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Microsoft Word 2010 Mail Merge & Forms Quick Reference Guide (Cheat Sheet Of Instructions, Tips & Shortcuts - Laminated Card)

Word 2010 Mail Merge & Forms

Mail Merge

Use a mail merge to automatically create personalized letters, addresses, labels, or envelopes, and to quickly generate documents. After creating a main document, you can merge it with a data source to create individualized documents. You can also use a data source to create a list of addresses, labels, or envelopes, and to merge it with a main document to create individualized documents.

1 Select the type of document

1. Click **File**, **Open**, **Workbooks**, **Mail Merge**.

2 Choose the type of document

1. Click **File**, **Open**, **Workbooks**, **Mail Merge**, **Letters**, **Labels**, **Envelopes**, **Form Letters**.

3 Write the document

1. Click **File**, **Open**, **Workbooks**, **Mail Merge**, **Letters**, **Labels**, **Envelopes**, **Form Letters**, **Write**.

4 Merge the document with the recipients

1. Click **File**, **Open**, **Workbooks**, **Mail Merge**, **Letters**, **Labels**, **Envelopes**, **Form Letters**, **Write**, **Finish**.

5 Send the document

1. Click **File**, **Open**, **Workbooks**, **Mail Merge**, **Letters**, **Labels**, **Envelopes**, **Form Letters**, **Write**, **Finish**, **Print**.

6 Save the document

1. Click **File**, **Open**, **Workbooks**, **Mail Merge**, **Letters**, **Labels**, **Envelopes**, **Form Letters**, **Write**, **Finish**, **Print**, **Save**.

7 Close the document

1. Click **File**, **Open**, **Workbooks**, **Mail Merge**, **Letters**, **Labels**, **Envelopes**, **Form Letters**, **Write**, **Finish**, **Print**, **Save**, **Close**.

8 Exit Word

1. Click **File**, **Open**, **Workbooks**, **Mail Merge**, **Letters**, **Labels**, **Envelopes**, **Form Letters**, **Write**, **Finish**, **Print**, **Save**, **Close**, **Exit**.

Writing the Document

Use the **Mail Merge** task pane to write the document. The **Mail Merge** task pane is located on the **Mailings** ribbon. To write the document, click **Write** in the **Mail Merge** task pane. The **Mail Merge** task pane will show the **Mail Merge** ribbon. The **Mail Merge** ribbon has the following tabs: **Mail Merge**, **Labels**, **Envelopes**, **Form Letters**, **Write**, **Finish**, **Print**, **Save**, **Close**, **Exit**.

Creating a Label Document

Use the **Mail Merge** task pane to create a label document. The **Mail Merge** task pane is located on the **Mailings** ribbon. To create a label document, click **Labels** in the **Mail Merge** task pane. The **Mail Merge** task pane will show the **Mail Merge** ribbon. The **Mail Merge** ribbon has the following tabs: **Mail Merge**, **Labels**, **Envelopes**, **Form Letters**, **Write**, **Finish**, **Print**, **Save**, **Close**, **Exit**.

Using an P., TAB, END, END

Use the **Mail Merge** task pane to use a plain text list in CSV. The **Mail Merge** task pane is located on the **Mailings** ribbon. To use a plain text list in CSV, click **Form Letters** in the **Mail Merge** task pane. The **Mail Merge** task pane will show the **Mail Merge** ribbon. The **Mail Merge** ribbon has the following tabs: **Mail Merge**, **Labels**, **Envelopes**, **Form Letters**, **Write**, **Finish**, **Print**, **Save**, **Close**, **Exit**.

Choosing the Document Type

Use the **Mail Merge** task pane to choose the document type. The **Mail Merge** task pane is located on the **Mailings** ribbon. To choose the document type, click **Letters**, **Labels**, **Envelopes**, or **Form Letters** in the **Mail Merge** task pane. The **Mail Merge** task pane will show the **Mail Merge** ribbon. The **Mail Merge** ribbon has the following tabs: **Mail Merge**, **Labels**, **Envelopes**, **Form Letters**, **Write**, **Finish**, **Print**, **Save**, **Close**, **Exit**.

