

***Mail Merge from
Scratch
Using Microsoft
Word***



Mail Merge from Scratch

In this guide you will start a **Mail Merge** from scratch using a blank document. But you can also use an existing letter or other business document.

Also, you can use the step-by-step **Mail Merge Wizard** to guide you through the **Mail Merge** process or you can use the tools on the **MAILINGS** tab to perform a manual **Mail Merge**.

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Download the file [Data Source](#) from here.

UNDERSTANDING MERGING FROM SCRATCH

You use **Mail Merge** when you want to send the same document to many people. For instance, you may need to send a letter to all your clients advising them of your new address or opening

hours. While you can use the **Mail Merge Wizard** to guide you through the **Mail Merge** process, you can also use the **Mailings** tab to perform a manual **Mail Merge** from scratch.

Begin the Mail Merge Process

Though Word has made performing a **Mail Merge** very quick and easy with the provision of the **Mail Merge Wizard**, there are times when you may need to perform a **Mail Merge** from scratch. Performing a **Mail Merge** from scratch means you have a bit more control over what you are doing and access to some more advanced features. Word makes performing a **Mail Merge** from scratch easy by providing the **Mailings** tab which sets out each stage of the process sequentially from left to right with the appropriate tools for each stage.

The Starting Document

The first group on the **Mailings** tab is the **Create** group and from here you can select what type of **Starting Document** to use. Alternatively if you need more options you can select **Start Mail Merge** in the **Start Mail Merge** group.

The first step in creating a **Mail Merge** document requires you to select the type of document you want to create. For instance, you can:

- send letters or any other type of business document to a group of people
- print addressed envelopes or labels for a group mailing
- create and print a single document comprising a catalogue (such as the name and description of products) or a directory of addresses.

This document is called the **main document**. The **main document** can be an existing document you open before you start the merge, or the document that is currently active in Word.

Select Recipients

The next step in the **Mail Merge** process is to connect the **main document** to the **data source file** commonly known as the **recipient list**.

The second group on the **Mailings** tab is the **Start Mail Merge** group and from here you can use several commands to either choose, create or edit a recipient. This file contains the recipients' information, such as names and addresses. You can use an existing file (such as a table created in a Word document or a client database in Access), your Outlook contacts list, or create a recipient list during this step of the merge process.

Finalise the Main Document

Once you have connected the **main document** to the **data source file**, you are ready to finalise the main document, which includes typing the content of the document, as well as inserting **Mail Merge fields**.

To do this you can use the **Write & Insert Fields** group on the **Mailings** tab which allows you to do all sorts of things. **Mail Merge** fields indicate to Word where the recipient data should be inserted based on the name of the fields. The name of the **Mail Merge** field must correspond to the **field headings** in the recipient list so Word knows what type of data to insert.

To save time when creating the **main document**, Word has included the **combination** fields:

<<AddressBlock>> and <<GreetingLine>>. These fields allow you to select, format and insert multiple fields such as the **First Name**, **Surname**, **Address**, **City**, **Postcode**, and so on into the main document as a single field, rather than inserting each mail merge field individually.

Preview the Results

Once you have created the main document and inserted the relevant **Mail Merge** fields, you can preview each **Mail Merge** document using the **Preview Results** group on the **Mailings** tab. For example, a preview of the document to be sent out to **Recipient 1** will appear — all **Mail Merge** fields will have been replaced by the corresponding data from the recipient list in the data source file. You can preview the **Mail Merge** document for each recipient to ensure the process has worked properly, as well as check for any formatting or layout issues. It's always a good idea to preview the main merge document.

Perform the Mail Merge

When you perform the **Mail Merge** you can either merge to a new document to save and personalise the documents as required, or send the **Mail Merge** documents directly to a printer. To do this simply use the **Finish** group on the **Mailings** tab.

SELECTING THE DOCUMENT TYPE

The first step of the **Mail Merge** process involves selecting the main document based on the *type* of document you want to create. For example, you may be creating a letter to distribute to

clients or send emails for a bulk mail out. Selecting the document type means the document will be created in the required layout with some formatting already completed to help save time.

Try This Yourself:

Before starting this exercise ensure you have a blank document open...

