

STUDY COURSE MATERIAL

COMPUTER

SESSION-2020-21

CLASS-VI

TOPIC: CHAPTER – 4 [MS-WORD _MAIL MERGE]

DAY-1

❖ TEACHING MATERIAL

What are mail merges?

Mail merges are one of the quickest ways to customize documents like emails, newsletters, and other personalized messages. A mail merge lets you create personalized documents that automatically vary on a recipient-by-recipient basis. This spares you the trouble of manually personalizing each document yourself!

Confused? Let me explain.

Here's an example:

Let's say you want to send a holiday email or letter to your customers. However, you don't want to send them a generic email or letter — you want each email to include unique greetings and mention their individual names and addresses.

Instead of manually creating separate emails or letters for each person, just perform a mail merge!

It will automatically add each person's details to the email or letter you send them — sparing you the trouble of doing it yourself.

Six Steps to Completing a Mail-Merge

Mail merging means to plug data from an address table into form letters, e-mail messages, envelopes, address labels, or a directory (a list or catalog, for example).

To start a mail merge, choose Tools | Letters and Mailings | Mail Merge Wizard to open the Mail Merge task pane.

Step 1: Select a Document Type

The first step is to select what Word calls a “document type” in the Mail Merge task pane, what kind of mail-merge you want to undertake: form letters, e-mail messages, envelopes for mass-mailings, labels for mass-mailings, or a directory (a list or catalog). Choose an option button and click Next at the bottom of the task pane to go to step 2.

Step 2: Select a Starting Document

What Word calls the “starting document” is the document in which the merging takes place. In other words, the address or other data you retrieve will land in the document you choose or create now.

You can create a new start document or use an existing one. In the case of labels and envelopes, you tell Word what size labels or envelopes you intend to print on. In the case of form letters, e-mail messages, and directories, you supply the text either by making use of a document you’ve written already or writing a new document.

DAY-2

❖ TEACHING MATERIAL

Step 3: Select Recipients

In step 3, you tell Word where to get the data that you will merge into the starting document you created or supplied in step 2. You can retrieve the data from a table in a Word document, an Access database table or query, or the address book or

contact list where you store your addresses. You can also create a new list for the data if you haven't entered the data in a file yet.

Step 4: Write/Arrange Your Document

In step 4, you insert the merge fields, the parts of the starting document that differ from recipient to recipient. By inserting merge fields, you tell Word where to plug information from the data source into the starting document. You also tell Word which data to take from the data source. Word offers special tools for entering an address block – the recipient's address, including his or her name, company, title, street address, city, and zip code.

Step 5: Preview Your Document

In step 5, you get a chance to see what your form letters, e-mail messages, envelopes, labels, or directory will look like after they are printed or sent. In this step, you find out what the document will look like when real data is plugged into it.

If something is amiss in the document, you can click the *Previous* link to return to step 4, the *Write/Arrange your document* task pane, and make changes there.

Step 6: Complete the Merge

Step 6 is where you complete the merge by either printing a new document or saving the new file and printing it later. By saving the merged data in a new file, you can edit the file before printing it. In the case of e-mail messages, you click the *Electronic Mail* link to tell Word to send the e-mail messages.

Preparing and Selecting the Data Source

The data source is the file where the addresses and other information is kept. Step 3 of the mail-merge procedure calls for you to name your data source, and before you name it, make sure that it is in good working order. The data source can be any number of things, as mentioned above. Word also offers a special dialog box for creating a data source from scratch and storing it in Microsoft Access.

Caution: After you create the data source, do not move it to a different folder or rearrange the merge fields/columns. If you do so, the document can't read the data source correctly and you can't complete the mail-merge.

Note: A field is one category of information (like last name, or zip code). A record comprises all the data about one person or thing. The field is the heading of a table, while records are all of the data underneath.

Using a Word Table as the Data Source For people who aren't familiar with databases, the easiest type of data source to manage is a Word table. Either create an address table from scratch or copy a table you have already created and save the table by itself in a document. Save the table under a name you will recognize. When you merge the data source table with the starting document, you will be asked to locate and select the document that holds your addresses or other to-be-merged information.

