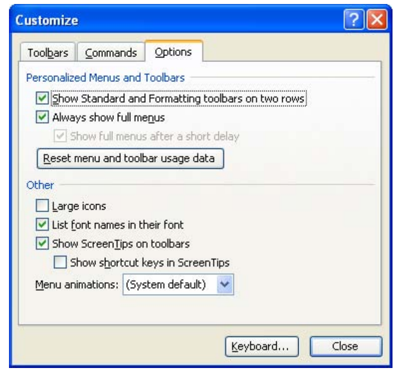
Merging Letters, Envelopes and Labels
Word 2003

Educational Technology Center

Resources for this class can be found at
http://www.davis.k12.ut.us/district/etc/documents/word_merge_doc.html

Toolbars

Two Rows of Toolbars



- The **Standard** and **Formatting** toolbars can be arranged on separate rows.
- On the **Menu Bar**, click on **Tools ➜ Customize….**
- Click on the **Options** tab.
- Click to place a checkmark in front of **Show Standard and Formatting toolbars on two rows**.
- Click on the **Close** button

Selecting Toolbars

- On the **Menu Bar**, click on **View ➔ Toolbars ➔** and choose the desired toolbar.
- Toolbars with a check mark in front of them are already being displayed on the screen.

Moving Toolbars from the Middle

- Toolbars can be docked at the top of the screen.
- Double click on the **Title Bar** of the toolbar.

Moving Docked Toolbars

- Toolbars located on one of the sides of the screen (top, side, or bottom) are docked.
- Move the cursor to the left end of the toolbar. (The cursor changes to a four-headed arrow.)
- Click and drag the toolbar to the desired location.

Full Menus

- On the **Menu Bar**, click on **Tools ➜ Customize….**
- Click on the **Options** tab.
- Click to place a checkmark in front of **Always show full menus**.
- Click on the **Close** button

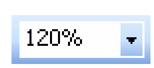
Views

Page Views

- On the **Menu Bar**, click on **View** and choose the view.
- **Normal -** This is the default setting. No margins are shown.
- **Print Layout -** This view shows the document as it will print out.

Zoom Box

- On the **Menu Bar**, click on **View ➜ Zoom** <u>OR</u> click on the **Zoom** box.



- Choose a percentage, **Page Width**, **Text Width**, **Whole Page**, or **Two Pages**.
- **Percentages** make the document on the screen appear in a size similar to the printed document.
- **Page Width, Text Width, Whole Page,** or **Two Pages** makes the document on the screen appear in relation to the size of the screen.

The Task Pane

- The **Task Pane** offers help with the document and with selecting other documents or templates.

Opening the Task Pane

- On the **Menu Bar**, click on **View ➜ Task Pane**.

Closing the Task Pane

- Click on the **X** in the top corner of the **Task Pane**.

Choosing a Task Pane

- Click on the down arrow on the top right side of the **Task Pane** and choose one.
- The pop-down Menu will show Task Panes for New Document, Clipboard, Search, Insert Clip Art, and others.
  - **Getting Started –** Search or open recently used documents.
  - **Help** – Locate instructions on accomplishing tasks.
  - **Clip Art** - Helps find and insert clipart that is on the computer.
  - **Clipboard** - Shows the files on the clipboard (up to 24)
  - **New Document** - Blank Document, Templates, from existing documents.
  - **Reveal Formatting** - Displays the current format and allows quick changes.

Merging Outlined

- Merging is best done in the **Mail Merge Task Pane**.

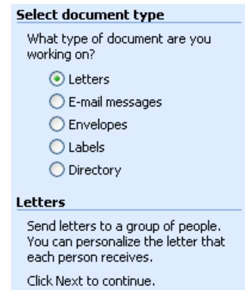
1. **Select document type –**
   - Select the type of document to be merged: letters, e-mail, envelopes, labels, or a directory.
2. **Select Starting document** –
   - Select the document to be used: the current document, from a template, or from an existing document.
3. **Select recipients** –
   - Select the recipients of the document using an existing list, a list of Outlook contacts, or by typing a new list.
4. **Write the Letter / Arrange the document** –
   - Set up the document, inserting the data fields in appropriate places.
   - Automate the process by inserting a date that is always updated, etc.
5. **Preview the document –**
   - Examine the document for completeness and correctness.
   - Be sure to save the form document.
6. **Complete the Merge** –
   - Finish the merge, either sending it to the printer or creating a new document for review and editing.

Types of Merges

- **Letters** - Use to create customized letters to a selected group of people.
- **E-mail messages** – Use to create e-mail messages to a selected group of people. (Must use **Outlook**.)
- **Envelopes** – Use to create addressed envelopes for a group mailing.
- **Labels –** Use to create address labels for a group mailing.
- **Directory –** Use to create a directory, a catalog, or a printed list of addresses.

Letters

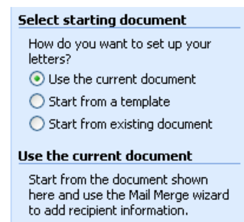
- Merging creates customized letters which appear more personal, with names, etc.
- On the **Menu Bar**, click on **Tools ➜ Letters and Mailings ➜ Mail Merge...**.
- The **Mail Merge Task Pane** is displayed.