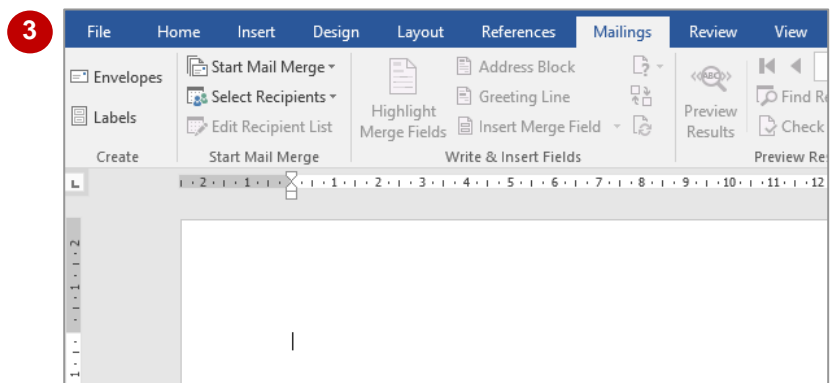
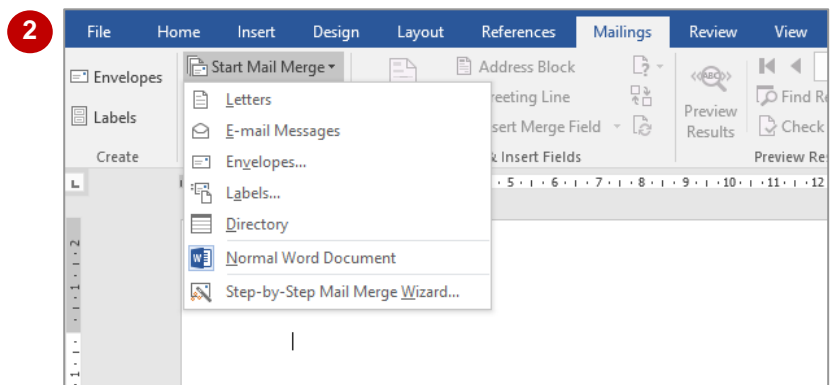
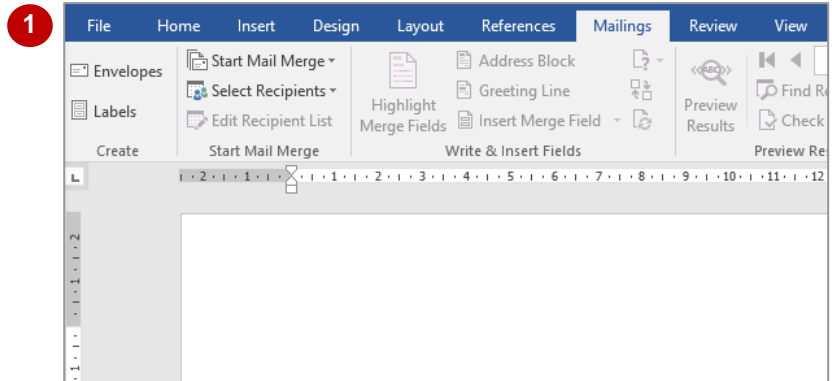
- 1 Click on the **Mailings** tab

The Mailings tab includes all options for completing a Mail Merge. Let's select the type of document to set up as the main document...

- 2 Click on **Start Mail Merge** in the **Start Mail Merge** group to display a list of document types and merge options

- 3 Select **Letters**
Nothing appears to have happened but the blank document is now the main document, ready for you to type the letter.

Leave the document open for the next exercise



For Your Reference...

To **select** the **document type**:

1. Click on the **Mailings** tab, then click on **Start Mail Merge** in the **Start Mail Merge** group
2. Select the desired document or merge type

Handy to Know...

- If you have selected the wrong document type as the main document, you can revert it back to a normal Word document. To do this, click on the **Mailings** tab, then click on **Start Mail Merge** in the **Start Mail Merge** group and select **Normal Word Document**.

SELECTING THE RECIPIENTS

Recipient data, such as names and addresses must be stored in a separate file in a tabular format with columns and rows, such as an Excel spreadsheet, Access database or a table in a

Word document. This data file, or data source, must be linked to the starting document so Word knows what fields (headings) are available, as well as where the merge data is stored.

Try This Yourself:

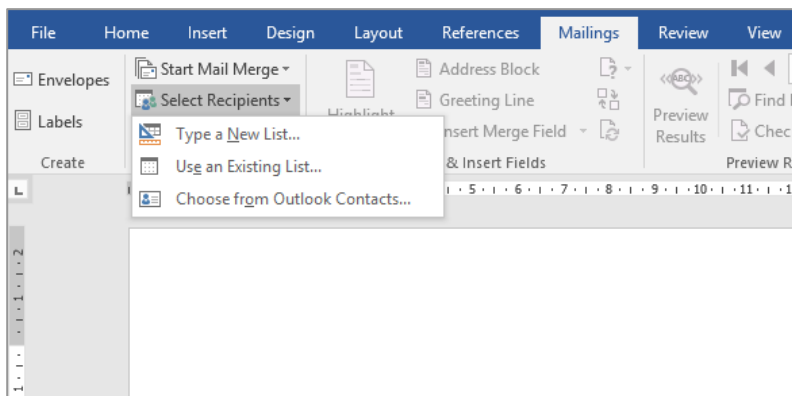
Same File

Continue using the previous file with this exercise...

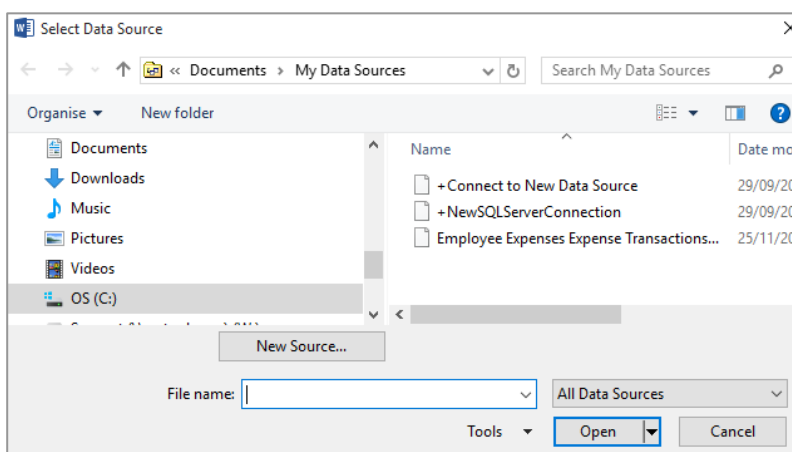
- 1 If necessary click on the **Mailings** tab, then click on **Select Recipients** in the **Start Mail Merge** group to display a menu of options
- 2 Select **Use an Existing List** to open the **Select Data Source** dialog box, then navigate to the course files folder
- 3 Navigate to the folder where you saved the file, then click on **Data Source**, then click on **[Open]**

Nothing appears to have happened but the data source file is now attached to the main document.

