

UNIT – III

Microsoft Word: Word Processing Overview – Creating and Editing Documents – Formatting Documents – Creating Tables – Mail Merging.

3.0 Word processing overview

Word processing is an application program that allows you to create letters, reports, newsletters, tables, form letters, brochures, and Web pages. Using this application program you can add pictures, tables, and charts to your documents. You can also check spelling and grammar

Features of word processing

Software companies have launched on the market many word processors that have similar features. Some brands names are better known than others. There are many commercial word processing programs; **Open office writer, Microsoft Word, Coral word Perfect** etc... All modern word processors share some basic features;

1. Basic editing tasks Easy to carry out.
2. A pre-view window to see what the document really looks like.
3. Possibility to store the document with a meaningful name.
4. Document suitably formatted to be sent by fax or e-mail
5. WYSIWIG features (What you see is what you get).

Some Common Word Processing Packages

The followings are examples of some popular word processor available

1. Soft word
2. WordStar
3. Word perfect
4. Microsoft word

Advantages of word processing

1. Mistakes can be corrected easily without leaving any trace;
2. Much better presentation of text is possible with formatting features such as different font styles and sizes, coloured text and justification;
3. Text can be easily inserted, deleted or rearranged without having to start again;
4. Documents can be saved on disk and used again whenever necessary;
5. Pictures, graphs, tables and charts can be easily included alongside text;
6. Multiple copies of the same document can be easily produced;
7. Standard letters can be mass-produced very quickly using mail merge;
8. Documents can be transferred instantly anywhere in the world via electronic communications links;
9. Spelling and grammar can be checked automatically.

3.1 MICROSOFT-WORD

There are many software packages to do the job of word processing. Some of them work in DOS environment. Examples are WordStar, Word Perfect and Professional Write. But in these days working in WINDOWS is becoming more and more popular. So let us consider software for word processing which works in WINDOWS. Our choice is MS-WORD because it is the most popular software in these days. MSWORD is a part of the bigger package called MS OFFICE, which can do much more than word processing. In fact when you open up MS OFFICE you will find four main components in it. They are MS-WORD (for word processing), MS EXCEL (for spreadsheet), MS ACCESS (for database management) and MS POWERPOINT (for presentation purposes)

Starting MS Word program

You can start your Word program different ways. One way is using Start button:

1. Click on the Start button.
 2. In the menu that appears select All Programs® Microsoft Office®Microsoft Office Word 2007.
- In few seconds you will see Word screen on the monitor. You can also start your MS Word program by double clicking on Microsoft Word icon, which lies on the Microsoft Office Shortcut Bar (MOSB).

Opening and naming a new word processor file

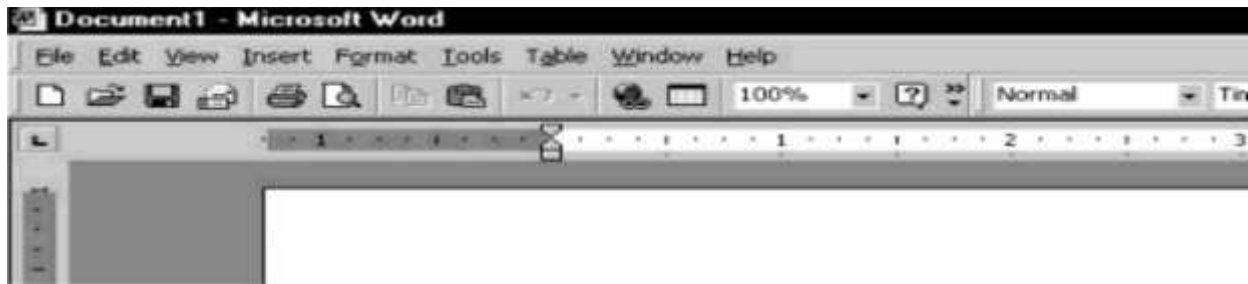
Before you can use *Word* you must first open the program.

Click on the **Start** button in the lower left corner of the screen, then from the **Programs** submenu select **Microsoft Word** (you may need to choose from the **Word Processing** or **Microsoft Office**



Open Microsoft *Word* by clicking on the program icon. If you can find Microsoft *Word* for yourself, select the program from the *Office* or word processing submenu. Otherwise get help from a friend, or your instructor, or from the lab supervisor. After you have opened *Word*, you should have a new blank document open on your screen.

If this is not the case, then just select **New** from the **File** menu



Window for a new *Word* document

As you can see, the new file is named "**Document1**". The file is so called because you haven't yet given it a name. It's always a good idea to give a new file a name or title of your own immediately and save it on the disk on which you intend to keep it. This is easy enough to do. Here are the steps.

Put your **Data** disk in the floppy disk drive (drive A:) and select **Save As** from the **File** menu. *Word* displays the *Save As* dialog box, prompting you among other things to type the name of the file and to select the disk on which you want to save it.

Click on the **Save In:** box and notice the **drop down menu** that appears listing the various disk drives on your computer. If you are saving your files on a regular 3.5" floppy disk drive, your disk will be in drive A: Click on the disk drive called **3 1/2 Floppy (A:)** to open it. Next you need to open a new folder on your disk in which you are going to store your word processor files.

Create a New Document

To open a new document, follow one of the following methods:

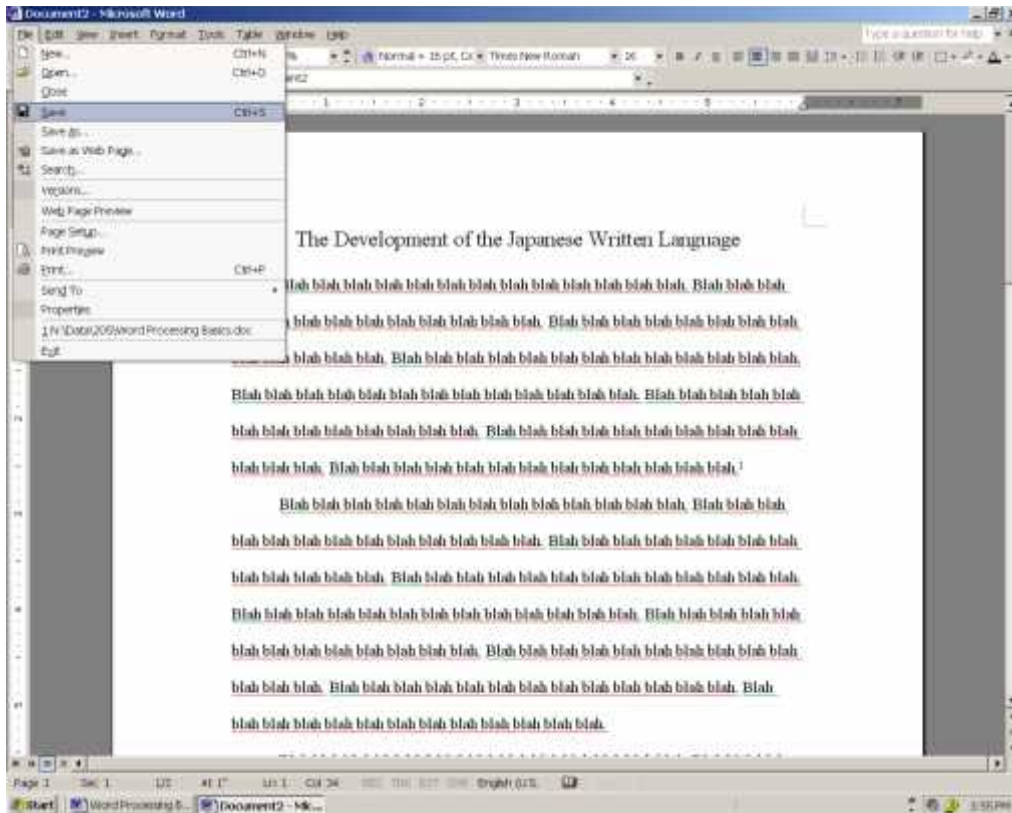
1. Click the New Document button on the menu bar.
2. Press CTRL+N keys on the keyboard.

Save a new / existing documents

To save a new/existing document that is opened, follow one of the following methods:

1. Click the Save button on the menu bar.
2. Press CTRL+S keys on the keyboard.

If the document is already named and saved earlier, it will simply save the document. On the other hand, if the file is a new document then it will prompt you by opening *Save As* dialog box. Select the folder where you want to place your document in *Save In:* box, type the name of the document in *File Name:* box, and then click OK. You can also save a new document by choosing CTRL+S on the keyboard and then selecting the above actions in *Save As* dialog box.



Keyboard shortcut keys

- Open a file CTRL+O
- New file CTRL+N
- Close a file CTRL+W
- Print CTRL+P
- Show/Hide paragraph symbols CTRL+*
- Spelling and grammar F7
- Help F1
- Find CTRL+F
- Replace CTRL+H
- Go To CTRL+G
- Select all - entire document CTRL+A
- Go to beginning of line HOME
- Go to end of line END
- Go to beginning of document CTRL+Home
- Go to end of document CTRL+End
- Cut CTRL+X
- Copy CTRL+C
- Paste CTRL+V
- Undo CTRL+Z
- Redo CTRL+Y
- Format painter CTRL+SHIFT+C

Left alignment CTRL+L
Center alignment CTRL+E
Right alignment CTRL+R
Justified CTRL+J
Bold CTRL+B
Word underline CTRL+SHIFT+W
All caps CTRL+SHIFT+A
Change case SHIFT+F3
Subscript CTRL+=
Superscript CTRL+SHIFT+=

3.2 Creating And Editing Documents

Creating a New Document :

When you start Word without opening an existing document, the program gives you an empty one to work in. Word gives you three ways to do so:



- ◆ **Creating a new blank document.** When you're preparing a simple document—like a two-page essay, a note for the babysitter, or a press release—a plain, unadorned page is fine. Or, when you're just brainstorming and you're not sure what you want the final document to look like, you probably want to start with a blank slate or use one of Word's templates (more on that in a moment) to provide structure for your text.
- ◆ **Creating a document from an existing document.** For letters, resumes, and other documents that require more formatting, why reinvent the wheel? You can save time by using an existing document as a starting point. When you have a letter format that you like, you can use it over and over by editing the contents.
- ◆ **Creating a document from a template.** Use a template when you need a professional design for a complex document, like a newsletter, a contract, or meeting minutes. Templates are a lot like forms—the margins, formatting, and graphics are already in place. All you do is

fill in your text. Microsoft provides a mind-boggling number of templates with Word, but they're not the only source. Your employer may even provide official templates for company documents.

To start your document in any of the above ways, click the Windows logo in the upper-left corner of the screen. That's Office 2007's new *Office button*. Click it, and a drop-down menu opens, revealing commands for creating, opening, and saving documents. Next to these commands, you see a list of your Word documents. This list includes documents that are open, as well as those that you've recently opened.

The Office button is also where you go to print and email your documents



Creating a New Blank Document

Say you want a new blank document, just like the one Word shows you when you start the program. No problem—here are the steps:

1. **Choose Office button New.**
The New Document dialog box appears.
2. **In the upper-left corner of the large "Create a new Word document" panel, click "Blank document".**The New Document box presents a seemingly endless number of options, but don't panic. The "Blank document" option you want is on the left side of the first line.
3. **At the bottom of the New Document dialog box, click Create.**
The dialog box disappears, and you're gazing at the blank page of a new Word document. Better get to work.



Open the New Document box (Office button **New**, or **Alt+F, N**),

Creating a New Document from an Existing Document

Word gives you a "New from existing" document-creation option to satisfy your desire to spend more time surfing and less time writing meeting minutes. Here's how to create a new document from an existing document:

1. **Choose Office button **New** (Alt+F, N) to open the New Document window. Then click "New from existing..." (it sits directly below the "Blank document" button).**

The three dots at the end of the button's title tell you that there's another dialog box to come. And sure enough, when you click "New from existing...", it opens another box, appropriately titled New from Existing Document. This box looks—and works—like a standard Windows Open File box. It lets you navigate to a specific folder and open a file.

