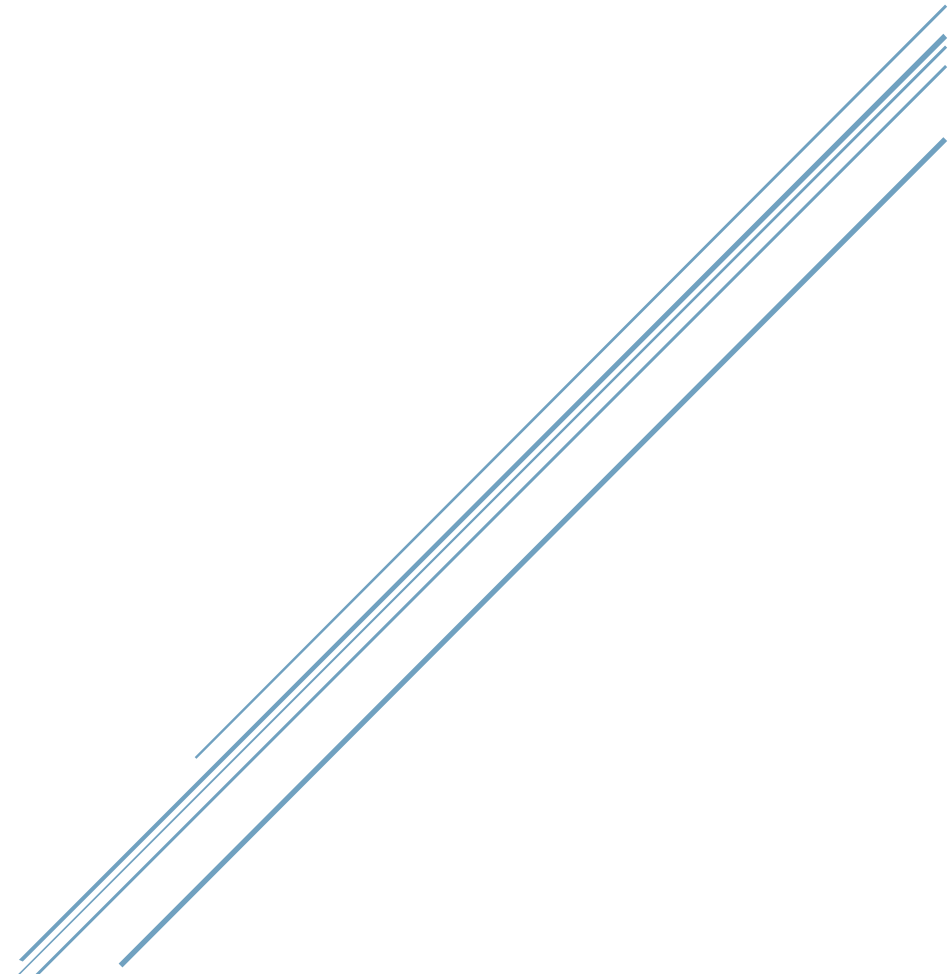
WORD ADVANCED

MINNCAP - 2019



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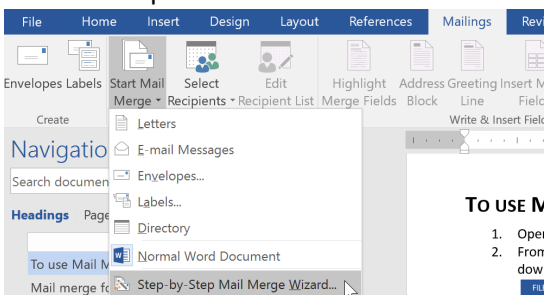
MAIL MERGE - LETTERS

1. Open an **existing** Word document, or create a **new** one.
2. From the **Mailings** tab, click the **Start Mail Merge** command and select **Step by Step Mail Merge Wizard...** from the drop-down menu.



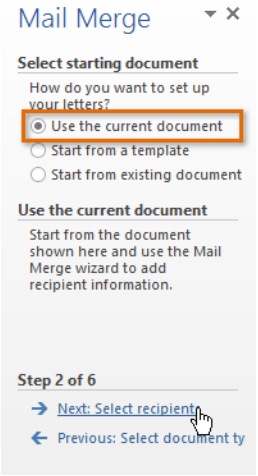
The Mail Merge pane appears and will guide you through the **six main steps** to complete a merge. The following example demonstrates how to create a form letter and merge the letter with a **recipient list**.

