Mr Peter Piper	No
Mr Jon Szaja	Yes
Mrs Patricia Smith	No
Ms Christine McDermott	Yes



To speed up the process, you might consider customising the list so that the Vegetarian field is directly below the Last Name field. This then allows you to see the two fields together without having to scroll across the list. Once you have input the data, return the Vegetarian field to its original position - below the Postcode field.

> Click OK

You are asked if you want to update the recipient list and save the changes.

Microsoft Office Word			
Do you want to update your recip	ient list and save	these changes to Ad	dress List.mdb?
Yes	No	Cancel	

- Click Yes
- Click OK

USING SPECIAL WORD FIELDS

You have already seen that, when you merge the main document and the data source, the merge fields in the main document are replaced by text from the data source.

In addition to merge fields, you can also place Word fields in a main document and these fields instruct Word to perform an action when the merge occurs.

So, for example, you might be sending a letter to your customers inviting them to attend a seminar which is taking place in both Leicester and Manchester. Your customers are divided into service areas around the country. You want the letters to your customers in service areas 1-3 to give details of the seminar in Leicester, while all of your other customers should receive details of the Manchester event.

By inserting a Word field in the main document, you can specify the text you want to appear in a particular letter which, in this scenario, would obviously depend upon the data in the service areas field.

Specifying text to appear in the merged document

In your letter you want to include a sentence advising those customers who have staff members who are vegetarian that they will be catered for at the dinner party.

For those who have indicated that they do not have any staff members who are vegetarian, an alternative sentence is to be inserted.

The field that you will add to the Confirmation Letter document will check whether the recipient has stated that they have vegetarian staff members or not.

If the field is **Yes**, the letter will include the line 'Both gourmet and vegetarian menus are available.'

If the field is No, the letter will state 'A full gourmet menu is available.'

- Ensure you can see the field codes in the Confirmation Letter document (the 'Write your letter' stage step 4)
- Position the insertion point before the line 'May I take this opportunity to wish you all a very pleasant evening.'

Position here

Press Enter

- On the Mailings tab, in the Write & Insert Fields group, click the down arrow next to Rules
- Select If...Then...Else...



The Insert Word Field: IF dialog box is displayed.

Insert Word Field: IF			? 🛛
IF Eield name: Title	<u>C</u> omparison: Equal to	~	Compare <u>t</u> o:
Insert this text:			<u> </u>
Otherwise insert this text:			<u>~</u>
			OK Cancel

> Click the down arrow in the Field name window and select Vegetarian

Eield name:	<u>C</u> omparison:	Compare <u>t</u> o:	
Title	Equal to	~	
City County Postcode Vegetarian Work_Phone Email_Address therwise insert this text:			

- > Leave the Comparison field as Equal to
- > In the Compare to window type Yes

=			
<u>F</u> ield name:	<u>C</u> omparison:	Compare <u>t</u> o:	
Vegetarian	 Equal to 	Ves	
therwise insert this text	t:		

> In the Insert this text window type:

Both gourmet and vegetarian menus are available.

> In the Otherwise insert this text window type:

A full gourmet menu is available.

Insert Word Field: IF				? 🛛
IF				
Eield name:	<u>C</u> omparison:		Compare <u>t</u> o:	
Vegetarian	Y Equal to	~	Yes	
Insert this text:				
Both gourmet and vegetar	ian menus are available			<
Otherwise insert this text:				
A full gourmet menu is ava	ilable.			<u> </u>
				~
			OK Car	ncel

➢ Click OK

The Word field is inserted into Confirmation Letter.

- Press Enter
- Preview the letters
- > Scroll through the letters
SORTING RECORDS

The records in the data source file are stored in the order in which you create them.

However, if you want to view them in a different order, you can sort them using one or more fields.

Sorting on one field

- > Ensure the Mail Merge Recipients dialog box is displayed
- Click the Company Name title

	nts					? 🛛	
This is the list of recipient checkboxes to add or ren	ts th move	at will be used in y e recipients from t	your merge. Use the o he merge. When you	ptions below t list is ready, o	to add to or change your list. click OK.	Use the	— Click here
Data Source	~	Last Name	▼ First Name	▼ Title		✓ Address	
Address List.mdb	~	Banks	Paul	Mr	Bill Bloggs Jeans	32-36 0	
Address List.mdb	2	Pigg	Greta	Ms	Atkins Machinery Co	Wains B	
Address List.mdb	~	Dawson	Matilda	Mrs	Harris Construction	76-80 FI	
Address List.mdb	~	Patel	Bhupinder	Ms	West End Flowers	25 Paisle	
Address List.mdb	~	Piper	Peter	Mr	Hotstuff Heating	Perriwin	
Address List.mdb	~	Szaja	Jon	Mr	Wordsmiths plc	Century	
Address List.mdb	~	Smith	Patricia	Mrs	Jim's Big Buffets	Belmont	
Address List.mdb	~	McDermott	Christine	Ms	Top Dog Grooming	87 Barki	
Data Source	Ш	Refine i	recipient list			>	

The records in the Company field are sorted into alphabetical order.

