Insert Word Field—insert various decision-making prompts for selecting specific merge records.

View Merged Data—displays the main document merged with information chosen from the data records.

First Record—displays the main document merged with information from the first data record selected for merging.

Previous Record—displays the main document merged with information from the selected record.

Go To Record—displays the main document merged with information from the selected record.

Next Record—displays the main document merged with information from the next data record selected for merging.

Last Record—displays the main document merged with information from the last data record selected for merging.

Mail Merge Helper—used to produce form letters, mailing labels, envelopes, catalogs, and other types of merged documents.

Check for Errors—reports errors in the main document or the data source that may prevent merging.

Merge to New Document—runs the mail merge and places the results in a single, new document.

Merge to Printer—runs the mail merge and prints the results.

Start Mail Merge—opens the Mail Merge dialog.

Find Record—searches for specific data records within a selected field.

Edit Data Source—opens the Data Form dialog where mail merge data can be viewed and edited one record at a time.

Here's how the general Mail Merge process works.

1. Open a new blank document.

2. Create your data by either typing it into a table or by importing it from a database, spreadsheet program, or ASCII text file. Look at the following example. Notice how column or field headings are placed in the first row; these are used to identify each data element in the main document.

| Fname	Lname	Address	City	State	Zip	Telephone
Bala	Murugan	93Bharathi Nagar	Tirunelveli	TN	NIL	0462 -532226
Nancy	Spivey	523 bern Lane	Sattler	TX	77545	210-263-7111
Bernard	Runyan	121Medical st	Dallas	TX	75075	512-238-9090

Note:

Do not put any leading characters prior to "Title." That is, make sure there are no spaces or carriage returns, etc.

1. Save the data document (in the example, Mrgdata.doc is used as the filename).

2. Click the New button (or use File / New) to open another new document; then use Tools / Mail Merge to display the Mail Merge Helper dialog.

3. Click the Create button to display a list of Mail Merge choices.
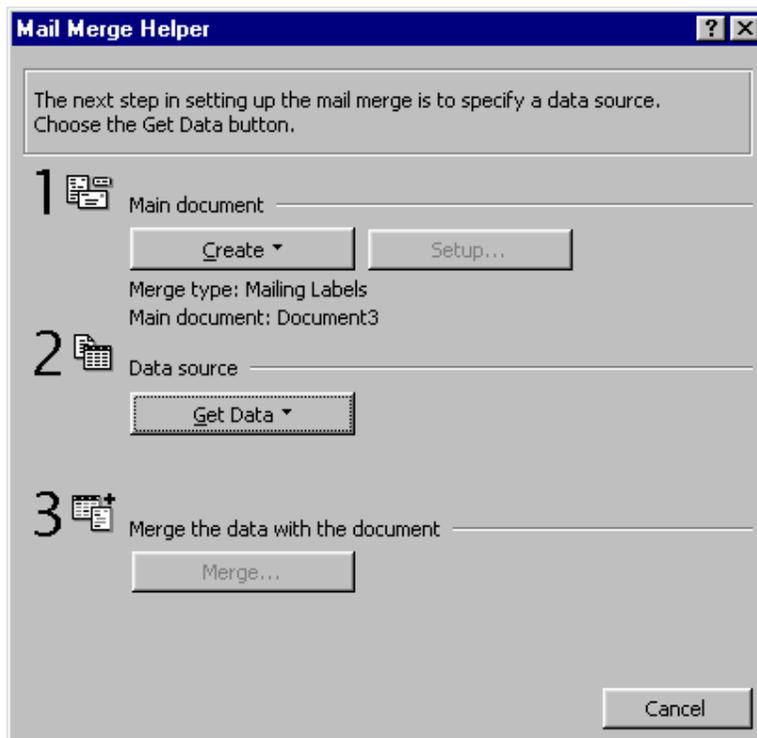
4. Pick Form Letters (or another appropriate choice).
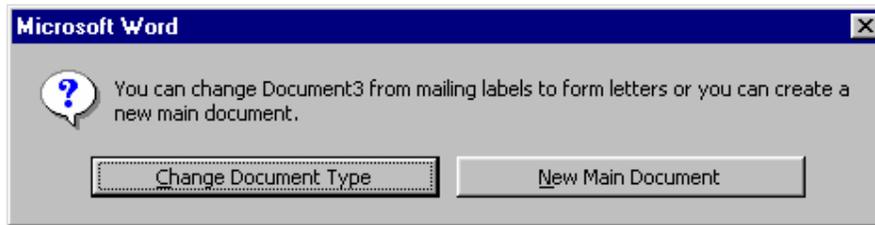
5. Pick the Active Window button to use the displayed blank document.