DAY-3

❖ TEACHING MATERIAL

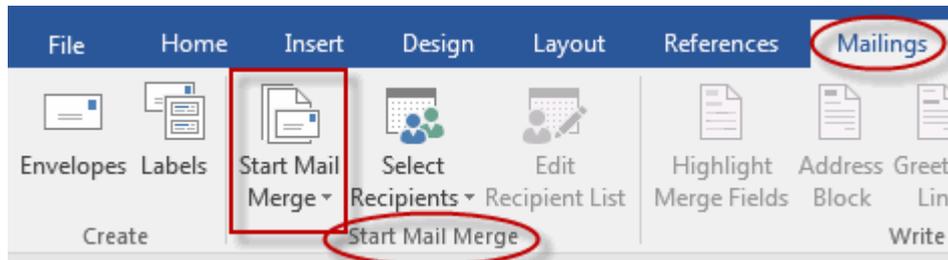
To use a Word table as the data source, the table must meet these standards:

✚ A descriptive heading must appear across the top of each column. The row of descriptive headings across the top of a table is called the header row, or sometimes the heading row. The names in the header row double as merge field names when you insert merge fields in the starting document. When you tell Word where to plug data into the starting document, you choose a column name from your table.

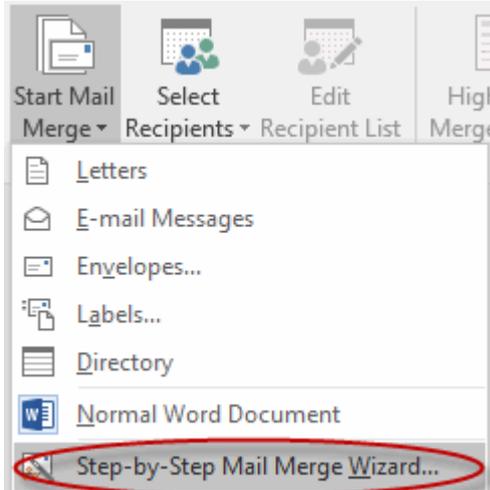
✚ No text or blank lines can appear above the table in the document. To be on the safe side, save the table in a document by itself.

To use a Word table as a data source, click the Use an Existing List option button in the Mail Merge task pane in step 3, and then click on the Browse hyperlink on the task pane or the Open Data Source button on the Mail Merge toolbar. The Select Data Source dialog box appears. Select the Word document with the table you need and click the Open button.

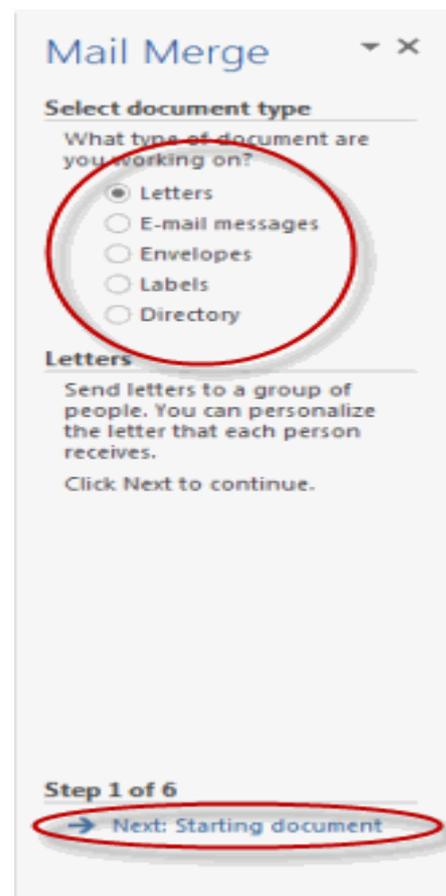
In a blank Microsoft Word document, click on the **Mailings** tab, and in the **Start Mail**



