

Merging Letters, Envelopes and Labels

Word 2007

Educational Technology Center

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Resources for this class can be found at

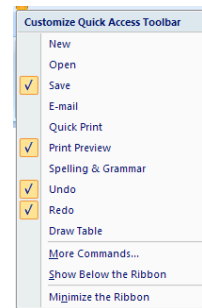
http://www.davis.k12.ut.us/district/etc/documents/word_merge_doc.html

Quick Access Toolbar

- The **Quick Access Toolbar** is at the top of the screen to the right of the **Microsoft Office Button**.
- When the cursor is over a button, the name of the button is displayed.
- The options available when **Microsoft Office 2007** is first installed include Save, Undo, and Redo.

Customizing the Quick Access Toolbar

- To add an item, click on the **Customize Quick Access Toolbar** drop down arrow at the end of the **Quick Access Toolbar** and click on the desired item.
- Options with a check mark in front of them are displayed on the **Quick Access Toolbar**.
- To remove a button, click on the **Customize Quick Access Toolbar** drop down arrow at the end of the **Quick Access Toolbar** and click on the desired item. (This removes the checkmark from in front of the item.)
- To add a command button from the **Ribbon**, right click on the desired command button and choose **Add to Quick Access Toolbar**.
- To remove a command button that has been added to the **Quick Access Toolbar**, right click on the button on the **Quick Access Toolbar** and choose **Remove from Quick Access Toolbar**.

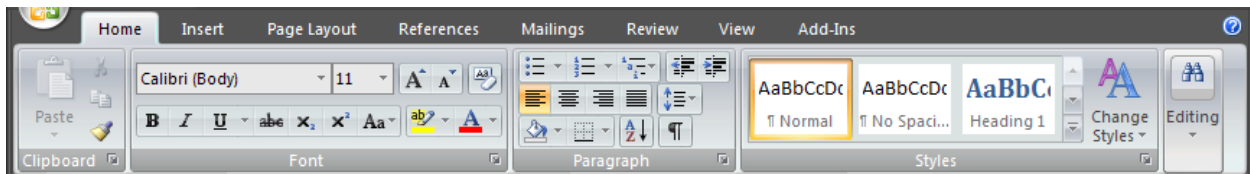


Changing the order of the Buttons on the Quick Access Toolbar

- Click on the **Customize Quick Access Toolbar** drop down arrow at the end of the **Quick Access Toolbar** and choose **More Commands...**
- In the column on the right below **Customize Quick Access Toolbar**, click on the item to be moved.
- To move the item up, click on the up arrow at the right.
- To move the item down, click on the down arrow at the right.
- Click on **OK**.



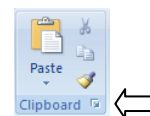
The Ribbon



- The **Ribbon** runs across the top of the window.
- The **Ribbon** consists of 3 types of items.
 - **Tabs** – This is the main level and includes Home, Insert, Page Layout, etc.
 - **Groups** – Each tab has several groups that show related items together.
 - **Commands** – A command is a button in a group or an item in a list.
- Some tabs are only available when a particular item is selected. For example, the **Picture Tools** tab is only shown when a picture is clicked on.

Using the Ribbon

- Click on the desired tab.
- The commands under each tab are grouped. The name of the group is at the bottom.
- Some groups have a **Dialog Box Launcher** button which opens the dialog box with more commands.



Views

Page Views

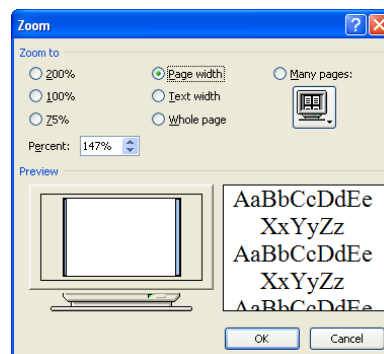
- On the **Ribbon**, click on the **View** tab.
- In the **Document Views** group, click on the desired view.

Full Screen Reading

- **Full Screen Reading** is a view which makes it easy to read the document on the screen.
- On the **Ribbon**, click on the **View** tab.
- Click on the **Full Screen Reading** view.
- Click on the **View Options** button at the top right of the screen for more options.
- To leave **Full Screen Reading** view, click on the **Close** button at the top right.

Zoom

- On the **Ribbon**, click on the **View** tab.
- In the **Zoom** group, click on the **Zoom** button.
- In the **Zoom to** section, choose the desired zoom.
- Click on **OK**.
- OR Use the **Zoom** toolbar on the **Status Bar** at the bottom right corner of the window.



Merging Outlined

- **Start the Mail Merge** –
 - Select the type of document to be merged: letters, e-mail, envelopes, labels, or a directory.
- **Select Recipients** –
 - Select the recipients of the document using an existing list, a list of Outlook contacts, or by typing a new list.
- **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.
- **Preview the document** –
 - Examine the document for completeness and correctness.
 - Be sure to save the form document.
- **Complete the Merge** –
 - Finish the merge, either sending it to the printer or creating a new document for review and editing.

