

# FORM LETTERS

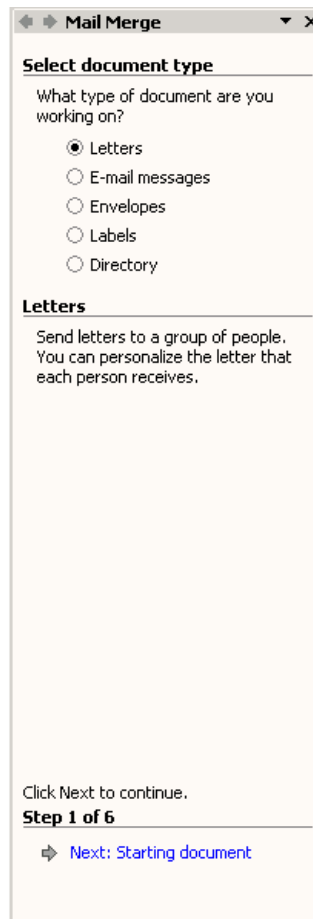
## ***MAIL MERGE***

You can use Word's Mail Merge feature to print form letters by combining a *data source* with a *main document*. The data source contains the information that changes with each document, such as the name and address of the person receiving the letter. Each item of information in the data source is called a *merge field*. The main document contains the text of the letter that stays the same in each document.

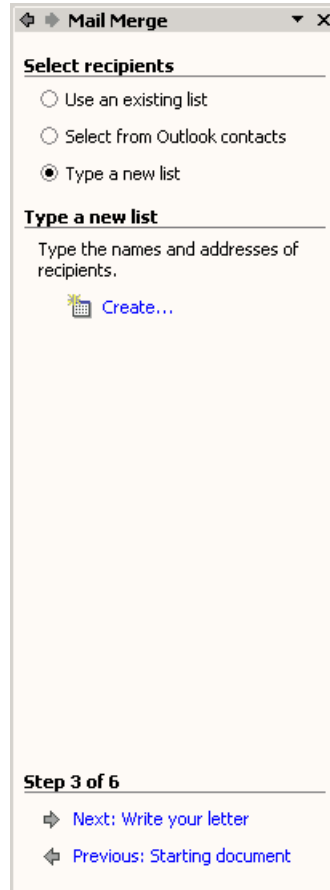
## ***DATA SOURCE***

To create the data source for a mail merge:

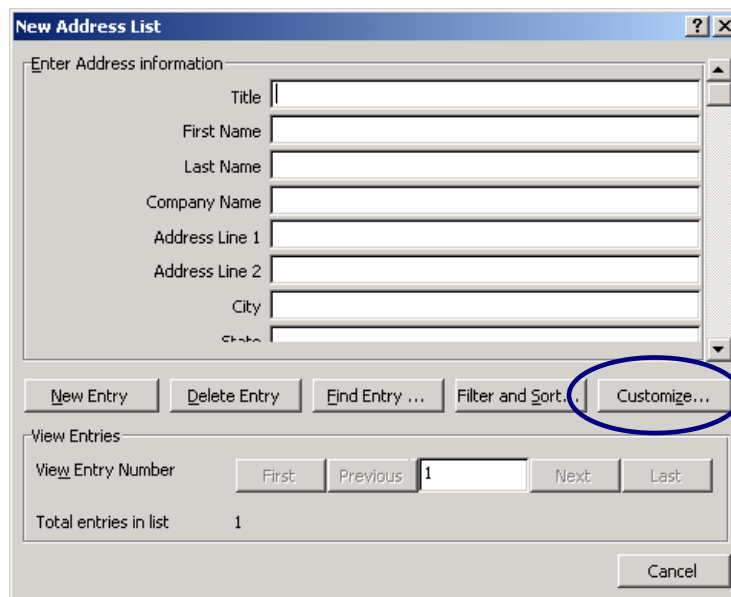
1. Open a new file.
2. From the menu, choose **T**ools, **L**etters and Mailings, **M**ail Merge Wizard.