Note:

You may open a new document in another active document by selecting New Main Document.

In this case, Document11 is shown in the illustration in Step 8; Document2 is more likely if you've only opened two new documents. In any case, the document number will be the number associated with the number of new documents you have opened in this session of Word, and is really immaterial. (You could also pick an existing form letter document here if one were prepared.)

5a. Use the Get Data button of the Mail Merge Helper dialog to specify the data resource you want to use. Click on Open Data Source….

5b. Select the appropriate data source file in the Open Data Source dialog (Mrgdata.doc in this example), then click the Open button.

5c. Select the proper field delimiter by clicking the Field delimiter down arrow and highlighting the appropriate delimiter (separator). If your data source uses tabs to delimit (separate) the data fields, then highlight Tab, click on OK, and click on Close.

Note:

If you previously attempted to perform a mail merge operation with the data source, you will not necessarily see the Header Record Delimiters dialog. It only appears the first time you use the file as a data source and then only if you are not using the default delimiters.

```
Get Data ▾
   Create Data Source...
   Open Data Source...
   Use Address Book...
   Header Options...
```

5d.   Click on the Edit Main Document button.

6. Now create a main document that resembles the following one, using the Insert Merge Field button to pick and insert the merge field names at the cursor position. Be sure to insert spaces and punctuation as needed.

7. Use File / Save and give the new document a name, such as Mrgmain.doc. Then click the Mail Merge Helper button on the Mail Merge toolbar to check the names of the Main Document and Data Sources filenames. Click the Merge button if the filenames are correct.

8. Use the View Merged Data, Next Record, and Previous Record buttons to see how the data looks when merged.

9. If, after checking for errors, all is well, you are ready to print your document to your printer or to a file. The default name of the merged document is Form Letters1. Closing this document returns you to the main document where the Mail Merge toolbar is displayed. From here you can use the appropriate button on the Mail Merge toolbar to print or examine your data.

Merge documents can be used for a variety of purposes. In addition to form letters, you can also create telephone directories, customer lists, inventory reports, and much more, you can read information into Word from other programs including databases and spreadsheets. You can also read ASCII files into a data document. These file types all serve as data files that are frequently used by a main mail merge document.

Hands-on Activity

In this activity you print the TextBox2.doc file. Then you create and print a mail merge document.

1. Start the Word program; click the **Open** button on the toolbar and open the **TextBox2.**

2. Prepare your printer for printing; then click the **Print** button on the toolbar to print the document.

3. Use **File / Close** to close the TextBox2.doc file.

4. Click the **New** button on the Standard toolbar to open a blank Document2.

5. Type the following data fields in a 6 x 6 table. Then save it as **Clubdat.doc**. (Or use Insert / File and pick Clubdat.doc from the \MSOffice\Files folder to save time.)

6. Click the **New** button again to open a second document. Now use **Tools / Mail Merge** to display the Mail Merge Helper dialog.

7. Click the **Create** button, pick **Form Letters**, and then click the **Active Window** button to choose the open document as the main document.

Mrms	Fname	Lname	Address	CSZ	Phone
Mr.	John	Simmons	123 Jogging Dr.	Austin, TX 78058	(512) 345-0987
Ms.	Linda	Garcia	1412 Elk Road	Denver, CO 58675	(303) 569-0987
Mr.	Tom	Johnson	36 Polynesia	Naples, FL 39037	(813) 468-0980
Ms.	Denise	McEvoy	44 5th Avenue	New York, NY 01220	(212) 444-5555
Mr.	Hernando	Mendez	12 Boeing Dr.	El Paso, TX 76905	(915) 514-5432

8. Click **Get Data**, select **Open Data Source**, select **Clubdat**, and click **Open**. Then click the **Edit Main Document** button.

9. Type the following text. (Do not type bracketed items.) Position your cursor and then use the **Insert Merge Field** button to display and insert the indicated mail merge field names into your main document.

```
March 19, 2000
<<Mr ms>> <<Fname>> <<Lname>>
<<Address>>
<<CSZ>>
Dear <<Fname>>,
This letter is to inform you
```

10. Click the **Mail Merge Helper** button to verify the filenames.

11. Try several of the buttons on the Mail Merge toolbar including the View Merged Data, Next Record, Previous Record, Check for Errors, Edit Data, Mail Merge, Find Record, and Edit Data Source buttons to determine their effect.