Step 1 - Select the Document Type

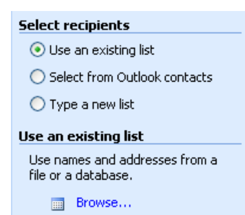
- Click to select **Letters** as the type of document.
- Click on **Next: Starting document** at the bottom of the **Task Pane**.

Step 2 - Select a Starting Document



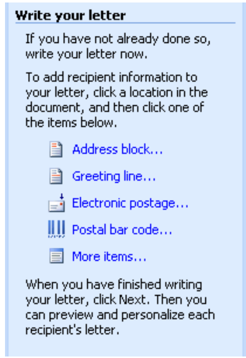
- Select the starting document.
- **Current Document** – Click on **Use the current document.**
    - Choose this to use the current document or to start with a blank document.
- **Existing Document** – Click on **Start from existing document.**
    - Choose this if the document already exists.
    - Click on **More files…** and then click on the **Open** button.
    - Navigate to the location of the desired file and click on it.
    - Click on the **Open** button.
- **Template** – Click on **Start from a template**.
    - Choose this to use a template.
    - Click on **Select template…**
    - Click on the desired template and then click on **OK**.
    - **Note** – Templates have pre-defined fields and other elements of the document that may need to be changed.
- Click on **Next: Select recipients** at the bottom of the **Task Pane**.

Step 3 - Select Recipients



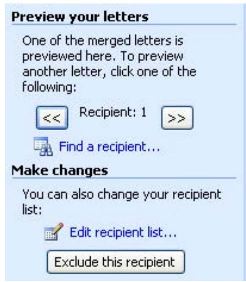
- Select the recipients of the document.
- **Existing List** – Click on **Use an existing list**.
    - Choose this to use an existing list such as an **Excel** spreadsheet or a **Word** document with a list.
    - Click on **Browse** to choose the list.
    - Navigate to the location of the desired file (i.e. spreadsheet).
    - Click on the desired file and then click on the **Open** button.
    - For more information on working with an existing list, see **Using a Spreadsheet** on page 14 or **Using an Existing List** on page 14.
- **New List** – Click on **Type a new list**.
    - Choose this to start a new list.
    - Click on **Create** to start entering the list.
    - For more information on creating a list, see **Creating the Data Source** on page 15 or **Creating a Spreadsheet List** on page 14.
- **Outlook Contacts** – Click on **Select from Outlook contacts**.
    - Choose this to use **Outlook** contacts as the list.
    - **Note – Outlook** must be your email program for this option to work.
- Click on **Next: Write your letter** at the bottom of the **Task Pane**.

Step 4 - Write Your Letter



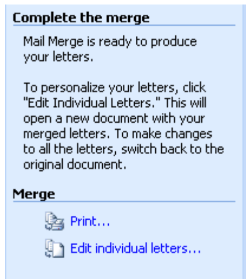
- Set up the document with the date, the field names, etc. as desired.
- To insert a field,
  - Click in the document where the field is to be inserted.
  - In the **Task Pane**, click on **More items…**
  - Click on the desired field in the list.
  - Click on the **Insert** button and then click on the **Close** button.
  - The name of the field is displayed. (i.e. <<**Last Name**>>)
  - For more information on inserting fields, see
    - **Inserting a Data Field** on page **17**.
    - **Inserting an Address Block** on page **17**.
    - **Inserting a Greeting Line** on page **18**.
  - For more information on graphics and formatting the document, see
    - **Graphics** on page **18**.
    - **Page Borders** on page **19**
- **Save the Form** –
  - On the **Menu Bar**, click on **File ➔ Save As….**
  - Navigate to the location the form is to be saved to.
  - Type a name for the form.
  - Click on the **Save** button.
- Click on **Next: Preview your letters** at the bottom of the **Task Pane**.

Step 5 - Preview Your Letters



- Check the letter for errors.
- In the **Task Pane**, on step 5 (**Preview your letters**), click on the **Next** and **Previous** buttons to see the recipient data placed in the document.
- To change the recipient list, in the **Task Pane**, click on **Edit recipient list**.
  - For more information on editing the recipient list, See **Organizing the Data** on page **14**.
- Click on **Next: Complete the merge** at the bottom of the **Task Pane**.

Step 6 - Complete the Merge



- Check the letter(s) for errors.
- In the **Task Pane**, click on **Print…** to print the merged letters.
- To edit the individual letters, in the **Task Pane**, click on **Edit individual letters…**
  - In the **Merge to New Document** window, choose the records to be merged into the new document. (All, Current record, or a specified range.)
  - Click on **OK**.
  - The merged letters open as a new document.

Envelopes

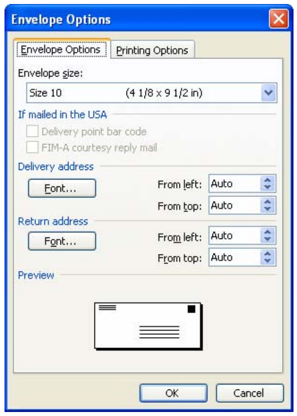
- On the **Menu Bar**, click on **Tools ➜ Letters and Mailings ➜ Mail Merge…**.

Step 1 - Select the Document Type

- In the **Task Pane**, choose **Envelopes**.
- At the bottom of the **Task Pane**, click on **Next: Starting document**.

