

Lesson 11

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Creating and Printing Merged Documents

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Learn how to:

- ◆ Create a main document
- ◆ Create a data source of names and addresses
- ◆ Attach an existing data source to a main document
- ◆ Merge data source information into a main document

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Merging Documents: Basic Techniques

- ◆ *Main document* contains the standardized text and graphics that go with every version of merged document
- ◆ *Data source* contains the data to be inserted into the main document
 - ✓ name, address etc
- ◆ *Merge fields* in main document connect the data source with the main document

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The Four Basic Steps

- ❶ Open a new or existing document that will be the main document
- ❷ Attach an existing data source or create a new one
- ❸ Insert merge field names into your main document
- ❹ Merge the data source information with the main document

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Create a Main Document

- ◆ Use the Tools | Mail Merge command
- ◆ Under Main Document click the Create button
- ◆ Choose click Form letters and then choose
 - ✓ Active Window (if you want to use the currently open document as the main document), or
 - ✓ New Main Document (if you want to create a new document)

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Creating a Data Source

- ◆ Data are stored in fields
- ◆ Fields make up a record
- ◆ Record is the complete information about one item (e.g., a person)
- ◆ Use the Create Data Source button in the Mail Merge Helper
- ◆ You can also use an existing data source or change from one data source to another
 - ✓ Use Get Data | Open Data Source option in the Mail Merge Helper

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Entering Data Records

- ◆ Use the data form
- ◆ Tab through the fields
- ◆ Navigation buttons at the bottom allow you to scroll through the records, or go to first or last record
- ◆ Add New button creates a new record

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Preparing Main Documents

- ◆ Once your data source is complete, you can complete the main document
 - ✓ you can now define the variable information (called merge fields) in the main document
- ◆ Add Merge fields to the document using the Insert Merge Field button on the Mail Merge toolbar

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