2. **On your computer, find the existing document you're using for a model.**

You can use the bar on the left to change the folder view. Word starts you in your My Documents folder, but you can switch to your desktop or your My Computer icon by clicking the icons on the left. Double-click folder icons in the large window to open them and see their contents.

3. **Click to select the file, and then click Create New (in the lower right corner). (Alternatively, just double-click the file's icon to open it. This trick works in all Open File boxes.)**

Instead of the usual Open button at the bottom of the box, the button in the New from Existing Document box reads Create New—your clue that this box behaves differently in one important respect: Instead of opening an existing file, you're making a *copy* of an existing file. Once open, the file's name is something like *Document2.docx* instead of the original name. This way, when you save the file, you don't overwrite the original document.

Windows' Open File boxes, like New from Existing Document, let you do a lot more than just find files. In fact, they let you do just about anything you can do in Windows Explorer. Using keyboard

shortcuts, you can cut (Ctrl+X), copy (Ctrl+C), and paste (Ctrl+V) files. A right-click displays a shortcut menu with even more commands, letting you rename files, view Properties dialog boxes, and much more. You can even drag and drop to move files and folders.

Creating a New Document from a Template

where you use an existing document to create the meeting minutes for the Chief Executive Officer's Surfing Association (CEOSA), each month you open the minutes from the previous month. You delete the information that pertains to the previous month and enter the current month's minutes. A template works pretty much the same way, except it's a generic document, designed to be adaptable to lots of different situations. You just open it and add your text. The structure, formatting, graphics, colors, and other doodads are already in place.

Here's how to get some help from one of Microsoft's templates for meeting minutes:

1. Choose Office button New (Alt+F, N) to open the New Document window.

On the left of the New Document box is a Template Categories list. The top entry on this list is Installed Templates—the ones Word has installed on your computer.

You could use any of these, but you also have a world of choice waiting for you online. On its Web site, Microsoft offers hundreds of templates for all sorts of documents, and you can access them right from the New Document box. If you have a fast Internet connection, then it's just as quick and easy to use an online template as it is using the ones stored on your computer. In fact, you'll use an online template for this example.

If you can't connect to the Internet right now, then simply choose one of the installed templates instead. Click Create, and then skip to step 4.

2. Scroll down the Template Categories list to the Microsoft Office Online heading. Under this heading, select Minutes.

In the center pane, you'll see all different types of minutes templates, from PTA minutes to Annual shareholder's meeting minutes (Figure 1-5). When you click a template's icon, a preview appears in the pane on the right.

Editing documents

Editing a word file means making changes in the text contained in a file. Everyone needs to edit a word file at some point or other to incorporate the changes which may arise. Editing a word file is one of the most basic MS office word operations. Here, we shall help you with the tutorial steps after which you should be able to edit the word file with ease. Editing a file covers these basic areas.

[Adding new text.](#)

[Deleting a part of the text.](#)

[Copying a text.](#)

[Moving text.](#)

[Pasting text.](#)

[Formatting text.](#)

For Adding New Text

If you want to add new text at the end of a file, simply place the cursor to the end part and start typing using the keyboard.

For adding text in between a document, place the cursor to the required portion and start typing.

Deleting A Part Of The File

If you wish to delete some parts from the end of the file, take the cursor to the end point and keep pressing “Backspace” till the text is cleared.

You can also select the part you want to clear by left clicking on the text and dragging the mouse along. After the part has been selected, simply click “Backspace” and the text gets deleted.

Copying A Text

If you want to copy an entire word file, simply select the whole file or use keyboard shortcut Control + A and then right click to select the option “Copy”. You can also use keyboard shortcut Control + C. Doing so will copy the entire text.

If you want to copy selected text, you need to select the part of the text initially by left clicking and dragging the mouse and then follow the same procedure.

Moving Text

If you want to move some text from one part of the document to another, simply select the part. Right click upon the selected part and choose “Cut”.

Move to the desired location where you want to move the cut part. Place the cursor at the desired place.

Click paste or use Control +V.

The text block has moved from one part to another.

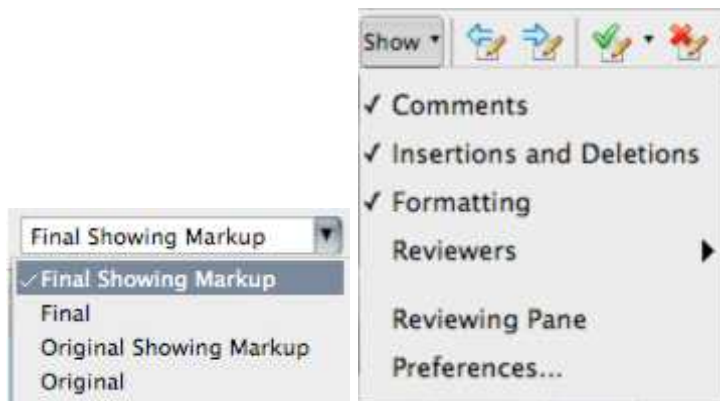
Pasting Text

Pasting a text is also simple as the copied contents simply need to be put in the desired place by right clicking and using “Paste” option. Keyboard shortcut Control + V also does the same.

To review editor comments

The **Highlight changes on screen** option can be controlled so that you see only certain types of changes: Comments, Deletions & Insertions, Formatting, etc., as well choosing whose changes you wish to review: All reviewers or those you’re working with (by name).

Visit Word’s Tool bar on the far-left side of your screen and you’ll see two dropdown selection menus for **Markup** and **Show**:



You'll also notice some words are either highlighted (previous Word versions) or are enclosed by parentheses that lead to a marginal text box. Each method indicates a comment exists.

To view **Comments**:

1. Move the cursor over the highlighted text to reveal a text box.
2. Select **Comments** under the **View** option in the **Main File Menu**.

A numerical list of all **Comments** will appear on the screen. (You can close the **Comments** window by clicking **Close** within its window.)

Remember, using Comments is the editor's way to query the author about unclear items. The author should address every comment.