Types of Merges

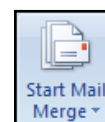
- **Letters** - Use to create customized letters to a selected group of people.
- **E-mail messages** – Use to create e-mail messages to a selected group of people. (Must use **Outlook**.)
- **Envelopes** – Use to create addressed envelopes for a group mailing.
- **Labels** – Use to create address labels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

Ribbon or Wizard

- Merging can be done with the **Ribbon** or with the **Mail Merge Wizard**.
- The **Mail Merge Wizard** is the same as a mail merge was done in previous versions of **Word**.
- To bring up the **Mail Merge** pane:
 - On the **Ribbon**, click on the **Mailings** tab.
 - In the **Start Mail Merge** group, click on the **Start Mail Merge** button and choose **Step by Step Mail Merge Wizard**.
- The **Ribbon** is covered first in these instructions.

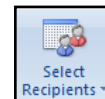
Letters

- Merging can create customized letters which appear more personal, with names, etc.
- On the **Ribbon**, click on the **Mailings** tab.
- In the **Start Mail Merge** group, click on the **Start Mail Merge** button and choose **Letters**.



Select Recipients

- Select the recipients of the document.
- In the **Start Mail Merge** group, click on the **Select Recipients** button and choose the desired item.
- **Existing List** – Choose **Use Existing List....**
 - Choose this to use an existing list such as an **Excel** spreadsheet or a **Word** document with a 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 15 or **Using an Existing List** on page 16.
- **New List** – Choose **Type New List....**
 - Choose this to start a new list.
 - Enter the information in the fields as desired.
 - For more information on creating a list, see **Creating the Data Source** on page 17 or **Creating a Spreadsheet List** on page 15.
- **Outlook Contacts** – Choose **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.

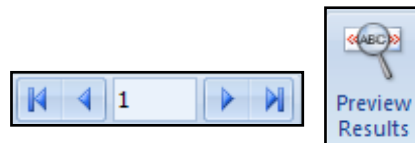


Write Your Letter

- 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 **Write & Insert Fields** group, click on **Insert Merge Field** button and choose the desired field.
 - The name of the field is displayed. (i.e. <<Last Name>>)
 - For more information on inserting fields, see
 - **Inserting a Data Field** on page 18.
 - **Inserting an Address Block** on page 18.
 - **Inserting a Greeting Line** on page 19.
 - For more information on graphics and formatting the document, see
 - **Pictures** on page 19.
 - **Page Borders** on page 20.
- **Save the Form** –
 - Click on the **Microsoft Office Button** and choose **Save As → Word Document**.
 - Navigate to the location the form is to be saved to.
 - Type a name for the form.
 - Click on the **Save** button.

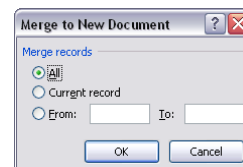
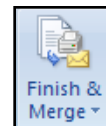
Preview Your Letters

- Check the letter for errors.
- In the **Preview Results** group, click on **Preview Results** button.
- The information for the first recipient appears in the form.
- In the **Preview Results** group, click on the **Next** and **Previous** arrows to see the recipient data placed in the document.
- To change the recipient list, in the **Start Mail Merge** group, click on **Edit Recipient List** button.
 - For more information on editing the recipient list, See **Organizing the Data** on page 16.



Complete the Merge

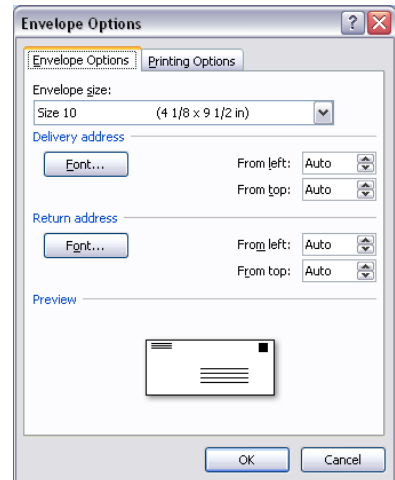
- Check the letter(s) for errors.
- In the **Preview Results** group, click on **Auto Check for Errors**.
 - Choose the first option to simulate the merge and create a separate document which reports errors in the merge. The merge only appears to have occurred.
 - Choose the second option to merge and have the program pause when an error occurs.
 - Choose the third option to complete the merge and create a separate document which reports errors in the merge.
- To complete the merge without pausing or creating a report, in the **Finish** group, click on **Finish & Merge** button and choose the desired item.
 - To edit the individual letters:
 - Choose **Edit Individual Documents...**
 - 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.



- To send the letters directly to the printer:
 - Choose **Print Documents...**
 - 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**.
 - Select the desired printer and other options as desired.
 - Click on **OK**.

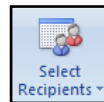
Envelopes

- On the **Ribbon**, click on the **Mailings** tab.
- In the **Start Mail Merge** group, click on the **Start Mail Merge** button and choose **Envelopes**.
- In the **Envelope Options** window, click on the **Envelope Options** tab.
- Click on the **Envelope size** down arrow and choose the desired envelope size.
- Make adjustments to the delivery address and the return address as desired.
- Click on **OK**.