Leave the document open for the next exercise



1



2

Link to download file [Data Source](#)

For Your Reference...

To **select** the **recipients**:

1. Click on the **Mailings** tab, then click on **Select Recipients** in the **Start Mail Merge** group
2. Select **Use Existing List**, locate and select the data source file, then click on **[Open]**

Handy to Know...

- If you don't want to send the **Mail Merge** document to all recipients in the data source, you can **exclude** recipients. To do this, click on **Edit Recipient List** in the **Start Mail Merge** group and click on the tick box beside the recipient name(s) you want to exclude until it appears *without* a tick.

INSERTING THE DATE

One of the first things you'll do when creating a letter is to insert the date. Word's **Date and Time** dialog box allows you to insert the date automatically in the desired format. The standard

format for business letters is **dd MM yyyy**, such as **19 April 2013**. But keep in mind that your organisation may have a specific format you must apply.

Try This Yourself:

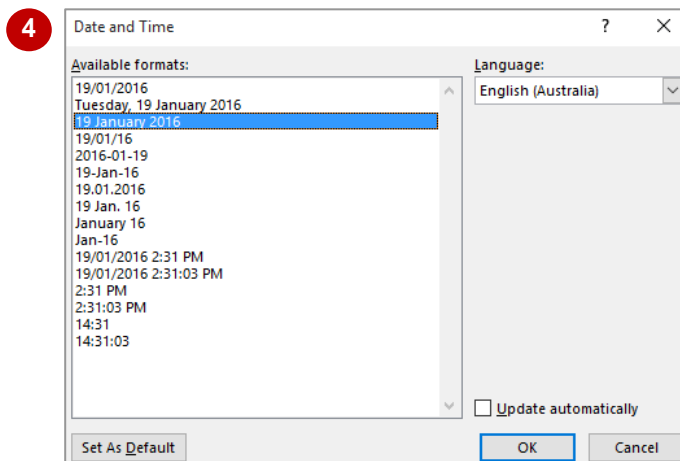
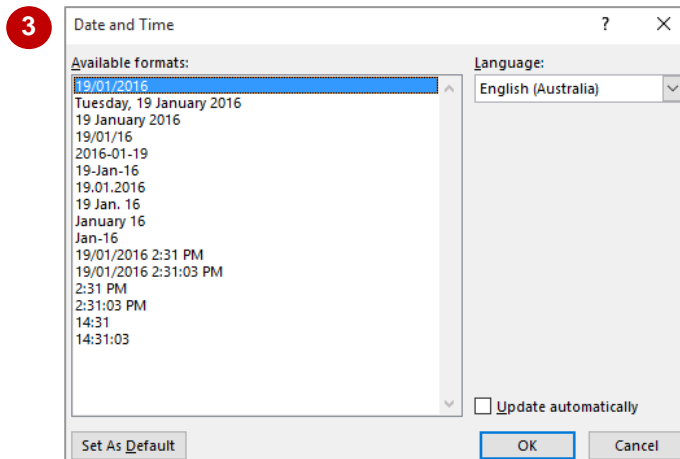
Same File

Continue using the previous file with this exercise...

- 1 Ensure the insertion point is at the top of the document, then press three times to insert three blank paragraphs
- 2 Click on the **Insert** tab, then click on **Date & Time** in the **Text** group, to open the **Date and Time** dialog box
- 3 Ensure **English (Australia)** is selected in **Language**
- 4 Click on the date format as shown to select it
- 5 Click on **[OK]** to insert the date into the document

The font applied to the date and the position of the date in the document may differ to what is shown here, as it depends on the layout and formatting applied to the default (Normal) template on your computer.

Leave the document open for the next exercise



19 January 2016|

5

For Your Reference...

To **insert** the **date**:

1. Click on the **Insert** tab, then click on **Date & Time** in the **Text** group
2. Select the desired format
3. Click on **[OK]**

Handy to Know...

- To set the selected date format as the default format for all correspondence, select the desired format in the **Date and Time** dialog box, click on **[Set as Default]**, then click on **[OK]** to insert the date and apply it as the default format.

INSERTING AN ADDRESS BLOCK

When creating mail merge fields, Word will look at the **field headings** in the data source to identify the mail merge fields that need to be inserted into the document. You can insert the

merge fields into the main document where required. For the address details, though, you can use the **Address Block** combination field to insert the address fields as a single field.

Try This Yourself:

Same
File

Continue using the previous file with this exercise...

1 Click to the right of the date and press **Enter** three times to position the insertion point

2 Click on the **Mailings** tab, then click on **Address Block** in the **Write & Insert Fields** group to open the **Insert Address Block** dialog box

A preview of the first recipient's address is shown in the **Preview** pane. Currently, the post code is missing. This means the field heading in the data source does not match the default Mail Merge heading. Let's add it...