Sorting on multiple fields

Suppose you want to sort the records by City and then, within that sort, you want to see the Company Names in alphabetical order.

Using a drop menu in the Mail Merge Recipients dialog box is not an option, as this sorts just one field at a time.

Instead, you need to use the **Advanced** feature which gives you the option of sorting on more than one field simultaneously.

The Mail Merge Recipients dialog box should still be open

- > Click on the down arrow next to the City column heading
- Select (Advanced...)

• •	Company Name	✓ Address Line 1	 Address Line 2 	👻 City	 Postcode
	Atkins Machinery Co	Wains Bridge Road		A	Sort Ascending
	Bill Bloggs Jeans	32-36 Oxford Road		Z*	Sont Ascending
	Harris Construction	76-80 Flowerpot Lane	Middleton	Z	Sort Descending
	Hotstuff Heating	Perriwinkle Lane	Sproston		-
	Jim's Big Buffets	Belmont Tower	Bakewell Square		(AII)
	Top Dog Grooming	87 Barking Lane			Thefford
	West End Flowers	25 Paisley Road			metroru
	Wordsmiths plc	Century House	High Road		Norwich
					Cromer (<u>B</u> lanks)
<	_				Cromer (<u>B</u> lanks) (<u>N</u> onblanks)
< Data Sou	irce	Refine recipient list			Cromer (Blanks) (Nonblanks) (Advanced)
<data sou<="" td=""><td>irce ss List.mdb</td><td>Refine recipient list</td><td></td><td></td><td>Cromer (<u>B</u>lanks) (<u>N</u>onblanks) (A<u>d</u>vanced)</td></data>	irce ss List.mdb	Refine recipient list			Cromer (<u>B</u> lanks) (<u>N</u> onblanks) (A <u>d</u> vanced)
< Data Sou Addre	arce ss List.mdb	Refine recipient list 2 ↓ <u>Sort</u> Filter			Cromer (<u>B</u> lanks) (<u>N</u> onblanks) (A <u>d</u> vanced)
< Data Sou Addre	urce ss List.mdb	Refine recipient list 2 ↓ Sort Filter			Cromer (<u>B</u> lanks) (<u>N</u> onblanks) (A <u>d</u> vanced)
<a>Addre	urce ss List.mdb	Refine recipient list 2 ↓ Sort Filter Filter Find duplicates			Cromer (Blanks) (Nonblanks) (A <u>d</u> vanced)
< Data Sou Addre	urce ss List.mdb	Refine recipient list 2↓ Sort Filter Eind duplicates Find recipient			Cromer (Blanks) (Nonblanks) (A <u>d</u> vanced)

> Click the Sort Records tab to bring it to the top

The last sort query that you devised is displayed.

ort by:	Company Name	*	Ascending	O <u>D</u> escending
nen by:		*	Ascending	
nen <u>b</u> y:		~	Ascending	

Click Clear All

You are going to sort the data source into City and Company Name order.

- > Click the down arrow in the Sort by window
- > Select City
- > Ensure the Ascending option is selected
- > Click the down arrow in the Then by window
- Select Company Name
- > Ensure the Ascending option is selected

Filter and	Sort		? 🛛
Eilter Reco	rds Sort Records		
<u>S</u> ort by:	City	() <u>A</u> scending	O Descending
Ihen by:	Company Name	Ascending	O Descending
Then <u>b</u> y:	×	Ascending	ODescending
_			
<u>⊆</u> lear All		ОК	Cancel

> Click OK

The records are sorted firstly by City and secondly by Company Name.