Setting up the Mailing Recipient List

Use the **Mail Merge** task pane to set up the mailing recipient list. The **Mail Merge** task pane is located on the **Mailings** ribbon. To set up the mailing recipient list, click **Write** in the **Mail Merge** task pane. The **Mail Merge** task pane will show the **Mail Merge** ribbon. The **Mail Merge** ribbon has the following tabs: **Mail Merge**, **Labels**, **Envelopes**, **Form Letters**, **Write**, **Finish**, **Print**, **Save**, **Close**, **Exit**.

Sending and Mailing the Documents

Use the **Mail Merge** task pane to send and mail the documents. The **Mail Merge** task pane is located on the **Mailings** ribbon. To send and mail the documents, click **Print** in the **Mail Merge** task pane. The **Mail Merge** task pane will show the **Mail Merge** ribbon. The **Mail Merge** ribbon has the following tabs: **Mail Merge**, **Labels**, **Envelopes**, **Form Letters**, **Write**, **Finish**, **Print**, **Save**, **Close**, **Exit**.

Creating a Plain Text List in CSV

Use the **Mail Merge** task pane to create a plain text list in CSV. The **Mail Merge** task pane is located on the **Mailings** ribbon. To create a plain text list in CSV, click **Form Letters** in the **Mail Merge** task pane. The **Mail Merge** task pane will show the **Mail Merge** ribbon. The **Mail Merge** ribbon has the following tabs: **Mail Merge**, **Labels**, **Envelopes**, **Form Letters**, **Write**, **Finish**, **Print**, **Save**, **Close**, **Exit**.

Sending an Existing Recipient List

Use the **Mail Merge** task pane to send an existing recipient list. The **Mail Merge** task pane is located on the **Mailings** ribbon. To send an existing recipient list, click **Write** in the **Mail Merge** task pane. The **Mail Merge** task pane will show the **Mail Merge** ribbon. The **Mail Merge** ribbon has the following tabs: **Mail Merge**, **Labels**, **Envelopes**, **Form Letters**, **Write**, **Finish**, **Print**, **Save**, **Close**, **Exit**.

Using Existing Contacts

Use the **Mail Merge** task pane to use existing contacts. The **Mail Merge** task pane is located on the **Mailings** ribbon. To use existing contacts, click **Write** in the **Mail Merge** task pane. The **Mail Merge** task pane will show the **Mail Merge** ribbon. The **Mail Merge** ribbon has the following tabs: **Mail Merge**, **Labels**, **Envelopes**, **Form Letters**, **Write**, **Finish**, **Print**, **Save**, **Close**, **Exit**.

Merging

Use the **Mail Merge** task pane to merge the documents. The **Mail Merge** task pane is located on the **Mailings** ribbon. To merge the documents, click **Write** in the **Mail Merge** task pane. The **Mail Merge** task pane will show the **Mail Merge** ribbon. The **Mail Merge** ribbon has the following tabs: **Mail Merge**, **Labels**, **Envelopes**, **Form Letters**, **Write**, **Finish**, **Print**, **Save**, **Close**, **Exit**.



Synopsis

Laminated quick reference card showing step-by-step instructions and shortcuts for how to use mail merge and forms features of Microsoft Office Word 2010. The following topics are covered: Mail Merge: Choosing the Document Type, Recipient Lists: Creating a Recipient List in Word, Selecting an Existing Recipient List, Using Outlook Contacts, Editing an Existing Recipient List, Selecting and Sorting Recipients. Writing the Document: Creating a Label Document, Using an If...Then...Else Rule. Previewing the Merge & Merging, The Mail Merge Wizard, Highlighting Merge Fields. Forms: Showing Macro and Form Controls, Creating a Template Library in Windows 7, Creating the Template File, Inserting Content Controls, Setting Content Control Properties: Add a Title, Format Contents Using a Style, Self Destruct Plain or Rich Text, For Plain Text, For Building Block Gallery, For Combo Box and Drop-Down List, For Date Picker, For Check Box. Turning On/Off Design Mode, Changing Placeholder Text, Protecting a Form from Changes, Unprotecting a Form, Protecting Only Parts of a Form: Preventing Editing of a Control's Content, Prevent Editing Parts of a Document, Preventing Deletions. Accessing the Form to Fill it Out, Changing the Form Template. This guide is one of several titles available for Word 2010: Word 2010 Introduction, Word 2010 Formatting, Word 2010 Advanced, Word 2010 Mail, Merge & Forms, Word 2010 Templates & Macros, Word 2010 Collaboration Features.

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