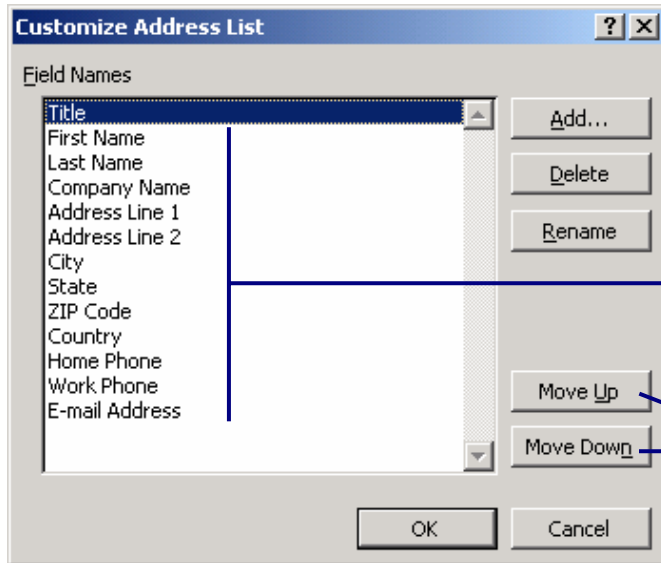
3. Under Select document type, choose Letters.  
**Note:** Create the data source first. You will complete the main document later.
4. Choose Next until you reach step 3 of 6. *Select recipients* is the title at the top of the task pane.
5. Choose *Type a new list*.
6. Under *Type a new list*, choose Create.



7. The New Address List box appears.



8. Select Customize. Word lists some common merge field names.



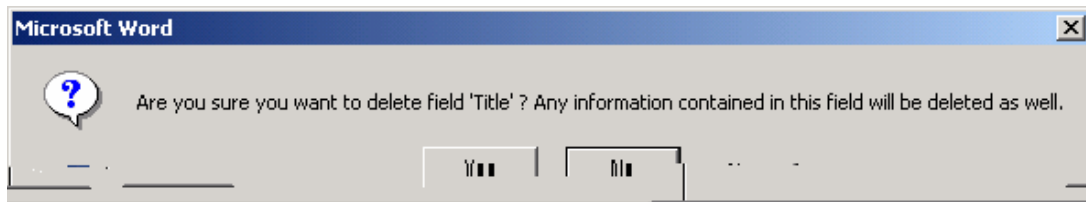
Common categories of fields used in merge documents.

Click Move Up or Move Down to move the selected field up or down the list

**Note:** To position the fields in the order in which you want them, select a field and click the up or down arrow in the Move area of the dialog box to move the field up or down the list.

9. To delete any unneeded fields, select the field and click **D**el~~e~~te.

**Note:** You will be asked if you are sure you want to delete that field, Click Yes.



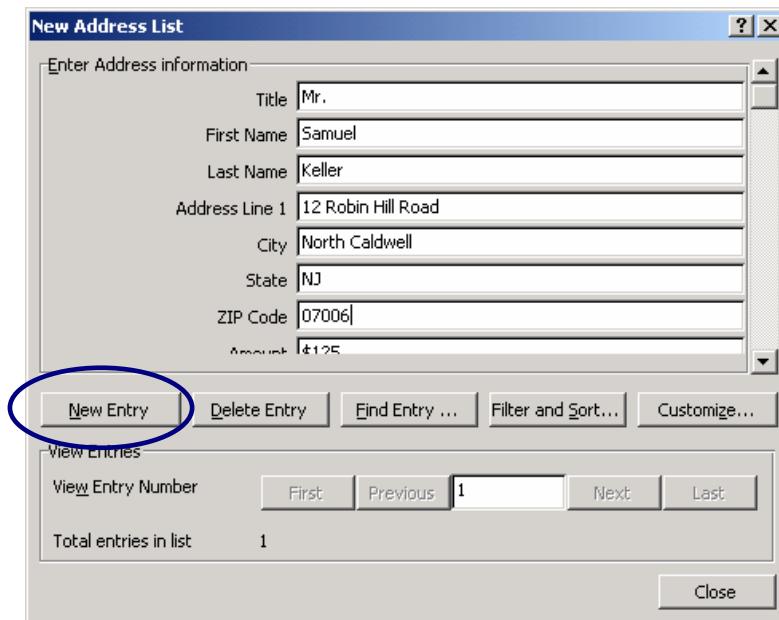
10. To add a field, click the **A**dd button, type the new field name in the Field Name box, and choose OK.