> Scroll across so that you can see both fields simultaneously

This is the checkbox	e list of recipients that will be u es to add or remove recipients	sed in your merge. Use the c from the merge. When your	ptions below to add to or list is ready, click OK.	change your list.	Use the
Title		✓ Address Line 1	 Address Line 2 	\star City 👻	Postcode
Ms	Top Dog Grooming	87 Barking Lane		Cromer	NR27 9XA
Mr	Wordsmiths plc	Century House	High Road	Cromer	NR27 0A\
Mr	Bill Bloggs Jeans	32-36 Oxford Road	- 80	Norwich	NR2 6RT
Mrs	Harris Construction	76-80 Flowerpot Lane	Middleton	Norwich	NR5 9NK
Mr	Hotstuff Heating	Perriwinkle Lane	Sproston	Norwich	NR5 8MN
Ms	West End Flowers	25 Paisley Road		Norwich	NR2 4HV
				ml 10 1	TD24 OVI
Ms	Atkins Machinery Co	Wains Bridge Road		Thetford	IP24 ONL
Ms Mrs	Atkins Machinery Co Jim's Big Buffets	Wains Bridge Road Belmont Tower	Bakewell Square	Thetford Thetford	IP24 SJN
Ms Mrs	Atkins Machinery Co Jim's Big Buffets	Wains Bridge Road Belmont Tower	Bakewell Square	Thetford Thetford	IP24 5JN
Ms Mrs Cata Sour	Atkins Machinery Co Jim's Big Buffets	Wains Bridge Road Belmont Tower	Bakewell Square	Thetford Thetford	IP24 5JN
Ms Mrs Oata Sour Addres	Atkins Machinery Co Jim's Big Buffets	Wains Bridge Road Belmont Tower	Bakewell Square	Thetford Thetford	IP24 SJN
Ms Mrs Data Sour Addres	Atkins Machinery Co Jim's Big Buffets	Wains Bridge Road Belmont Tower	Bakewell Square	Thetford Thetford	IP24 SJN
Ms Mrs Data Sour Addres	Atkins Machinery Co Jim's Big Buffets	Wains Bridge Road Belmont Tower	Bakewell Square	Thetford	IP24 5JN
Ms Mrs Data Sour Addres	Atkins Machinery Co Jim's Big Buffets	Wains Bridge Road Belmont Tower Refine recipient list 2↓ Sort Filter Find duplicates Pind recipient	Bakewell Square	Thetford	IP24 SJN
Ms Mrs Data Sour Addres	Atkins Machinery Co Jim's Big Buffets	Wains Bridge Road Belmont Tower	Bakewell Square	Thetford	IP24 SJN

DELETING A RECORD

The Mail Merge Recipients dialog box should still be open.

- Click Address List.mdb
- Click Edit
- > Find the record for Ms Greta Pigg
- Click Delete Entry

A warning message is displayed asking whether you want to delete this entry.



> Click Yes

The entry is deleted.

- > Click OK
- Click Yes
- ➢ Click OK
- ➢ Save the changes to Confirmation Letter
- Close Confirmation Letter

USING AN EXCEL WORKSHEET AS A DATA SOURCE

You can use an Excel worksheet as a data source.

> Using the Mail Merge Wizard, create the following main document

Adult Education Department Greenwood Community College Jane Storer Way Thurnby Leicester LE7 9AB
Date
Dear
ENROLMENT CONFIRMATION
I am writing to confirm your enrolment on the evening classes.
I hope that you will enjoy the course, and look forward to welcoming you to the college.
Yours sincerely
Jackie Wilson-Taylor Adult Education Facilitator

To select the recipients:

- Browse for the file Evening Class which is in the WordMailMerge folder on drive C
- Click Open

The Select Table dialog box is displayed.

Name	Description	Modified	Created	Туре
💷 '1st quarter\$'		5/25/2007 3:15:00 PM	5/25/2007 3:15:00 PM	TABLE
🔢 Sheet2\$		5/25/2007 3:15:00 PM	5/25/2007 3:15:00 PM	TABLE
🔟 Sheet3\$		5/25/2007 3:15:00 PM	5/25/2007 3:15:00 PM	TABLE
				Ĩ

This dialog box shows a list of worksheets within the workbook.

The worksheet 1st quarter is already selected.

Notice that the checkbox 'First row of data contains column headers' is automatically checked. This means that the wizard will use the first row of data in the worksheet as field names.

> Click OK

The Mail Merge Recipients dialog box is displayed.

Mail Merge Recipi	ents					? 🗙
This is the list of recipion of the checkboxes to add or i	ents th remov	nat will be used in yo e recipients from the	ur merge. Us e merge. Wh	se the options below to a en your list is ready, click	dd to or change your list. U: .OK.	se the
Data Source	1	Surname 👻	Title 👻	Address1	✓ Address2	
Evening Class.xls	-	Mistry	Ms	8 Bilson Close		Leices
Evening Class.xls		Parker	Mrs	112 Freeman Drive	Oadby	Leices
Evening Class.xls	~	Smith	Mr	43 Diseworth Road	Birstall	Leices
Evening Class.xls	~	Pandya	Mr	98 Shepherd Road		Leices
Evening Class.xls	~	Arnett	Miss	3 Bannister Place	Humberstone	Leices
Evening Class.xls	~	Dolby	Mr	Flat 4	9 Armitage Crescent	Lough
Evening Class.xls	~	Owen	Ms	Border House	132 Mander Road	Leices
Evening Class.xls	~	Martindale	Mr	87 Stanton Drive	Wigston	Leices
Evening Class.xls	~	Traylor	Mrs	226 Mentor Road	Sileby	Lough
Evening Class.xls	V	Somerset-Thomas	Miss	66 Pasture Crescent		Leices
Cata Source		Refine re	cipient list			>
Evening Class.xls	Refre	A 2↓ Sor ∑ Eith C E	t er d duplicates d recipient idate address	<u>.</u> 65		
						ОК