Step 2 - Select a Starting Document

- Select the starting document.
- **Existing Document** – Click on **Start from existing document**
    - Choose this if the document already exists.
    - Click on **More files…** and then click on the **Open** button.
    - Navigate to the location of the desired file and click on it.
    - Click on the **Open** button.
- **Current Document** – Click on **Change document layout**
    - Choose this to use the current document or to start with a blank document.
    - In the **Task Pane**, click on **Envelope options…**.
    - Click on the **Envelope Options** tab.
    - Click on the down arrow in the **Envelope size** box and choose the desired size.
    - Change the **Delivery address** and the **Return address** as desired.
    - Click on **OK**.
- In the **Task Pane**, click on **Next: Select recipients**.

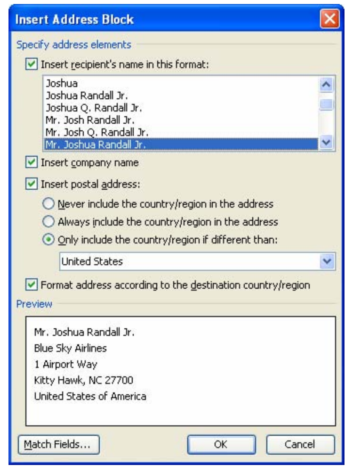


Step 3 - Select Recipients

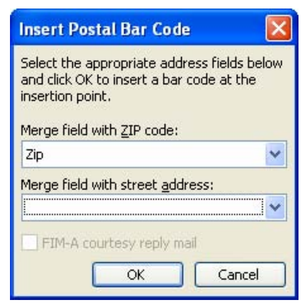
- **An Existing List –** In the **Select recipients** section, choose **Use an existing list**.
    - Choose this to use an existing list such as an **Excel** spreadsheet or **Word** table.
    - Click on **Browse** to choose the list.
    - Navigate to the location of the desired file (i.e. spreadsheet).
    - Click on the desired file and then click on the **Open** button.
    - For more information on working with an existing list, see **Using a Spreadsheet** on page 14 or **Using an Existing List** on page 14.
- **A New List –** In the **Select recipients** section, choose **Type a new list**.
    - Click on **Create** to start entering the list.
    - For more information on creating a list, see **Creating the Data Source** on page 15 or **Creating a Spreadsheet List** on page 14.
- In the **Task Pane**, click on **Next: Arrange your envelope**.

Step 4 - Arrange Your Envelope

- **Return Address** - Click on the top right corner of the envelope and type the return address.
- **Delivery Address** - Click in the middle of the envelope towards the bottom. There is a text box for the delivery address.
  - Click on **More Items…** in the **Task Pane** and build the address as desired.
  - OR click on the **Insert Address Block** button.
    - In the **Specify address elements** section, select the desired elements.
    - For more information on **Inserting an Address Block** on page **17**.
    - Click on the **Match Fields…** button at the bottom to double check the address block.
    - For more information on **Using Match Fields** see page **17**.
    - The **Preview** window displays the results of the choices.
    - Click on **OK**.



- **Postal Bar Code**
  - The **Postal Bar Code** is the bar code used for automatic routing by the postal service and is usually included on the envelope or label and not in the letter.
  - To include a postal bar code, in the **Task Pane**, click on **Postal bar code…**.
  - Choose the field with the zip code.
  - Click on **OK**.



- **Save the Envelope Form** –
  - On the **Menu Bar**, click on **File → Save As…**.
  - Navigate to the location the form is to be saved to.
  - Type a name for the envelope form.
  - Click on the **Save** button.
- In the **Task Pane**, click on **Next: Preview your envelopes**.

Step 5 - Preview Your Envelopes

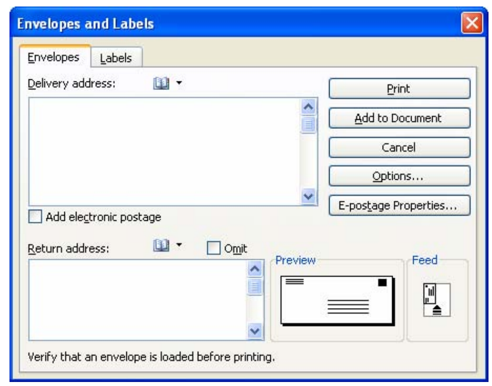
- In the **Preview your envelopes** section, click on the **Next** and **Previous** buttons to see each recipient placed in the envelope.
- To change the recipient list, in the **Task Pane**, click on **Edit recipient list**.
  - For more information on editing the recipient list, see **Organizing the Data** on page **14**.
- Click on **Next: Complete the merge** at the bottom of the **Task Pane**.

Step 6 - Complete the Merge

- Check the envelopes for errors.
- In the **Task Pane**, click on **Print…** to print the merged envelopes.
- To edit the individual envelopes, in the **Task Pane**, click on **Edit individual envelopes…**
  - In the **Merge to New Document** window, choose the records to be merged into the new document. (All, Current record, or a specified range.)
  - Click on **OK**.
  - The merged envelopes open in a new document.

- **Note** - The envelopes may need to be fed in one at a time, depending on the printer.

