

# Word 2007/2010 Using Mail Merge for Mass Mailings - Online

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| <b>Audience</b>    | This course is appropriate for those who are experienced Word users. Students should know how to enter, edit, select, move, and copy text, create and edit text in columns using tables, set page margins and page breaks, apply styles, and insert headers/footers in Word. They should also know how to add simple data in Excel.   |
| <b>Description</b> | This course uses a combination of lecture, hands-on practice, and independent exercises after class to teach students how to use Word's fields and mail merge tools to add information automatically to documents. The skills needed to set up a main document, create a data source, and perform a mail merge to hardcopy and to email are covered.  |
| <b>Objectives</b>  | Upon successful completion of the class, students should be able to: <ul style="list-style-type: none"><li>■ Understand the basics of the mail merge process</li><li>■ Identify the two files needed for a basic mail merge</li><li>■ Discuss the different types of fields and what they are used for</li><li>■ Understand the syntax of field coding</li><li>■ Insert informational fields such as the Date field and User Information fields</li><li>■ Insert merge fields for use in a mail merge</li><li>■ Preview mail merge results</li><li>■ Create Rules for special features such as manually inserting information during the merge</li><li>■ Understand the features of a data source</li><li>■ Create a data source in Word and Outlook</li><li>■ Edit a data source and data fields in Word</li><li>■ Troubleshoot the data source</li><li>■ Merge to a new document, a printer, and email</li><li>■ Select, sort, and filter records for a merge</li><li>■ Merge all, current, or a range of records</li><li>■ Create mailing labels, envelopes, and directories</li></ul> |
| <b>Length</b>      | 3 hours   |

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## I. Setting up the Main Document

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|-------------------------|-----------------------------------|
| A. What is Mail Merge?  | 2. Form Fields                    |
| B. What are Fields?     | 3. Merge Fields                   |
| 1. Informational Fields | C. Using the Mail Merge Wizard    |
|                         | D. Inserting Informational Fields |



- E. Locking/Unlocking Fields
- F. Inserting Merge Fields
- G. Merging to a Document or Printer
- H. Creating Rules

## **II. Creating the Data Source**

- A. Features of the Data Source
- B. Creating a Data Source in Word
- C. Editing a Data Source and Data Fields
- D. Trouble Shooting the Data Source
- E. Creating a Data Source in Outlook

## **III. Merging**

- A. Merging to Email
- B. Selecting, Sorting, & Filtering Records
- C. Creating Mailing Labels
- D. Creating Envelopes
- E. Creating a Directory