Step 1:

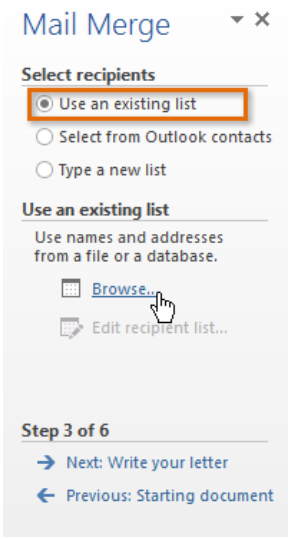
- Choose the **type** of document you wish to create. In our example, we'll select **Letters**. Then click **Next: Starting document** to move to Step 2.

Step 2:

- Select Use the current document, then click Next: Select recipients to move to Step 3



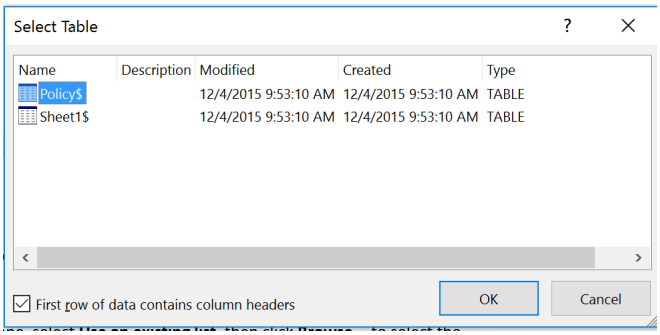
Step 3:



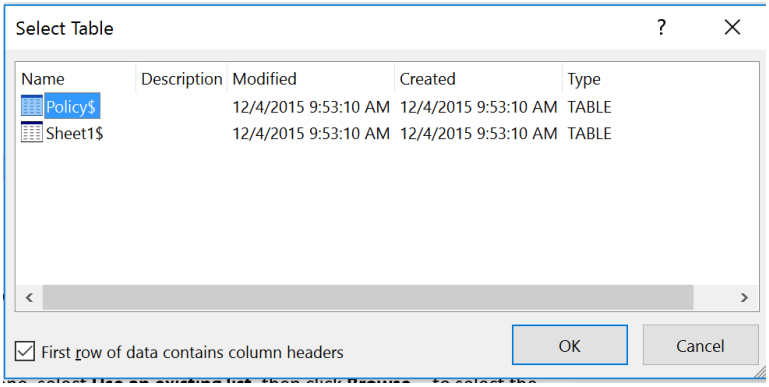
Now you'll need an address list so Word can automatically place each address into the document. The list can be in an existing file, such as an **Excel workbook**, or you can **type a new address list** from within the Mail Merge Wizard.

1. From the **Mail Merge** task pane, select **Use an existing list**, then click **Browse...** to select the file.
2. Locate your file and click **Open**.

3. If the address list is in an Excel workbook, select the **worksheet** that contains the list and click **OK**.

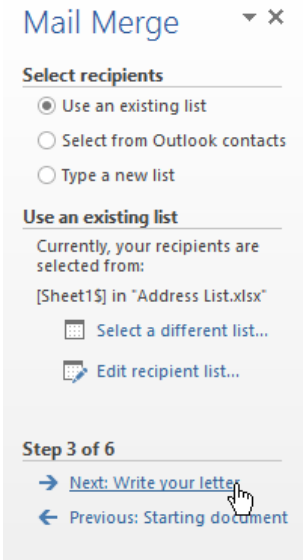


4. In the **Mail Merge Recipients** dialog box, you can **check** or **uncheck** each box to control which recipients are included in the merge. By default, all recipients should be selected. When you're done, click **OK**.



You can also filter your list by using the Drop Downs on each of the filed headings. This will allow you to select groups of individuals. It will also let you sort!

5. From the **Mail Merge** task pane, click **Next: Write your letter** to move to Step 4.



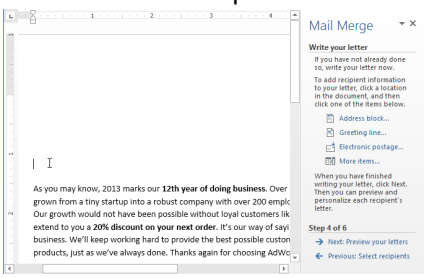
If you don't have an existing address list, you can click the **Type a new list** button and click **Create**. You can then type your address list.

