

Word 2007 Mail Merge

- Audience** 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.
- Description** This course uses a combination of lecture, hands-on practice, and independent exercises 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.
- Objectives** Upon successful completion of the class, students should be able to:
- Understand the basics of the mail merge process
 - Identify the two files needed for a basic mail merge
 - Discuss the different types of fields and what they are used for
 - Understand the syntax of field coding
 - Insert informational fields such as the Date field and User Information fields
 - Insert merge fields for use in a mail merge
 - Preview mail merge results
 - Create Rules for special features such as manually inserting information during the merge
 - Understand the features of a data source
 - Create a data source in Word and Outlook
 - Edit a data source and data fields in Word
 - Troubleshoot the data source
 - Merge to a new document, a printer, and email
 - Select, sort, and filter records for a merge
 - Merge all, current, or a range of records
 - Create mailing labels, envelopes, and directories
- Length** ½ day
- Beyond This Level** When you have successfully completed this class, the next class you should consider is Word Forms or VBA. The Word Forms course teaches how to create fields in a form to collect data from others. The Visual Basic for Applications course covers an introduction to VBA, objects, and the Word object model. Students also learn to write VBA code, use forms, procedures, functions, control structures, and debugging techniques. Basic and advanced macro features are also covered. Be sure to leave time for practice before registering for the next level.



I. Setting up the Main Document

- A. What is Mail Merge?
- B. What are Fields?
 - 1. Informational Fields
 - 2. Form Fields
 - 3. Merge 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