1. Click **Step-by-Step Mail Merge Wizard**.

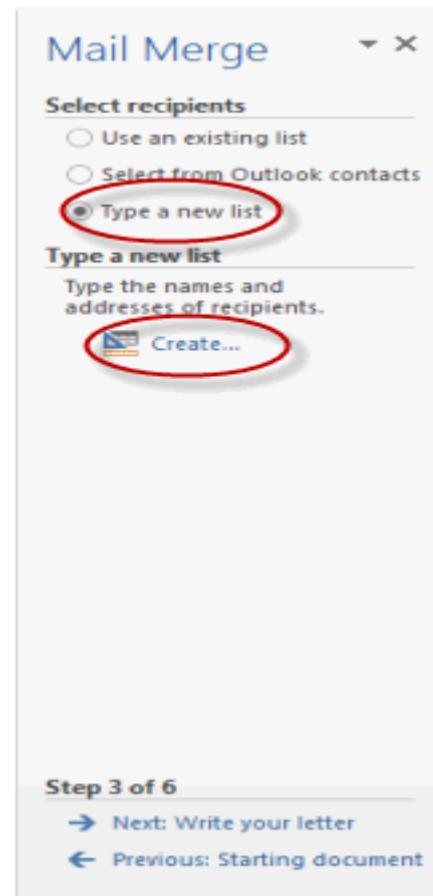


2. Select your document type. In this demo we will select **Letters**. Click **Next: Starting document**.



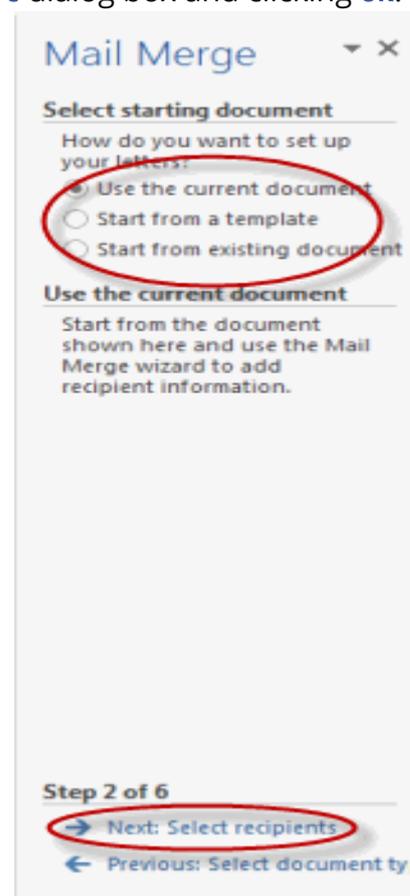
3. Select the starting document. In this demo we will use the current (blank) document. Select **Use the current document** and then click **Next: Select recipients**.

- a. Note that selecting **Start from existing document** (which we are not doing in this demo) changes the view and gives you the option to choose your document. After you choose it, the Mail Merge Wizard reverts to **Use the current document**.



4. Select recipients. In this demo we will create a new list, so select **Type a new list** and then click **Create**.

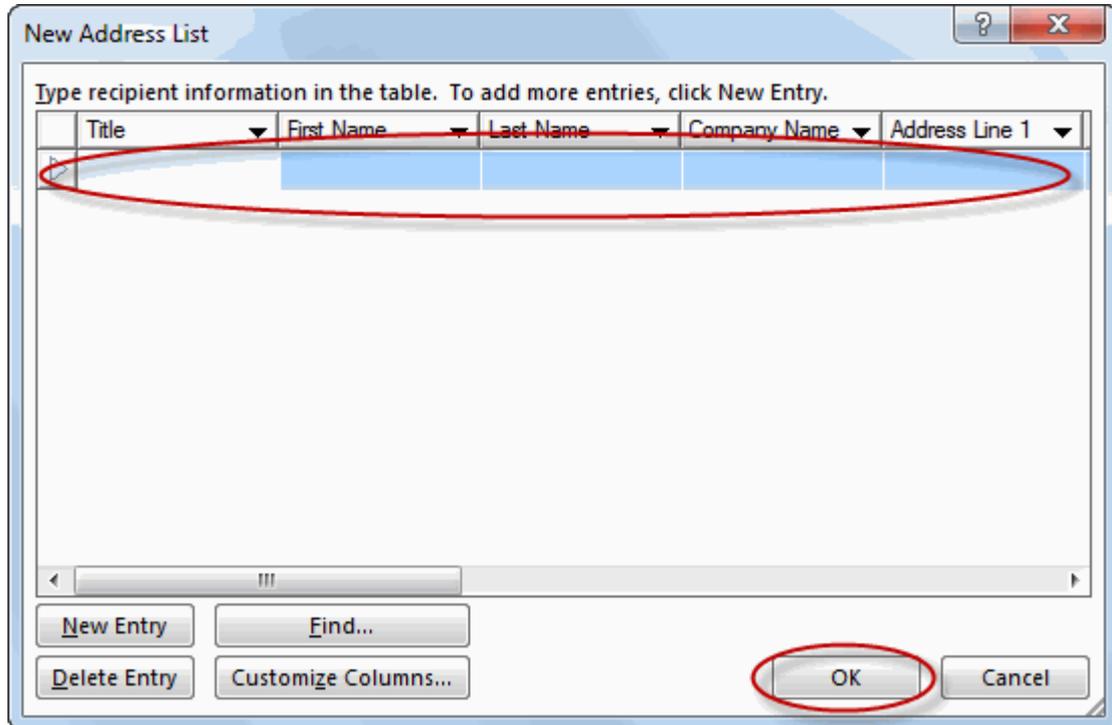
- a. Create a list by adding data in the **New Address List** dialog box and clicking **OK**.