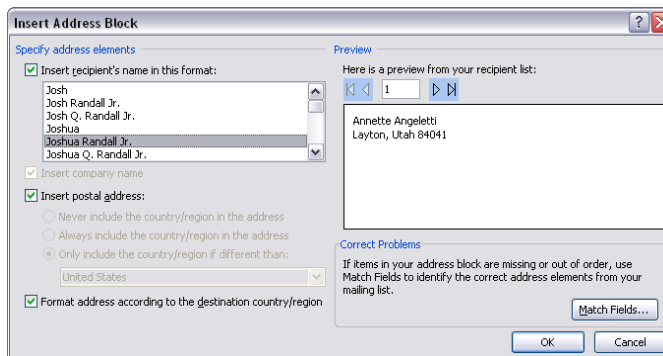
Select Recipients

- Select the recipients of the document.
- In the **Start Mail Merge** group, click on the **Select Recipients** button and choose the desired item.
- **Existing List** – Choose **Use Existing List...**
 - Choose this to use an existing list such as an **Excel** spreadsheet or a **Word** document with a 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 15 or **Using an Existing List** on page 16.
- **New List** – Choose **Type New List...**
 - Choose this to start a new list.
 - Enter the information in the fields as desired.
 - For more information on creating a list, see **Creating the Data Source** on page 17 or **Creating a Spreadsheet List** on page 15.
- **Outlook Contacts** – Choose **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.



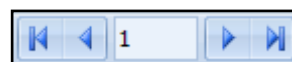
Arrange Your Envelope

- **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.
 - In the **Write & Insert Fields** group, click on **Insert Merge Field** button and choose the desired field, building the address as desired.
 - OR in the **Write & Insert Fields** group, click on the **Address Block** button.
 - In the **Specify address elements** section, select the desired format.
 - For more information on **Inserting an Address Block** on page 18.
 - Click on the **Match Fields...** button at the bottom right to double check the address block.
 - For more information on **Using Match Fields** see page 18.
 - The **Preview** window displays the results of the choices.
 - Click on the **Next** and **Previous** arrows to see different recipients.
 - Click on **OK**.
- **Save the Envelope Form** –
 - Click on the **Microsoft Office Button** and choose **Save As → Word Document**.
 - Navigate to the location where the form is to be saved.
 - Type a name for the form.
 - Click on the **Save** button.



Preview Your Envelopes

- Check the envelopes for errors.
- In the **Preview Results** group, click on **Preview Results** button.
- The information for the first recipient appears in the form.
- In the **Preview Results** group, click on the **Next** and **Previous** arrows to see the recipient data placed in the document.
- To change the recipient list, in the **Start Mail Merge** group, click on **Edit Recipient List** button.
 - For more information on editing the recipient list, See **Organizing the Data** on page 16.



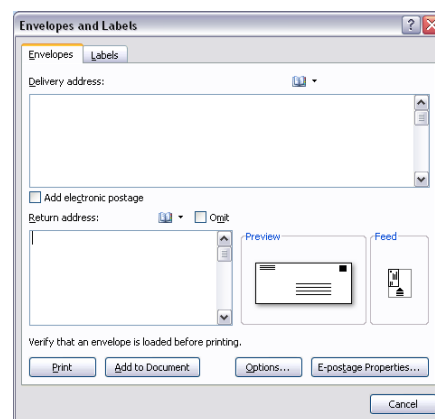
Complete the Merge

- Check the envelope(s) for errors.
- In the **Preview Results** group, click on **Auto Check for Errors**.
 - Choose the first option to simulate the merge and create a separate document which reports errors in the merge. The merge only appears to have occurred.
 - Choose the second option to merge and have the program pause when an error occurs.
 - Choose the third option to complete the merge and create a separate document which reports errors in the merge.
- To complete the merge without pausing or creating a report, in the **Finish** group, click on **Finish & Merge** button and choose the desired item.
 - To edit the individual envelopes:
 - Choose **Edit Individual Documents...**
 - 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 as a new document.
 - To send the envelopes directly to the printer:
 - Choose **Print Documents...**
 - 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**.
 - Select the desired printer and other options as desired.
 - Click on **OK**.
- **Note** - The envelopes may need to be fed in one at a time, depending on the printer.



Creating an Envelope

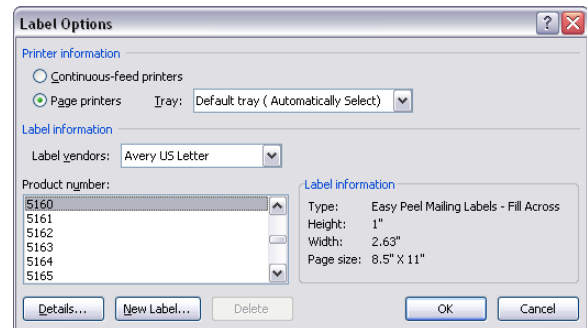
- On the **Ribbon**, click on the **Mailings** tab.
- In the **Create** group, click on the **Envelopes** button.
- Click on the **Envelopes** tab.
- Enter the address in the **Delivery address** box.
- Enter your address in the **Return address** box.
- **Options**
 - Click on the **Options** button.
 - 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
 - Click on the **Microsoft Office Button** and then choose **Print**.
 - In the **Page Range** section, choose **Pages:** and type **0** in the box.
 - Click on the **Print** button.
- Click on the **Print** button.