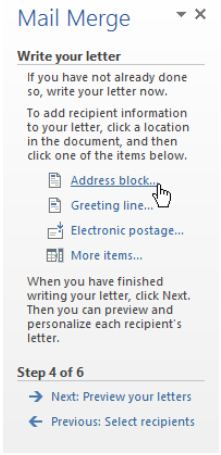
Step 4:

Now you're ready to write your letter. When it's printed, each copy of the letter will basically be the same; only the **recipient data** (such as the **name** and **address**) will be different. You'll need to add **placeholders** for the recipient data so Mail Merge knows exactly where to add the data.

To insert recipient data:

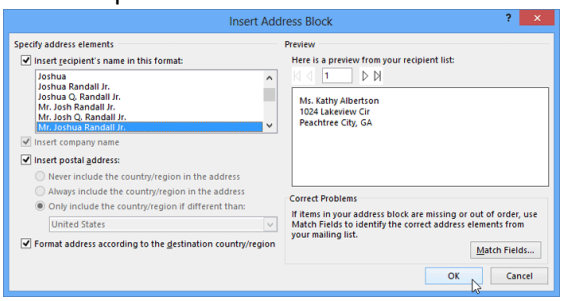
1. Place the insertion point in the document where you wish the information to appear.



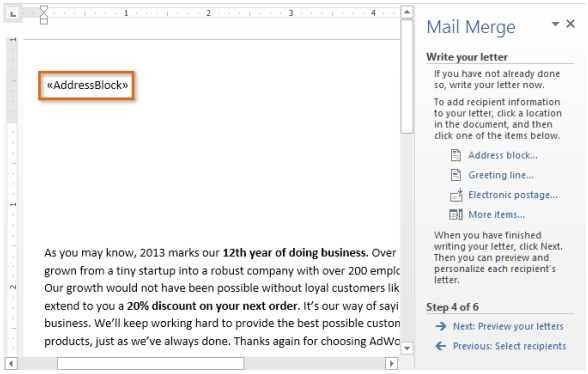


2. Choose one of the four **placeholder** options: **Address block**, **Greeting line**, **Electronic postage**, or **More items**.

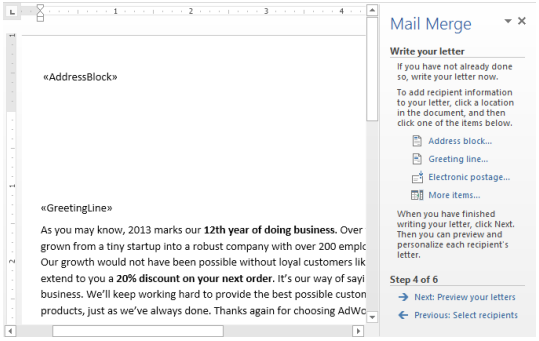
3. Depending on your selection, a dialog box may appear with various options. Select the desired options and click **OK**.



4. A placeholder will appear in your document. For example: **«AddressBlock»**.

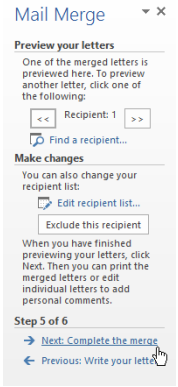


5. Repeat these steps each time you need to enter information from your data record. In our example, we'll add a **Greeting line**.

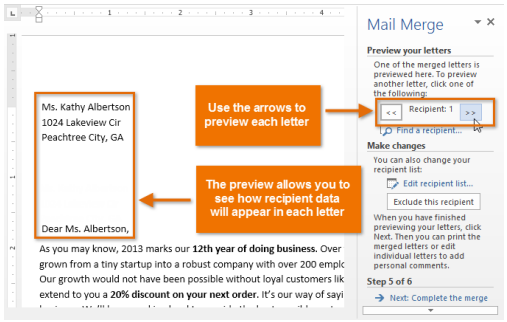


6. When you're done, click **Next: Preview your letters** to move to Step 5.
7. For some letters, you'll only need to add an **Address block** and **Greeting line**. Sometimes, however, you may wish to place **recipient data** within the body of the letter to **personalize it** even further.

Step 5:



1. Preview the letters to make sure the information from the recipient list appears correctly in the letter. You can use the left and right scroll arrows to view each document.