12. If you wish, use the **Merge to Printer** or **Merge to New Document** buttons to see the finished results.

13. Click the **Save** button to save the Main Document as **Clubmain.doc**.

14. Press 0**<Alt+F4>** to exit Word. You may wish to save the documents for later referral.

8.3 Master Document

Word's master document feature, which is accessed using View / Outline, is used to combine two or more documents into a larger, fully paginated document. An ideal use for the master document feature is to integrate and control the pagination (page numbers, headers, footers, etc.) of several documents containing chapters of a book into a single, multi chapter book. Master documents put the pages of each subdocument (such as a chapter) in the proper sequential order, i.e., 1 to n. You can also use Insert / Index and Tables to prepare a complete table of contents, table of figures, table of authorities, and an alphabetical index.

Changes to subdocuments within a book often move headings and words contained in your alphabetical index to different pages. The new page numbers associated with moved elements are automatically adjusted. Just delete the old table or index and rerun the table of contents and re-index to capture the changes. This eliminates the need to edit your book's front matter (list of tables) and indexes every time you make a change. If you create large, multi chapter documents, becoming proficient with Word's master document feature will save you a lot of time.

Each new subdocument within a master document is put in a separate section. You can use the Layout tab of the Page Setup dialog to control the way your sections behave. For example, you may want each section to begin on an odd-

numbered, right-hand page; have a running header on every left-hand page of the book and unique chapter headers on the right-hand pages; and use small Roman numerals in the front matter (title page, copyright page, and contents pages) and regular Arabic numerals in the balance of the book. It is easy to obtain these effects when you use the Master Document and Section features available in Word.

The outlining and Master Document Toolbars

When you display a document in the Outline view, the Outlining and Master Document toolbars appear.

Use the Outlining toolbar to apply different heading levels or body text to selected headings, paragraphs, and lists. The Outlining toolbar begins with the Promote button and includes all the buttons to the right until the Master Document View button.
The Master Document toolbar begins with the Master Document View button and includes all the toolbar buttons to the right. Use the Master Document toolbar to manage subdocuments that comprise the master document under construction.

You can display the button names in the usual manner. Just put your mouse pointer on a button to display a descriptive label. Look at the status bar at the bottom of your screen to see additional information about the button. Following is a description of each of the buttons on the Outlining and Master Document toolbars. These toolbars are displayed when you choose View / Master Document.

Outlining Toolbar

This toolbar promotes, demotes, and applies different heading styles to one or more selected list elements or paragraphs.

Promote—Increase the selected paragraph to the next higher heading level, i.e., promote a "Heading 3" to a "Heading 2."

Demote—Decrease the selected paragraph to the next lower heading level, i.e., demote a "Heading 1" to a "Heading 2."

Demote to Body Text—Change the selected heading to Normal (or body text).

Move Up—Move the selected heading or paragraphs ahead of the preceding heading or paragraph.

Move Down—Move the selected heading or paragraphs below the following heading or paragraph.

Expand—Display the next lower level headings and/or paragraphs by selecting a heading and clicking the Expand button.

Collapse—Hide the next lower level headings and/or paragraphs by selecting a heading and clicking the Collapse button.

Show Heading 1 through 7—Click the 1 through 7 button to display those headings at and higher than the selected level. For example, if you wish to display headings 1, 2, and 3, click 3.

All—Display all heading levels.

Show First Line Only—Show only the first line of text of each paragraph.

Show Formatting—Show or alternately hide heading formats; when hidden, headings are shown as normal text.

Master Document Toolbar

Master Document View—Display or hide the Master Document toolbar buttons.

Collapse or Expand Subdocuments—Collapse or expand the display of subdocuments within the master document.

Create Subdocument—Insert a new subdocument within the current master document.

Remove Subdocument—Remove the selected subdocument from the master document.

Insert Subdocument—Open a document and insert it as a subdocument.

Merge Subdocument—Merge two or more adjacent subdocuments as a single subdocument.

Split Subdocument—Divide a subdocument into two subdocument sections.

Lock Document—Lock the selected subdocument to prevent changes. Also, use this button to unlock the document when changes are required.

Using Master Document

Following is a step-by-step approach for creating a book (or similar multi chapter document) that is created by using several smaller documents. The procedure also guides 0you through creating a table of contents and index.

Note:

The following procedure makes use of existing documents. These are inserted into the master document as subdocuments. You can also create and edit new and revised documents directly into a master document. Hence, there are many ways to create and save master documents. You may wish to experiment with the Master Document toolbar until you find the method you like best.

Document Creation

1. Create and save each section or chapter of a book as an individual document. End each document with a carriage return. Be sure to assign a descriptive name, such as Chap01.doc, Chap02.doc, etc. Using sequential names sorts them within the active file folder, making each subdocument file easy to find.

2. Open a new document after all individual chapter documents have been created and saved.

3. Click View / Outline to display the Outlining and Master Document toolbars.