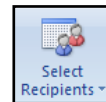
Labels

- On the **Ribbon**, click on the **Mailings** tab.
- In the **Start Mail Merge** group, click on the **Start Mail Merge** button and choose **Labels**.
- In the **Printer information** section, choose **Page printers**.
- In the **Label information** section, click on the **Label vendors** down arrow and choose the appropriate company.
- Click on the **Product number** down arrow and choose the desired product number.
- Click on **OK**.



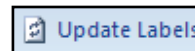
Select Recipients

- Select the recipients.
- In the **Start Mail Merge** group, click on the **Select Recipients** button and choose the desired item.
- **Existing List** – Choose **Use Existing List...**
 - Choose this to use an existing list such as an **Excel** spreadsheet or a **Word** document with a 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 15 or **Using an Existing List** on page 16.
- **New List** – Choose **Type New List...**
 - Choose this to start a new list.
 - Enter the information in the fields as desired.
 - For more information on creating a list, see **Creating the Data Source** on page 17 or **Creating a Spreadsheet List** on page 15.
- **Outlook Contacts** – Choose **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.



Arrange Your Labels

- Set up the label with the desired fields.
- The first cell is the anchor cell. Set up the desired fields in that cell.
- For more information on inserting fields, see
 - **Inserting a Data Field** on page 18.
 - **Inserting an Address Block** on page 18.
- For more information on graphics and formatting the document, see
 - **Pictures** on page 19.
 - **Page Borders** on page 20.
- To copy the same structure of fields and formatting to the other labels, in the **Write & Insert Fields** group, click on the **Update Labels** button.
- **Save the Label Form** –
 - Click on the **Microsoft Office Button** and choose **Save As → Word Document**.
 - Navigate to the location where the form is to be saved.
 - Type a name for the form.
 - Click on the **Save** button.

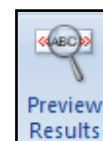


Aligning the Labels

- Labels can be centered top to bottom.
- Click in the first label.
- On the **Ribbon**, click on the **Layout** tab of the **Table Tools**.
- In the **Alignment** group, click on the desired alignment button.
- On the **Ribbon**, click on the **Mailings** tab.
- In the **Write & Insert Fields** group, click on the **Update Labels** button.

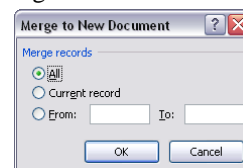
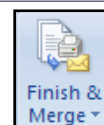
Preview Your Labels

- Check the labels for errors.
- In the **Preview Results** group, click on **Preview Results** button.
- The information for the recipients appears in the labels.
- In the **Preview Results** group, click on the **Next** and **Previous** arrows to see the recipient data placed in the document.
- To change the recipient list, in the **Start Mail Merge** group, click on **Edit Recipient List** button.
 - For more information on editing the recipient list, See **Organizing the Data** on page 16.



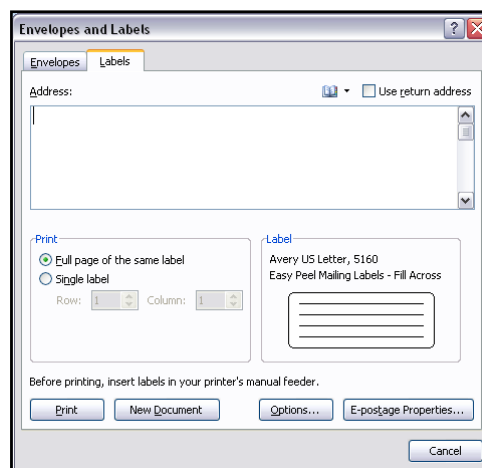
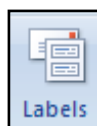
Complete the Merge

- Check the label(s) for errors.
- In the **Preview Results** group, click on **Auto Check for Errors**.
 - Choose the first option to simulate the merge and create a separate document which reports errors in the merge. The merge only appears to have occurred.
 - Choose the second option to merge and have the program pause when an error occurs.
 - Choose the third option to complete the merge and create a separate document which reports errors in the merge.
- To complete the merge without pausing or creating a report, in the **Finish** group, click on **Finish & Merge** button and choose the desired item.
 - To edit the individual labels:
 - Choose **Edit Individual Documents...**
 - 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 as a new document.
 - To send the labels directly to the printer:
 - Choose **Print Documents...**
 - 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**.
 - Select the desired printer and other options as desired.
 - Click on **OK**.