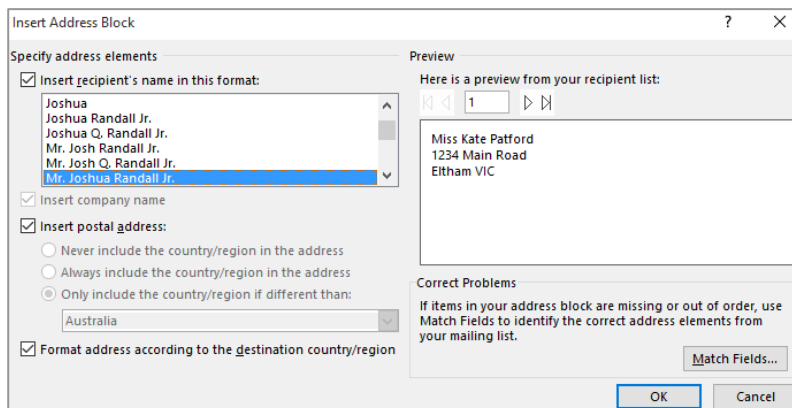
3 Click on **[Match Fields]** to open the **Match Fields** dialog box

4 Click on the drop arrow for **Postal Code** and select **Postal_Code**, then click on **[OK]**

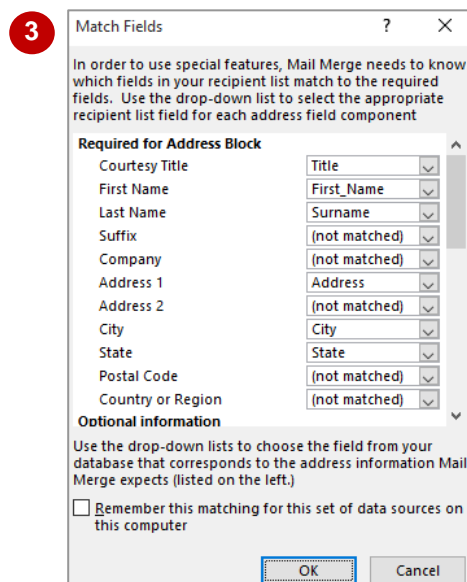
The post code now appears in the **Preview** pane...

5 Click on **[OK]** to insert the **Address Block** field into the document

Leave the document open for the next exercise



2



5



For Your Reference...

To **insert** an **address block**:

1. Click on **Address Block** in the **Write & Insert Fields** group
2. Select the desired format for the recipient
3. Click on **[Match Fields]** if necessary
4. Click on **[OK]**

Handy to Know...

- If you don't want to use an **address block**, you can insert the address merge fields one by one. To do this, click on **Insert Merge Field** in the **Write & Insert Fields** group, then select the relevant field. Press **Space** or **Enter**, then click on **Insert Merge Field** to insert the next field, and so on.

INSERTING THE GREETING LINE

The **Greeting Line** field is a combination field you can use to insert the salutation. The **Greeting Line** field is usually made up of the **Title** field (such as Ms or Mr) and **Last name** or

Surname field. You can also format the **Greeting Line** field to your preferred format, depending on the level of formality that you want to convey, for example, 'Dear Miss Patford' or 'To Kate'.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

1 Click to the right of the **Address Block** field and press **Enter** three times to position the insertion point

2 On the **Mailings** tab, click on **Greeting Line** in the **Write & Insert Fields** group to open the **Insert Greeting Line** dialog box

A preview of the salutation for the first recipient is shown in the **Preview** pane. Currently, a comma appears at the end of the salutation. Let's remove the comma because the most widely accepted layout for business documents is a fully blocked style with open punctuation (all unnecessary commas and full stops removed)...

3 Click on the drop arrow to the right of the comma box and select **(none)** as shown

4 Click on **[OK]** to accept the change and insert the **Greeting Line** field

Leave the document open for the next exercise

19 January 2016

«AddressBlock»

|

1

3

19 January 2016

«AddressBlock»

«GreetingLine»

4

For Your Reference...

To **insert** the **greeting line**:

1. Click on the **Mailings** tab, then click on **Greeting Line** in the **Write & Insert Fields** group
2. Set the desired **Greeting line format**
3. Click on **[OK]**

Handy to Know...

- If the preview in the **Preview** pane of the **Insert Greeting Line** field is blank or only partially correct, you may need to match the field names. To do this, click on **[Match Fields]** then, under **Required for Greeting Line**, select the field name that corresponds to the **Courtesy Title** and **Last Name**.

TYPING THE LETTER

The next step in the **Mail Merge** process is to set up the main document, which means typing the text or inserting the required content into the document. In this case you'll type a letter that will

be sent out to the recipients. This step also includes applying any font or paragraph formatting, inserting headers and footers, as well as adjusting the page layout, if necessary.

Try This Yourself:

Continue using the previous file with this exercise...

- 1 Click to the right of the **Greeting Line** field and press **Enter** twice
- 2 Type the text as shown, pressing **Enter** at the end of each paragraph.

Note the following:

- Press **Enter** twice after typing **RE: Personal Assistant ...**
- The hash symbols (#) indicate where the remaining mail merge fields will be inserted
- Press **Enter** four times after **sincerely**, to insert space for the signature

*Press **Shift** and **Enter** after **Fred Smith** to insert a soft return*

- 3 Select the text **Re: Personal Assistant to the General Manager** and press **Ctrl + B** to make the text bold

Leave this document open for the next exercise

19 January 2016

«AddressBlock»

«GreetingLine»

RE: Personal Assistant to the General Manager

Thank you for your application for this position.

You are invited to attend an interview with both myself and Sally Young, Training Manager, on # at #.

Please contact me to confirm the appointment or to schedule a more convenient time.

Yours sincerely,

Fred Smith
Recruitment Officer

2

19 January 2016

«AddressBlock»

«GreetingLine»

RE: Personal Assistant to the General Manager

3

For Your Reference...

To **type** the **letter**:

1. Click in the document and type the details as desired
2. Apply any font and paragraph formatting as required
3. Adjust the page layout as required

Handy to Know...

