



www.aseasonofhappiness.com

Working-with-Microsoft-Word Tutorial 4

Review-Exercise 3

Having completed Exercise 3, you should now have a file containing the Keyboard shortcuts to date; organised into categories and in alphabetical order. Continue adding to this as you progress through the tutorials.

At the end of Exercise 3, I had you Save the Word-Keyboard Shortcuts file As... Word-Keyboard Shortcuts(2). Then you opened the original file so that both were sitting on the Desktop. Had you tried to Delete either of these files from the Word Tutorial Folder while they were open, Word would have posted a warning and refused to obey the delete command. Whenever you have files with similar names, to prevent deleting the wrong one from the Folder, open them; then close only the one(s) you no longer need. That way, as long as you keep those you still require open on the Desktop, you can't delete them by accident.

Just in case you do, click on  then slide across to the right-hand list where you can restore recently saved files. Also, see Page 19 about deleted files and recovering them from the Recycle Bin.

While on the subject of Word-Keyboard Shortcuts, open that doc file, **Ctrl+A** to Select ALL; and drop-down the Paragraph menu to make the spacing After the paragraphs 0 (zero). Your list now takes up less page space and is easier to read.

If, however, you prefer an extra space to separate the sub-headers from their respective lists, you can **Enter** either at the end of the sub-header, or at the start of the first item listed. This will create a new paragraph which can be adjusted using the Font-size drop-down on the toolbar. Or, use the Paragraph drop-down on the toolbar to add a space After each sub-header. When you have finished, Save and Close the file.

This Tutorial is rather long, so you may prefer to go through it a section at a time.

Just remember to Save all open documents before taking a break.

Creating a Formatting Templates document

This will be useful for many projects. You will be compiling a Folder of useful formats as templates, and adding to them throughout the tutorials. That way you will only need to create them the once, and won't have to remember how to re-create them later.

Creating a Business Letter Template

The fourth tutorial in this series helps you to format a template which is handy for letters, particularly the business kind. The basics can also be used for personal mail.

The Form Letter

Sometimes the same letter with only minor changes needs sending to a number of different people. A little one-suits-all preparation makes printing easy.

Part 1 - Saving Formatting Templates

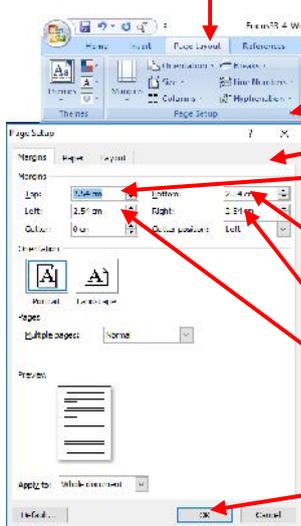
Open your Word-Basic document from the Word Tutorial Folder and **Save As...** Word-Formats. **Enter** three times, then **Arrow up** to the top line and type: Word Format Templates, and make it Bold, Centralised and 14pt. **Arrow down** to the last line below.

You are about to change the margins of this file; but first type: // Changing the Page Setup in Page Layout affects the whole page and any continuing pages. To do this, click on Page Layout on the top toolbar; then access the menu with a click on the Page Setup drop-down arrow. Change margin sizes as required and **Enter** (OK). //

N.B. the double forward slashes (//) indicate that everything between them is important information intended only as a guide. Text is Normal with no special formatting contained.

Make "Changing the Page Setup" Bold. You are now going to try this.

To save hassles, use the mouse for this procedure. So far, you have been working with the Home (default) toolbar. Now you are going to switch to "Page Layout", so left-click on the Page-Layout tab at the top. Then click on the Page Setup drop-down arrow,



and this menu opens.

Notice that the pre-selected size is for the Top margin and the default highlighted is set on 2.54 cm. Just type: 1.

Click in the "Bottom" box, hold and drag to Select the lot, and type: 2.

Using the same method, change "Right" to 5,

and "Left" to 1.

Click on "OK" (foot of the menu) and see how the new format has changed your page.

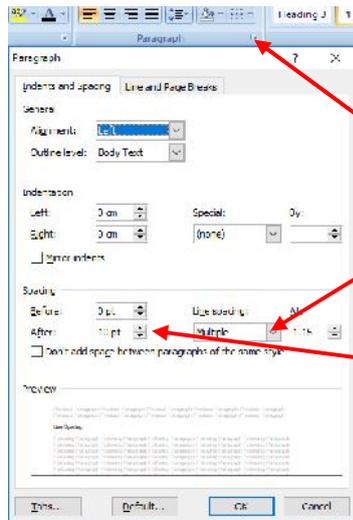
Now you know How-to change the margins on any document. **Don't save yet.**

If there is a special format you need for some other task that you intend to repeat on occasions (maybe a recipe page), open Word-Basic, Save **As...** (let's say) Recipes-Template; then change the margins. You can change them again anytime. This is a useful adjustment, particularly when text wraps to the next page by just a line or two. Decreasing the margins by a little will probably bring it back to the single page.