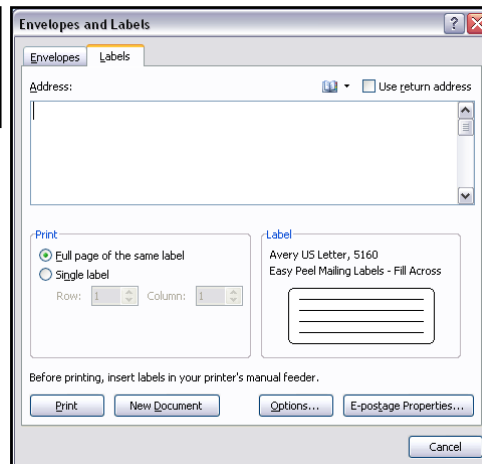
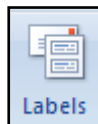
Labels - A Page of the Same

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



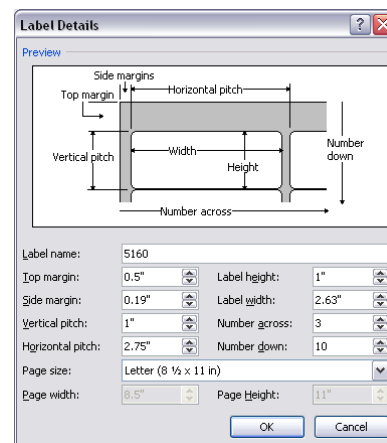
Adding Borders

- On the **Ribbon**, click on the **Design** tab of the **Table Tools**.
- In the **Draw Borders** group, click on the **Line Style** button and choose a style.
- In the **Draw Borders** group, click on the **Line Weight** button and choose a thickness for the line.
- In the **Table Styles** group, click on the down arrow of the **Borders** button and choose the desired border.

Custom Labels

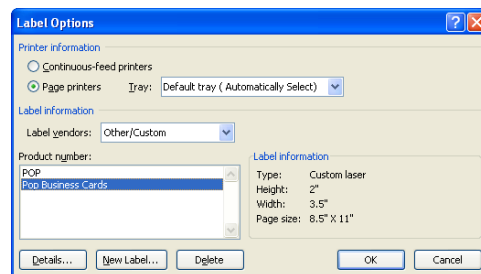
Creating a Custom Label

- On the **Ribbon**, click on the **Mailings** tab.
- In the **Create** group, click on the **Labels** button.
- 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**.



Using a Custom Label in a Mail Merge

- On the **Ribbon**, click on the **Mailings** tab.
- In the **Start Mail Merge** group, click on the **Start Mail Merge** button and choose **Labels**.
- In the **Printer information** section, choose **Page printers**.
- In the **Label information** section, click on the **Label vendors** down arrow and choose **Other/Custom**.
- In the **Product number** box, choose the desired label.
- Click on **OK**.
- Design the label as noted above.



Using a Custom Label in a Single Page

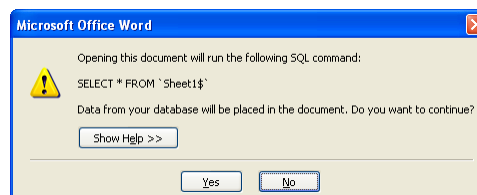
- On the **Ribbon**, click on the **Mailings** tab.
- In the **Create** group, click on the **Labels** button.
- Click on the **Labels** tab.
- Click on the **Options** button.
- In the **Printer information** section, choose **Page printers**.
- In the **Label information** section, click on the **Label vendors** down arrow and choose **Other/Custom**.
- In the **Product number** box, choose the desired label.
- Click on **OK**.
- Design the label as noted above.

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.
 - 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.



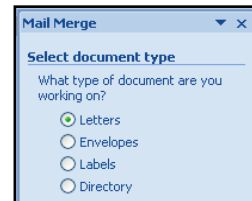
- The document must then be linked to a data source such as an **Excel** spreadsheet, a **Word** table document, a list created in **Word**, or a new list.
- Changes can then be made as usual.
- When editing is completed, save the changes if desired.
- **Note 2** – A single document can be linked to different data sources as needed.

Mail Merge Wizard

- On the **Ribbon**, click on the **Mailings** tab.
- In the **Start Mail Merge** group, click on the **Start Mail Merge** button and choose **Step by Step Mail Merge Wizard**....

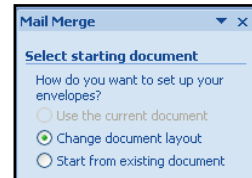
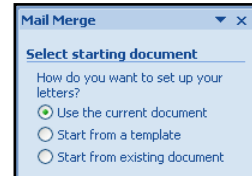
Step 1 – Select the Document Type

- Choose the starting document.



Step 2 – Select a Starting Document

- Choose the type of document to be created.
- A **Letter** or a **Directory** can:
 - Use the current document.
 - Start from a template.
 - Start from an existing document.
- An **Envelope** or **Labels** can:
 - Change the document layout to an envelope or labels.
 - Start from an existing document.



Step 3 – Select Recipients

- Select the recipients of the document.
- An existing list can be used. The list could be an **Excel** spreadsheet or a **Word** document with a list.
- A new list can be created in **Word**.
- **Outlook Contacts** can be used as the source of the recipient list.