Creating an Envelope



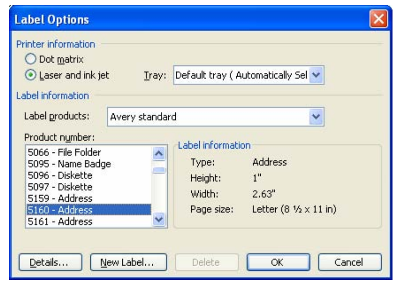
- On the **Menu Bar**, click on **Tools ➜ Letters and Mailings ➜ Envelopes and Labels...**.
- Click on the **Envelopes** tab.
- In the **Delivery address** box, enter the address.
- In the **Return address** box, enter your address.
- **Options**
  - Click on the **Options** button.
  - Click on the down arrow in the **Envelope size** box and choose the desired size.
  - In the **Delivery address** section, click on the **Font** button to change the font of the delivery address.
    - Adjust the position from the left and from the top OR leave it on **Auto**.
  - In the **Return address** section, click on the **Font** button to change the font of the return address.
    - Adjust the position from the left and from the top OR leave it on **Auto**.
  - Click on **OK**.
- **Add to Document** – The envelope can be added to a letter so that it is a single document.
  - Click on the **Add to Document** button.
  - The envelope appears above the letter (document).
  - The letter can now be written as normal. The envelope will print when the letter is printed.
  - **Note** – To print the envelope only
    - **O**n the **Menu Bar**, click on **File ➔ Print**.
    - In the **Page Range** section, choose **Pages:** and type **0** in the box.
    - Click on the **Print** button.
- Click on the **Print** button.

Labels

- On the **Menu Bar**, click on **Tools ➜ Letters and Mailings ➜ Mail Merge…**.

Step 1 - Select the Document Type

- In the **Task Pane**, choose **Labels**.
- At the bottom of the **Task Pane**, click on **Next: Starting document**.



Step 2 - Select a Starting Document

- Select the starting document.
- **Existing Document** – Click on **Start from existing document**
  - Choose this if the document already exists.
  - Click on **More files…** and then click on the **Open** button.
  - Navigate to the location of the desired file and click on it.
  - Click on the **Open** button.
- **Current Document** – Click on **Use the current document**
  - Choose this to use the current document or to start with a blank document.
  - In the **Task Pane**, click on **Label options…**.
  - In the **Label information** section, click on the down arrow and select the company which made the labels.
  - In the **Product number** window, select the desired label number.
  - For non-standard labels, see **Creating Custom Lists** on page **11**.
  - Click on **OK**.
- In the **Task Pane**, click on **Next: Select recipients**.

Step 3 - Select Recipients

- **An Existing List** – In the **Select recipients** section, choose **Use an existing list**.
  - Choose this to use an existing list such as an **Excel** spreadsheet or **Word** table.
  - Click on **Browse** to choose the list.
  - Navigate to the location of the desired file (i.e. spreadsheet).
  - Click on the desired file and then click on the **Open** button.
  - For more information on working with an existing list, see **Using a Spreadsheet** on page 14 or **Using an Existing List** on page 14.
- **A New List** – In the **Select recipients** section, choose **Type a new list**.
  - Click on **Create** to start entering the list.
  - For more information on creating a list, see **Creating the Data Source** on page 15 or **Creating a Spreadsheet List** on page 14.
- In the **Task Pane**, click on **Next: Arrange your labels**.

Step 4 - Arrange Your Labels

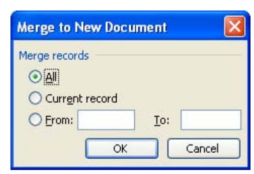
- Set up the label with the desired fields.
- The first cell is the anchor cell. Set of the desired fields in that cell.
- For more information on inserting fields, see
  - **Inserting a Data Field** on page **17**.
  - **Inserting an Address Block** on page **17**.

- The **Postal Bar Code** is the bar code used for automatic routing by the postal service and is usually included on the envelope or label and not in the letter.
  - To include a postal bar code, in the **Task Pane**, click on **Postal bar code**.
  - Choose the merge field that has the postal code.
  - Click on **OK**.
- For more information on graphics and formatting the document, see
  - **Graphics** on page **18**.
  - **Page Borders** on page **19**.
- To copy the same structure of fields and formatting to the other labels, click on the **Update all labels** button in the **Replicate labels** section.
- **Save the Label Form** –
  - On the **Menu Bar**, click on **File → Save As…**.
  - Navigate to the location the form is to be saved to.
  - Type a name for the label form.
  - Click on the **Save** button.
- In the **Task Pane**, click on **Next: Preview your labels**.

Step 5 - Preview Your Labels

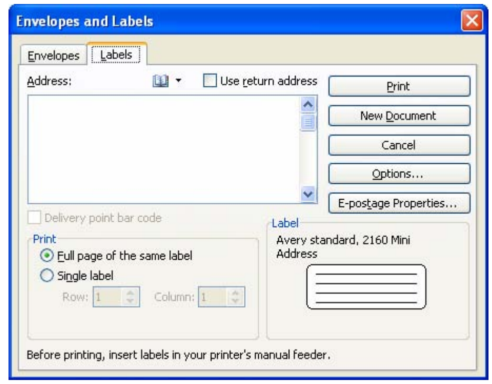
- Review the labels for errors.
- In the **Task Pane**, click on **Next: Complete the merge**.

