

Merging Letters, Envelopes and Labels

Word 2003

Educational Technology Center

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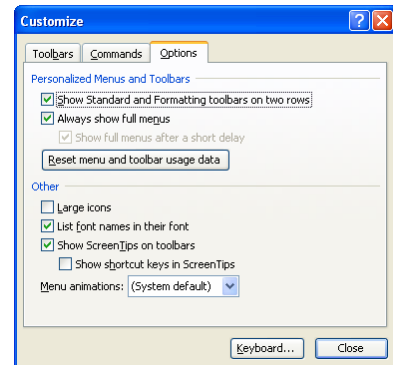
Resources for this class can be found at

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

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

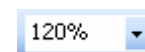
Views

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 OR** 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

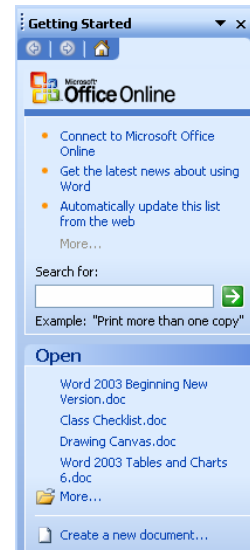
- On the **Menu Bar**, click on **View → Task Pane**.

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

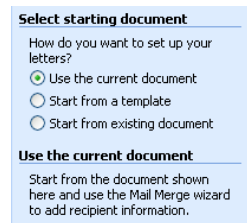
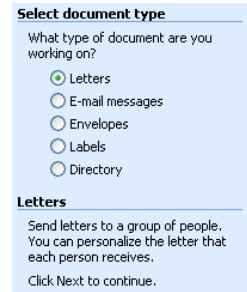
- Merging creates customized letters which appear more personal, with names, etc.
- On the **Menu Bar**, click on **Tools → Letters and Mailings → Mail Merge...**
- The **Mail Merge Task Pane** is displayed.

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**.

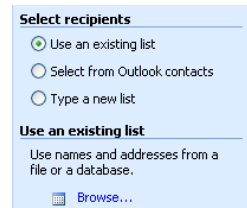
Step 2 - Select a Starting Document

- 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**.



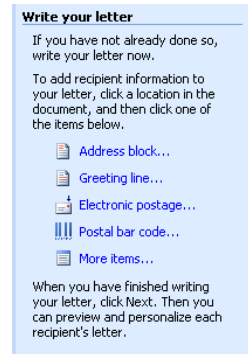
Step 3 - Select Recipients

- 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**.



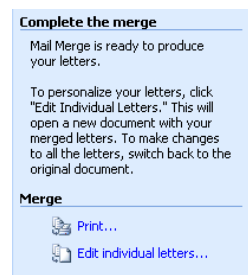
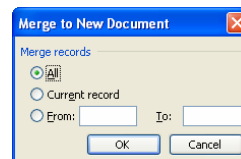
Step 5 - Preview Your Letters

- 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

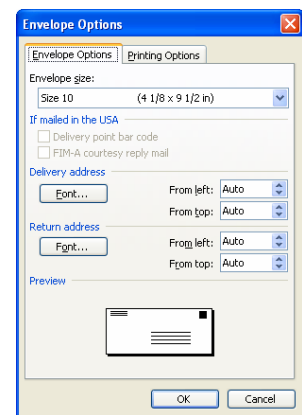
- On the **Menu Bar**, click on **Tools → Letters and Mailings → Mail Merge...**

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**.

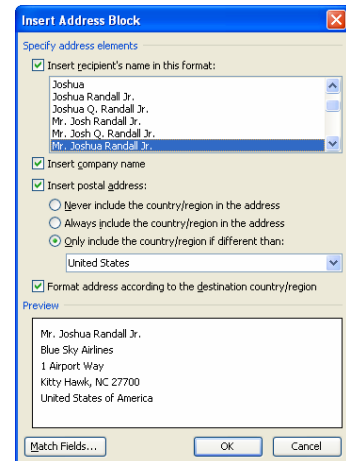


Step 3 - Select Recipients

- **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**.