- It is customary to end a letter in a polite way by using a complimentary close. The two most common closes are 'Yours faithfully' (used when addressing the recipient as Sir or Madam) and 'Yours sincerely' (used with personalised salutations such as 'Dear Marie' or 'Dear Ms Smeetz').

INSERTING INDIVIDUAL MERGE FIELDS

As part of setting up the main document, you can insert individual merge fields from your data source file. Simply click in the document at the location where you want the information to

appear and then select the desired field from either the **Insert Merge Fields** drop-down menu or dialog box. During the merge, the values from the data source file will replace the mail merge field code.

Try This Yourself:

Same
File

Continue using the previous file with this exercise...

1 Select the first hash symbol (#) in the second paragraph, but make sure not to select the space after #

2 Click on the **Mailings** tab, click on the bottom half of **Insert Merge Field** in the **Write & Insert Fields** group to display a list of available merge fields in the attached data source file

The interview date needs to be inserted here...

3 Select **Date**
*The selected hash symbol will be replaced with the **Date** merge field. Let's insert the time of the interview...*

4 Repeat steps **1** to **3** to replace the second hash symbol (#) with the **Time** merge field

Leave the document open for the next exercise

«GreetingLine»

RE: Personal Assistant to the General Manager

Thank you for your application for this position.

You are invited to attend an interview with both myself and Sally Young. Training Manager, on # at #.

Please contact me to confirm the appointment or to schedule a more convenient time.

1

«GreetingLine»

RE: Personal Assistant to the General Manager

Thank you for your application for this position.

You are invited to attend an interview with both myself and Sally Young. Training Manager, on «Date» at #.

Please contact me to confirm the appointment or to schedule a more convenient time.

3

«GreetingLine»

RE: Personal Assistant to the General Manager

Thank you for your application for this position.

You are invited to attend an interview with both myself and Sally Young. Training Manager, on «Date» at «Time».

Please contact me to confirm the appointment or to schedule a more convenient time.

4

For Your Reference...

To **insert merge fields**:

1. Position the cursor where you want to insert the merge field
2. Click on the bottom half of **Insert Merge Field** in the **Write & Insert Fields** group and select the required merge field

Handy to Know...

- You cannot manually type the merge field characters (<<>) or use the **Symbol** command on the **Insert** tab.
- If the merge fields appear as the underlying **field codes**, such as **{MERGEFIELD Time}**, right-click on the code and select **Toggle Field Codes** to display the merge fields.

PREVIEWING THE MERGE

By this stage you should have finalised the main document, including inserting content and applicable merge fields, and finalised the layout of the document if required. Now you can preview

the merged documents to see how they will look when printed or sent. At this stage you can check for spelling, layout and then make the required changes before completing the merge.

Try This Yourself:

Same File Continue using the previous file with this exercise...

1 On the **Mailings** tab, click on **Preview Results** in the **Preview Results** group

A preview of the first merged document, addressed to the first recipient will appear. At this point you could fix any layout or formatting issues.

2 Click on **Preview Results** again to return to the main document, then click in the text **Yours sincerely**

3 Click on the **Layout** tab, then click on for **Spacing Before** in the **Paragraph** group, until it reads **18 pt**

4 Click on the **Mailings** tab, then click on **Preview Results** again to view the result

Now let's preview all the merged documents...

5 Click on **Next Record** in the **Preview Results** group to scroll through the records, then click on **First Record** to return to the first record

Leave this document open for the next exercise

19 January 2016

Miss Kate Patford
1234 Main Road
Eltham VIC 3095

Dear Miss Patford

RE: Personal Assistant to the General Manager

Thank you for your application for this position.

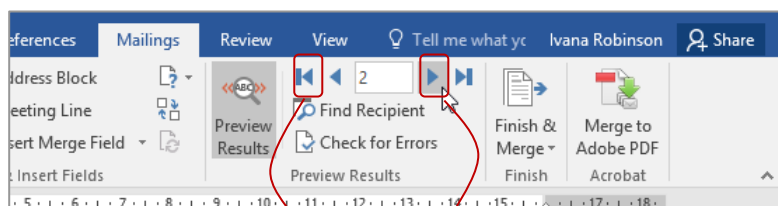
You are invited to attend an interview with both myself and Sally Young, Training Manager, on Friday 6 May at 9.00 am.

Please contact me to confirm the appointment or to schedule a more convenient time.

Yours sincerely,

Fred Smith
Recruitment Officer

4



5

First Record Next Record

For Your Reference...

To **preview** the **merge**:

1. On the **Mailings** tab, click on **Preview Results** in the **Preview Results** group
2. Click on **Next Record** and **Previous Record** to scroll through each merged document

Handy to Know...

- To preview a merged document for a particular recipient, click on **Find Recipient** in the **Preview Results** group on the **Mailings** tab. Type the text you are looking for in **Find what**, select the field in which the text is found in **In field** and click on **[Find Next]**.

COMPLETING THE MERGE TO PRINT

When you're ready to complete the merge, you can send the merged documents directly to the printer, edit individual letters or send via email. When you select the edit individual letters option, a new

document is created that contains all the merged documents, each starting on a new page. If you have included recipients' email addresses in the data source, you can email the merged document to each recipient.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

- 1 Click on the **Mailings** tab, then click on **Finish & Merge** in the **Finish** group to display a menu of options

Let's print the first merged document...