Because you've saved the file, you can in turn respond using additional comments (either within the existing comment or by creating a new one):

Highlight the relevant text portion in the manuscript and under Word's **Insert** option in the **Main File Menu**, select **Comment**. The selected text becomes highlighted and a **Comments box** appears allowing you to type a response to the editor's query. Be sure to **Save** your document frequently as you work. However, when you're ready to send your "final" version, use the **Save As** feature to create a so-called new document. This allows you to keep backup versions, as well as keeping the current iteration of the document "clean" for ease of readability. It's tough shuffling through dozens of comment.

FORMATTING DOCUMENTS

Formatting improves the readability of your documents and often provides visual clues to the document's purpose. It's an important part of most every document and users often spend a great deal of time applying formats. These tips will help you work more efficiently and judiciously when applying formats.

◆ **Copy defaults**

When copying content from another source, even another Word document, Word retains the source formatting by default. You can eliminate subsequent formatting by applying the destination document's default style during the copy process as follows:

1. Copy the content from the source to the Clipboard using [Ctrl]+C (or some other route).
2. In the destination document, position the cursor and then click the Home tab (in Ribbon versions).
3. In the Clipboard group, choose the Keep Text Only option shown in **Figure A** from the Paste drop-down. In Word 2003, choose the Keep Text Only option from the Paste Options (smart tag) drop-down *after* pasting the content.

Changing the default, as follows might be more efficient:

1. Click the File tab and choose Options (under Help). In Word 2007, click the Office button and then click Word Options. Choose Advanced in the left pane.
2. In the Cut, Copy, and Paste section, choose the appropriate option. For example, you might want to retain source formatting when copying from other Word documents, but not Web sites.
3. Click OK.

In Word 2003, choose Options from the Tools menu and click the Edit tab. You can uncheck the Smart Cut And Paste option or click the Settings button to customize the feature.

◆ **Insert section breaks**

Dividing a document into sections lets you customize formats for a section's content and purpose. For instance, you might want a single page to be in landscape in the middle of a portrait document. Or you might want the header text or page numbering scheme to change for several pages. Using sections, you can apply different formatting as needed.

To insert a section break, click the Page Layout tab and choose a Breaks option in the Page Setup group:

- ◆ Next Page: Starts the new section on the next page.
- ◆ Continuous: Starts the new section on the same page.
- ◆ Even Page: Starts the new section on the next even-numbered page.
- ◆ Odd Page: Starts the new section on the next odd-numbered page.

Display formatting codes to select a section break.

◆ **Keep it together**

To keep two or more words together on the same line, insert a nonbreaking space character between them by pressing [Ctrl]+[Shift]+[Spacebar] instead of inserting a regular space character. The space will look the same, but Word will keep the two words on the same line.

A nonbreaking hyphen works the same as a nonbreaking space but with hyphenated words. If you don't want Word to wrap at a hyphen character, enter a nonbreaking hyphen by pressing [Ctrl]+[Shift]+[-]. When the hyphenated word reaches the right margin, Word will wrap the entire word to the next line if necessary rather than breaking at the hyphen.

◆ **Format a list**

Formatting just the number component in a numbered list is a bit tricky. You usually end up formatting the entire item or list, unless you know this simple trick:

1. On the Home tab, click Show/Hide in the Paragraph group. In Word 2003, click Show/Hide on the Formatting toolbar.
2. Select only the Paragraph mark at the end of the line.
3. With the paragraph mark selected, apply formats.

Selecting the paragraph mark is the key to formatting only the item's number.

To format more than one number, but not all of them, hold down the [Ctrl] key while selecting markers. To format all of the numbers in the list, without changing the format of the actual text, click any number in the list to highlight all of the numbers. Word will extend the format to new items. Formats applied to the entire list will take precedence over formats applied via the paragraph marker.

◆ Remove formats

Removing formats isn't hard, but there's more than one way to get the job done. When you want to remove a single format, you probably select the text and click the appropriate option; most of them work as toggles. You might display the Format dialog and uncheck options when you need to delete more than one format.

If you want to strip all of the formatting, there's a quicker method: Select the text and press [Ctrl]+[Spacebar]. This shortcut removes all the character formatting except what's defined by the underlying style. To remove just the paragraph formats, press [Ctrl]+Q.

◆ Keep styles from updating

Word lets you update a style when you add formatting to text. This behavior can be troublesome if users don't understand it, so you might want to disable it as follows:

1. Click the Home tab.
2. Launch the Styles dialog. In Word 2003, click the Styles And Formatting tool on the Formatting toolbar.
3. Find the style.
4. Choose Modify from the style's drop-down or right-click the style.

Disable a style's automatic updating behavior to protect styles.

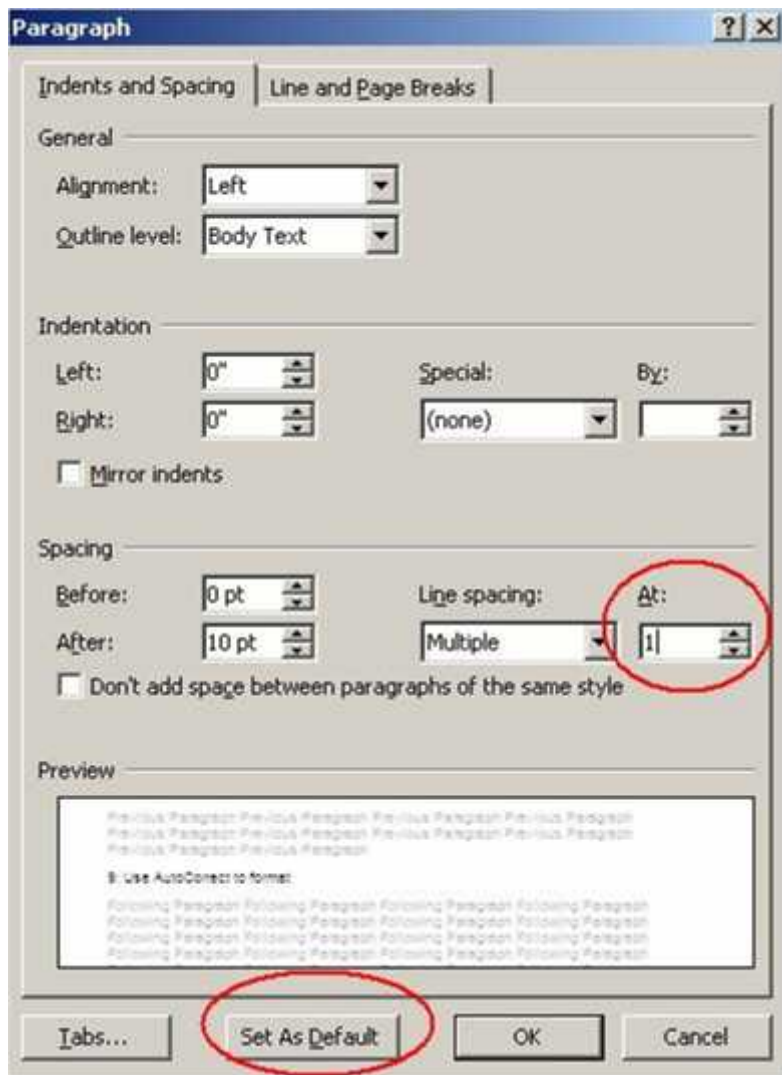
By default, Word doesn't set this option for built-in styles, but users often accidentally enable the feature. Don't enable this behavior when basing a new style on an existing style or creating a new one unless you have a specific reason to do so.

