

LEARNING ABOUT MAIL MERGE: PART II

Okay, let's continue with our lesson. Let's review a moment. First you opened Word 7.0 and opened the *Mail Merge Helper* dialog by clicking on Tools from the menu bar. Then you selected create source and were presently deleting the heading from a pre-prepared list. The Create Data Source dialog should still be up on your screen. To add to the list of headings (listed on the front of *Learning About Mail Merge: Part I*), do the following steps:

- Step 1 In the *Create Data Source* window called *Field Name*, type the new title: *Nickname*
- Step 2 Click on the *Add Field Name* button to add *Nickname* to the *Field Names In header Row*

Pretty neat. *Nickname* has been added to the bottom of the list. Now go ahead and add the following to the list by repeating the steps above. Here are the new entries you will make:

ZipCode
Hobby
Grade

Notice that *ZipCode* is all one word. You won't have to add the other entries because they are already there.

Remember, now. We are just creating heading or categories at this time. The actual information about each child will be entered shortly, but this list serves as a template for the information we will enter. In a sense, we are actually going to create a simple database of information about children we are in charge of and we will store their names, addresses, hobby and grade in our database.

Okay, enough preaching. Let's get going with some more instruction.

- Step 3 Click on the OK button on the *Create Data Source* dialog, to accept our new field list.
- Step 4 You will get a *Save As* dialog box, so that you can save the work you have done on the data source.
- Step 5 Type a filename in the *File name* window (notice where the file is being saved – check the *Save in* window) Let's call the file: *kid source*
- Step 6 Click the *Save* button on the dialog box
- Step 7 Click on the *Edit Data Source* button that appears.

Hey! We got something new: the data form. Take a good look at this. Notice that it has little windows on the left side, all labeled with the headings you typed into the data source dialog. This is where you will enter the names of the children in your class. Remember this is only a sample merge exercise, so we will only be using a few children as examples. You can expand this lesson to greater lengths, however, once you learn the basics.

Let's now enter the names and information for the three children in our fictitious class. Use the names on the information sheet that accompanies this lesson. Here are the steps for doing this:

Step 1: Click on the *First Name* window to get a flashing cursor, if there is not already one there.

Step 2: Tap the Enter key to move down to the *Last Name* window.

This is the procedure throughout. When you have entered the *Hobby* information, tap the Enter key and the cursor will jump up to the *First Name* window, again. Notice that the *Record* number is incremented. Use this routine until you have entered the information for all three students. Of course you can use the editing keys (insert, delete, backspace, arrows, etc.) to make necessary corrections as you are typing.

When you finished all of the names click on the *OK* button and your source data will be saved to disk. Take a look at the top of your screen and you will see that you now have another tool bar added. It should look something like this illustration:



You are now back to the main document and are ready to start playing with mail merge.

In the next part of this lesson we will try some simple experiments using the source file you have just created and the document you are now in.

Leave your screen as is and go to the next lesson.