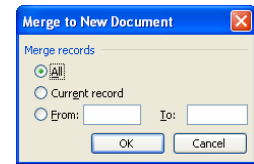


Step 5 - Preview Your Envelopes

- 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**.

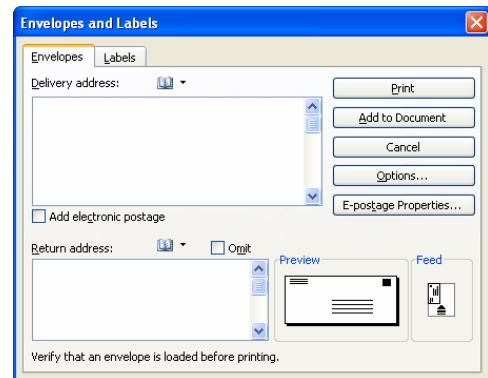
Step 6 - Complete the Merge

- 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
 - On 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

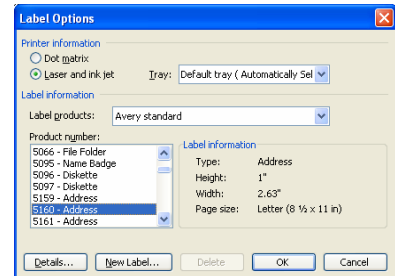
- On the **Menu Bar**, click on **Tools → Letters and Mailings → Mail Merge...**

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**.

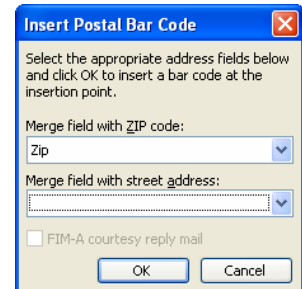


Step 3 - Select Recipients

- **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**.

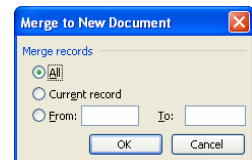


Step 5 - Preview Your Labels

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

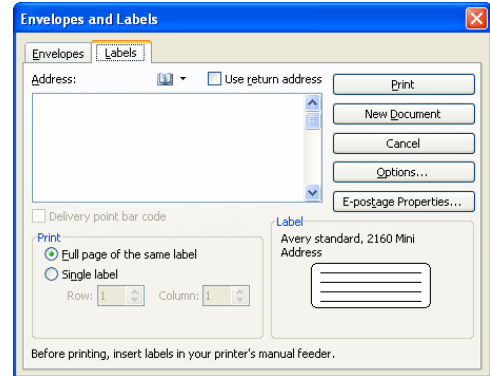
Step 6 - Complete the Merge

- 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.
 - 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.

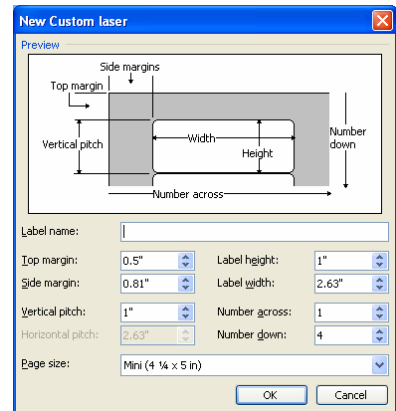


Labels - A Blank Page

- On the **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.
 - 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.

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**.

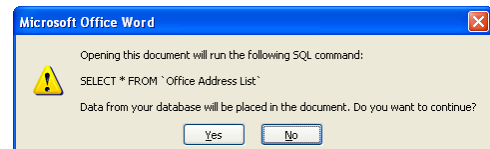


Special Printing

- 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 ▾ | 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

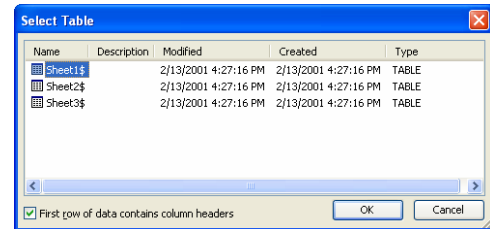
- Open a blank **Word** document.
- Create a table of the desired size.
- Each column is a field.
- The name of the field is taken from the first row.
- Save the document.