◆ Adjust the default line spacing

Word 2007 and 2010 use a 1.15 line spacing setting. That's great if you publish a lot of content to the Web. If not, you can change the default to 1 as follows:

1. Click the Home tab.
2. Right-click Normal in the Styles Quick gallery and choose Modify.
3. Choose Paragraph from the Format list.
4. In the Spacing section, change the At setting from 1.15 to 1, as shown in **Figure E**.
5. Click OK.
6. Check the New Documents Based On This Template option. If you don't want to change the template, skip this step.
7. Click OK.

Figure E



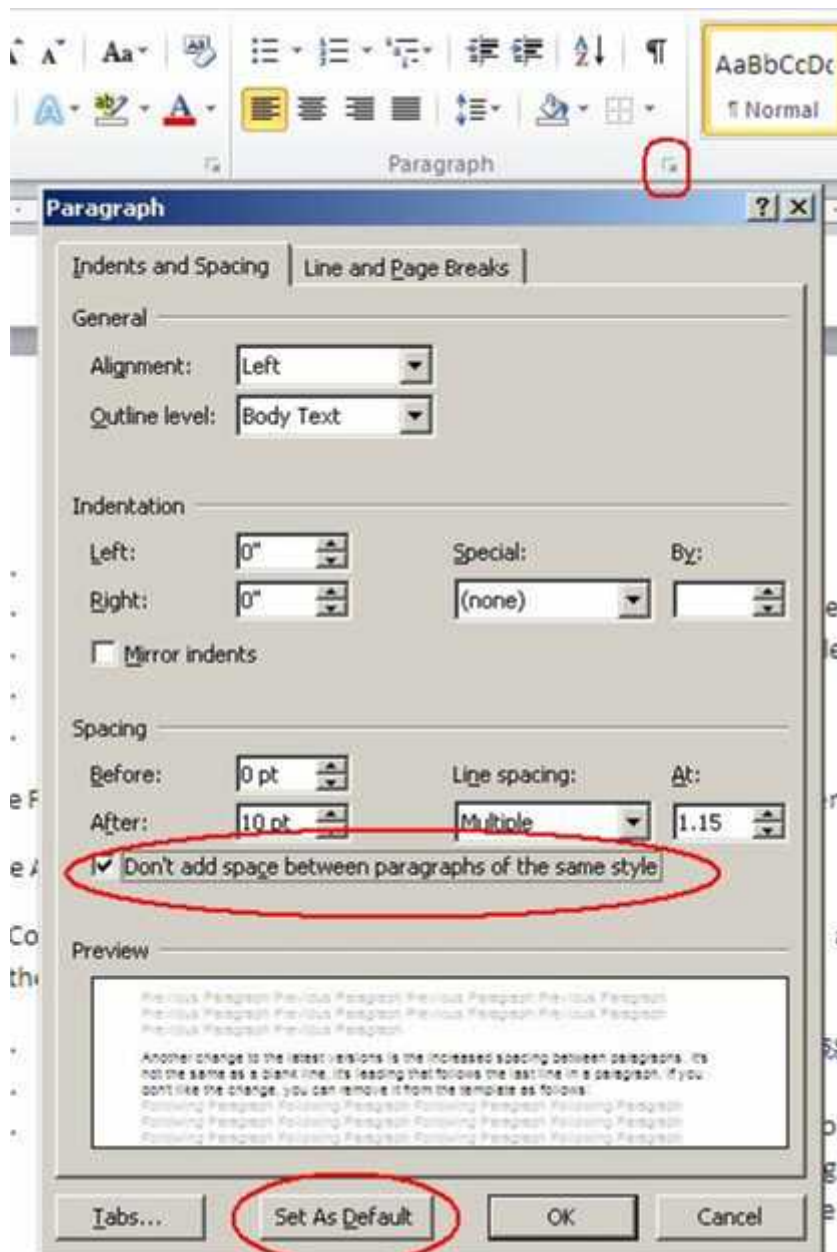
Reset the default Line Spacing option to 1.

◆ **Eliminate extra paragraph spacing**

Another change to the latest versions is the increased spacing between paragraphs. It's not a blank line that you could easily delete. If you don't like that much space, you can modify it as follows:

1. Click the Home tab.
2. Click the Paragraph group's dialog launcher (the small arrow in the lower-right corner).
3. Check the Don't Add Space Between Paragraphs Of The Same Style option.
4. Click Set As Default, as shown in **Figure F**.
5. Click OK.

Figure F



Use this setting to reduce extra white space between paragraphs.