At the moment, because you will be adding more to the Word-Formats file, you need to put it back the way it was before. **Ctrl+Z** to undo the changes. **Ctrl+End** the cursor, then **Enter** twice. **Ctrl+S** to Save.

Now, let's get back to Word-Formats. Where the cursor is flashing, type: Line Spacing. **Enter** and type: 1: Add / Remove extra spacing Before and After Paragraphs: drop down Paragraphs menu.

Go back and make “Line Spacing” Bold. **Arrow up** and Select both paragraphs to include the sub-header then follow the procedure below:



Because you are still in the Page Layout toolbar, click back to Home at the top above the toolbar.

Left-click with the mouse on the Paragraph drop-down.

Drop down the Line spacing and click “Single”. The only thing you need to change now is the spacing After the paragraph.

This is here. Left-click in the box and Select the lot; then tap the number 0 (zero) on your keyboard. You can also use the down arrow on the right of the box. Click OK.

You should have:

Line Spacing

1: Add / Remove extra spacing Before and After Paragraphs: drop down Paragraphs menu.

Drop the cursor at the end of the Normal line and **Enter, Enter, Enter**. On the last line, type:

2: For no extra space Before or After Paragraph, Select the two empty lines and **Ctrl+C**.

Your text should look like this:

Line Spacing

1: Add / Remove extra spacing Before and After Paragraphs: drop-down Paragraphs menu.

2: For no extra space Before or After Paragraph, Select the two empty lines and **Ctrl+C**.

Notice how new paragraphs have no extra spacing between. You are now going to change the rest of the document to this same format. **Ctrl+A** to Select All; and repeat the Removal of the 10pt extra space procedure. If the Spacing After box is empty, drop the cursor in it with a click and type: 0 (zero); if it is Selected already, type 0. **Enter**. Your Word-Formats document should have no extra spacing between paragraphs; and every new paragraph will be spaced exactly the same as ordinary lines of text. **Ctrl+S** to Save these changes.

Open a new Word-Basic doc, **Save As...** Word-Letter 1 for the next lesson...

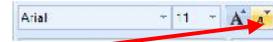
Part 2 - Writing a Business Letter

Setting up the page

Before we begin this exercise, take a look at the above header which is followed by a sub-header. Both were formatted as described earlier, but one small change has to be made. With Word, whenever you “Enter” for a new paragraph, the default may make the first letter typed appear as upper-case. Mine did and I didn’t want this; so, after typing the entire sub-header, I went back to that letter, deleted it and replaced it with a lower-case “s”.

In your Word-Letter doc, **Enter** three times, then skip back to the top and copy my header and sub-header to your document and edit the “S” to “s”.

The sub-header Font-size is 14pt and I think it’s too large. You can make a speedy reduction of this with the mouse by first Selecting all of the sub-header, then mousing to the toolbar and clicking the down-arrow on the “Shrink Font” icon. I prefer to Select, then **Ctrl+Shift+<**. It’s quicker still. If you moused over the icon next to it, you’ll see that you can increase the size in the same way; or **Ctrl+Shift+>**. Don’t forget to save any new shortcuts into your Word-Keyboard Shortcuts.



Following this tweaking of your sub-header, we can continue with the tutorial.

setting up the page

I chose the business letter as an example because most tend to follow similar standards; and when one is created, the way it is formatted can be used as a template for future letters.

The “letter head” can be just that, and is usually the name and address of the sender. This may be an individual, a partnership, or a Company. Have a look at some you’ve probably received and check out the different head styles. I’ve noticed some Company letter heads just have a logo at the top, and the sender details are at the foot of the page. Yours, however, really should be at the top making it clear from the start who the letter is from.

We’ll try a simple style, centralising across the top of the page. **Enter**, **Enter**, then type your particulars like those below, substituting your own name, address and email/phone details:

J J Doe 3/52, Central Drive, Scotsville, GARLAND 54321

email : jjdoe@jiggermail.com mobile: 8800 555 222

Don’t you agree that there’s too much space between the lines? Drop the cursor in the first line, go to the Paragraph menu and zero the extra space After paragraphs. If the file header and sub-header now seem too close, just go back to the menu and try a 3pt space. Select either line to change the Font style and size to whatever you want.

With the cursor at the end of the email/mobile line, **Enter**. Changing the space between the two paragraphs has only affected them specifically. Every paragraph after takes with it the same formatting as the line it was Entered from. You are going to change this.

The cursor should be flashing directly under the previous line – it is centralised. Make it left-aligned. It also needs to be in your Normal text format. Enter for another paragraph and the cursor will be flashing at the start of it. **Ctrl+Shift+End** to Select. Do nothing more yet.

Go to the Word-Formats file (**Line Spacing**) and Select just the two empty lines between 1 and 2; then **Ctrl+C** to copy. Activate the Word-Letter 1 file with a single click; then **Ctrl+V**. This copy from Word-Formats has replaced the Selection with the new line-spacing, which will now control any further text until changed again. If all’s well, close Word-Formats, and Save Word-Letter 1 file.