- 2 Select **Print Documents** to open the **Merge to Printer** dialog box

- 3 Click on **Current record**, as shown, then click on **[OK]** and click on **[OK]** again to print the first merged document

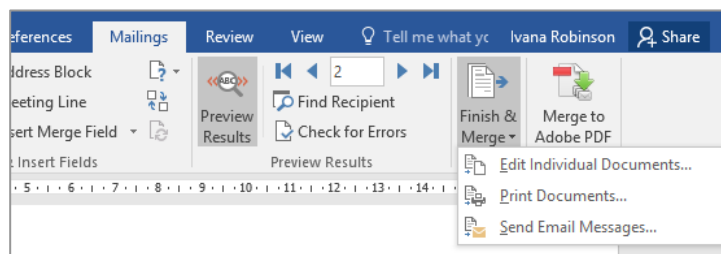
Now let's merge the records to a new document...

- 4 Repeat step 1 and select **Edit Individual Documents** to open the **Merge to New Document** dialog box

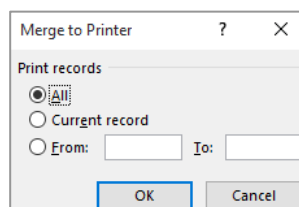
- 5 Click on **All** in **Merge records**, then click on **[OK]** to create a new document called **Letters1**

Notice that the status bar indicates you are on 'Page 1 of 5', as each letter is on a separate page of the document...

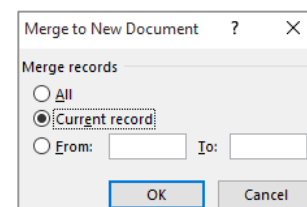
- 6 Click on the **File** tab, click on **Close**, then click on **[Don't Save]** to close the letters without saving



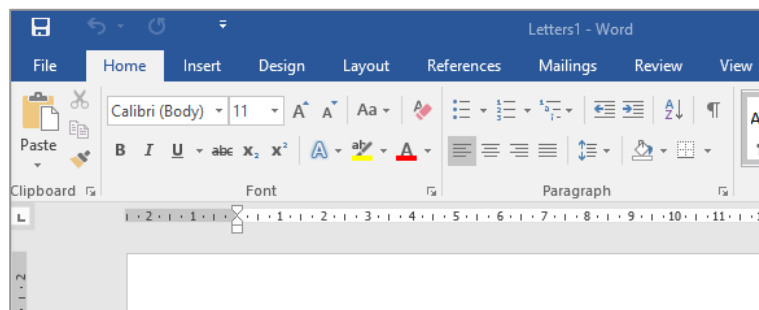
1



2



3



5

For Your Reference...

To **complete** the **merge**:

1. On the **Mailings** tab, click on **Finish & Merge** in the **Finish** group
2. Select **Edit individual document**, then click on **[OK]** to create the letters, or Select **Print Documents**, then click on **[OK]**

Handy to Know...

- If you have included recipients' email addresses in the data source, you can email the merged document to each recipient. To do this, click on **Finish & Merge** and select **Send Email Messages**. Select the email field for **To**, type a **Subject** and select the preferred **Mail format**. Click on **[OK]**.

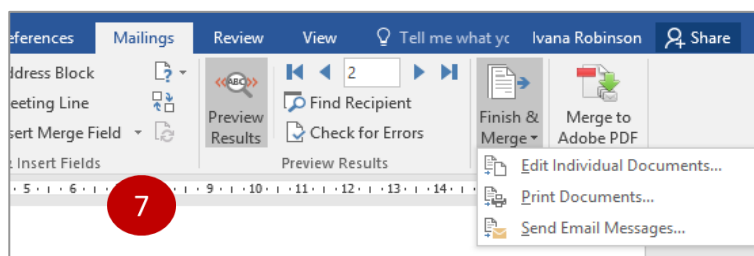
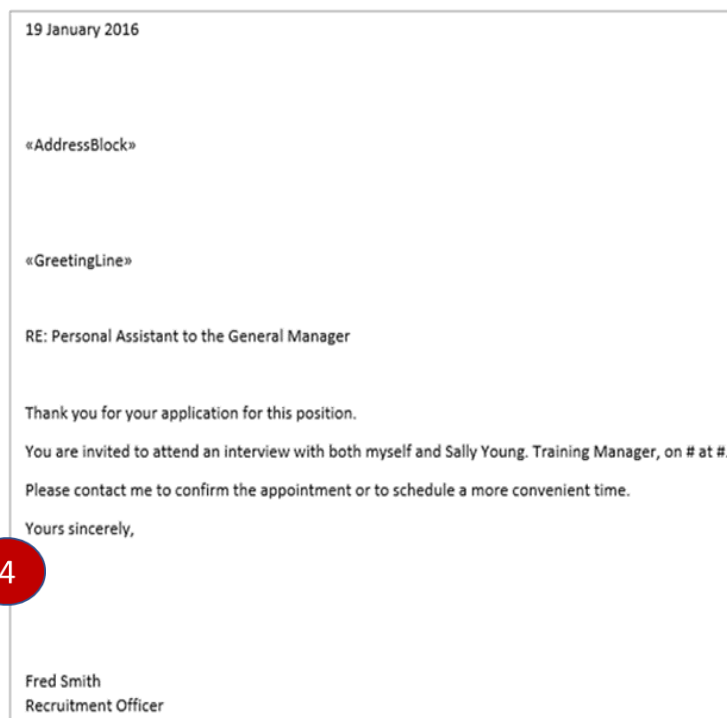
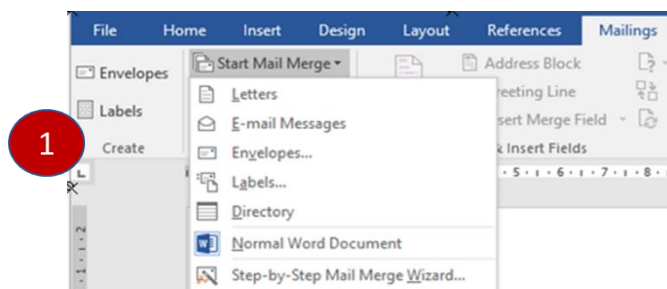
COMPLETING THE MERGE TO EMAIL

When you're ready to complete the merge, you can e-mail the merged documents directly to everyone.