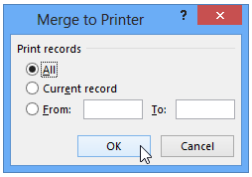


2. Click **Next: Complete the merge** to move to Step 6.

Step 6:

1. Click **Print...** to print the letters.

2. A dialog box will appear. Click **All**, then click **OK**.



3. The **Print** dialog box will appear. Adjust the print settings if needed, then click **OK**. The letters will be printed.

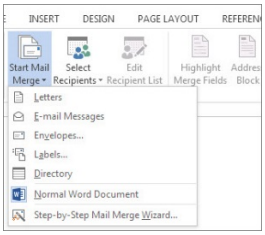
MAIL MERGE FOR LABELS

In a mail merge, Word pulls the information from your mailing list into your label document. Making labels with mail merge can get complicated—but it basically involves four steps.

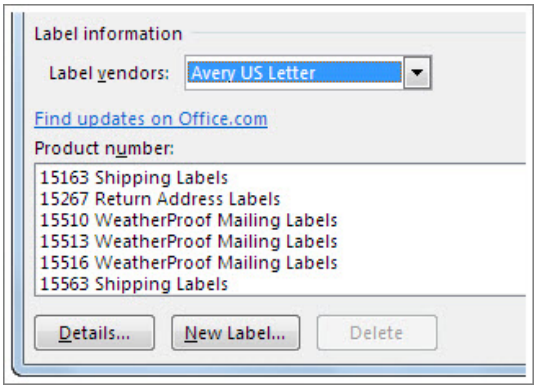
Let's start with those four basic steps—and if at any time problems crop up or you want more information, click a link to get the details.

Set up a document that matches your label size

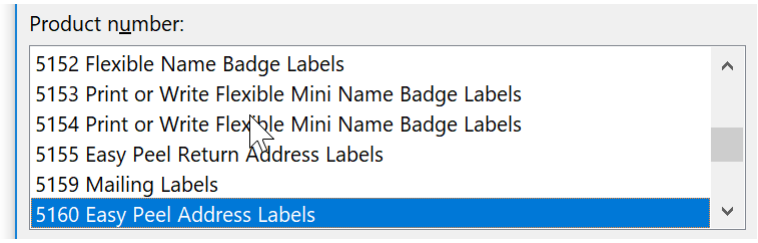
1. Click Mailings > Start Mail Merge > Step by Step Mail merge Wizard. Select Labels as the document type.



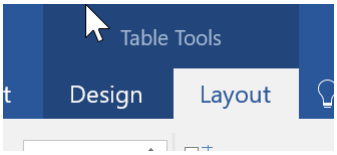
2. Click Next Starting document. Click the label options… link.
2. In the **Label vendors** list, click the company that made the labels you're going to print on. Often times, this is Avery US Letter.

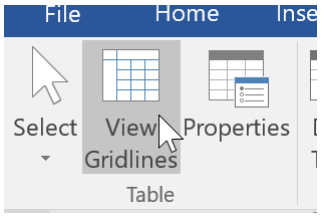


3. In the **Product number** list, click the number that matches the product number on your package of labels. To find the exact label, type the number quickly. Click Ok.

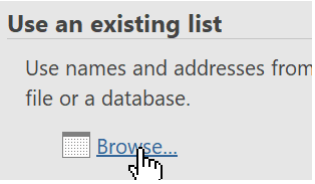


4. You will now be in a table. If the gridlines do not show up, Click the Layout tab within the Table Tools tab of the ribbon. Select the View Gridlines options (second button in from the left).

