

LEARNING ABOUT MAIL MERGE: PART III

Let's try a simple experiment, using the merge source we created in the last lesson:

- Step 1 Click on the button that says *Insert Merge Field*.
- Step 2 On the drop-down menu that appears, click on *First Name*.

A tag appears that looks something like this <<FirstName>>

- Step 3 Tap the *spacebar* on your keyboard
- Step 4 Click on the button that says *insert merge field*, again.
- Step 5 On the drop-down menu that appears, click on *Last Name*.
- Step 6 Tap the *Enter* key on your keyboard, to move down a line.
- Step 7 Type the following line:

This student has received a grade of

- Step 8 Make sure there is one extra space after the word of.
- Step 9 Click on the button that says *Insert Merge Field*.
- Step 10 On the drop-down menu that appears, click on *Grade*.
- Step 11 Now tap the *Enter* key, two more times, to put in a couple of blank lines.

Take a moment to reflect upon what you have done here. You have used codes – substitute word symbols – for the real words that will merge with this document eventually. Even the sentence you created will have a code attached to it and that real word will be filled in on merge to complete the sentence accurately.

You don't believe it? Well let's try it.

Let's create a document called a *catalog*. This will simply give a list of the students and their grades, according to the template created above.

- Step 1 Click on the *Mail Merge Helper* button, on the *mail merge toolbar* at the top of the document.



- Step 2 Click on the *Create* button, under *Main Document*.
- Step 3 Select *catalog* from the drop-down list that appears.
- Step 4 Click the *Change Document Type* button.

Merge Type, under the *Create* button, should now read *Catalog* as the document type. If not, repeat steps 2 - 4 above.

- Step 5 Click on the *Merge* button, at the bottom of the dialog.
- Step 6 Click on the *Merge* button that appears on the next dialog box.

The box should clear and your document is visible. You should see the list of kids' names, each followed by a notation about grade.

Close the document by clicking on *File* on the menu bar and then on *Close*. Don't bother to save the document, since this was just an experiment. The document will close and you will be back at the source document, which contains the codes for the merge.

Your instructor has demonstrated some of the features of Mail merge. Now it is time for you to experiment. Don't be afraid to try different ideas. If they don't work out, close down and start over again.

You may close this document and start from scratch if you like, or go back to the Mail Merge Helper and try some other document types, including labels and envelopes.