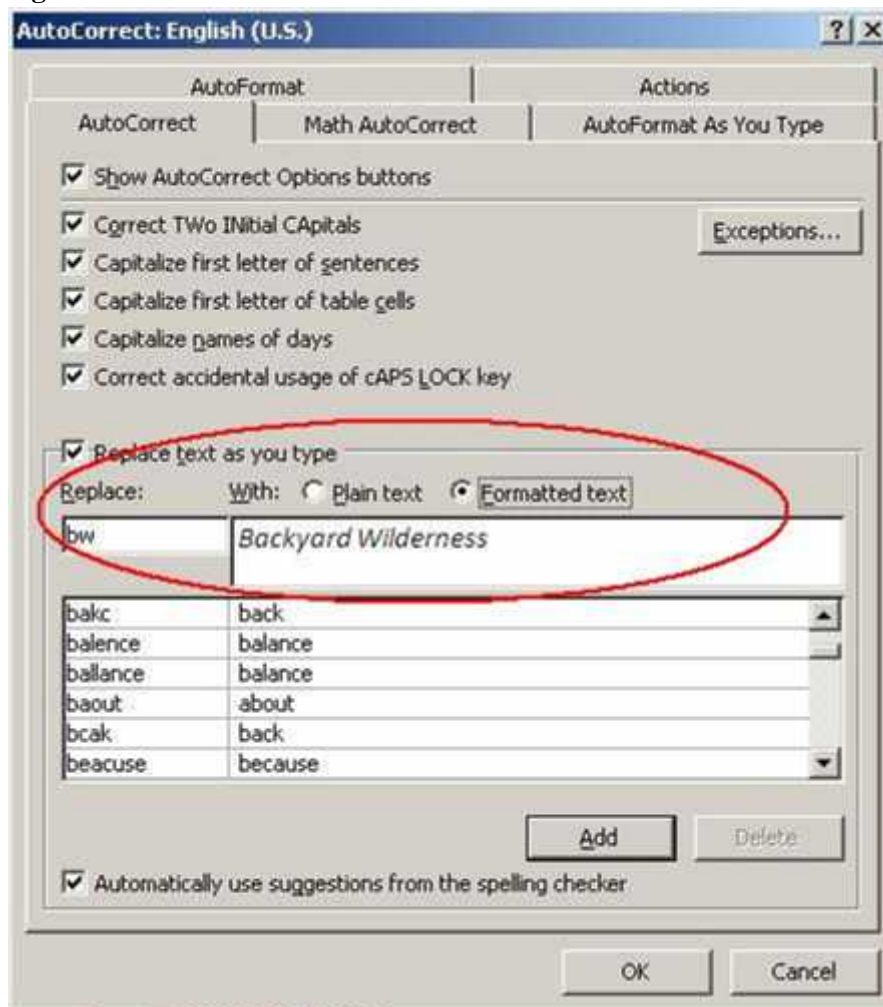
◆ **Save formatted text as AutoCorrect entries**

AutoCorrect reduces data entry and corrects typos, but it can also apply formatting. Simply save the appropriately formatted text as an AutoCorrect entry, as follows:

1. Enter and format the text. For instance, enter *Backyard Wilderness* and italicize it as a title.
2. Select the formatted text.
3. Click the File menu, choose Options, and then click Proofing in the left pane. In Word 2007, click the Office button, click Word Options, and then choose Proofing in the left pane. In Word 2003, choose AutoCorrect Options from the Tools menu.
4. Click the AutoCorrect Options button in the AutoCorrect Options section. (Skip this step in Word 2003.)
5. Word will fill the With control with the selected (and formatted) title.

6. Click the Formatted Text option.
7. Enter *bw* in the Replace control, as shown in **Figure G**.
8. Click Add.
9. Click OK twice (just once in Word 2003).

Figure G



To insert the formatted title, type *bw*.

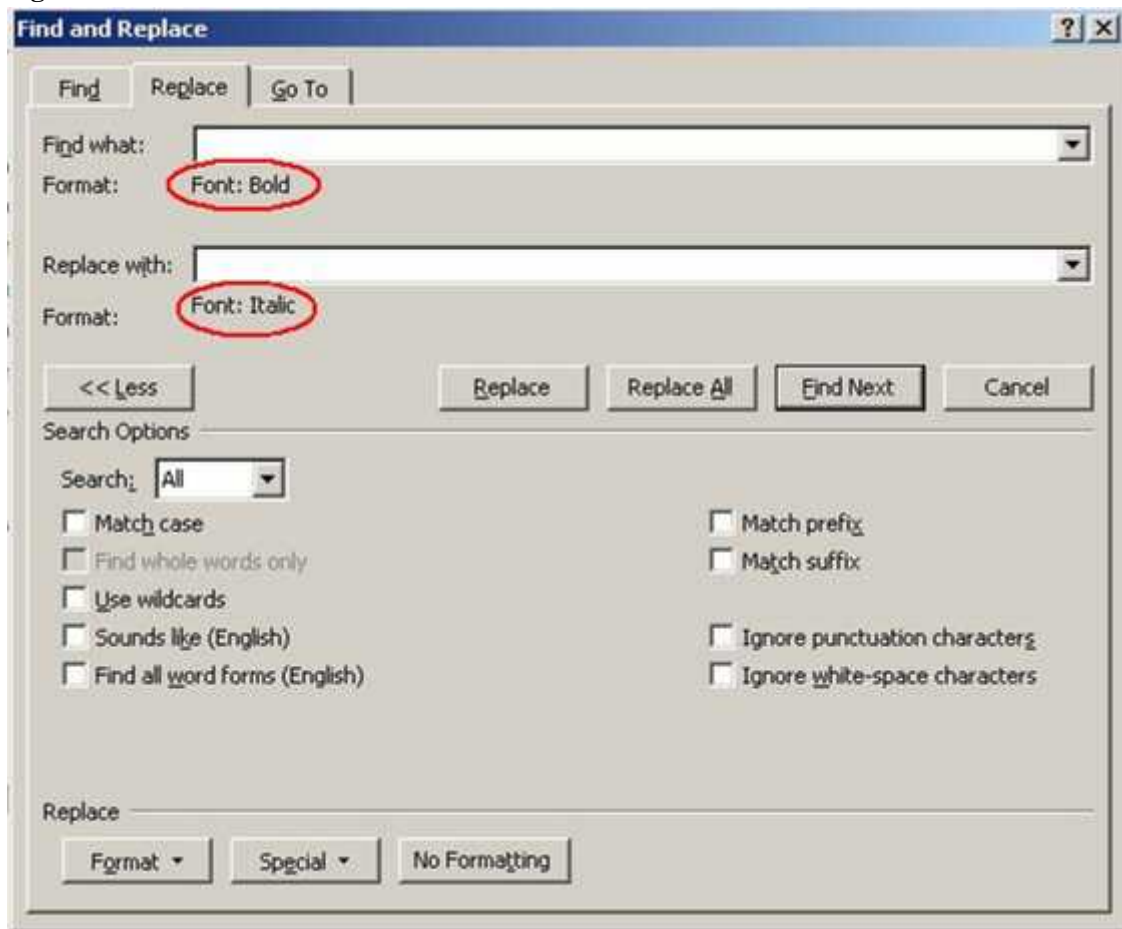
◆ **Use Find And Replace to change formatting**