**Note:** Do not use spaces or symbols when creating a field name.

11. Choose OK again to return to the New Address List box.

12. Type the variable information for the first record. Press the TAB key to jump to the next field.

13. Then choose **N**ew Entry to move to the next record.

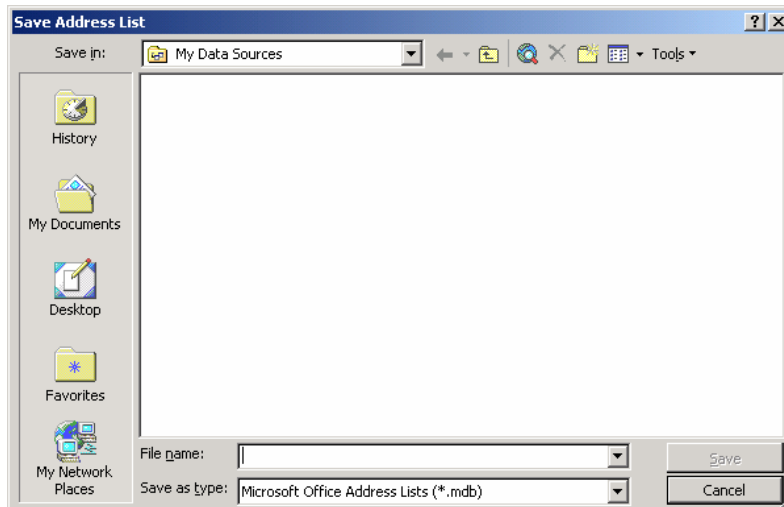


The screenshot shows the 'New Address List' dialog box with the following fields filled in:

Title	Mr.
First Name	Samuel
Last Name	Keller
Address Line 1	12 Robin Hill Road
City	North Caldwell
State	NJ
ZIP Code	07006
Amount	\$125

Below the fields are buttons for 'New Entry', 'Delete Entry', 'Find Entry ...', 'Filter and Sort...', and 'Customize...'. The 'New Entry' button is circled in blue. Below these buttons is a 'View Entries' section with 'View Entry Number' set to 1, and 'Total entries in list' set to 1. A 'Close' button is at the bottom right.

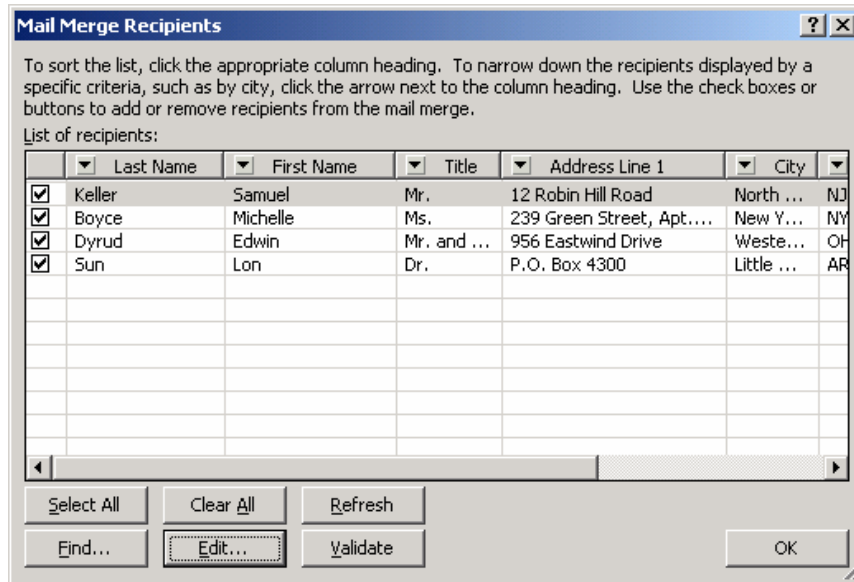
14. When all the records have been entered, choose **C**lose. A **S**ave Address List box appears.