Step 6 - Complete the Merge



- In the **Task Pane**, click on **Print…** to print the merged labels.
- To edit the individual labels, in the **Task Pane**, click on **Edit individual labels…**
  - In the **Merge to New Document** window, choose the records to be merged into the new document. (All, Current record, or a specified range.)
  - Click on **OK**.
  - The merged labels open in a new document.

Labels - A Page of the Same

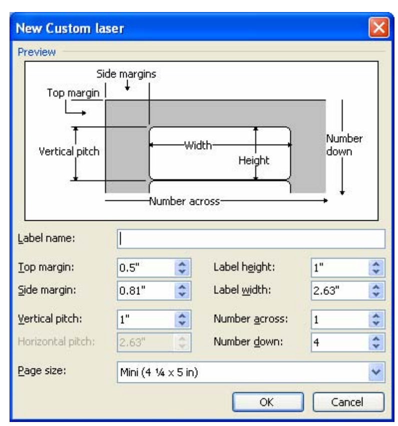


- On the **Menu Bar**, click on **Tools ➜Letters and Mailings ➜ Envelopes and Labels...**.
- Click on the **Labels** tab.
- In the **Address** window, enter the desired information.
- In the **Print** section, choose **full page of the same label**.
- Click on the **Options** button.
  - o In the **Label information** section, click on the down arrow and select the company.
  - o In the **Product number** window, select the desired label number.
  - o For non-standard labels, see **Creating Custom Labels** below.
  - o Click on **OK**.
- Click on the **Print** button to send it immediately to the printer.
- Click on the **New Document** button to open the labels as a document for formatting such as changing the font, the font size, alignment, etc.

Labels - A Blank Page

- On the **Menu Bar**, click on **Tools ➜Letters and Mailings ➜ Envelopes and Labels...**.
- Click on the **Labels** tab.
- In the **Print** section, choose **full page of the same label**.
- Click on the **Options** button.
  - o In the **Label information** section, click on the down arrow and select the company.
  - o In the **Product number** window, select the desired label number.
  - o For non-standard labels, see **Creating Custom Labels** below.
  - o Click on **OK**.
- Click on the **New Document** button.
- Enter the desired information on the labels.

Creating Custom Labels



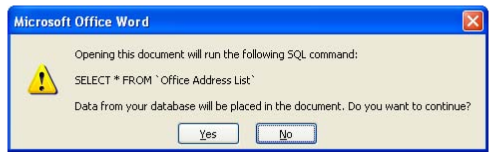
- On the **Menu Bar**, click on **Tools ➜ Letters and Mailings ➜ Envelopes and Labels...**.
- Click on the **Labels** tab.
- Click on the **Options** button.
- Click on the **New label...** button.
- Enter a name for the label.
- Measure the label and enter the **Top margin**, **Side margin**, **Label height**, and **Label width**.
- Enter the number of columns of labels on each sheet in **Number across**.
- Enter the number of rows of labels on each sheet in **Number down**.
- Measure the distance from the top of one label to the top of the next label and enter the measurement in **Vertical pitch**.
- Measure the distance from the right edge of one label to the right edge of the next label and enter the measurement in **Horizontal pitch**.
- Choose the paper size.
- Click on **OK**.

Special Printing

- A sheet of labels that has been used before may not have all of the labels at the top of the page, but labels can still be used.
- Create the desired label document as noted above.
- Click on the **Update all labels** button.
- Delete the contents of the cells (labels) that are not to print, but do not delete information from the anchor cell. The first cell (label) is the anchor cell (label).
- Cut the information from the anchor cell and paste it into the first cell to be printed.

Opening a Merge Document

- **Note** – Moving the document and/or the data may break the link between them. When the document is reopened, it may be necessary to locate the data file to link them again.
- On the **Menu Bar**, click on **File ➔ Open**.
- Navigate to the location of the merge document and click on the desired document.
- Click on the **Open** button.
- A warning window opens indicating an SQL command will run and data will be placed in the document.



- **Clicking on Yes**
    - Click on **Yes** to open the document with the data linked.
    - In the **Mail Merge Task Pane** step 3 will be displayed.
    - Changes can then be made as usual.
    - When editing is completed, save the changes if desired.
- **Clicking on No**
    - Click on **No** to open the document without the data linked.
    - In the **Mail Merge Task Pane** step 1 will be displayed.
    - The document must then be linked to a data source such as an **Excel** spreadsheet, a **Word** table document, a list created in **Word**, or a new list.
    - Changes can then be made as usual.
    - When editing is completed, save the changes if desired.
- **Note 2** – A single document can be linked to different data sources as needed.

Mail Merge Toolbar

- On the **Menu Bar**, click on **View ➔ Toolbars ➔** and choose the **Mail Merge** toolbar.
- Toolbars with a check mark in front of them are already being displayed on the screen.

Using the Mail Merge Toolbar

- All of the choices available on the **Task Pane** during a mail merge are on the **Mail Merge Toolbar**.
- Hold the mouse over a button to see the name of the button.

Inserting the Next Record Command

- The **Next Record** command tells the program to move to the next record in the list.
- Click in the document where the **Next Record** command is to be inserted.
- On the **Mail Merge Toolbar**, click on the **Insert Word Field** down arrow and choose **Next Record**.