DAY-4

❖ TEACHING MATERIAL

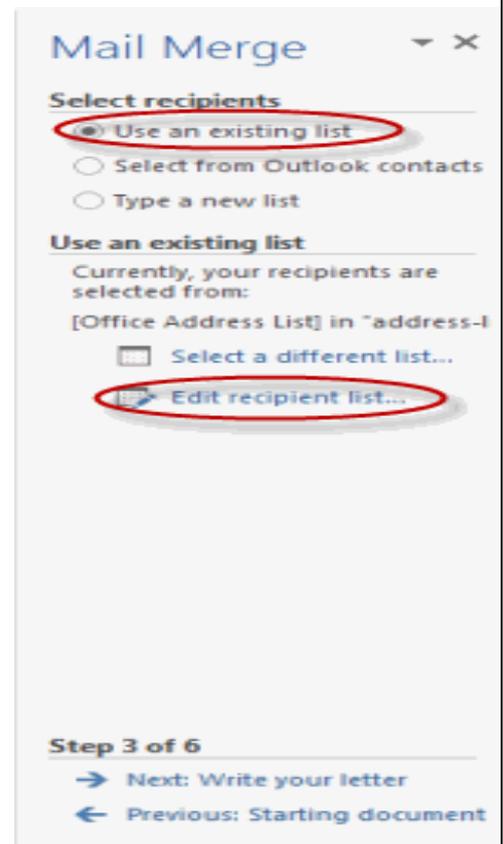
1.



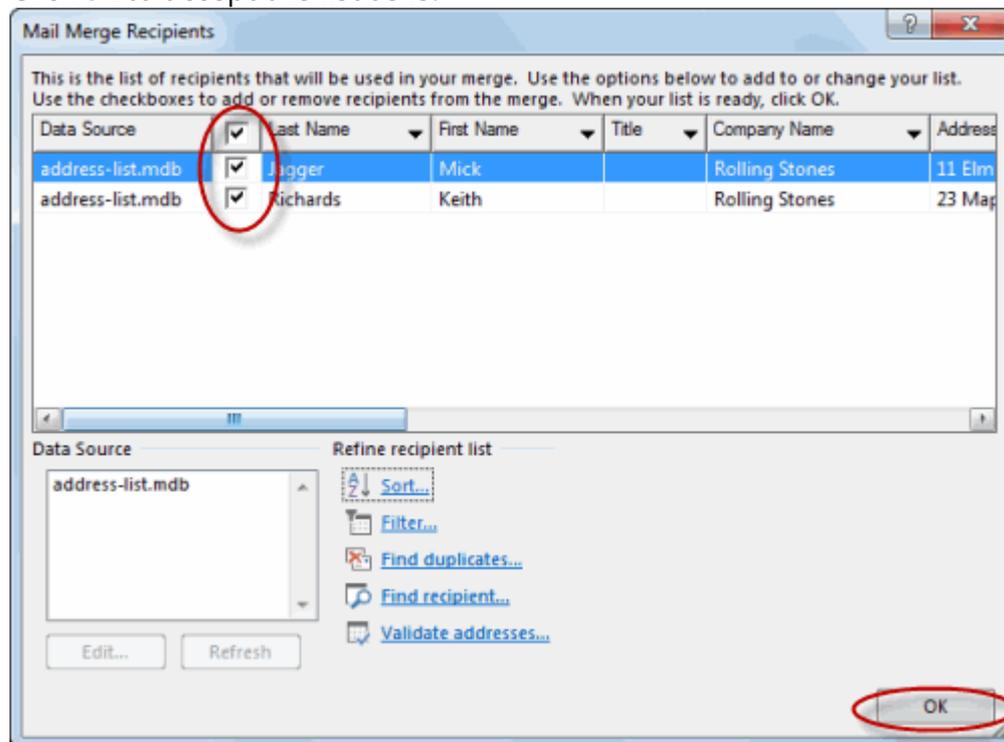
○ Save the list.

