

Word - Effective and personalized mailings

Duration: 1 day

Audience: Pour tous

Who is this training for?

Microsoft Word users who want to automate the creation of multiple documents.

Training objectives

Use mail merge to create multiple documents in a single action.

Summary

Automate your mailings and personalize your communications in the blink of an eye! Need to send communications to multiple recipients while maintaining a personalized touch? Word – Efficient and Personalized Direct Mail training allows you to master merging and direct mail to quickly produce targeted, professional and impactful documents. With this training, you will learn how to save a considerable amount of time by automating the creation of letters, emails, envelopes and labels, while adapting the content to each recipient.

Course outline

Know the basics of merging

- Identify the elements specific to the main document and the data source
- Introduce the functionality of the Mail Merge ribbon
- Use the Mail Merge wizard

Manage a data source

- Create the data source
- Edit the data source
- Find a record
- Add a new record
- Delete a record

Prepare the master document and perform the merge

- Create the document main
- Link the main document to a data source
- Edit the main document
- Merge the data with the main document
- Apply filters to limit the list of recipients
- Insert fields in the main document
- Insert rules to customize the result of the merge

Create envelopes, labels, and lists

- Create mail merge envelopes
- Create mail merge labels
- Create lists (directory)
- Create merge e-mail messages

Create templates

- Use existing templates
- Create custom templates
- Manipulate document templates

Use group work tools

- Use track changes
- Review the modified document
- Explore the Checks pane
- Create and manipulate comments
- Compare documents
- Protect the document for comments and changes

Approach and methodology

- Lectures
- Demonstrations
- Guided and individual exercises

Prerequisites

Microsoft Word - Creating Simple Documents or Equivalent Content

Recommendations

- Know the basics of text input and formatting (writing, selecting, copy-paste)
- Be comfortable with file management (opening, saving, naming a document correctly)
- Understand the structure of a document (headings, paragraphs, sections)
- Have a logic for organizing content (prioritize information, structure a text clearly)