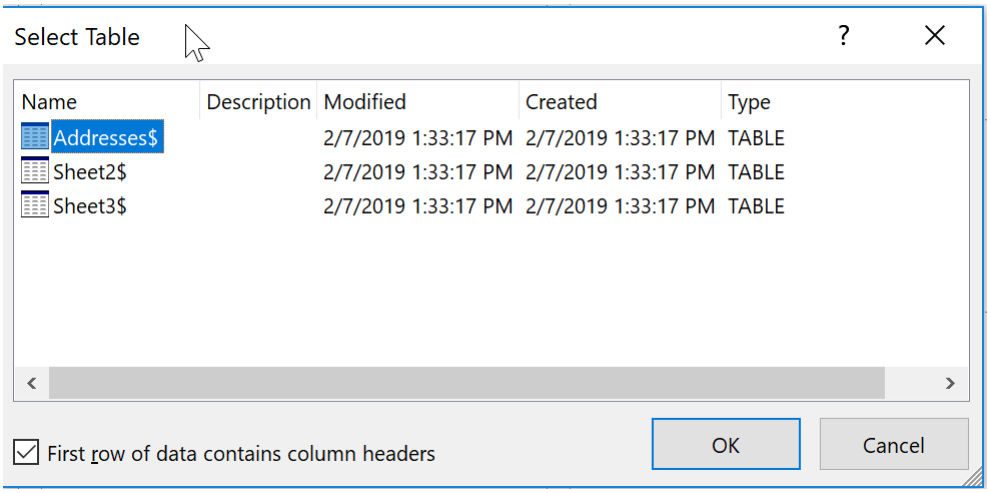




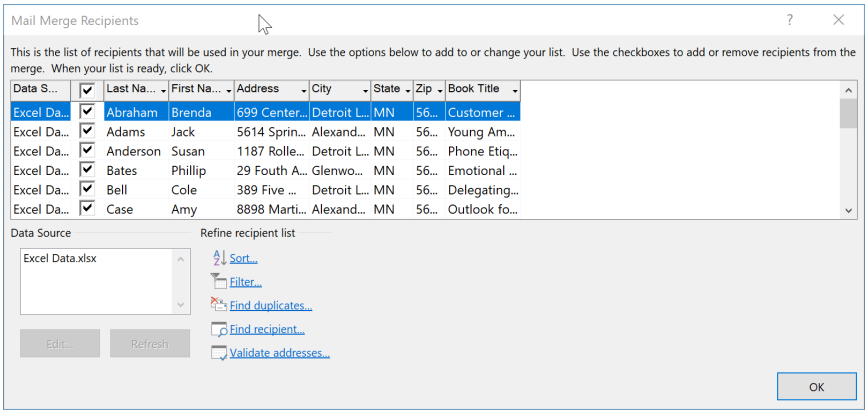
5. Click Next: Select recipients. Click the Browse… link.



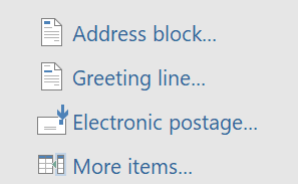
6. Navigate and select the Excel file.
7. Select the checkbox for First row of data contains column headers. And select the worksheet the data is in. Click OK.



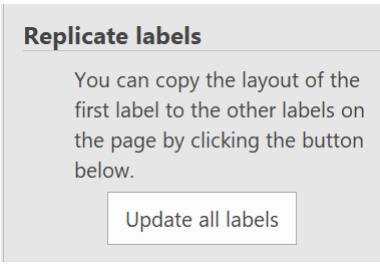
8. In this window you can sort or filter your data. Click OK when done.



9. Select Next: Arrange your labels. Select Address block. Click OK.



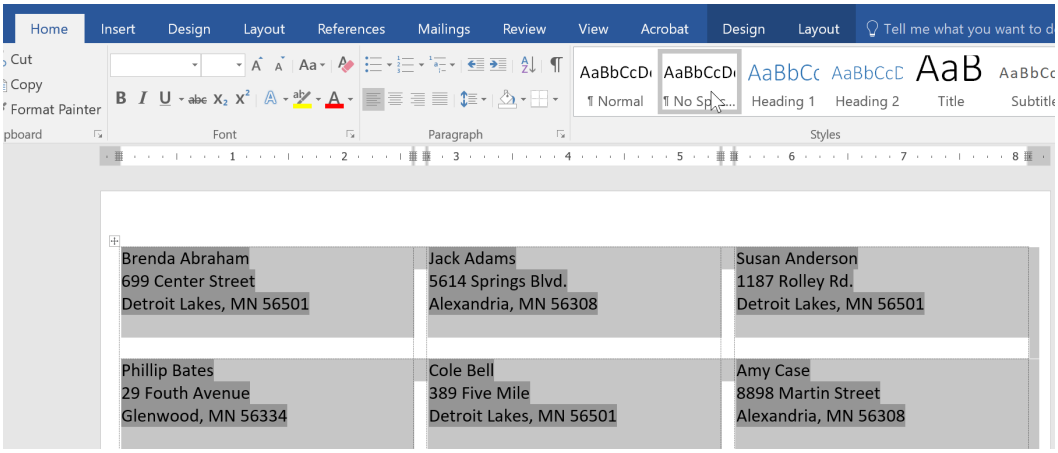
10. Click Update all labels.