Part 3 – Creating the Letter Formats

So far, all you have is a letter head with your particulars. **Save As...** Word-Letter Template (Bus) and Close. Re-open Word-Letter 1 from Word Tutorial to continue this exercise – any new work will be saved to your Template later.

Drop the cursor at the end of the mobile phone number and **Enter, Enter; Ctrl+L**, then copy-type the date like this (for the day, use plain numbers, not 24th):

February 24 2018

Next, you need the name and address of whomsoever you are sending the letter to. This is generally a couple of spaces below the date, so **Enter** twice, and copy-type the following address:

Dispatch Department
Whatever Manufacturing Co
17 Yellowbrick Road
Wizard County 12345

Many business communications require a reference. **Enter, Enter**; then type:

Your Ref: 762450

What you must remember now is that, if your cursor is at the end of the Zip code and you “Enter” for a new line it will be directly beneath without the extra spacing, because you have formatted the page with no extra spacing After paragraphs. Add one now – **Enter**, then **Enter** again to create that line-space yourself. Unless you re-format, you have full control over the spacing between paragraphs. To verify this, left-click in a space between any paragraphs and your cursor should drop and stay flashing there. As a custom-made spacer, this can be adjusted by **Shift+End**, then changing its Font size on the toolbar.

For the next part of your letter you may wish to insert a line indicating a specific person or department in the Company for whom it is intended. Give yourself two paragraphs under “Your Ref:” and type: For the attention of the Dispatch Manager. Make this Centralised, Bold and Underlined. You should have this:


For the attention of the Dispatch Manager

With the cursor at the end of this line, disable the Bold and Underline by clicking on the highlighted “B” and “U” on the toolbar to make everything following Normal. **Enter, Ctrl+L**; then **Enter** again. We know the Dispatch Manager’s name, so we can type it here:

Dear Mr Makepeace

Perhaps you have to include a reference of your own, for instance: your Customer number, or your vehicle registration. Insert this now. Go back up and drop the cursor at the end of the reference number, **Enter**; then type: My Ref: 9988721.

Your Word-Letter 1 document should now look similar to mine:

J J Doe 3/52, Central Drive, Scotsville, GARLAND 54321

email : jjdoe@jiggermail.com mobile: 8800 555 222

February 24 2018

Dispatch Department
Whatever Manufacturing Co
17 Yellowbrick Road
Wizard County 12345

Your Ref: 762450

My Ref: 9988721

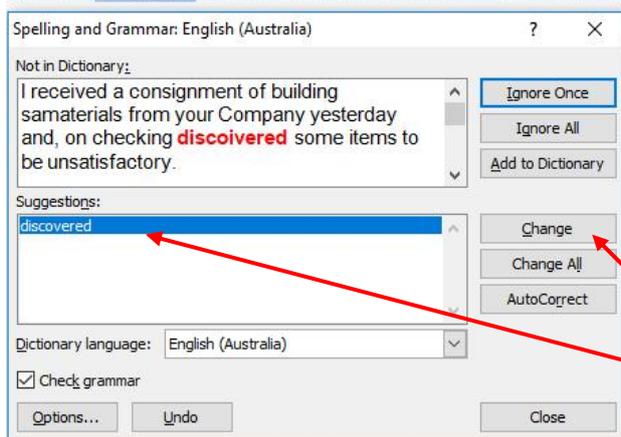
For the attention of the Dispatch Manager

Dear Mr Makepeace

Add an extra line of space after “Makepeace” and start typing as quickly as you can, making a few typos and spelling errors on the way. Copy-type this: I received a consignment of building materials from your Company yesterday and, on checking, discovered some items to be unsatisfactory. These are listed below: Here’s my contribution:

I received a consignment of building samaterials fRO your Company yesterday and, on checking, discovered some items to be unsatisfactory. These are listed below:

I received a consignment of building samaterials from your Company)
checking discovered some items to be unsatisfactory. These are liste



Clearly I’ve made a mess of it, and I could go back and rectify it myself; but when Microsoft Word can do it for me, why would I bother? All I have to do is Select all the text, open the “Review” tab above the toolbar; then left-click ABC in the far left corner. It did highlight **samaterials**, but gave no suggestions, so I had to sort that myself. When it picked **discovered** the spell-check suggested this. That was fine by me, and it was already Selected, so I left-clicked Change.

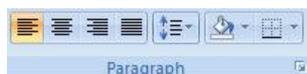
And that’s what Word Spelling and Grammar check can do for you. Occasionally there are more than one suggestion. If none of them are suitable, you can make changes manually – a cursor will be flashing at the end of the incorrect word in the Spelling and Grammar box. You can edit this the same as any text in your document. When the errors are fixed, simply left-click Change and it will be applied to your document. Once the opening statement of your letter has been corrected, **Ctrl+S** Word-Letter 1.