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

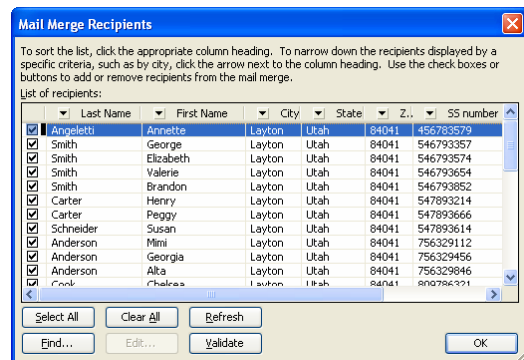
- Open the **Word** document and begin a mail merge.
- In the **Task Pane**, step 3, choose **Use an existing list**.
- Click on **Browse**.
- Navigate to the file, and choose the file.
- Click on the **Open** button.
- Click on **OK**.

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

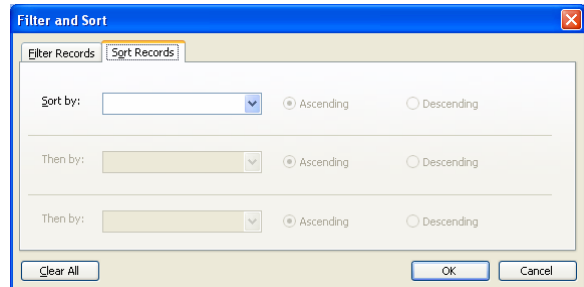
- Notice the checkmarks at the beginning of each record.
- A checkmark indicates that the record is chosen.
- Click on the **Select All** button to select all records.
- Click on the **Clear All** button to unselect all records.
- **Note** - If most of the records are to be used, click on the **Select 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**.

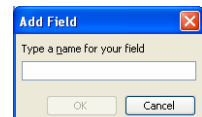
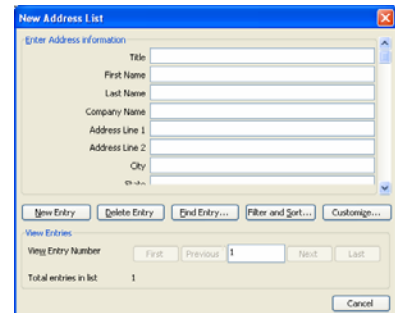
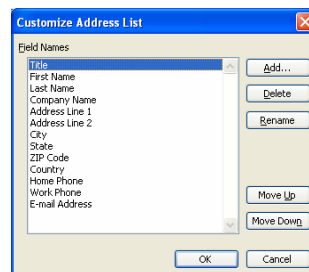


Creating the Data Source

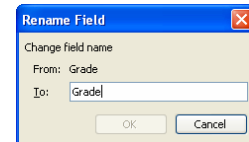
- In the **Task Pane**, step 3, choose **Type a new list**.
- Click on **Create**.

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

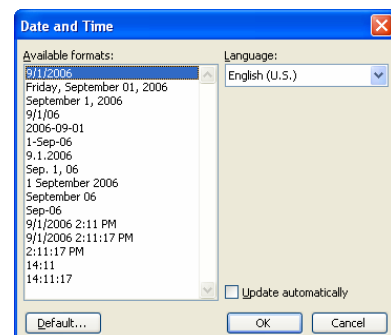
- Click on **First** to move to the first record in the list.
- Click on **Previous** to move to the previous record in the list.
- Click on **Next** to move to the next record in the list.
- Click on **Last** to move to the last record in the list.

