Introduction to Word for Macintosh
Part 2

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I. Mail Merge - Data files and Form letters

When using Mail Merge, two files need to be created: the Main document file (form template file -- document that has text and merge field codes) and the Data source file (file that contains the information to be merged into the Main document).

The three main steps to merge mail are:

1. Create the Data source.
2. Create the Main document.
3. Merge the Data source and Main document.

We begin by creating the Data source:

After we start Word, we will be on a fresh blank page. From here, do the following:

1. Click on **Tools** on the menu bar**.**
2. Click on **Mail Merge.**
3. You will then see the Mail Merge Helper box. click on **Create** next to "1-Main document". A drop-down menu will appear. Click on **Form Letters**.
4. Word will now ask you if you want to use the **Active Window** or if you want a **New Main Document**. For our purposes, we will click on **Active Window**. ***NOTE:*** *Although we are creating a Data source, we have to open a Main document (whether new or old) in order to have the option of creating a Data source.*
5. You will still be in the Mail Merge Helper box. Now click **Get Data** next to the "2-Data source" heading, and a drop down menu will appear.
6. Now click on **Create Data Source**....
7. You are now in the Create Data Source box. In this box, you can add or remove field names. You can use the default field names, or create some of your own. If you want to use the default field names, skip to STEP #10.

   NOTE: *Field Names can be up to 40 letters/numbers long, but cannot contain special characters (i.e., *, #, /, etc.). If you use numbers in your field name, make sure that the field name does not **begin** with a number. For example: "Address1" is acceptable, but "1Address" is not.*

Also remember not to use spaces when typing in a field name.

ENTER TEXT Refer to STEPS 8-10 below to help you with this section. We will be using the **Add Field Name** button**, Remove Field Name** button**,** and the **Move** arrows to end up with **only** the following field names in the following order: Company, FirstName, LastName, Address1, City, State, Zip, WorkPhone.

8. To add a field name to the list, type the field name that you wish to add in the **Field name** box and click the **Add Field Name** button.
9. To remove a field name, make sure that the field name you want removed is highlighted, and then click the **Remove Field Name** button.
10. Notice the up and down arrows to the right side. Also notice the word **Move** between the arrows. This feature allows you to change the order of your field names. To move the field names, click on the field name that you wish to move, and use the "Move" arrows to move the field name to the desired location in the list. Simply quit using the "Move" arrows when you are through moving things around. Note that there will always be a field name highlighted in this area.
11. When you have finished picking out and arranging your field names, click **OK**.
12. Now you should be in the **Save Current Document As** box. Name your Data source and click **Save**. ***NOTE:*** *Word will automaticallygive this file a ".doc" file extension. This file extension is attached to all Word documents. In order to tell your regular documents from your data source files, it is best to specify that this file is a data source somewhere in your filename--not just in your file extension. For example: You could name your data source something like "address.dat", and Word will still attach the ".doc" extension leaving your file named "address.dat.doc".*

    Also remember that it is still best to stick with the 8 character file name with the 3 character extension.

ENTER TEXT: Specify Path?

We will call our Data Source: SMPL_DAT.

13. Word should now be asking you whether you want to **Edit Data Source** or **Edit Main Document**. Click on **Edit Data Source**.
14. You will now be in the **Data Form** box, which is a quick-entry box with your pre-selected fields. Fill in all of the fields for as many records as you have.

<u>**ENTER TEXT**</u> We will type in the following records. Press enter to go to the next record.

Textiles Inc.	C. C. Machine Shop	Performance Plus
Mary Smith	Jerry Brown	Cliff Matthews
P.O. Box 1234	P.O. Box 2353	1515 3rd St.
Alice TX 78333	Corpus Christi TX 78412	Corpus Christi TX 78412
512-664-6546 (press enter)	512-994-1203 (press enter)	512-883-1234 (see # 15)

15. When data-entry is complete, click **OK**.

You have now created a data source that contains 3 records.

<u>We will now add a new record to our Data Source.</u>

1. Okay, you now have 3 records, but we forgot to put in the information for Trucks 'n Stuff.
2. Click on **Tools** on the menu bar**.**
3. Click on **Mail Merge.**
4. You will be back in the Mail Merge Helper box. Now click **Edit** next to the “2-Data source” heading, and a drop down menu will appear.
5. Now click on **SMPL_DAT.doc**.
6. You will be in the Data Form quick entry box again. Click the **Add New** button.
7. Type in the following:

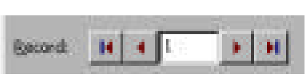
<u>**ENTER TEXT**</u> We will type in the following record:
Trucks 'n Stuff
Tommy Jones
P.O. Box 5454
Alice TX 78333
512-668-4711