11. Click Next: Preview your labels. Make any formatting changes here. .

Brenda Abraham 699 Center Street Detroit Lakes, MN 56501	Jack Adams 5614 Springs Blvd. Alexandria, MN 56308	Susan Anderson 1187 Rolley Rd. Detroit Lakes, MN 56501

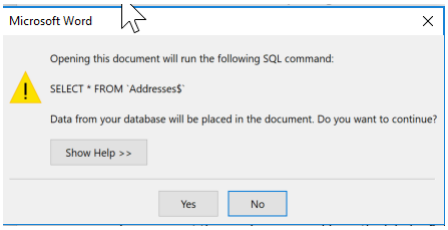
I.e. you want the spacing removed from the labels. Select all of the information (Ctrl + A). From the Home Tab >> Styles Group >> No Spacing



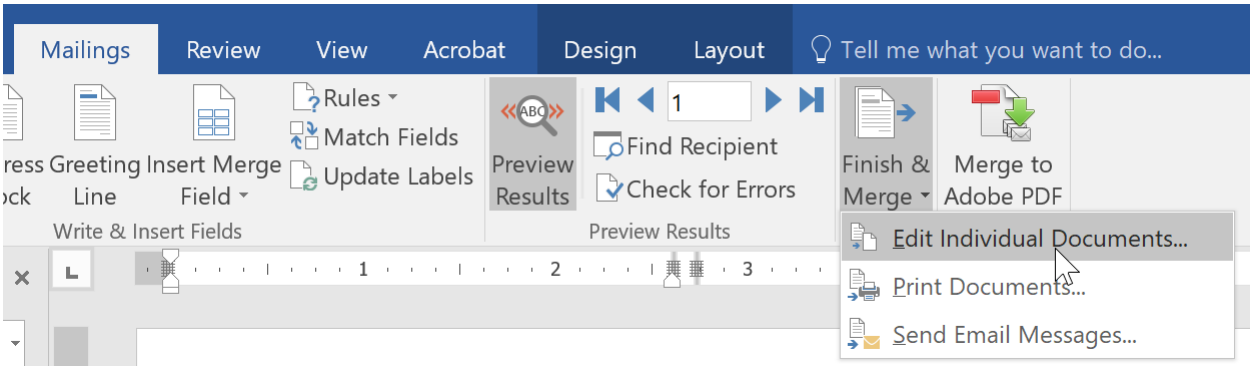
12. Select Next: complete the merge. Either choose Print… or Edit Individual labels and merge them all into a new document.

UPDATE EXCEL AND MERGE

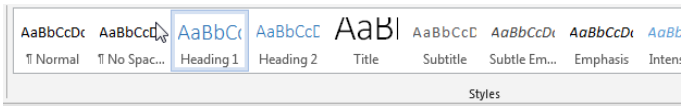
1. You can update your Excel file and then Merge your labels and Letter again. After you have updated the Excel file, open the Word file. Click Yes at this message. This will merge all of your updated information.



2. Click the Mailings Tab >> Finish & Merge >> and either Print or Edit Individual Documents and merge them into a new file.



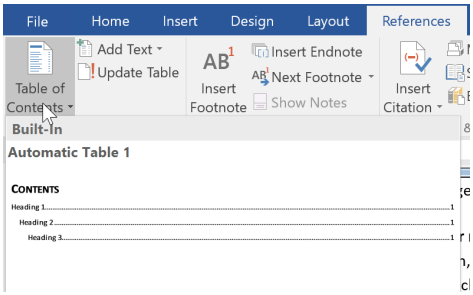
SELECT A STYLE



1. Select the text that you want to format.
2. In the Style group on the Home tab, hover over each style to see a live preview in the document. Click the More drop-down arrow to see additional styles.
3. Select the style you desire. Now the selected text appears formatted in the style.
   NOTE: to create an automatic Table of Contents use Heading 1, Heading 2, Heading 3

CREATE A TABLE OF CONTENTS USING STYLES

Please note you must have applied heading styles to your section headings within the document. i.e. Heading 1, Heading 2, Heading 3, from the Styles Group.



1. Place the cursor where you the Table of Contents is to be inserted.
2. From the References Tab, Select Table of Contents.
3. Select one of the Automatic Tables.

UPDATE A TABLE OF CONTENTS

If you continue to edit the document, it will be necessary to update the table of contents.