- Scroll across to view all of the fields
- > Click OK
- Using whichever method you prefer (Address block, More items), insert the name and address fields between the date and 'Dear'
- > Ensure that you include the Initials field
- > Insert the Title and Surname after 'Dear'
- > Insert the Course Title field in the first sentence
- Preview the letters
- > Complete the merge
- Rather than print the letters now, save the file as Enrolment Confirmation in the WordMailMerge folder on drive C
- Close the file
- Close the document without saving

USING AN ACCESS TABLE AS A DATA SOURCE

You can use an Access table or query as a data source.

An Access database containing a table and a query has already been set up for this exercise, and you will use the table to create mailing labels.

- > Ensure you have a blank document open
- ➢ Run the Mail Merge Wizard and select Labels
- Select Label options
- Ensure that Avery A4/A5 is selected
- > Choose L7162 as the label
- Select recipients
- Browse for the file Evening Course Enrolments which is in the WordMailMerge folder on drive C

The Select Table dialog box is displayed containing two items: a table and a query (shown as type VIEW).

lect Table				?
Name	Description	Modified	Created	Туре
Sorted by course	e	2/2/2005 3:14:32 PM	2/2/2005 3:14:31 PM	VIEW
Enrolments		2/2/2005 3:14:32 PM	2/1/2005 4:28:39 PM	TABLE
. 1				1
		lill		
			ОК	Cancel

You are going to use the table.

- Select Enrolments
- Click OK

The Mail Merge Recipients dialog box is displayed.

Data Source	$\mathbf{\nabla}$	Surname 👻	Title 🔻	Address1 🗸 🗸	Address2	- 0
Evening Course En	1	Traylor	Mrs	226 Mentor Road	Sileby	1
Evening Course En	~	Patel	Mrs	11 Shaftesbury Drive	Quorn	L
Evening Course En	~	Dolby	Mr	Flat 4	9 Armitage Crescent	L
Evening Course En	~	Martindale	Mr	87 Stanton Drive	Wigston	L
Evening Course En	v	Parker	Mrs	112 Freeman Drive	Oadby	L
Evening Course En	~	Pandya	Mr	98 Shepherd Road		L
Evening Course En	~	Thomas	Mr	41 Senden Close		L
Evening Course En	~	Owen	Ms	Border House	132 Mander Road	L
Evening Course En	<	Somerset-Thomas	Miss	66 Pasture Crescent		L
Evening Course En		Smith	Mrs	43 Diseworth Road	Birstall	L
Evening Course En	~	Smith	Mrs	75 Highgate Road		L
Evening Cource En		Micheo	Me	8 Bilcon Close		1
eta Source	lmeni	Refine re ts.mc ▲ 2↓ Sor 1 Filt 2 Fin 2 Fin	cipient list <u>t</u> d duplicates d recipient	<u>.</u>		

- Do not include the following recipients in the mail merge: Mrs D G Smith and Miss L B D Arnett
- > Click OK
- Arrange your labels
- > Remember to apply the **No Spacing** paragraph style (see page 25)
- Add the recipient information (name and address) using the Address block or More items
- > Ensure that you include the Initials field
- > Update all labels
- > Preview

Aiss C Birks 34 Monet Crescent Anstey Leicester LE7 7HB		



The first name on the labels is the one that is currently selected in the Mail Merge Recipients dialog box. You need to complete the merge to see all of the labels.

Complete the merge

Arr H Dolby	Mr M Martindale	
9 Armitage Crescent Loughborough LE12 9YJ	Wigston Leicester LE18 2ED	
Mrs J Parker 112 Freeman Drive Oadby Leicester LE2 9LX	Mr S F Pandya 98 Shepherd Road Leicester LE3 1JK	
Mr D W Thomas 41 Senden Close Leicester LE3 2FG	Ms A O Owen Border House 132 Mander Road Leicester LE3 8JF	
Miss P Somerset-Thomas	Mrs V Smith	

- Save the file to print later as Evening Course Labels in the WordMailMerge folder on drive C
- Close the file
- Close the document without saving