The screenshot shows the 'Save Address List' dialog box. The 'Save in:' location is 'My Data Sources'. The 'File name:' field is empty. The 'Save as type:' is 'Microsoft Office Address Lists (\*.mdb)'. There are 'Save' and 'Cancel' buttons at the bottom right.

15. Type a file name for the new document; then choose **S**ave.


16. A Mail Merge Recipients box appears. Use this box to sort, narrow the list, and add or remove recipients.



17. If all the information is correct, choose OK.


**Note:** You can edit information if needed by selecting *Edit*.

## ***RETURN TO MAIN DOCUMENT***

1. Type the main document. To insert data from the data source file, click the Insert Merge Field  button on the Mail Merge toolbar and select the appropriate field. **Note:** Pressing the space bar adds additional fields to a document.
2. Add spaces, punctuation, and line returns after the fields have been entered. Word encloses merge fields in chevrons as shown below.


«Title» «First\_Name» «Last\_Name»      Needed spaces must be typed.  
 «Address\_Line\_1»  
 «City», «State» «ZIP\_Code»      Needed punctuation must be typed.


Dear «Title» «Last\_Name»:

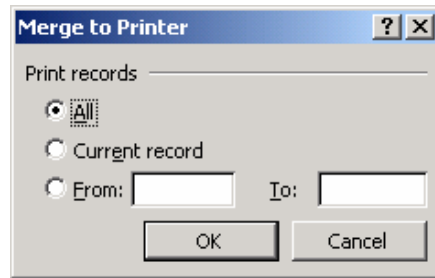
3. Save the main document.
4. With the main document in the active window, click the View Merged Data  button on the Mail Merge toolbar. Word displays the data in the first record in place of the merge fields in the main document.

Mr. Samuel Keller  
 12 Robin Hill Road  
 North Caldwell, NJ 07006


Dear Mr. Keller:

5. To view other records, choose the Next Record  button.
6. Click the View Merged Data button again to view the merge fields.

- To print all the letters, click the Merge to Printer  button on the Mail Merge toolbar.



**OR:**

- Select the records you want to print and choose OK.  
**Note:** You can also merge the main document and the data source to a new document by clicking the Merge to New Document  button. The merged documents can then be saved and printed. By default, Word names the document *Letters1.doc*.

## PRACTICE

- Open a new file and use the Mail Merge command to create a form letter.
- Create a data source file with fields in this order: *Title, First Name, Last Name, Address Line 1, City, State, ZIP Code, Amount*.
- Name this data file *Practice data file*.
- Edit the data source by typing the variable information for these four records in the data source file (don't forget to enter each part in the appropriate field):

Mr. Samuel Keller  
12 Robin Hill Road  
North Caldwell NJ 07006  
\$125

Ms. Michele Boyce  
239 Green Street, Apt. 2-A  
New York NY 10003  
\$250

Mr. and Mrs. Edwin Dyrud  
956 Eastwind Drive  
Westerville OH 43081  
\$100

Dr. Lon Sun  
P.O. Box 4300  
Little Rock AR 72214  
\$50

5. Type the main document—the form letter—inserting the appropriate field names as needed. Use standard business letter format.

main  
document

December 3, 20\_\_

«Title» «First\_Name» «Last\_Name»  
«Address\_Line\_1»  
«City», «State» «ZIP\_Code»

Dear «Title» «Last\_Name»:

Thank you for your recent contribution of «Amount». As you know, contributions such as yours help us to house stray pets abandoned by their owners.

Best wishes for an enjoyable holiday season.

Sincerely,

Suzanne Kramer  
Director

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6. Save the main document with the file name *Practice main*.
7. View the four letters.