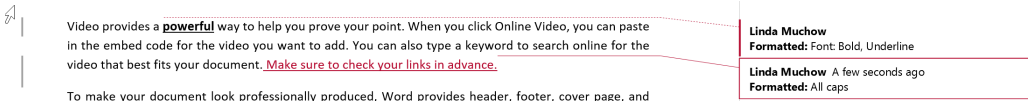
1. Click within the table of contents.
2. Click the Update Table button.
3. Choose Update Entre Table.

TRACKING CHANGES

When you turn on Track Changes, every change you make to the document will appear as a colored markup. If you delete text, it won't disappear—instead, the text will be crossed out. If you add text, it will be underlined. This allows you to see edits before making the changes permanent.

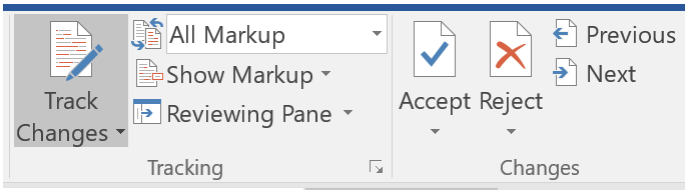
TURN ON TRACK CHANGES

1. From the Review Tab >> Track Changes
2. From this point on, any changes you make to the document will appear as colored markups.

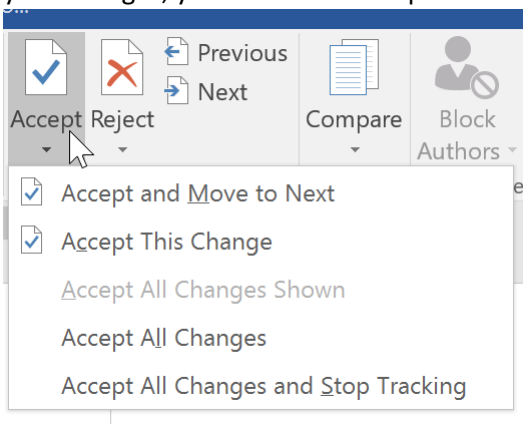


ACCEPT OR REJECT CHANGES

1. Turn off tracking.
2. Select the change you want to accept or reject (or click Next in the Changes group)

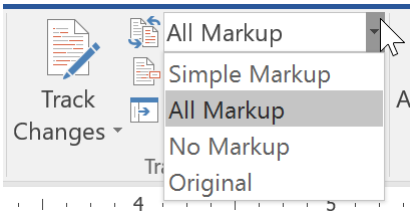


3. From the Review Tab >> Accept or Reject.
4. The markup will disappear, and Word will automatically jump to the next change.
5. To accept all changes at once, click the Accept dropdown arrow >> Accept All. If you no longer want to track your changes, you can select Accept all and Stop Tracking.



HIDE TRACKED CHANGES

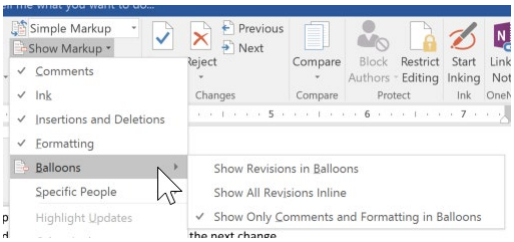
1. From the Review Tab >> Tracking Group >> Display for Review command.



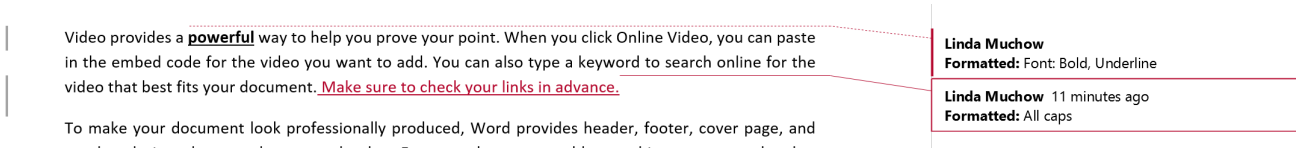
2. Select the desired option: Simple Markup, All Markup, No Markup, Original.

