## USING MAIL MERGE

You use mail merge when you want to create a set of documents, such as a form letter that is sent to multiple individuals. Each document has the same kind of information, yet some of the content may be unique. For example, in letters to your customers and vendors, you can personalize each letter to address each party by name. The unique information in each letter comes from entries in a data source.

1. TO SET UP THE MAIN DOCUMENT--The main document contains the text and graphics that are the same for each version of the merged document — for example, the return address in a form letter.
2. TO CONNECT THE DOCUMENT TO A DATA SOURCE--A data source is a file that contains the information to be merged into a document. For example, the names and addresses of the recipients of a letter.
3. TO REFINE THE LIST OF RECIPIENTS OR ITEMS--Microsoft Word generates a copy of the main document for each recipient or item in your data file. If you want to generate copies for only certain items in your data file, you can choose which items (or records) to include.
4. TO ADD PLACEHOLDERS, CALLED MAIL MERGE FIELDS, TO THE DOCUMENT--When you perform the mail merge, the mail merge fields are filled with information from your data file.

You will use the commands on the Mailings tab to perform a mail merge.

SET UP THE MAIN DOCUMENT

1. START WORD--A blank document opens by default. Leave it open. If you close it, the commands in the next step are not available.
2. On the Mailings tab, in the Start Mail Merge group, click Start Mail Merge.
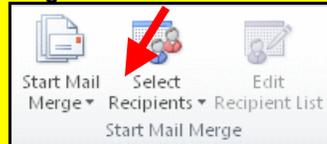
CONNECT THE DOCUMENT TO A DATA SOURCE

To merge information into your main document, you must connect the document to a data source, or a data file. If you don't already have a data file, you can create one during the mail merge process.

If you use an existing list, make sure that it contains the information that you want to use, including all the columns and the rows. You can make some changes during the merge, but you can't open your data source separately during the merge. The merge process is easier if your data source is ready before you connect to it.

CHOOSE A DATA FILE

On the Mailings tab, in the Start Mail Merge group, click Select Recipients.

REFINE A LIST OF RECIPIENTS OR ITEMS

When you connect to a certain data file, you might not want to merge information from all the records (or rows) in that data file into your main document.

To narrow the list of recipients or use a subset of the items in your data file, do the following:
1. On the Mailings tab, in the Start Mail Merge group, click Edit Recipient List.
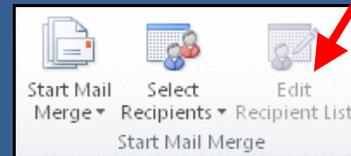
TO FILTER RECORDS

1. Under Refine recipient list, click Filter.
2. On the Filter Records tab in the Filter and Sort dialog box, choose the criteria that you want to use for the filter.

For example, to generate letters only for addresses that list Australia as the country/region, you click Country or Region in the Field list, click Equal to in the Comparison list, and then type or select USA in the Compare to list.

3. To refine the filter further, click And or Or and choose more criteria.

For example, to generate letters only for businesses in Chicago, you filter on records whose City field contains Chicago and whose Company Name field is not blank. If you use Or instead of And in this filter, your mail merge includes all Chicago addresses as well as all addresses that include a company name, regardless of city.

ABOUT MAIL MERGE FIELDS

The placeholders, such as address and greeting, are called mail merge fields. Fields in Word correspond to the column headings in the data file that you select.

	A	B	C
1	Name	Last Name	Street Address
2	Nancy	Anderson	123 Main St.
3	Ann	Beebe	567 Country Rd.
4			
5			
6			
7			
8			
9			

1. Columns in a data file represent categories of information.
2. Rows in a data file represent records of information. Word generates a copy of the main document for each record when you perform a mail merge.
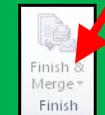
PREVIEW THE MERGE

You can preview your merged documents and make changes before you actually complete the merge.
1. To preview, choose the Preview Results group of the Mailings tab.
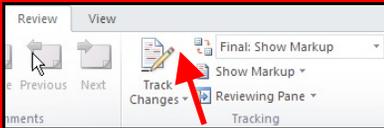
PRINT MERGED DOCUMENTS

1. On the Mailings tab|Finish group|Finish & Merge, click Print Documents.

2. Choose whether to print the whole set of documents, only the copy that's currently visible, or a subset of the set, which you specify by record number.