Step 4 – Write/Arrange the Document

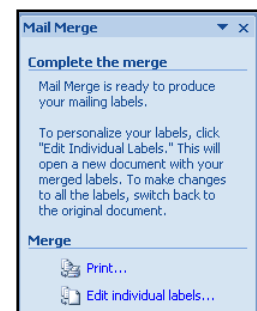
- Set up the document with the field names as desired using the **Address Block**, **Greetings Line**, or **More Items**.
- Click where the field is to be added.
- Click on the desired type of field to be added.
- Format as desired.

Step 5 – Preview the Document

- The information from the recipient list is displayed in the document.
- Click on the arrow buttons in the pane to see each recipient displayed, one at a time.
- Click on the **Edit recipient list** link in the pane to change aspects of the recipient list.

Step 6 – Complete the Merge

- Check the document for errors.
- Click on **Print** in the **Mail Merge Pane** when ready.



Data

Types of Data

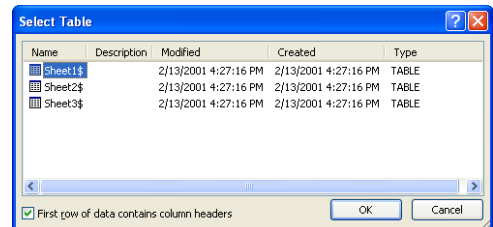
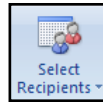
- Data can be drawn from an existing source or a new source can be created.
- Possible sources of data include
 - a **Word** document with a table
 - a spreadsheet
 - an address book from a handheld device or an e-mail program
 - a database.

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.

Using a Spreadsheet

- On the **Ribbon**, click on the **Mailings** tab.
- In the **Start Mail Merge** group, click on the **Select Recipients** button and choose **Use Existing List...**
- Navigate to the spreadsheet file, choose the file, and click on the **Open** button.
- Choose the appropriate sheet.
- Click on **OK**.

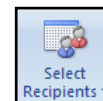


Creating a Spreadsheet List

- Open **Excel 2007**.
- 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:
 - Click on the **Microsoft Office Button** and choose **Save As** → **Excel Document**.
 - Give the spreadsheet a name.
 - Click on the **Save** button.

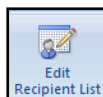
Using an Existing List

- Open the **Word** document and begin a mail merge.
- In the **Start Mail Merge** group, click on the **Select Recipients** button and choose **Use Existing List....**
- Navigate to the file, choose the file, and click on the **Open** button.
- Click on **OK**.



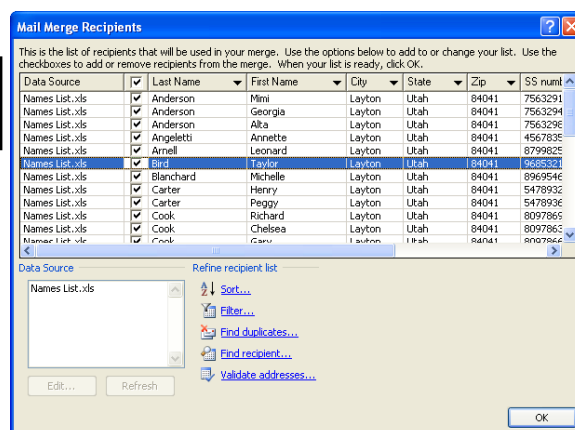
Organizing the Data

- On the **Ribbon**, click on the **Mailings** tab.
- In the **Start Mail Merge** group, click on the **Select Recipients** button and choose **Edit Recipient List....**



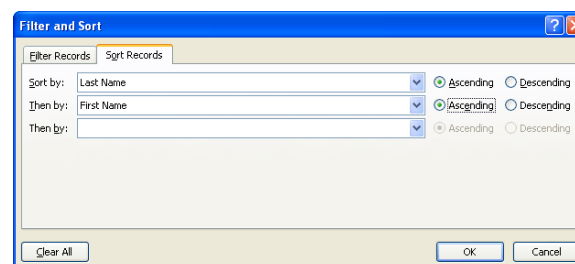
Alphabetizing the List

- 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.



Sorting Records

- Click on the **Sort** link.
- Click on the **Sort by** down arrow and choose the first field to sort by.
- Choose **Ascending** to sort A to Z. Choose **Descending** to sort Z to A.
- To choose a second field to sort by, click on the **Then by** down arrow and choose the desired field.
- Choose **Ascending** to sort A to Z. Choose **Descending** to sort Z to A.
- Choose a third field to sort by if desired.
- Click on **OK**.



Selecting Records

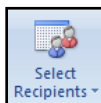
- Notice the checkmarks at the beginning of each record.
- A checkmark indicates that the record is chosen.

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.
- For a more extensive filter, use the **Filter** link.