Part 4 - Indenting Text

At the end of the closing phrase: "...These are listed below:" **Enter, Enter**; then copy-type this short list:

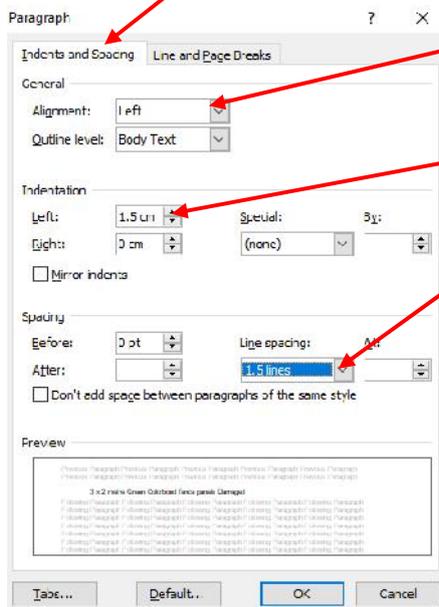
3 x 2 metre Green Colorbond fence panels **Damaged**
1 x 2 metre fence post the **Wrong Colour**
Fixing-screws packet split and some **Missing**

You want this to stand out from the rest of the letter, so it might be better indented from the left margin. First, Select the entire list, including the final ¶; and open the "Home" toolbar.



Left-click the Paragraph drop-down panel.

Indents and Spacing is the default which is okay.



Leave the Alignment Left,

Add a 1.5 cm Indentation to the left margin

Mouse down to the Line Spacing options, drop down the options and select 1.5

then **Enter**.

Done correctly, you should have a list like this, set in from the left margin 1.5cm:

3 x 2 metre Green Colorbond fence panels **Damaged**
1 x 2 metre fence post the **Wrong Colour**
Fixing-screws packet split and some **Missing**

This might be a handy format to keep for future use; so Select the entire list, including the ¶ at the end of the last line (this is important) and **Ctrl+C**. Open your Word-Formats file and **Ctrl+End** to take the cursor to the bottom. **Enter, Enter**; then **Ctrl+V** to paste your copy. Drop the cursor at the beginning of the first line; type: Left Indent 1.5cm; Line Spacing 1.5: **Enter**, then go back and make the line above Bold. You should have this:

Left Indent 1.5cm; Line Spacing 1.5:

↑ 3 x 2 metre Green Colorbond fence panels **Damaged**
↑ 1 x 2 metre fence post the **Wrong Colour**
↑ Fixing-screws packet split and some **Missing**

Number each line (1,2 and 3) at the start of the lines.

For each line in turn, drop the cursor immediately after the first new number, **Shift+End**, then **Delete**. Only the numbers should remain, plus the formatting.

When finished, with the cursor flashing after the “3”,**Enter** for another line, and type: Select and Ctrl+C lines 1,2 and 3 for this format.

The line is indented the same as the lines above, but because you deleted the last word “**Missing**” with the rest, you also removed the Bold command, so the instruction at the bottom is now Normal. You need to make the text on this line **Bold**.

Don’t close Word-Formats yet. While you are there, you can conduct a test to make sure this formatting can be transferred with ease to a required place in any document.

First, Select the formatted lines 1,2 and 3, and **Ctrl+C**. **Ctrl+End** the cursor and add a couple of lines - they should all be Normal. **Arrow up** to the new middle Normal line, and **Ctrl+V**. Your lines should be indented with only a number at the start of each:

- 1
- 2
- 3

After copying and pasting into their new location, you can use this format for any indented list. Simply **Backspace** the numbers in turn and start typing. If the text wraps to another line, it will simply drop the next numbered one down.

The format will repeat for as long as you stay within it, so you can have a list as long as your arm. If, however, you need less than 3, **Delete** any unnecessary lines. You can even use the format for a single line.

Arrow up to the line above the test, **Ctrl+Shift+End** and **Delete**. **Ctrl+S** and close Word-Formats file.

Back to Word-Letter 1. Your letter now needs a closing statement, so **Ctrl+End** to drop the cursor on the last line which should be in the Normal settings. If not, change it. **Enter** for an extra space, then type:

I need the new fence to be completed by March 14 2018 at the latest. Please contact me ASAP to arrange a suitable time for delivery of the correct items as per my original order, and to collect those not required.

Enter 3 times. Type:
Yours sincerely

Enter 5 times. This allows space for a signature. Type (substitute your own name):
J J Doe

The draft for your letter in Word Letter 1 should look something like my version:

J J Doe 3/52, Central Drive, Scotsville, GARLAND 54321

email : jjdoe@jiggermail.com mobile: 8800 555 222

February 24 2018

Dispatch Department
Whatever Manufacturing Co
17 Yellowbrick Road
Wizard County 12345

Your Ref: 762450

My Ref: 9988721

For the attention of the Dispatch Manager

Dear Mr Makepeace

I received a consignment of building materials from your Company yesterday and, on checking, discovered some items to be unsatisfactory. These are listed below:

3 x 2 metre Green Colorbond fence panels **Damaged**

1 x 2 metre fence post the **Wrong Colour**

Fixing-screws packet split and some **Missing**

I need the new fence to be completed by March 14 2018 at the latest. Please contact me ASAP to arrange a suitable time for delivery of the correct items as per my original order, and to collect those not required.