Mail Merge Toolbar

Icon	Icon Name	Description
	Insert Merge Fields	Click to insert a **Merge Field**. A window opens with the list of fields available from the current data source.
	Insert Word Field	Click to insert a field such as **<Next Record>**. The list of fields (commands) is extensive with advanced features.
	View Merged Data	Click to see the information from the data inserted into the field areas.
	Match Fields	Click to match the fields in the chosen data with the standard fields used by **Word**.
	Propagate Labels	Click to copy the contents of the first label to all other labels.

Data

Types of Data

- Data can be drawn from an existing source or a new source can be created.
- Possible sources of data include
  - a **Word** document with a table
  - a spreadsheet
  - an address book from a handheld device or an e-mail program
  - a database.

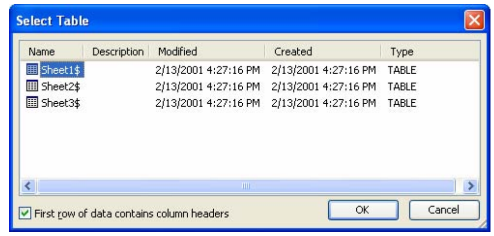
Creating a Data File in a Table

- Open a blank **Word** document.
- Create a table of the desired size.
- Each column is a field.
- The name of the field is taken from the first row.
- Save the document.

Creating a Data File from an Address Book

- Open the program that has the address book and go to the address book.
- On the **Menu Bar**, click on **File ➜ Export**.
- Notice the location the file is being exported to. Make changes as necessary.
- Change the file type to CSV.
- Click on the **Export** button. (May be an **OK** button or a **Save** button.)

Using a Spreadsheet



- In the **Task Pane**, step 3, choose **Use an existing list.**
- Click on **Browse**.
- Navigate to the spreadsheet file, choose the file, and click on the **Open** button.
- Choose the appropriate sheet.
- Click on **OK**.

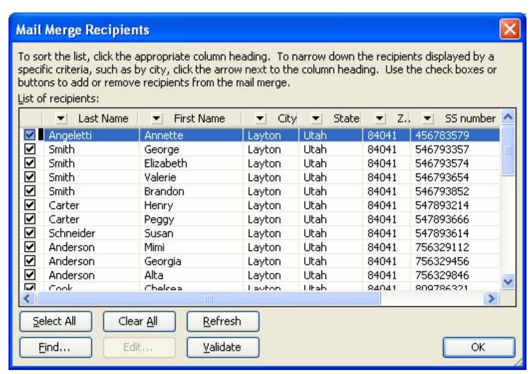
Creating a Spreadsheet List

- Open **Excel 2003**.
- The first row should be labels identifying the information in each column (field).
- Click in cell **A1** and enter a name for the information that will be in the first column such as **Last Name**.
- Press the **Tab** key and enter a name for the information that will be in the second column.
- Continue pressing the **Tab** key and entering names for the desired columns.
- Click in cell **A2** and enter the information.
- Press the **Tab** key to move to the next column.
- Continue entering the desired information.
- To change the width of the column to fit the information:
    - Place the cursor on the **Column Indicator** between the column to be adjusted and the next one to the right. (The cursor will change to a double-headed arrow.)
    - Double click.
- To save the list:
    - On the **Menu Bar**, click on **File ➜ Save As…**
    - Give the spreadsheet a name.
    - Click on the **Save** button.

Using an Existing List

- Open the **Word** document and begin a mail merge.
- In the **Task Pane**, step 3, choose **Use an existing list.**
- Click on **Browse**.
- Navigate to the file, and choose the file.
- Click on the **Open** button.
- Click on **OK**.

Organizing the Data



- In the **Task Pane**, move to step 3.
- Click on **Edit list.…**

Alphabetizing the List

- Click on the name of a field to alphabetize the list by.
- Click on the name of the field again to reverse the alphabetical order.

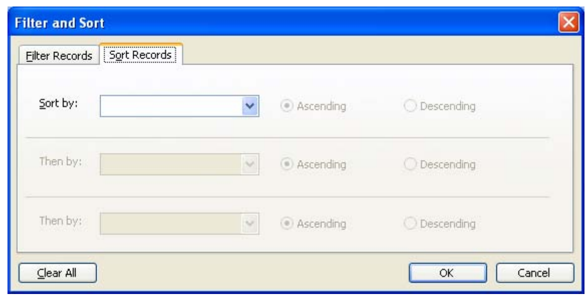
Selecting Records

- Notice the checkmarks at the beginning of each record.
- A checkmark indicates that the record is chosen.
- Click on the **Select All** button to select all records.
- Click on the **Clear All** button to unselect all records.
- **Note** - If most of the records are to be used, click on the **Select All** button and then remove the checkmark from those records not to be used.

Filtering Records

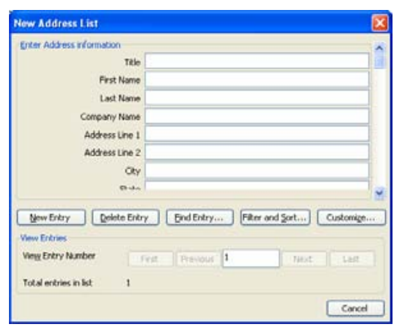
- Click on the down arrow next to the field name.
  - **All** - Choose this to have all records available.
  - **(Blanks)** - Choose this to use only records that have no information in this field.
  - **(Nonblanks)** - Choose this to use only records that have information in this field.
  - **(Advanced)** - Choose this to filter or sort the information.