Try This Yourself:

Start with a blank document

- 1 Click on the **Mailings** tab, then click on **Start Mail Merge**, in the **Start Mail Merge** group to display a menu of options. Select **E-mail Messages**.
The document window will widen
- 2 Click on the **Mailings** tab, click on **Select Recipients** in the **Start Mail Merge** group and select **Use an Existing List**.
- 3 Navigate to the course files folder, select **Data Source.xlsx**, then click on **Open**.
*Notice If you are using a Excel spreadsheet, you will be ask to select the sheet with the data. Then click **OK**.*
- 4 Type the text as shown, pressing Enter at the end of each paragraph.
- 5 Insert the **Date**, **Address block** and **Greeting Line**. Shown in the letter image.
Note: Refer to the contents page if needed.
- 6 Select the first hash # symbol. **Click on Insert Merge Field**, Select **Date**. Repeat these to replace the second hash with the **Time** merge field. Then preview the merge.
- 7 On the **Mailings** tab, click on **Finish & Merge**. Select **Send Email Messages**.
- 8 In the **To** box select **E-mail**. In the Subject line: box enter **Interview**. Then click **OK**.



For Your Reference...

To **complete** the **merge**:

1. On the **Mailings** tab click on **Start Mail Merge**. Select **E-mail Messages**.
2. Select recipients and place the fields where you want the data to appear,
4. Preview, edit and send emails

Handy to Know...

- If you have included recipients' email addresses in the data source, you can email the merged document to each recipient. To do this, click on **Finish & Merge** and select **Send Email Messages**. Select the email field for **To**, type a **Subject** and select the preferred **Mail format**. Click on **[OK]**.

SETTING UP MAILING LABELS

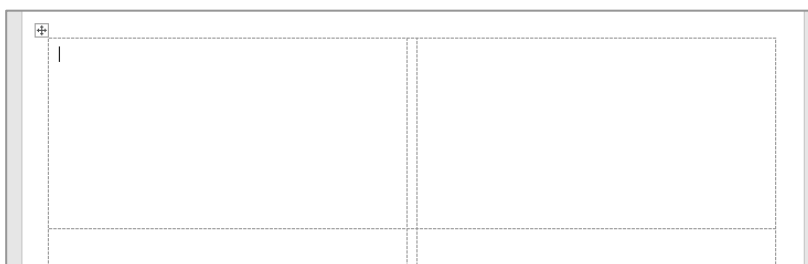
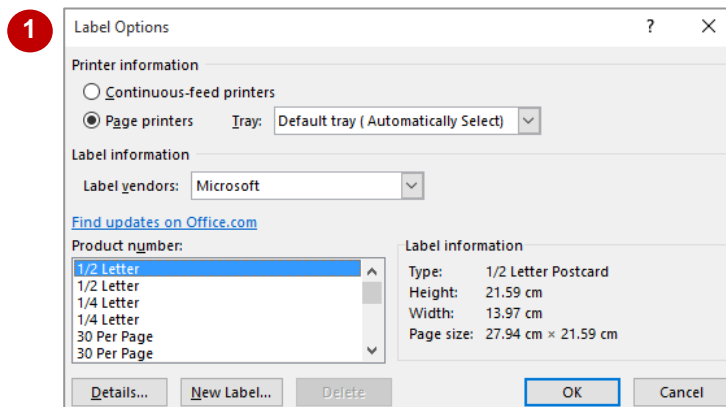
Mailing labels are easy to create, particularly if you purchase standard mailing labels from known label vendors so the label dimensions match the corresponding codes in Word. Even if you use an

obscure sheet of labels, you can specify the dimensions of the label yourself using the **Label Options** dialog box.

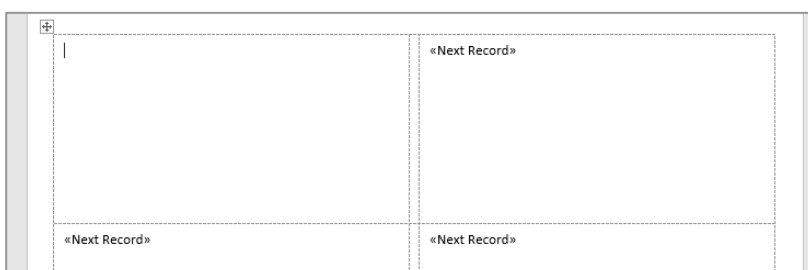
Try This Yourself:

Before starting this exercise you MUST ensure a blank document is open...

- 1 Click on the **Mailings** tab, click on **Start Mail Merge** in the **Start Mail Merge** group and select **E-mail messages**.
The screen will widen...
- 2 In **Tray**, ensure **Default tray** is selected, then in **Label vendors** select **Avery A4/A5**.
If you are using different labels, select the appropriate option...
- 3 Under **Product number** scroll down to and click on **L783**, then click on **[OK]**.
Dotted lines should appear showing each label on the page. Let's add the recipients...
- 4 Click on **Select Recipients** in the **Start Mail Merge** group and select **Use an Existing List** to open the **Select Data Source** dialog box.
- 5 Navigate to the course files folder, select **Data Source.xlsx**, then click on **[Open]**.
Next Record appears in all labels except the first, which is ready for you to select the merge fields you want to include in the labels. Keep this file open for the next exercise



- 3 *If dotted lines indicating the labels don't appear, click in the document and click on the Table Tools: Layout tab then click on View Gridlines in the Table group.*



For Your Reference...