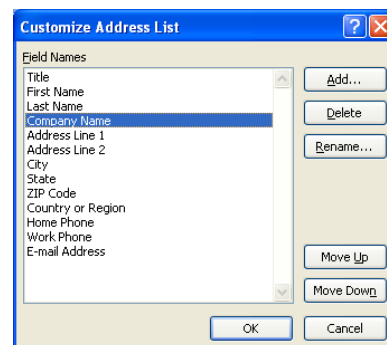
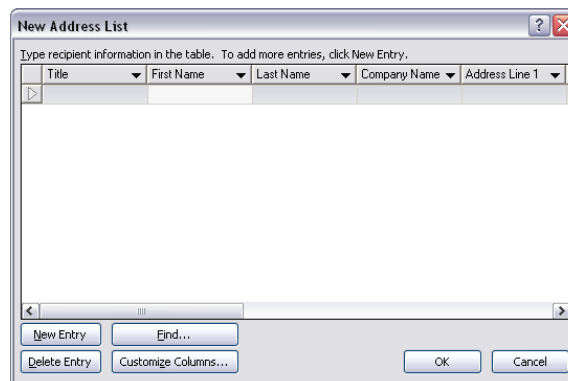
Creating the Data Source

- On the **Ribbon**, click on the **Mailings** tab.
- In the **Start Mail Merge** group, click on the **Select Recipients** button and choose **Type New List....**



Setting up the Fields

- Click on the **Customize Columns...** 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 also deleted.
- **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.

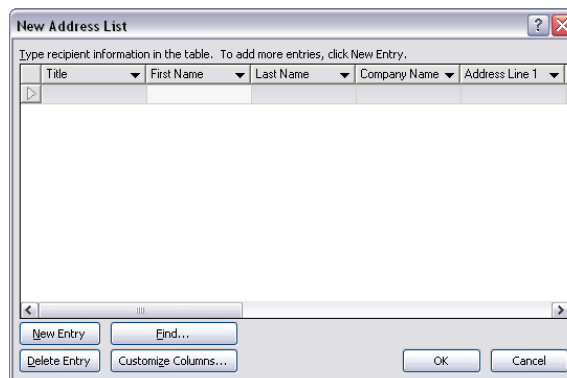


Entering the Information

- Click in the first field.
- Enter the information.
- Press the **Tab** 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.

Deleting a Record

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



Inserting the Date

- On the **Ribbon**, click on the **Insert** tab.
- In the **Text** group, click on **Date & 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

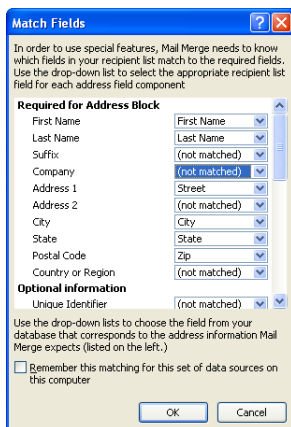
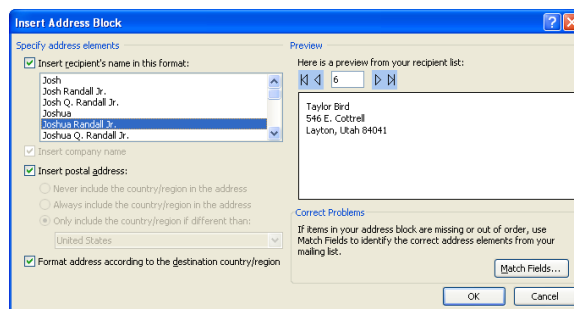
- Click in the document where the data field is to be inserted.
- On the **Ribbon**, click on the **Mailings** tab.
- In the **Write & Insert Fields** group, click on the **Insert Merge Field** button and choose the desired field.
- **Note** - Remember that the fields may need spaces between them.

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.
- On the **Ribbon**, click on the **Mailings** tab.
- In the **Write & Insert Fields** group, click on **Address Block** button.
- Choose the format of the name of the recipient.
- Click on **OK**.



Using Match Fields

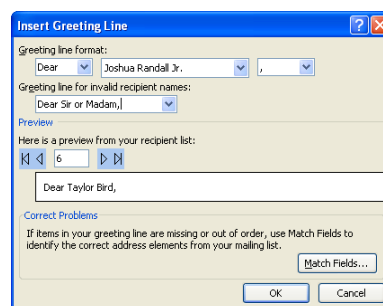
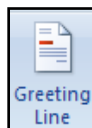
- In the **Insert Address Block** window, click on the **Match Fields...** button.
- Match the items on the left with the fields in the data source.
- Click on the down arrow for the field to be corrected and choose the appropriate field in the source data.
- To not use a field, choose **(not available)**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

- On the **Ribbon**, click on the **Mailings** tab.
- In the **Write & Insert Fields** group, click on **Greeting Line** button.
- Choose the **Greeting line format** by clicking on the down arrows and making the desired choices.
- Choose a greeting line for invalid recipient names. This can be edited by typing directly in the box.
- Use the **Next** and **Previous** arrow buttons to preview the results.
- Use the **Match Fields...** button as needed to make corrections.
- Click on **OK**.



Editing the Greeting Line

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

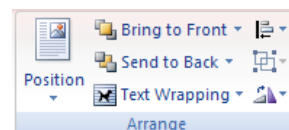
Pictures

Inserting a Picture from Clip Art

- On the **Ribbon**, click on the **Insert** tab.
- In the **Illustrations** group, click on **Clip Art**.
- In the **Clip Art** panel, type a name in the **Search text:** box and click on the **Go** button.
- If a message appears asking if pictures should be included from the Microsoft site, click on the **Yes** button.
- Scroll through the collection and find the desired picture.
- Click in the document where the picture should be placed.
- Click on the desired picture.