Sorting Records



- Click on the down arrow next to one of the fields.
- Choose **(Advanced)**.
- Click on the **Sort Records** tab.
- Click on the down arrow after **Sort by** and choose a field to sort by.
- Decide whether the information is to be sorted in ascending order (alphabetical order) or in descending order (reverse alphabetical order).
- If another field is to be used to sort the information further, click on the down arrow after **Then by** and choose the field to be sorted.
- Decide whether the information is to be sorted in ascending order or descending order.
- Sort by a third field if desired.
- Click on **OK**.

Creating the Data Source



- In the **Task Pane**, step 3, choose **Type a new list**.
- Click on **Create**.

Setting up the Fields

- Click on the **Customize** button.
- **Add a New Field**
  - Click on the **Add** button.
  - Enter the name of the field.
  - Click on **OK**.
- **Deleting a Field**
  - Click on the field to be deleted.
  - Click on the **Delete** button.
  - Click on **Yes** to delete the field.
  - **Note** - When fields are deleted the information in the field is deleted, also.

- **Renaming a Field**
  - Click on the field to be renamed.
  - Click on the **Rename** button.
  - Change the name of the field as desired.
  - Click on **OK**.

- **Change the Order of the Fields**
  - Click on the name of the field.
  - Click on the **Move up** or **Move Down** buttons to change the order of the fields..
  - **Note** - Arrange the order of the fields to make data entry easy. The order of the fields in the list does not effect how the fields are used in the document.
- Click on the **Close** button.
- Enter a name for the list.
- The default location for saving this information is **My Data Sources**.
- Click on the **Save** button.

Entering the Information

- Click in the first field.
- Enter the information.
- Press the **Enter** key to move to the next field.
- To move to the next record, continue pressing the **Enter** key or click on the **New Entry** button.

Navigating the List

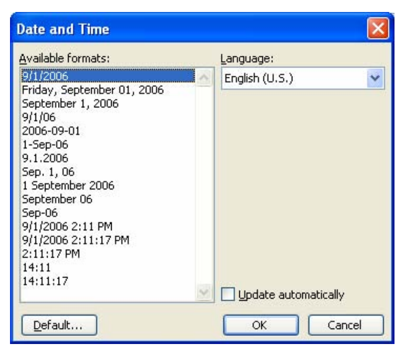
- Click on **First** to move to the first record in the list.
- Click on **Previous** to move to the previous record in the list.
- Click on **Next** to move to the next record in the list.
- Click on **Last** to move to the last record in the list.

Deleting a Record

- Find the record to be deleted.
- Click on the **Delete Entry** button and click on **Yes**.

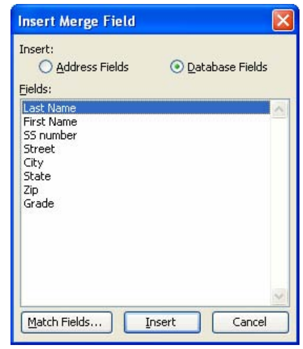
Inserting the Date

- On the **Menu Bar**, click on **Insert ➜ Date and Time...**.
- Choose the desired date format.
- **Note** - Click in the **Update automatically** box to get the current date each time the document is opened.
- Click on **OK**.



Inserting a Data Field

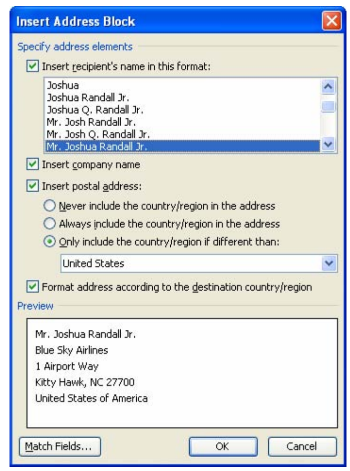
- Click in the document where the data field is to be inserted.
- Using the **Task Pane**, navigate to step 4, **Write your Letter**.
- Click on **More items…** in the **Task Pane**.
- Choose the desired field.
- Click on the **Insert** button.
- **Note** - Remember that the fields may need spaces between them.
- Click on the **Close** button.



Deleting a Data Field

- Click and drag to highlight the name of the data field in the document.
- Press the **Delete** key.

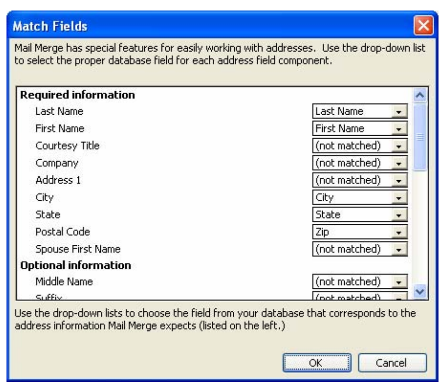
Inserting an Address Block



- An address block is the total address.
- In the **Task Pane,** click on **Address block...**.
- Choose the format of the name of the recipient.
- Choose whether to include the company name.
- Choose whether to include the postal address.
- If the postal address is included, decide if the country or region will be included and other options as desired.
- Click on **OK**.

Using Match Fields

- In the **Insert Address Block** window, click on the **Match Fields...** button.
- Match the items on the left with the fields in the data source.
    - o Clicking on the down arrow for the field to be corrected and choose the appropriate field in the source data.
- To not use a field, choose **(not available)** in the list.
- Click on **OK**.