8. When you are finished, click **OK**.

<u>We will now add a new field to our Data Source.</u>

1. Okay, you now have 4 records, but we forgot to put in a field for the WidgetType.
2. Click on **Tools** on the menu bar**.**
3. Click on **Mail Merge.**
4. You will be back in the Mail Merge Helper box. Now click **Edit** next to the “2-Data source” heading, and a drop down menu will appear.
5. Now click on **SMPL_DAT.doc**.
6. You will be in the Data Form quick entry box again.
7. Click the **View Source** button. You will see a screen with a table in it that contains the info you just finished inputting. This is what your Data Source (SMPL_DAT.doc) actually looks like. Look at your toolbars. The Database toolbar has appeared somewhere in your toolbar area. It will either be located under the Formatting toolbar, or on either end of your Standard toolbar/Formattingtoolbar. Click on the **Manage Fields** icon (2nd one…the hand held chart).
8. You will now be in the Manage Fields box. Type in "WidgetType" in the **Field name** field.
9. Click the **Add** button.
10. Click **OK**.
11. Now, look at your Database toolbar again and click on the **Data Form** icon (1st one…the chart and pencil).
12. Type the following in the new WidgetType field for the corresponding records:

Record#	**Company**	**Type this in WidgetType Field**
Record 1	Textiles Inc.	Heavy
Record 2	C.C. Machine Shop	Medium
Record 3	Performance Plus	Light
Record 4	Trucks n Stuff	Heavy



Use the red arrows to move between records or press the ENTER key to move to the next record. The arrows with the blue lines take you to either the very first or very last record in your data source, and the arrows without lines will move you one record at a time in either direction.

13. When finished adding the widget type to all of the records, click **OK**.

14. Click **File** on the menu bar, and then click on **Save**. **CAUTION:** This will overwrite the SMPL_DAT.doc file. If you are unsure of the changes that you make, be sure to click on **File**, then click on **Save As**, give your Data Source another name and click on the Save button. You can always go back and delete the original file if you decide that you were satisfied with the changes that you made.
15. Now click on **File** on the menu bar, and then click on **Close** to close the SMPL_DAT.doc window.

<u>Next, we will set up the Main document:</u>

1. Now you are on a blank page. This is the page that you will use to form a template to be merged with a data source. Notice that another toolbar is just below the formatting toolbar. This is the Mail Merge Toolbar. It may also appear at the end of the Standard toolbar or at the end of the Formatting toolbar. To create our letter, we will use the **Insert Merge Field** pull down menu. Type document as you normally would, inserting merge fields where necessary. To access the merge fields that you want to insert, click on the down arrow next to Insert Merge Field button, and click on the name of the field that you need to insert into your document. **NOTE:** *Remember that commas, spaces, and other punctuation have to be entered where needed when creating a document.*

<u>HOW TO USE THE DATE AND TIME FEATURE</u>

1. Click **Insert** on the menu bar.
2. Click **Date and Time…**
3. You will now be in the Date and Time box. There are several date and time formats to choose from. We want to display our date in the following format: "October 22, 1998". Click on the date that is displayed in this format.
4. Click the box next to **Update automatically** so that a check mark appears. ***NOTE***: *At the bottom of the Date and Time box, there is an option to* ***Update automatically***. *If you would like for the date in your letter to be updated automatically each time that you use it, then click in the box next to* ***Update automatically*** *so that a check mark appears. If you do not have a check in this box, then the original date that you use in your letter will remain the same.*
5. When you are finished, click **OK**.

<u>ENTER TEXT</u> We will create our letter as follows:
-

-
-(Skip 3 lines)
Date goes here (October 22, 1998)
-
-
-
-
-(Skip 5 lines)
<Insert **Company** field>
<Insert **FirstName** field>[space] <Insert **LastName** field>
<Insert **Address1** field>
<Insert **City** field>[comma + space]<Insert **State** field>[space]<Insert **Zip** field>
-
-(Skip 2 lines)
RE: Promotional Widgets
-
-(Skip 2 lines)
Dear[space] <Insert **FirstName** field>[space]<Insert **LastName** field>[colon]
-(Skip 1 line)
We recently sent you a package with samples of our new line of [space]<Insert **WidgetType** field>[space]widgets. We would now like to schedule a meeting to discuss these widgets, and your company's needs. One of our representatives will call[space]<Insert **WorkPhone** field> [space]to set up an appointment. If your phone number has changed, please contact me at 1-800-234-5678.
-(Skip 1 line)
Thank you for your interest in our widgets. We are looking forward to meeting with you.
-(Skip 1 line)
Sincerely,
-
-
-(Skip 3 lines)
Joan Smith
Promotional Services Rep.

