How to create letters using Mail Merge in Microsoft Word

See below for help on mail merge.

Mail merge is a function within Microsoft Word that allows a user to easily customise a standard letter with minimal time and effort. A letter can quickly be created for each patient, the patients’ information is taken from a data source, which should either be a MS Excel Spreadsheet or a MS Access Database.

Mailings > Start Mail Merge > Letters

Select Recipients > Use Existing List > Browse and locate data source

Ensure cursor is in the correct place for first merged field

Insert Merge Field > Select appropriate field

Repeat steps 3 and 4 until all merged fields are inserted

Finish and Merge > Edit Individual Documents

*Other Options*

When inserting fields for the greeting line the Greeting Line can be used

Greeting Line > Set up as required (remember no punctuation in modern style letters, apart from the body of the letter)

Match required fields > OK > OK

When inserting address fields the Address Block can be used

Address Block > Match Fields

Match required fields > OK > OK

Creating Tables in Microsoft Word

Creating tables in Microsoft Word allows you to present figures and information in an easy read format.

* Insert > Table
* On the grid use your mouse to highlight how many rows and columns you require
* Click with your mouse on the last block when finished
* Each block in a table is called a cell. Use the tab key or arrow keys to move from cell to cell. Once you have created a table you will note the Table Tools ribbons will be activated. The Design ribbon allows you to add a table style, shading, add or remove borders and change line style and width.

Insert a Row, Column or Cell

Highlight the row, column or cell next to where you wish to create a new one

Table Tools, Layout > select the required option i.e. Insert Right

Delete a Table, Row, Column or Cell

Highlight the row, column or cell you want to delete

Table Tools, Layout > Delete

Merge a Table, Row, Column or Cell

The merge function allows you to turn two or more cells into one.

Highlight the rows, columns or cells you want to merge

Table Tools, Layout > Merge Cells

Split a Table, Row, Column or Cell

The split function allows you to turn a cell or table into multiple rows and/or columns.

Highlight the rows, columns or cells you want to split

Table Tools, Layout > Split Cells / Split Table

Resizing Column Widths

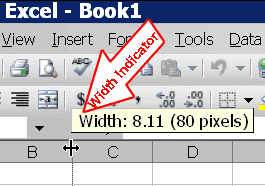
You can resize your column widths by placing the cursor on the line that separates two columns. This triggers the width indicator to appear. After the indicator appears, click and drag with the mouse to adjust the column width. You can automatically adjust the column width to fit the text by double clicking rather than clicking and dragging.

Table Headings

If a table continues on more than one page, the table headings will display on the first page only. To correct this problem, you can assign a row as the heading row. Heading rows are repeated on the top of your table at the top of each page.

Highlight the row you want as the header row

Table Tools, Layout > Repeat Header Rows

Sorting a Table

Table data can be sorted in ascending or descending order.

Highlight the column/row you want the data sorted by

Table Tools, Layout > Sort

In the Sort dialog box ensure the correct column/row is selected that you want to sort by

Select either Header row or No header row depending on the cells you highlighted

OK