You probably use Word's Find And Replace feature to replace characters, but you can use it to change formatting. For example, you might want to change all instances of bold to italics, as follows:

1. Press [Ctrl]+H.
2. Click the Find What control and click More.
3. From the Format drop-down, choose Font.
4. Select Bold in the Font Style list and click OK.
5. Click the Replace With control and click More.
6. From the Format drop-down, choose Font.
7. Select Italics in the Font Style list and click OK. As you can see in **Figure H**, Word displays the specified formats under both controls.

8. Click Replace All.

Figure H



Replace one format with another using the Replace option.

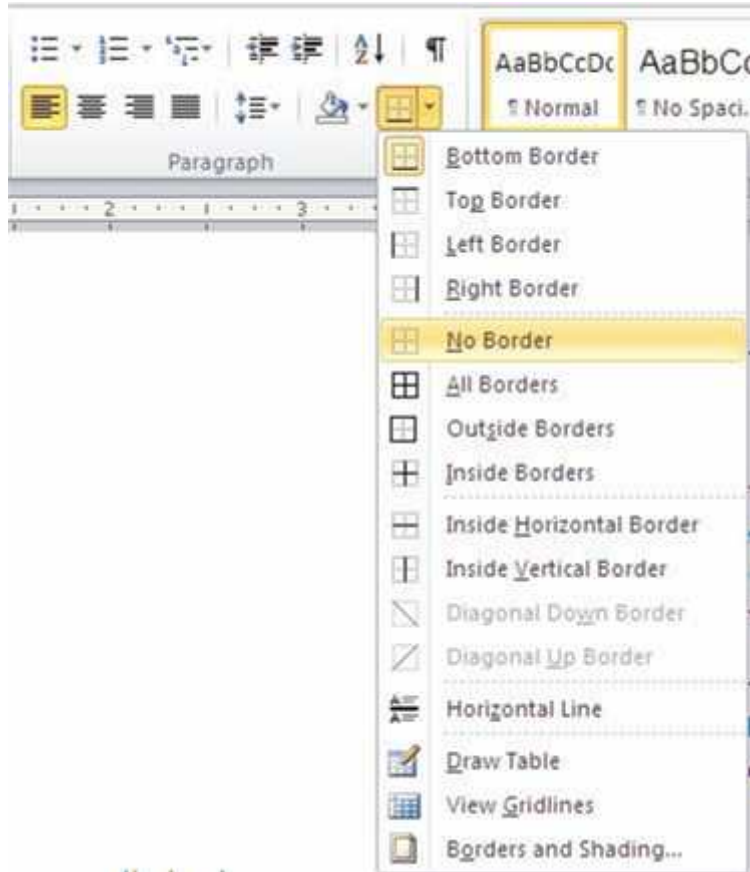
You can use Replace to remove an unwanted format by leaving the Replace With control empty. Or you can quickly format all occurrences of the same text by entering that text in the Find control. For more ways to use these options,.

◆ Eliminate sticky borders

If you type three hyphens and press [Enter], Word will replace them with a solid line that extends from the left to the right margin. Sometimes this line sticks to the text or the bottom of the page no matter what you do to try to delete it. This happens when you enter the three hyphens directly under text; Word attaches the border as a paragraph format.

To quickly remove this sticky border, click inside the paragraph and choose No Border, as shown in **Figure I**, from the Border drop-down in the Paragraph group. In Word 2003, this option's on the Formatting toolbar.

Figure I



◆ **Locating the Formatting Toolbar**

If it is not possible to locate the formatting toolbar, the process of adding it is quite simple; select the *View* menu. Next, select the *Toolbars* option and click the formatting toolbar. After doing so, a check mark should appear to the left of the formatting option. The formatting toolbar is what houses the options for formatting the text of your document.

1. Select *View*.
2. From the *Insert* menu, select *Toolbars*.
3. From the *Toolbars* menu select *Formatting*.

3.3 CREATING A TABLE

There are two ways to create a table:

- ◆ Insert a table by using the *Insert Table* dialog box or the *Insert Table* button on the *Standard Toolbar*.
2. Draw a table by using the *Tables and Borders Toolbar*.

Columns, Rows and Cells in a Table

Day	Departure Time	Arrival Time	Flight Number
Mon-Fri	7:20 a.m.	8:20 a.m.	664
Sat	9:00 a.m.	10:05 a.m.	808
Mon-Sun	9:25 a.m.	10:30 a.m.	822
Mon-Sat	10:50 a.m.	11:55 a.m.	968

Note: You can apply formatting options to tables, such as borders and shading, or display a table with or without gridlines.

Keying and Editing Text in Tables

Keying and editing text in tables is similar to working with text in paragraphs. The Insert and Delete keys work the same way. But if you key text in a cell and press Enter, a new paragraph is created within the same cell. The first row of a table is often called the header row, in which each cell contains a heading for the column of text below it.

Shortcuts for Moving Between Cells

To move to	Press
Next Cell	Tab
Previous Cell	Shift + Tab
First Cell in the Current Row	Alt + Home
Last Cell in the Current Row	Alt + End
Top Cell in the Current Column	Alt + PgUp
Last Cell in the Current Column	Alt + PgDn

This way you can create a table with more than ten columns and eight rows, as well as set the column width behavior.