2. When you have finished, click on **File**. Then click on **Save As**. Name your main document "SMPLMAIN", and click **Save** button.

You have now created a main document.

Last, we will perform a Merge: **NOTE:** *Make sure your main document is open.*

1. Click on **Tools** on the menu bar**.**
2. Click on **Mail Merge**.
3. In the Mail Merge Helper box, click **Merge** next to “3 -- Merge the data with the document".
4. Choose how you want to merge. For our purposes, we will make sure that the **Merge to** field says **New document.** You may also want to specify the range of records that you want to merge (i.e. **All** records, or **From** 21 **To** 38). For our purposes, we will click next to **All** so that a black dot appears in the circle.
5. Notice the **Query Options**... button on the right side of the Merge box.

ENTER TEXT--Filtering We want to filter our records so that we only send letters to those people who have a Corpus Christi address.

1. Click on **Query Options**… button in the **Merge** box.
2. Click on **Filter Records** tab. This option allows you to choose variables to eliminate/choose particular records according to the data contained in fields.
3. In the "Field" box, click the arrows and click on **City**.
4. Make sure the "Comparison" box says **Equal to**.
5. Type the words **Corpus Christi** in the "Compare to" box.
6. When finished, click the **Sort Records** tab. This option allows you to sort records by chosen field(s).

ENTER TEXT--Sorting We will use the sort feature to merge our letters in alphabetical order by LastName. This will help us to easily find and pull (delete) a letter if we need to. For instance, Jerry Brown already called and set up an appointment, so we do not need to mail him a letter.

1. After clicking on the Sort Records tab, click the arrows next to the "Sort by" box and click on LastName. Make sure that there is a dot next to **Ascending**.
2. If you need to sort by more than one field, then fill in the "Then by" boxes.

6. When finished with these options, click **OK**.
7. You are now back in the Merge box. Click the **Merge** button.
8. Notice that the name of your document on the title bar is now **Form Letters#.** Your document and data source have been merged and put into a new document that you can rename and save, or delete (close without saving) when finished. Since these documents tend to be rather large, and a mail merge can be performed again quickly, these files are rarely saved for later use.
9. Close all files by clicking on **File**, and then clicking on **Close** until you have a blank screen.
10. Now click on the **New Sheet** icon (white piece of paper) on the Standard toolbar.

You have now performed a mail merge.

SOME EXTRA NOTES ON MAIL-MERGE:

· If you already have a data source and a main document, you may merge them by opening your Main Document and clicking on **Tools** on the menu bar, and then clicking on **Mail Merge**. In the Mail Merge Helper box, click the **Merge** button next to “3-Merge the data with the document", then in the Merge box, click the **Merge** button. (NOTE: You must open your Main document to do this.) The Main Document and the Data Source are tied together by Word, so you do not have to choose a Data Source unless you want to as will be pointed out next.

***** If you would like to use a different Data Source than the one tied to the Main Document, do the following:

1. Open the Main Document that you wish to use.
2. Click on **Tools** on the menu bar**.**
3. Click on **Mail Merge**.
4. Next to “2-Data Source”, click **Get Data**.

5. Now left-click **Open Data Source**. Click on the data source file that you wish to merge into the open Main Document and click on the **Open** button.
6. You are now back in the Mail Merge Helper box. Next to "3-Merge the data with the document", click on **Query Options** if you need to sort or filter records, or click on **Merge.**
7. Your merge will now be in a new document that you can rename and save, or delete (close without saving) when finished. Since these documents tend to be rather large, and a mail merge can be performed again quickly, these files are rarely saved for later use.

II. Envelopes and Labels

To make a large batch of envelopes/labels, follow the previous steps for mail merging choosing **Envelopes/Mailing Labels** instead of **Form Letters** where necessary.

MAILING LABELS

When using this process to make **Mailing Labels**, you must specify the type/size of the labels you will be using. Word has a list of labels to choose from. These labels are based on Avery product numbers. All you have to do is look at the packaging that the labels come in, find the product number, and choose it from the list. Also make sure that your printer is ready to feed labels before you start to print. ***NOTE:*** *Make sure that your printer can do this before you start to print because some printers do not have this capability.*

Let's Create Some Labels With the Data Source SMPL_ DAT.DOC:

1. Click on **Tools** on the menu bar**.**
2. Click on **Mail Merge.**
3. You will then see the Mail Merge Helper window. Click on **Create** next to "1-Main document". A drop-down menu will appear. Click on **Mailing Labels**.
4. Word will now ask you if you want to use the **Active Window** or if you want a **New Main Document**. For our purposes, we will click on **Active Window.**
5. You will still be in the Mail Merge Helper box. Now click **Get Data** next to the "2-Data source" heading, and a drop down menu will appear.
6. Now click on **Open Data Source**....