○ Note that now that a list has been created, the Mail Merge Wizard reverts to **Use an existing list** and you have the option to edit the recipient list.

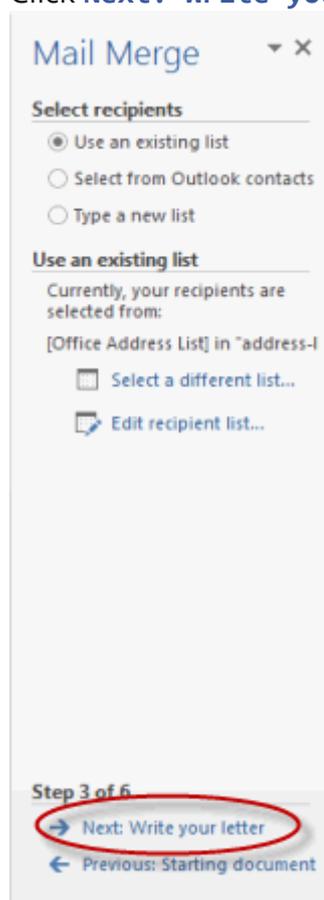
○ Selecting **Edit recipient list** opens up the **Mail Merge Recipients** dialog box, where you can edit the list and select or unselect records.



Click **OK** to accept the list as is.

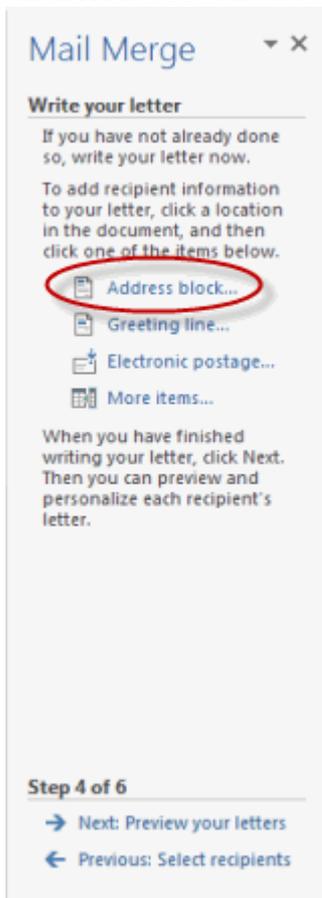


- Click **Next: Write your letter.**

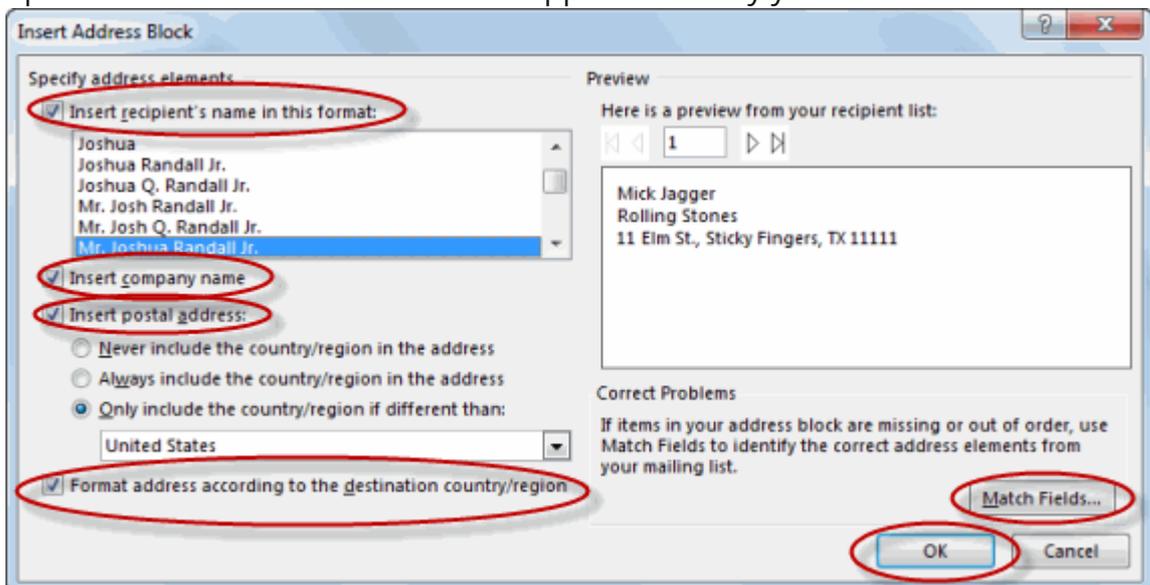


2. Write the letter and add custom fields.

- Click **Address block** to add the recipients' addresses at the top of the document.