SHOW REVISIONS IN BALLOONS

1. From the Review Tab >> Show Markup >> Balloons>> Show Revisions in Balloons



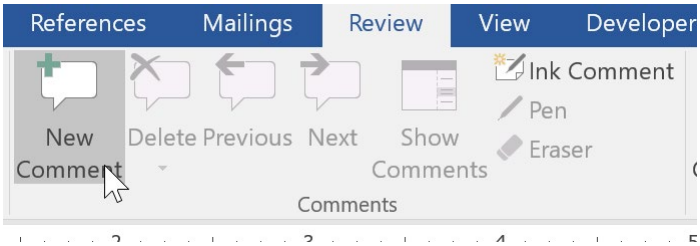
2. Most revisions will appear in the right margin, although any added text will still appear inline.



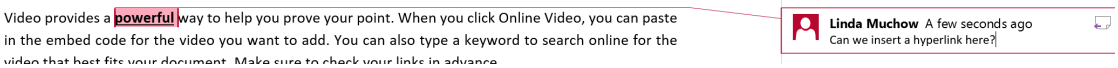
COMMENTS

Sometimes you may want to add a comment to provide feedback instead of editing a document. While it's often used in combination with Track Changes, you don't necessarily need to have Track Changes turned on to add comments.

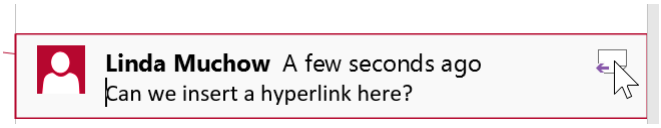
1. Highlight text, or place your cursor when you want the comment to appear.
2. From the Review tab >> Comments Group >> New Comment

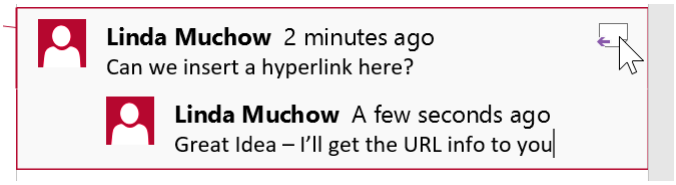


3. Type your comment. Press Esc or click anywhere outside the comment box when you are done.



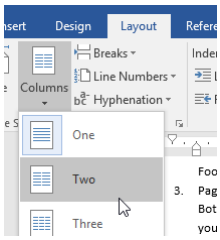
4. To delete a comment, right mouse click the comment and choose Delete Comment.
5. To reply to comment, click the reply button in the upper right corner of a comment.



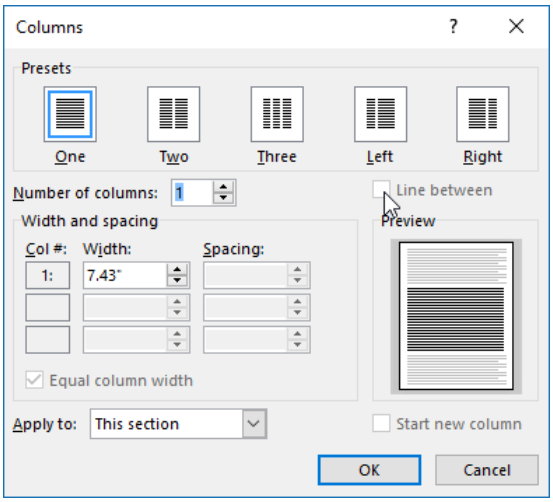


COLUMNS

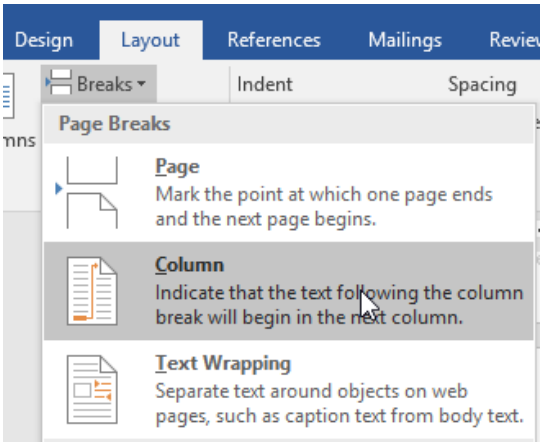
1. Select the text you want to format.
2. Layout Tab >> Columns
3. Select the number of columns you want to create.



4. Select Columns >> More Columns to adjust the number of columns, insert a line between the columns, change the alignment of the columns.



5. To remove columns, select Columns >> One from the dropdown that appears.

COLUMN BREAKS

1. Place the insertion point at the beginning of the text you want to move.
2. Select Layout Tab >> Breaks >> Column.