

# Maximizing Efficiency with Mail Merge - (Microsoft Word 2007 & 2010)

## Course Aims

Microsoft Word's mail merge feature assists in the efficient production of form letters, mailing labels, name badges, membership lists and other documents so that repetitious tasks can be streamlined. Data can be taken from a Word document, Excel spreadsheet or Outlook contacts. Learn how to fully maximize the potential of the mail merge feature in this course.

## Pre-requisites

The participants attending this course must have the knowledge stated below:

- How to create documents in Microsoft Word including editing, creating and applying styles, printing and how to move around the Microsoft Word environment.

| Level        | Duration          | Time               |
|--------------|-------------------|--------------------|
| Intermediate | 1 Day / 7.5 Hours | 9:00 am to 5:30 pm |

### Module 1. Anatomy of a mail merge

- Creating Main document
- Creating Data files

### Module 2. Connect to data files

- More about data files
- Where data files come from
- Fields, defined
- Fields that insert data file information
- Other fields
- Practice

### Module 3. Perform a mail merge

- Choose the main document
- Connect to a data file
- Choose the records you want to use
- Arrange the main document
- Preview
- Complete the merge
- Practice

### Module 4. Perform a more complex merge

- Get started with the mail merge ribbon
- Connect to a data file and choose records
- Add fields to the main document
- Add other fields
- Preview
- Complete the merge
- Practice

### Module 5. Using mail merge

- Starting the mail merge wizard
- Identifying the main document
- Creating a data source
- Adding fields to a data source
- Removing fields from a data source
- Rearranging fields in a data source
- Saving a data source
- Entering records into a data source
- Setting view options for merging
- Inserting merge fields into a document
- Previewing merged data
- Merging to a new document
- Sorting records to be merged
- Merging to the printer
- Practice

### Module 6. Merging mailing labels and directories

- Creating mailing labels
- Selecting label options
- Attaching a data source
- Inserting label merge fields
- Merging labels to a new document
- Creating a directory
- Merging with an outlook data source
- Practice