- In the **Insert Address Block** dialog box, check or uncheck boxes and select options on the left until the address appears the way you want it to.



- Note that you can use **Match Fields** to correct any problems. Clicking **Match Fields** opens up the **Match Fields** dialog box, in which you can associate the fields

from your list with the fields required by the wizard.

Match Fields

In order to use special features, Mail Merge needs to know which fields in your recipient list match to the required fields. Use the drop-down list to select the appropriate recipient list field for each address field component

Required for Address Block

Courtesy Title	Title
First Name	First Name
Last Name	Last Name
Suffix	(not matched)
Company	Company Name
Address 1	Address Line 1
Address 2	Address Line 2
City	City
State	State
Postal Code	ZIP Code
Country or Region	Country or Region

Optional information

Use the drop-down lists to choose the field from your database that corresponds to the address information Mail Merge expects (listed on the left.)

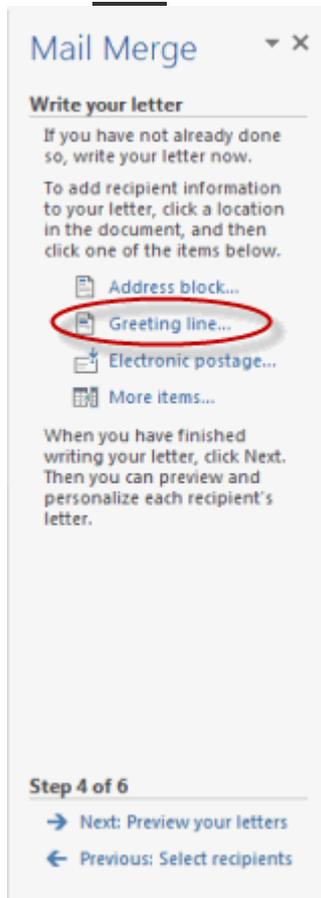
Remember this matching for this set of data sources on this computer

OK Cancel

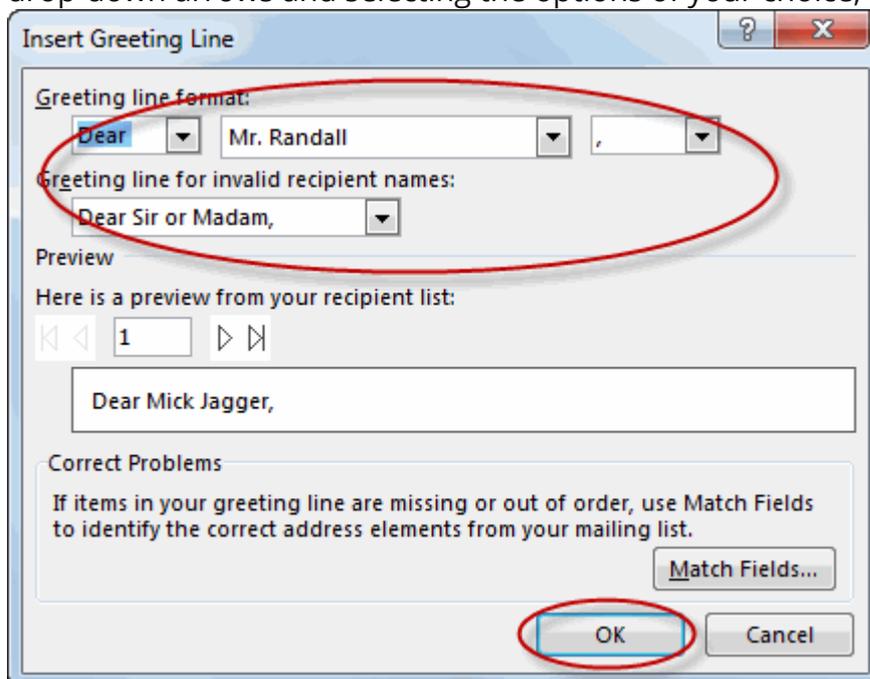
The advantages of using mail merge are:

- 1. Only one document needs to be composed for communicating to an extensive list of interested people, clients or customers.*
 - 2. Each document can be personalised i.e. it appears to be have been written specifically, to each recipient. It contains details only relevant to the receiver.*
 - 3. Many document formats can be developed to use with one database.*
 - 4. Errors in transcribing details from one document to another are eliminated.*
- This advantage, of course, depends upon the accuracy of data entry into individual records in the first place!*

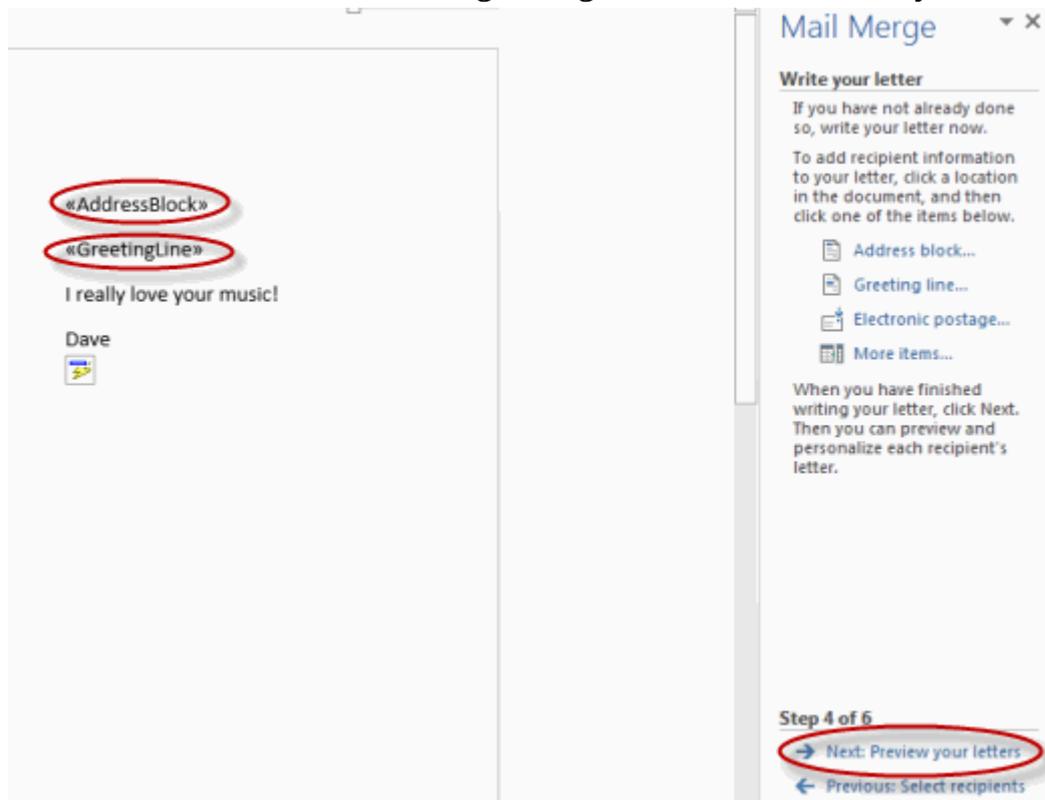
3. Click **Greeting line...** on the ribbon and click **Greeting line...** to enter a greeting.



