

WORD - DESIGNING FORMS and MAIL MERGE

Introduction

This course provides these key users with the skills to create sophisticated form templates that can be used by other people in a team, department or organisation and use the Word mail merge facility efficiently.

In order to produce consistent-looking documents within an organisation, Word offers the facility to create document "stencils" through user and workgroup templates; for individuals and groups of people respectively. It is essential that certain key Word users in the organisation are, therefore, responsible for creating and maintaining these templates.

The crux of creating templates for others to use is ensuring they are stored in the correct location for other users to access. Creating and modifying both paragraph and character styles, is essential to maintaining a consistent appearance.

The Mail Merge Summary: Sending letters to multiple recipients can be time consuming and laborious. Mail Merge allows you to quickly send the same or very similar documents

Course Content

Designing a Form

AutoText

Headers and Footers in multiple sections

- ◆ Same as Previous
- ◆ Odd v Even

Working with Graphics

Symbols

Basic Fields

- ◆ Date and Time
- ◆ Doc Info (Properties)
- ◆ Toggle Code
- ◆ Update
- ◆ Tools - Options - View - Field Shading

Creating Fields

- ◆ Switches
- ◆ Fill In Field
- ◆ CTRL & SHIFT F9

Forms Fields

- ◆ Text Boxes
- ◆ Drop Down Lists
- ◆ Check Boxes
- ◆ Field Options
- ◆ Protect

Macros

- ◆ Record, Run & Delete
- ◆ View Code

Templates

- ◆ User
- ◆ Workgroup

Mail Merge

- ◆ Letters
- ◆ Envelopes
- ◆ Labels

Using the Mail Merge Wizard to create standard letters

- ◆ Merge to Printer
- ◆ Merge to New Document

Using existing data sources in the Mail Merge process

- ◆ Word
- ◆ Excel
- ◆ Access
- ◆ Outlook Contacts

Design guidelines for a data source in either Excel, Access or Word

- ◆ Field Headings

Creating a data source in Excel

- ◆ Filtering the data source
- ◆ Advanced query options

Creating labels and envelopes using the Mail Merge Wizard Using the Mail Merge toolbar as an alternative to the Wizard

- ◆ Customizing the Toolbar for Insert- Merge Field (XP only)

Using Word fields to vary the mail merge output

- ◆ IF then Else

Duration: 1 Day Course

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