Editing the Address Block

- **Right click** in the **Address Block** and choose **Edit Address Block...**.
- Make changes as needed.
- Click on **OK**.

Inserting a Greeting Line

- In the **Task Pane**, click on **Greeting line...**.
- Choose the type of greeting.
- Choose the format of the name.
- Choose the type of punctuation.
- Choose the type of greeting for records that have invalid recipient names.
- Click on **OK**.

Editing the Greeting Line

- **Right click** in the **Greeting Line** and choose **Edit Greeting Line...**.
- Make changes as needed. (The salutation can be changed by typing in the box.)
- Click on **OK**.

Graphics

Inserting a Graphic from Clip Art

- On the **Menu Bar**, click on **Insert ➜ Picture ➜ Clip Art...**.
- The **Task Pane** will appear and display the **Insert Clip Art** panel.
- If the **Add Clips to Organizer** window pops up, click on the **Later** button. Clicking on the **Now...** button will cause the program to collect all picture, sound, and motion files from the hard drive for use in the collection.
- Enter a name in the **Search text:** box and click on the **Search** button.
- Scroll through the collection and find the desired picture.
- Click on the desired picture.

Positioning Graphics in Word

- Click on the graphic. (The **Picture Toolbar** should appear.)
- **Note** - If the **Picture Toolbar** does not appear, click on **View ➜ Toolbars ➜ Picture**.
- On the **Picture Toolbar**, click on the **Text Wrapping** button (see below) and choose **Square** or **Tight**.
  - **Square** causes the text to line up on a straight edge on the side of the graphic.
  - **Tight** causes the text to wrap closely to the graphic, following the shape for the graphic.

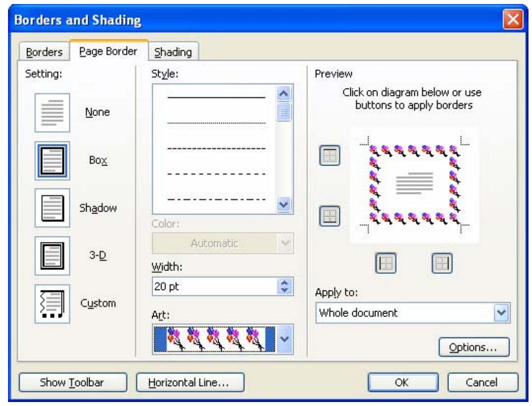
Resizing a Graphic

- Click on the graphic.
- Move the cursor to a corner of the graphic (The cursor changes to a two-headed arrow.).
- Click and drag to make the graphic the desired size.

Inserting a Graphic from Files

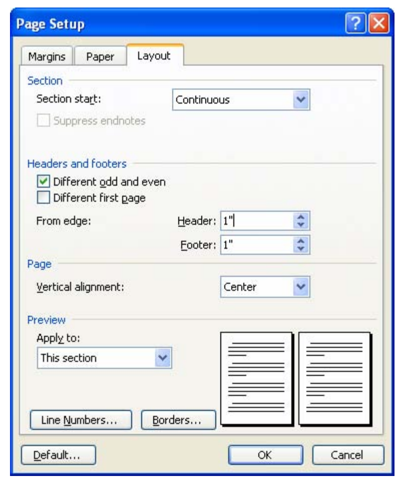
- On the **Menu Bar**, click on **Insert ➜ Picture ➜ From File...**.
- Navigate to the location of the graphic.
- Click on the desired graphic.
- Click on the **Insert** button.

Page Borders



- On the **Menu Bar**, click on **Format ➜ Borders and Shading...**.
- Click on the **Page Border** tab.
- **Simple Border**
  - o On the left side, click on **Box**, **Shadow**, or **3D**.
  - o In the **Style** section, choose a style, color, and width.
- **Art Border**
  - o In the **Style** section, click on the down arrow under **Art:** and choose a graphic.
- Click on the down arrow under **Apply to:** and choose what part of the document will have the border.
- Click on **OK**.

Centering (Vertical Alignment)



- Select the text to be centered.
- On the **Menu Bar**, click on **File ➜ Page Setup.**
- Select the **Layout** tab.
- In the **Page** section, click on the down arrow and choose **Center** as the vertical alignment.
- In the **Preview** section, click on the down arrow and choose **selected text**.
- The selected text is now centered on its own page.

Saving the Document

- When the document is set up with the fields and is ready to merge, save the document before performing the merge.
- On the **Menu Bar**, click on **File ➜ Save As...**.
- Navigate to the desired location for saving the file.
- Enter an appropriate name for the file.
- Click on the **Save** button.

Online Templates

- On the **Menu Bar**, click on **File ➜ New...**.
- In the **Task Pane**, click on **Templates on Microsoft.com**.
- This will open the browser in the Template Gallery site of Microsoft.
- Scroll down and click on **Publications and Education**.
- Click on **For Teachers**.
- Scroll down the list and find an appropriate template.
- Notice that the icon in front of the template indicates which program the document is for: PowerPoint, Word, Excel, or Publisher.
- Click on the name of the document.
- It may be necessary to install a small program to view the document.
- From the **Preview** window, click on the **Edit in Microsoft Word** button.
- Save the file in **Word** if desired.