Yours sincerely

J J Doe

As this is a one-size-fits-all template, there may be inclusions that are unnecessary for a particular letter. For example: unless you subscribe to a purchase plan or club, the Customer number is irrelevant. To remove it, drop the cursor after the Your Ref: number, **Shift+Arrow-down** then **Arrow-right** 1 tap and **Delete**. **BUT** for now, just leave this as it is.

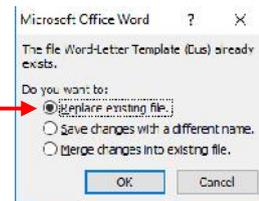
When satisfied with your efforts, **Ctrl+S**. This is important. You can use it later to try out different styles of your own; and it won't interfere with the Word-Letter Template (Bus) file.

If you have any other work apart from the business letter in this open Word-Letter 1 document (you may have tried some practice text), I want you to **Delete** everything except the letter, retaining your name and address at the top as well. On the screen, you should now see your letter head, plus the rest of the letter, but nothing else.

At this stage, if you realise you've lost something important during the editing procedure, **Ctrl+Z** and try again. You need the complete letter with all of its formatting; and this will be contained in the Word-Letter Template (Bus) file for future use. You could now transfer this information to that file by copying and pasting; but I want you to try something different.

If you are satisfied that the open Word-Letter 1 document contains only what you need for the business letter, **Save As...** Word-Letter Template (Bus).

Because you already have a file with the same name, Word will remind you with a pop-up options panel. You can pick whichever you like, but for the sake of the exercise, accept the default  and tap **Enter** to OK. Re-open Word-Letter 1 just to make sure everything is still there, then close it.



If you wish to take a break, Save and Close your files as usual. You will need the Word-Letter Template (Bus) open for the next part.

Part 5 – The Form Letter

Occasionally you may have to send the same letter to a number of different people, perhaps to inform customers of new sales items, or a change in prices and conditions. I have chosen an example which most will need to send more than once in a lifetime – a change-of-address notification. You could use your Business Letter Template and, one by one, substitute details such as the person's or company's name and address, plus any reference numbers. Microsoft Word, however, can make this tedious chore so much easier.

You may already have an address list of some kind; this one, however, will be more than just a single file. As there is also the facility to link the recipients in the form-letter list to print labels and envelopes, there could be quite a few files, all associated with addresses. To avoid these becoming buried among the others already created, it would be best to have a separate Folder to keep them separate. Open your Word Tutorial Folder from the shortcut on the desktop, right-click in an empty space and make a new Folder: My Addresses. Look down the list below for Word-Letter Template (Bus), left-click to Select, then right-click and Copy. Double left-click on My Addresses to open the Folder, then right-click on the empty space and Paste.

Open the Word-Letter Template (Bus) from this new Folder and **Save As...** Word-Change of Address Template. Any changes you make now will be saved to this new file. So, starting from the top, change your address to the new one you will be moving to, or are already residing in. If contact particulars are also different (maybe the land-line number), amend

these too. The date will also have to be changed, but this can wait until just before you are ready to mail.

Copy-type the following address. This is obviously not the company you personally will be mailing to; but it will give you an example of how to set up your recipient list, and how to add the field labels to the form letter. Fields are exact locations where the individual details of those you are sending to will be placed in each letter respectively.

Health Insurance Co
Suite 4, Wellbeing Towers
357 Main Street
Goodton
MEDICO 80123

Give yourself an extra line of spacing, then copy-type: Your Ref: BP907-33J-57689. On the next line, copy-type: My Ref: Policy No: 762450, and while the cursor is there, go to the Paragraph drop-down on the toolbar and make the space Before 3 pt.

Naturally, these will change from letter to letter; and on some they won't be required at all. This will all be taken care of shortly.

The new message comes next; so, Select everything in the original, including the last word "required." But leave the ¶ at the end of the line. Now copy-type the message below, changing both addresses to your own – the former, and the new (maybe from a previous move). The date should be that from which your change of circumstances takes effect, even though it may be different to the one at the top of the page when the letter will be sent; so amend this now to avoid forgetting it later.

To Whom It May Concern

Please be advised that, as of this day, March 15 2018

JJ Doe, formerly of 3/52, Central Drive, Scotsville, GARLAND 54321

has relocated to:

17, Grange Street, Welcome Falls, ARNO 65432

I would be grateful if you could amend your records accordingly, and notify me in writing that this change of address has been actioned.

