Lesson 11

Creating and Printing Merged Documents

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

The Four Basic Steps

1. Open a new or existing document that will be the main document
2. Attach an existing data source or create a new one
3. Insert merge field names into your main document
4. Merge the data source information with the main document
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)

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

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