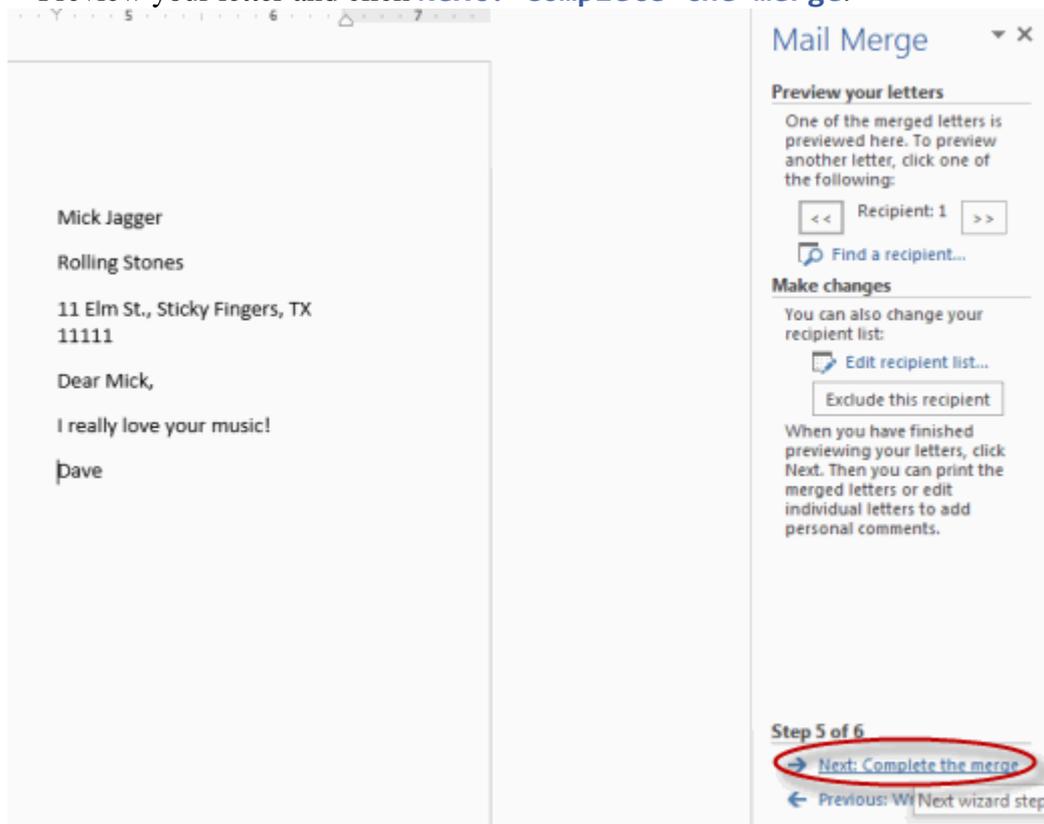
4. In the **Insert Greeting Line** dialog box, choose the greeting line format by clicking the drop-down arrows and selecting the options of your choice, and then click **OK**.



5. Note that the address block and greeting line are surrounded by chevrons (« »). Write a



- Preview your letter and click **Next: Complete the merge.**



- Click **Print** to print your letters or **Edit individual letters** to further personalize some or all of the letters.

Mail Merge ▾ ×

Complete the merge

Mail Merge is ready to produce your letters.

To personalize your letters, click "Edit Individual Letters." This will open a new document with your merged letters. To make changes to all the letters, switch back to the original document.

Merge

-  Print...
-  Edit individual letters...

Step 6 of 6

[← Previous: Preview your letters](#)

DAY-5

❖ TEACHING MATERIAL

Constructing an Access Data Source File During the Mail-Merge

If you haven't yet created a table or database table with the information you want to merge, you can create a data source with Word's help. When you are done, you will have created a Microsoft Access database.

*To create an Access database table from scratch and use it as the data source in a mail-merge, start during step 3 of the mail-merge. Choose the **Type a New List** option button in the **Mail Merge** task pane, and then click the **Create** hyperlink. You see the **New Address List** dialog box.*

Your first task in this dialog box is to decide which field names you need. You need one field for each piece of information that you will plug into the starting document.

*If you are making address labels, for example, you need a **First Name**, **Last Names**, **Address Line1**, **City**, **State**, and **Zip Code** fields, and perhaps more. To trim the list to only the field names you need, click the **Customize** button. Then do the following in the **Customize Address List** dialog box:*

- **Removing Field Names:** Select the name that needs removing and click the **Delete** button.*
- **Creating a New Merge Field:** Click the **Add** button, enter a name in the **Add Field** dialog box, and click **OK**.*
- **Changing Field Names:** Select the field that needs a new name, click the **Rename** button, and enter a new name in the **Rename Field** dialog box.*
- **Rearranging the List:** Select a name and click the **Move Up** or **Move Down** button until the name is in the right place on the list.*

*Your next task is to enter the information that will be plugged into the starting document. To do so, enter information in the text boxes, and click the **New Entry** again to go to the next entry. You can click a **View Entry Number** button – **First**, **Previous**, **Next**, or **Last** – to review the entries you've made. Display an entry and click the **Delete Entry** button to remove an entry from the database table you are creating.*

*When you are finished entering data and you click the **Close** button, you see the **Save Address List** dialog box. Select a folder for your database, enter a descriptive name for it, and click the **Save** button.*

ASSIGNMENT

Q-1. Write the advantages of Mail merge system.

Q-2. Write the Ways to add source data into word to start mail merge.

Q-3. Define address book or data source.

Q.4. Is mail merge document saved like any other document in MS-word.

Q-5. Why the data always formatted or arranged in tabular form, is there any specific reason, explain your answer.