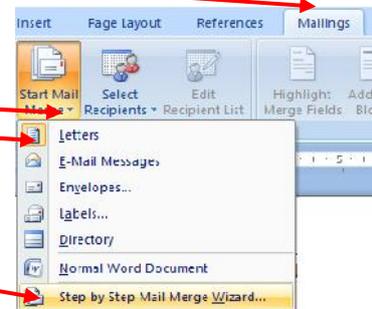
Don't forget – as changes are made to your document and you are happy with the result, Save frequently.

What you have now is the basic template for a standard change of address letter. This one is the business type which can be used for Government Departments, Insurance Companies and the like. It is also specific, at present, to the Health Insurance Co; but this will only be

used as a guide to position the Fields where the unique details of individual recipients will be placed for the final printout.

Now is the time to fill in the details of each recipient; but for the sake of the exercise, we'll only do one and use this to set the field placements. Go up to the tabs at the top of the document and open the "Mailings" toolbar:

All that concerns you at the moment is the Start Mail Merge; so drop down the options and left-click Letters



The options menu will disappear. Drop down the Start Mail Merge again and you will see that Letters is now highlighted. This time, click on the Step by Step Mail Merge Wizard.

This opens a blue panel on the right which will take you through the procedures for entering details in your recipients list. Notice the options under "Select document type". From this you will gather that other facilities are available, in particular the ability to send the form letter as an E-mail. Also, the recipient list you create can be used to print envelopes. Unfortunately, some printers, especially the cheaper ones, don't seem to handle envelopes well causing paper-jams. We have found a better alternative is to print a sheet or two of self-adhesive labels, and this is catered for.

At the moment, the default selection is "Letters" which is what you want, so go to the foot of the Mail Merge panel and click Next: Starting document. Once again, the default "Use the current document" is okay. Left-click Next: Select recipients. As you are starting from scratch, you need to "Type a new list", so click inside the circle to change from the default. This presents you with the Create... option. Click on it and the New Address List appears. You are now going to fill in the blanks; but before you do, use the double-arranged handles on the sides to drag the panel out so that you can see as much as possible on your screen. Not only does this give you an idea of the entry choices, but it will make things easier. You may still have to use the bottom scroll bar. I have split my entries in two for easier viewing:

Company Name	Address Line 1	Address Line 2	City	State	ZIP Code	Country or Region
Health Insurance Co	Suite 4 Wellbeing Towers	357 Main Street	Goodton	MEDICO	80123	

As this is to be a generalised business letter, I've shown only those entries that are pertinent for this example. I have inserted two more Fields at the end for the references.

E-mail Address	Home Phone	Work Phone	Your Ref	My Ref
			Your Ref: BP907-33J-57...	My Ref: Policy No: 762...

Don't worry if the order of Fields in your list is different to the example above (E-mail Address seems to be out of place). Any of these can be re-positioned, even deleted for your own convenience; and you'll learn how next with the procedure for Customizing Fields.

To put in your own additional fields, follow these next steps:

Click “Customize Columns...”

Click E-mail Address to highlight. This will place your new field beneath it.

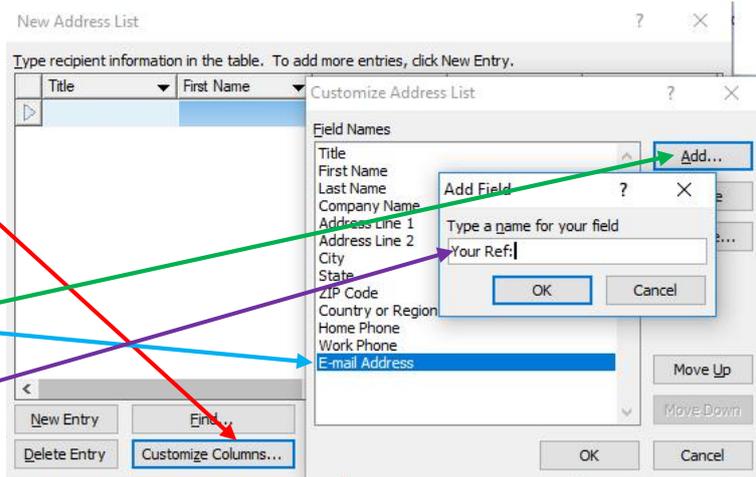
Click Add...

Then fill in the Add Field box with “Your Ref:” and **Enter**.

Repeat for “My Ref:”.

Just don't include the inverted commas (“ ”). OK these changes.

Your list will come up with the first entry being “Title”. For a formal business letter you might put “The Accounts Supervisor” here; but we don't need to right now because we aren't sure who will be dealing with our change of address. Neither do we need the “First Name” or “Last Name sections”. Remember these options, though, because they can be used for more personalised form letters.



The cursor is at the beginning of the Title. We don't need it, or the next two; so **Tab** across until it is in the Company Name box and start typing. Keep **Tabbing** along the line until you finish at the Zip Code. Continue across to the “Refs” Fields and type in all that you have on your letter, e.g. Your Ref: BP907-33J-57689. If you don't only the numbers will be printed.