To **create mailing labels**:

1. Click on **Start Mail Merge** on the **Mailing** tab and select **Labels**
2. Specify the label options and click on **[OK]**
3. Click on **Select Recipients** in the **Start Mail Merge** group

Handy to Know...

- If you want to specify your own label dimensions, click on **[New Label]** in the **Label Options** dialog box.

COMPLETING MAILING LABELS

Once you've specified the dimensions of your label sheets and selected the recipient list, you are ready to select the **fields** of data you want to include on your labels. In most instances, you will

want to select name and address details but this isn't the sole use of mailing labels. You may want to produce labels for stock items, name badges, and more.

Try This Yourself:

Same File

Continue using the previous file with this exercise.

A message will appear asking if you want to continue. Click on [Yes] to open the file...

- 1 On the **Mailings** tab click on the bottom half of **Insert Merge Field** in the **Write & Insert Fields** group to display a menu of options
- 2 Click on **Title** to insert this field, then press **Space** to insert a blank space after the **Title** field
- 3 Repeat steps 1 and 2 to insert the **Surname** field
Let's add the next line of fields...
- 4 Press **Shift + Enter** to move the cursor to the next line, then repeat the above steps to insert the **Address** field
- 5 Click on **Update Labels** in the **Write & Insert Fields** group to add the fields to all labels on the page
- 6 Click on **Preview Results** in the **Preview Results** group to see how all labels would appear if printed
- 7 Click on **Preview Results** again to turn off preview mode, then close the file without saving it

*If you want to edit and print the labels, click on **Finish & Merge** in the **Finish** group*

1

«Title»	«Next Record»
«Next Record»	«Next Record»

2

«Title» «Surname» «Address»	«Next Record»«Title» «Surname» «Address»
«Next Record»«Title» «Surname» «Address»	«Next Record»«Title» «Surname» «Address»

5

Miss Newton 123 Master Road	Mr Strains 54 The Ridge
Mr Jennings 3/45 Alexander Ave	Dr Jenkins 171 Silverdale Road

6

For Your Reference...

To **complete mailing labels**:

1. On the **Mailings** tab click on **Insert Merge Field** in the **Write & Insert Fields** group
2. Select the fields and click on **[Insert]**
3. Click on **Update Labels**
4. Preview, edit and print the labels

Handy to Know...

- Use the options in the **Write & Insert Fields** group to control the information that is added to the first blank address label. For example, you can click on individual fields rather than the **Address block** to insert and format the recipient's name and postal address details.

CHALLENGE EXERCISE

Getting Help

Tasks:**Completed:**

Before starting this exercise, you MUST have completed all of the topics in the chapter Merging to Labels...

- 1 In the space provided on the following page describe how to start a **Labels** mail merge
- 2 On the next page describe what appears in each label area once you have started the merge and connected to a data source.
- 3 Explain how to add fields to all labels on a page.

Files required for exercise:

None

Files/work created by student:

Photocopy of the page showing completed answers

Exercise Completed:

CHALLENGE EXERCISE SAMPLE

Getting Help

- 1 Describe how to start a **Labels** Mail Merge

- 2 What placeholder appears in each label area once you have started the merge and connected to a data source

- 3 Explain how to add fields to all labels on a page

CHALLENGE EXERCISE

Merging From Scratch

Tasks:

Completed:

Before starting this exercise you **MUST** have completed all of the topics in the chapter *Merging From Scratch*...

- 1 Open a new blank document, then create a letter inserting the current date and using the text and mail merge fields shown below:

Current date

<<AddressBlock>> (ensure that you include the post code)

<<GreetingLine>> (using no commas)

You will have already received our formal acknowledgement of your order number <<Order_Number>> dated <<Date>>. But since this is your first order with us I felt I must write to say how pleased we were to receive it and to thank you for the opportunity given to us to supply the goods you need.

I hope our handling of your order will lead to further business between us, and a happy and mutually beneficial association.

Yours sincerely

FRED SMITH

Manager Customer Services

- 2 Connect the document to the data source called **PE_Scratch Data Source.docx** (it can be found in the same folder as the student files)

- 3 Preview the merged documents, then use **Save As** to save the document as **PE_Merging From Scratch Preview (Completed).docx**

- 4 Finalise the merge to a new document comprising all six letters, then use **Save As** to save the document as **PE_Merging From Scratch (Completed).docx**

Files required for exercise:

PE_Scratch Data Source.docx

Files/work created by student:

PE_Merging From Scratch Preview (Completed).docx and *PE_Merging From Scratch (Completed).docx*

Exercise Completed:

CHALLENGE EXERCISE SAMPLE

Merging From Scratch

Wednesday, 5 February 2016

«AddressBlock»

«GreetingLine»

You will have already received our formal acknowledgement of your order number <<Order_Number>> dated <<Date>>. But since this is your first order with us I felt I must write to say how pleased we were to receive it and to thank you for the opportunity given to us to supply the goods you need.

I hope our handling of your order will lead to further business between us, and a happy and mutually beneficial association.

Yours sincerely

FRED SMITH

Manager Customer Services