Positioning Pictures in Word

- Double click on the picture.
- The **Format** tab of **Picture Tools** comes up on the **Ribbon**.
- In the **Arrange** group, click on the **Text Wrapping** button and choose **Square** or **Tight**.
 - **Square** causes the text to line up on a straight edge on the side of the picture.
 - **Tight** causes the text to wrap closely to the picture, following the shape for the picture.



Resizing a Picture

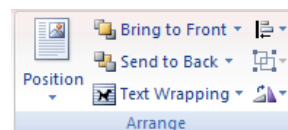
- Click on the picture.
- Move the cursor to a corner of the graphic (The cursor changes to a two-headed arrow.).
- Click and drag to make the picture the desired size.

Inserting a Picture from Files

- Click in the document where the picture is to be placed.
- On the **Ribbon**, click on the **Insert** tab.
- In the **Illustrations** group, click on **Picture**.
- Navigate to the location of the picture.
- Click on the desired picture.
- Click on the **Insert** button.

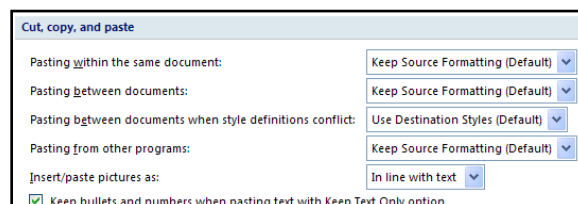
Rotating the Picture

- Double click on the picture.
- The **Format** tab of **Picture Tools** comes up.
- In the **Arrange** group, click on the **Rotate** button and choose the desired rotation.
- Notice the green dot above the picture. This is the rotation handle.
- Click on the green dot and drag the picture to the desired angle.



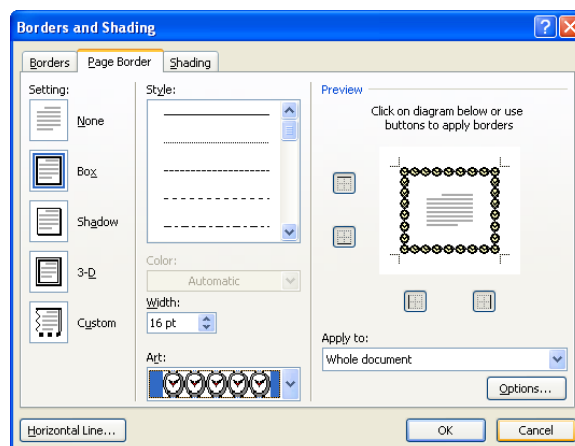
Changing Default Text Wrapping

- Click on the **Microsoft Office Button** and then click on the **Word Options** button.
- Click on **Advanced**.
- Scroll to the **Cut, copy and paste** section.
- Click on the down arrow below **Insert/paste pictures as** and choose **Square** or **Tight**.
- Click on **OK**.



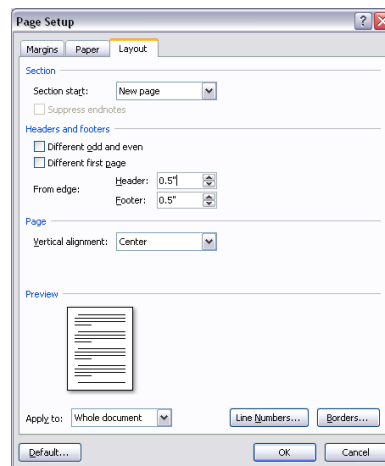
Page Borders

- Click in the document.
- On the **Ribbon**, click on the **Page Layout** tab.
- In the **Page Background** group, click on the **Page Borders** button.
- The **Borders and Shading** window opens with the **Page Border** tab selected.
- **Line Borders**
 - Select from the list on the left.
 - **OR** choose a style, color and width as desired.
- **Art Borders**
 - Click on the down arrow under **Art** and select a border.
 - Make changes as desired to color and width.
- Look at the **Preview** to see if the desired effect is obtained.
- Click on the down arrow under **Apply to** and select which pages the border will be placed.
- Click on **OK**.



Centering (Vertical Alignment)

- Select the text to be centered.
- On the **Ribbon**, click on the **Page Layout** tab.
- In the **Page Setup** group, click on the **Page Setup Dialog Box Launcher** button at the bottom of the group.
- Click on 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.
- Click on the **Microsoft Office Button** and choose **Save As → Word Document**.
- Navigate to the desired location for saving the file.
- Enter an appropriate name for the file.
- Click on the **Save** button.

Templates

- Templates provide the basic format of a document.
- Click on the **Microsoft Office Button** and then click on **New**.
- The **Templates** section displays templates available on the computer.
 - Choose the category of template desired.
 - Click on the desired template.
 - Click on the **Create** button.
- The **Microsoft Office Online** section connects to templates available online from Microsoft.
 - Choose a category and click on the desired template.
 - Click on the **Download** button.
 - The template opens in **Word**.
 - **Note** – The document should be saved to the computer.