Use the scroll bar to check back across the line for typos and spelling mistakes; and edit if necessary. Once you are happy with this first entry, and your additional Fields appear at the end of the line, **Enter** or click OK. This brings up a Save panel. Type in the file name: Business Addresses. Next, ensure you change the destination Folder on the Explorer tree to: Local Disk (C:) > MY WORD > Word Tutorial > My Addresses; then **Enter**. For the moment, don't add any more recipients to the list – this will be done later.

The next stage is to put Field Placement Markers in the letter. Click on Next: Write your letter. You have already done this, so you can proceed; but before you do, have a look down the options in the Wizard panel, then compare them with those at the top of the document on the toolbar. Once you have been through the various steps of the Wizard and know How-to create a form letter, should you wish to make a different one in future – maybe an annual newsletter to friends - you can add the Placements to letters, or create additional Fields in the new recipients list straight from the toolbar. For now, continue with the Wizard.

In the letter, drop the cursor in front of “Health”, it being top of the address block. Left-click Address block... in the Mail Merge panel. The Preview window on the right shows the details that will be included in the block. As long as it looks alright, left-click OK. You will see <<AddressBlock>> appear at the start of the address. Leave this as it is and drop the cursor at the beginning of: **To Whom It May Concern**. Now click on Greeting line... Use the drop-down arrow of “Greeting line for invalid recipient names:” and select To Whom It May Concern: then OK the selection. Notice the difference between this Placement Marker and the Address block one. It has adopted the formatting of the line it was at the beginning of and is Bold, Centralised and Underlined.

Putting in Field Placement Markers for the references is done the same way. Drop the cursor before "Your Ref:" and open the More items... options in the Wizard panel. You need Your Ref, so select it, left-click "Insert", then Close. Repeat the steps for "My Ref:", not forgetting to drop the cursor in the letter first, before My Ref:

You should now have placed the Field Markers where they need to be; but, when it comes to printing, what you see is what you get. Obviously, you no longer require the original details that you copied into the recipients list, because Microsoft Mail Merge will do that for you when the time comes. So, go through and Delete whatever information each marker represents; but leave the Field Markers and the ¶ at the end of each section. DON'T touch anything else!

Your form letter should now look like this:

J J Doe 17, Grange Street Welcome Falls ARNO 65432
email : jjdoe@jiggermail.com mobile: 8800 555 222

March 15 2018

«AddressBlock»

«Your_Ref»

«My_Ref»

«GreetingLine»

Please be advised that, as of this day, March 15 2018

JJ Doe, formerly of 3/52, Central Drive, Scotsville, GARLAND 54321

has relocated to:

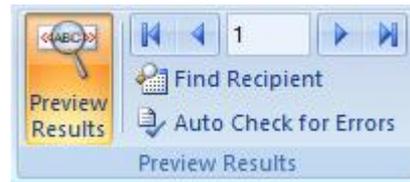
17, Grange Street, Welcome Falls, ARNO 65432

I would be grateful if you could amend your records accordingly, and notify me in writing that this change of address has been actioned.

Yours sincerely

J J Doe

To see what your letter will look like when it is printed, left-click on the Preview icon on the toolbar at the top. You will notice that there is extra spacing between the Company name and the address. We'll fix that shortly. I decided to drop down the date a little; and also took out a line space between it and the Company name. The first part of my letter Preview then turned out like this:



March 15 2018

Health Insurance Co

Suite 4, Wellbeing Towers
357 Main Street
Goodton MEDICO 80123

Your Ref: BP907-33J-57689

My Ref: Policy No: 762450

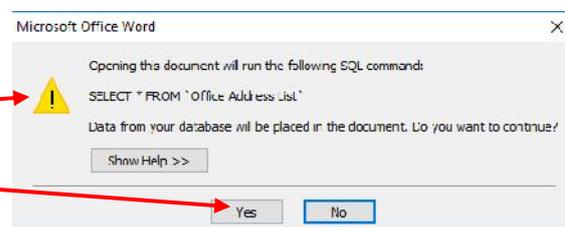
To Whom It May Concern:

If all's well, **Ctrl+S**.

Part 6 – Editing the Recipients List

Now that you have entered the details of one recipient, adding more to the list should be straightforward; and you could do this now while the file is still open. There will be times, however, when you will have to edit the list; either to remove some entries, or update details. So, let's assume this is necessary now and you have to re-open the file to make changes.

First, Close your Change of Address_Letter Template file. Next, re-open it and this message will appear. Left-click the "Yes" button.



The Mail Merge Wizard panel has gone and you will need to re-activate it. Open the Mailings tab and do the same as you did when you first started: drop down Start Mail Merge, but this time just click on the bottom Wizard option. You will be presented with the Select Recipients panel. At the moment, you only have one recipients list, and its file name is shown in the "Use an existing list" details; in this instance "Business Addresses.mdb". You may want to add more lists later, perhaps one for friends and family; and, once created, other file names will appear in this panel, so, at that time, that you can Select whichever you need. For now, there is only one to change, so left-click on "Edit recipient list..."