1. Click Insert > Table > Insert Table.
2. Set the number of columns and rows.
3. In the AutoFit behavior section you have three options for setting how wide your columns are:
 - Fixed column width: You can let Word automatically set the column width with Auto, or you can set a specific width for all of your columns.
 - AutoFit to contents: This will create very narrow columns that will expand as you add content.
 - AutoFit to window: This automatically changes the width of the entire table to fit the size of your document.

If you want each table you create to look like the table you're creating, check Remember dimensions for new tables.

A **table** is a grid of cells arranged in **rows** and **columns**. Tables are useful for various tasks such as presenting text information and numerical data. In Word, you can create a **blank** table, **convert text** to a table, and apply a variety of **styles** and **formats** to existing tables.

To insert a blank table:

1. Place your insertion point where you want the table to appear, then select the **Insert** tab.
2. Click the **Table** command.
3. A drop-down menu containing a grid of squares will appear. Hover the mouse over the grid to select the number of **columns** and **rows** in the table.
4. Click the mouse, and the table will appear in the document.
5. You can now place the insertion point anywhere in the table to add text.

To move the insertion point to the next cell, press the **Tab** key while typing. If the insertion point is in the last cell, pressing the **Tab** key will automatically create a new row.

To convert existing text to a table:

In this example, each row of information contains an **item name** and **price**, separated by tabs. Word can convert this information into a table, and it will use the tabs to separate the data into two columns.

1. Select the text you want to convert.
2. From the **Insert** tab, click the **Table** command.
3. Select **Convert Text to Table** from the drop-down menu.
4. A dialog box will appear. Choose one of the options in the **Separate text at:** section. This is how Word knows what text to put in each column.
- 5.
6. Click **OK**. The text appears in a table.

3.4 MAIL MERGING

Mail Merge

You use mail merge when you want to create a set of documents, such as a form letter that is sent to many customers. Each document has the same kind of information, yet some of the content is unique.

The mail merge process entails the following overall steps:

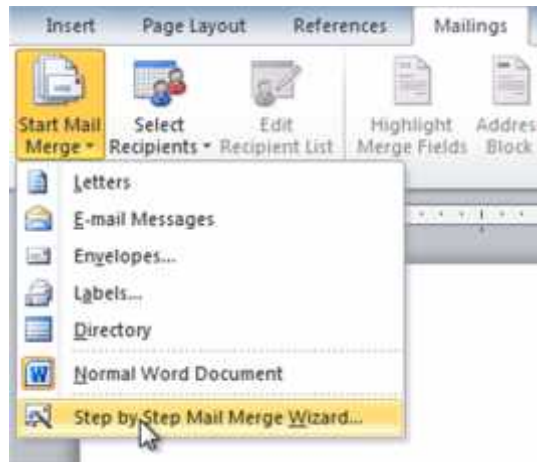
- **Set up the main document.** The main document contains the text and graphics that are the same for each version of the merged document — for example, the return address in a form letter.
- **Connect the document to a data source.** A data source is a file that contains the information to be merged into a document. For example, the names and addresses of the recipients of a letter.
- **Refine the list of recipients or items.** Microsoft Word generates a copy of the main document for each recipient or item in your data file. If you want to generate copies for only certain items in your data file, you can choose which items (or records) to include.
- **Add placeholders, called mail merge fields, to the document.** When you perform the mail merge, the mail merge fields are filled with information from your data file.
- **Preview and complete the merge.** You can preview each copy of the document before you print the whole set.

When you are performing a **Mail Merge**, you will need a **Word document** (you can start with an existing one or create a new one) and a **recipient list**, which is typically an **Excel workbook**. If you'd like to work along with the lesson, you can download the examples below.

- ♦ **Letter** (Word document)
- ♦ **Recipient list** (Excel workbook)

To use Mail Merge:

1. Open an **existing** Word document, or create a **new** one.
2. Click the **Mailings** tab.
3. Click the **Start Mail Merge** command.
4. Select **Step by Step Mail Merge Wizard**.



The Mail Merge task pane appears and will guide you through the **six main steps** to complete a merge. The following is an example of how to create a form letter and merge the letter with a **recipient list**.

Step 1:

1. Choose the type of document you want to create. In this example, select **Letters**.



2. Click **Next: Starting document** to move to Step 2.

Step 2:

1. Select **Use the current document**.



2. Click **Next: Select recipients** to move to Step 3.

With the mail merge process, your organization can create a batch of personalized letters or emails to send to your professional contacts. Each letter or email can include both standard and custom content. You can choose, for example, to greet each recipient by their first name, use their mailing address, or add unique information like a membership number. All the information you use to customize the letter or email is taken from entries in your data source, which can be a mailing list.

With the combination of your letter or email and a mailing list, you can create a mail merge document that sends out bulk mail to specific people or to all people on your mailing list. You also can create and print mailing labels and envelopes by using mail merge.

Mail merge process

The mail merge process has three documents involved in creating and printing letters and emails, or labels and envelopes.

- ◆ Your main document :This document contains text and graphics (a logo or an image, for example) that are identical for each version of the merged document. An example of identical content is the return address on the envelope or in the body of a letter or an email message.
- ◆ Your mailing list :This document contains the data that is used to fill in information in your main document. For example, your mailing list contains the addresses to be printed on the labels or envelopes.
- ◆ Your merged document: This document is a combination of the main document and the mailing list. Information is pulled from your mailing list and inserted in your main document, resulting in the merged document—the letter, email, labels, or envelopes—personalized for different people on the mailing list.

What bulk mailing document do you want to create?

- ◆ Letters

Create and print a batch of personalized letters for everyone on your mailing list. Each letter prints on a separate sheet of paper.

- ◆ Email

Create and send email messages for each person on your mailing list with custom information inserted from the mailing list.

- ◆ Envelopes

Create and print a batch of envelopes for mailing

- ◆ Labels

Create and print sheets of mailing labels; each label is a unique mailing address.

Benefits of Mail Merge

_It is quick, easy and saves time.

Mail Merge Use

1. Create mass mailings :
2. Letters - _Form letters
3. Envelopes - Can print directly to the envelope
4. Labels - Faster than envelopes - Not as professional as printing directly to the