7. You are now in the Open Data Source box. Find the file named **SMPL_DAT** and double click on it. (***NOTE**: Depending on how your files are displayed, you may or may not have a ".doc" file extension on **SMPL_DAT**. If you do have the ".doc" file extension, rest assured that this is the same file.)*
8. A "**Set Up Main Document**" box will appear to remind you that you still have not set up your Main Document. Click on the **Set Up Main Document** button.
9. You will now be in the Label Options box. Click next to the correct printer type (**Laser and ink jet** for us), select correct tray (**Manual feed** for us), select **Label products** (**Avery standard**), and click **on Product number** (**5160 - Address**). When you are finished making selections in this box, click **OK**.
10. You will now be in the **Create Labels** box. Use the Insert Merge Field button to insert the following fields. Don't forget commas and spaces where necessary.

> **ENTER TEXT** We will use the following fields for our labels:
>
> <Insert **Company** field>
> <Insert **FirstName** field>[space] <Insert **LastName** field>
> <Insert **Address1** field>
> <Insert **City** field>[comma + space]<Insert **State** field>[space]<Insert **Zip** field>

11. When you are finished, click **OK**.
12. You are now back in the Mail Merge Helper box. Click the **Close** button in the bottom right hand corner of the Mail Merge Helper box.
13. Click on **File** on the menu bar.
14. Click on **Save As**.
15. Name you label form "**SMPL_LBL**".
16. Click the **Save** button.
17. Click on **Tools** on the menu bar.
18. Click on **Mail Merge**.
19. Click on the **Merge** button next to "3-Merge the data with the document".
20. The **Merge** box will appear. Make sure that the **Merge to** field **says New document**. Make sure there is a dot next to **All** in the **Records to be merged** area. Also make sure that there is a dot next **to Don't print blank lines when data fields are empty**. If you needed to sort/filter

your records, you would click on the **Query Options** button to access the sort/filter settings.

21. When you are finished making selections, click **Merge**.
22. You will now be in a new document that contains your merged labels. Click the **Print Preview** icon (page with a magnifying glass) on the Standard toolbar.
23. It is a very good idea to take a look at the layout of your labels before printing.
24. Click the **Close Preview** icon (**Close** button) on the Standard toolbar for the Print Preview screen.
25. Your merge is now in a New Document that is most probably called "**Labels#1**". You may save it under another name. For our purposes, we will close without saving changes.

ENVELOPES ***NOTE:*** *Make sure that your printer can do this before getting started because some printers do not have this capability.*

When using this process to make **Envelopes**, you must specify the type/size of the envelopes you will be using. If you are not using envelopes that have a pre-printed return address, you may create one. Just do the following to set up a default return address (this will remain the same until you change it):

1. Click on **Tools** on the menu bar**.**
2. Click on **Preferences.**
3. Click the **User Information** tab.
4. Type your return address in the **Mailing Address** portion of the box, and then click **OK**.

NOTE: *This is your personal information screen, and the information that it contains will remain the same until you go back in and make changes.*

QUICK ENVELOPES/LABELS

If you only need one envelope, one label, or a full sheet of labels containing a single address, then do the following:

1. Click on **Tools** on the menu bar.
2. Click on **Envelopes and Labels.**
3. Click on either the **Envelopes** tab or the **Labels** tab and fill in the info

needed.
4. When all info has been entered, click the **Print** button.

NOTE: *Make sure your printer is ready to feed labels/envelopes before you click the Print button.*

III. Help Section

VII. Help Section

A. The Office Assistant

1. Click on **Help**
2. Click on **Microsoft Word Help**.
3. This is the built-in Office Assistant. You may also get help from the assistant by clicking on the question mark icon on the right hand side of the standard tool bar. To use the office assistant, simply type in the question that you need to ask and click the **Search** button. Word's Office Assistant will then provide a list of topics to choose from. Use your mouse pointer to click on the buttons next to the topic that you want to view.

B. Contents and Index Guide

1. Click on **Help.**
2. Click on **Contents and Index.**
3. From here, you may click on the **Contents** tab to look up broad topics, the **Index** tab to look for help by typing in the first few letters of the word/topic you are looking for.

C. Show Balloons

1. Click on **Help.**
2. Click **Show Balloons**.
3. If you place your cursor on something, Word will display the info it has about the item you have selected.

D. Online Help???

1. Click on **Help.**
2. Click on **Help on the Web.**
3. This is where you can find out how to get help directly from

Microsoft via the Web.