The existing one opens and can now be edited. “Business Addresses.mdb” is in the Data Source box at the bottom. Left-click on this to Select and the Edit... button is activated. Left-clicking on this provides more options which are self-explanatory. The one you want at the moment is New Entry. Clicking on this drops down a new line in which another recipient’s details can be entered.

Open the Word-Letter Template (Bus) file from the My Addresses Folder and use the particulars to fill in the respective Fields on the new recipients line. Here are my entries:

Title	Company Name	Address Line 1	Address Line 2	City	State	ZIP Code
	Health Insurance Co	Suite 4, Wellbeing Tow...	357 Main Street	Goodton	MEDICO	80123
Dispatch Department	Whatever Manufacturi...	17 Yellowbrick Road		Wizard County		54321

Once you have saved the changes, there will now be 2 recipients to select from at the top of the Mail Merge “Preview your letters” panel (Mail Merge Wizard 5 of 6). Clicking on the arrows from one to the next will show that the basic letter is the same in both, but the particulars of each recipient are as per the respective entries in the Merge List. That extra space between the Company name and the address block doesn’t appear in the new entry; but is still in the first entry. To rectify this, I edited the recipient list again, deleting the Health Insurance Co name from the “Company Name” box and inserted it into the “Title” box:

Title	Company Name	Address Line 1	Address Line 2	City	State	ZIP Code
Health Insurance Co		Suite 4, Wellbeing Tow...	357 Main Street	Goodton	MEDICO	80123
Dispatch Department	Whatever Manufacturi...	17 Yellowbrick Road		Wizard County		54321

and this was the result:

Health Insurance Co
 Suite 4, Wellbeing Towers
 357 Main Street
 Goodton MEDICO 80123

I purposely entered no references for the Manufacturing Co as a comparative example. So, with a bit of thought and selective tweaking, you get what you want, the way you want it.

For the final stage, click Next: Complete the merge. Once again, the instructions at the top of the Mail merge panel speak for themselves; and clicking on the Print... option lets you choose which records you want to be printed. For now, accept the default “All” and click OK. This will open your Printer menu window which you set as you would normally do. In conjunction with Microsoft Word’s Mail Merge program, your printer will do the rest.

In this panel, there is also the facility for making changes to the odd letter which may need to be slightly different in some areas. To do this, first move to a particular letter using the Preview arrows (Previous: Preview your letters). Left-click on the Edit individual letters... option, Select Current record and OK. That letter will open and you can change anything other than information relating to the Fields (<< >>) which, of course, are filled in by the Mail Merge

Sending form letters as E-mails uses the same procedures for entering recipients, except that the “E-mail Address” for each needs filling in (towards the end of the list entry line).

Should you wish to simplify the list boxes for your own particular requirement, you can go to the “Edit recipient list... option (Step 3 of 6 on the Mail Merge panel), Select the appropriate Data Source, open Edit..., then Customize Columns... Click “Yes” to save and you will be presented with a Customize Address List panel in which you can Add or Delete Fields.

It does take time to set up the recipients list, but it will save a lot of hassles whenever you move house in future.

Exercise 4

Save your open Word-Letter Template (Bus) As... Word-Letter Template (Priv). This will be your private letter template for friends, family, etc., so you don’t need any references, the company address, or the “attention” line. Delete all of these. Clear any empty paragraphs above your letter head.

Delete “Mr Makepeace”, but leave the “Dear”.

Delete all of the business letter except for: “I received” at the beginning, and “required.” at the end. Select just these words and the final full-stop, then type: message.

Replace “Yours sincerely” with: Regards.

N.B. a letter that starts Dear John (or a person’s first name) is generally closed like this.

Save this new template.

Coming next: images and text boxes – the ideal creative partnership for layouts.

WT4 – ADDENDUM FOR 365 USERS

Page 25 Restore recently deleted files from the Recycle Bin.

Page 26 To change the Page Layout, click the Layout tab on the Toolbar.

Page 29 Spell-check in 365 is different to 2007. Changes, when there are no suggestions, have to be edited in the actual document. To substitute those suggestions which are suitable, just click on the right one and it will be changed in the document.

Page 36 To use Mail Merge, first drop down the “Start Mail Merge” options and select “Letters”. Drop down “Select Recipients”; then “Type New List”. Fill in the information in the boxes and OK. To insert Field Placement Markers, drop down “Insert Merge Field and, having dropped the cursor at the beginning of the appropriate line of the letter, click on the Field Name on the list. This has to be done separately for each Field Name. The “Greeting Line” Insert is on the Toolbar next to the Insert Merge Field tool. To Edit individual letters, or Print a selection, drop down the “Finish & Merge options on the far right of the Toolbar.