TRACK CHANGE BUTTON

The tracking button is found in the Ribbon under the Review tab, in the group 'Tracking'.

COMPARING DOCUMENTS

The Compare feature in the Review tab allows the user to compare revised documents with the original document, and also gives the user the option of combining multiple revised document into one.

1. Click the compare button under the Review tab, and when the dropdown menu displays, select Compare.
2. In the dropdown menu offered, under Original document, select your original document.
3. In the dropdown menu below Revised document, select your final document.
4. Click OK.

The new window will display and on one pane will show your original document, your revised document, and the combined view of both documents.

5. Click the "Accept" or "Reject" button on the "Reviewing" tab when Word highlights a change to tell the program if you want to make that change to your document permanent or delete it.

AIN'T IT THE TRUTH

Computers make very fast, very accurate mistakes.

CREATE A TABLE OF CONTENTS FROM THE GALLERY

You create a Table of Contents by applying heading styles — for example, Heading 1, Heading 2, and Heading 3 — to the text you want to include in the Table of Contents.

Microsoft Word searches for those headings and then inserts the table of contents into your document.

After you mark the entries for your Table of Contents, you are ready to build it.

1. Click where you want to insert the table of contents (usually at the beginning of a document.)
2. On the References tab, in the Table of Contents group, click Table of Contents, and then click the table of contents style that you want.
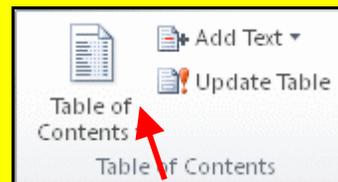
NOTE If you want to specify more options — for example, how many heading levels to show — click Insert Table of Contents to open the Table of Contents dialog box.

TO CREATE MAILING LABELS

1. Select Tools menu|Letters and Mailings|Mail Merge Wizard.
2. Select the radio button for Labels| Starting document" at the bottom of the Mail Merge wizard.
3. Keep the default radio button|click the link "Label options…"
4. Select the label product number and click OK.
5. You can now print or edit your labels.

ENDNOTES AND FOOTNOTES

The Reference tab allows you to insert footnotes, endnotes & bibliographies.

END NOTES

Type a sentence and if you need to cite it, you will then click on Endnotes under the Footnotes tab.

Endnotes are to be located at the end of the current document.

FOOTNOTES

As in Endnotes, you will be using footnotes when you will be referencing something or using words or terms with which your reader may not be familiar. You will then go to the Footnotes tab and click Insert Footnotes.

However, unlike the endnotes, footnotes will always display at the end of the current page.

CROSS REFERENCES

Cross references are for large documents and refer to items such as headings, figures and tables by inserting a cross reference such as "See Table 6 below" or "See page 5."

For inserting your cross references, make sure every picture is captioned because the feature only works on inserting headings, bookmarks and captions in you document.

If you have created footnotes, endnotes, headings and page numbers, you will not be able to cross reference them.

1. Activate the target document.
2. On the Caption tab, select the cross reference entry.
3. At Reference type, make your selection.
4. Click on Insert.

BOOKMARKS

This feature allows you to keep track of important information in a long document.

1. Open the target document and select the text to be Bookmarked.
2. Click Insert Tab|Links group|Bookmark.
3. At the Bookmark dialog, provide a bookmark name, with not spaces, and click Add.
4. Make sure to save your document before closing it.

TO RETRIEVE A BOOKMARK

1. Open the target document.
2. Select Insert tab|Links group|Bookmark.
3. Select the target bookmark and click Go To.
4. Depress Close and you will see the text has again been highlighted.

UPDATE FROM YOUR IT DEPT
(TEE HEE)

When you get a message about insufficient disk space, delete everything in the Windows directory. It's nothing but trouble anyway.