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

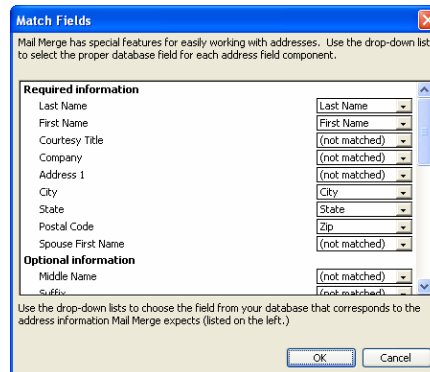
- Click and drag to highlight the name of the data field in the document.
- Press the **Delete** key.

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**.

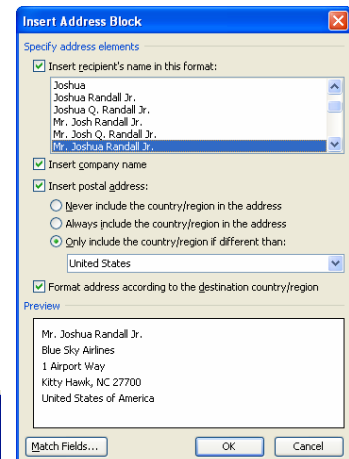
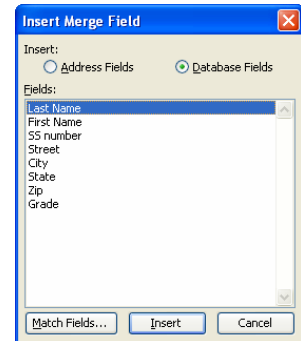
Using Match Fields

- 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.
 - 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**.



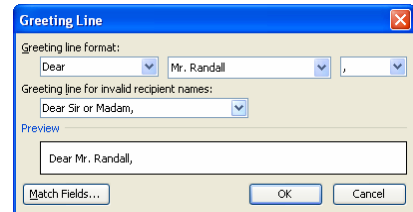
Editing the Address Block

- **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**.



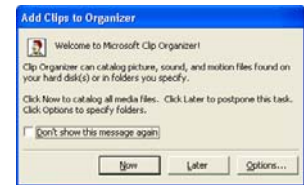
Editing the Greeting Line

- **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

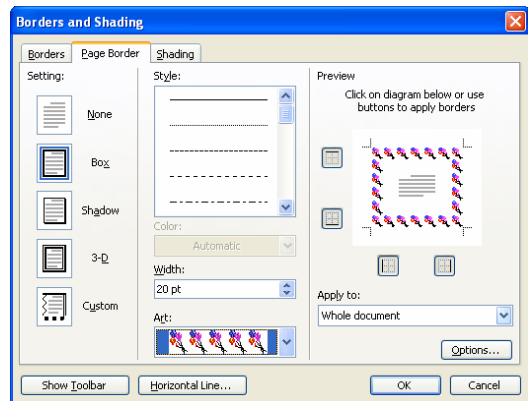
- Click on the graphic.
- Move the cursor to a corner of the graphic (The cursor changes to a two-headed arrow.).
- Click and drag to make the graphic the desired size.

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.

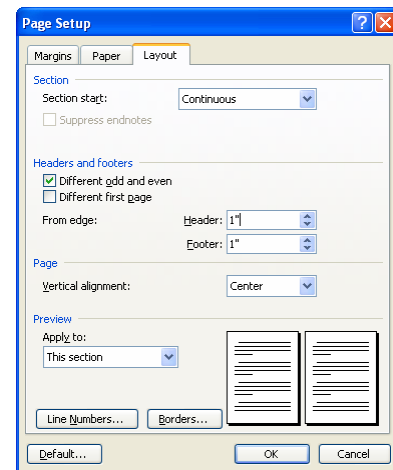
Page Borders

- On the **Menu Bar**, click on **Format → Borders and Shading...**
- Click on the **Page Border** tab.
- **Simple Border**
 - On the left side, click on **Box**, **Shadow**, or **3-D**.
 - In the **Style** section, choose a style, color, and width.
- **Art Border**
 - 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.