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Special Edition Using Microsoft® Word 97

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Chapter 17. Mastering Envelopes, Mail Merge, and Form Letters

- **Insert an individual's name and address in a letter**
Insert an address from the Personal Address Book, Schedule+, or Outlook.
- **Print envelopes and include their bar code or FIM code**
Print envelopes by themselves, attached to a document, or as part of a mass mailing.
- **Use the Mail Merge Helper to create a main document and a data source and to control the data merging of documents**
The Mail Merge Helper manages the entire mail-merge process in three easy steps.
- **Perform mail merge with documents such as letterheads, envelopes, and mailing labels**
Specify different top margins for the first page of a form letter to allow for a letterhead page, merge envelopes or envelopes and documents at the same time, and create custom mailing labels.
- **Insert field codes that prompt you to enter a personal note in each mail-merge document**
FILLIN is a special Word field that prompts the user to enter a personalized message to the recipient during the merge operation.

Successful businesses know that staying in touch with their clients and customers is crucial to the success of the business. Staying in touch with many people can be difficult, however, unless you learn how to create personalized form letters and envelopes with Word 97.

To make single letters easier to produce, Word has automated the process of printing an envelope. The envelope printing feature uses the address from a document to print an envelope with or without a return address. The envelope can be printed separately or attached to the document with which it is associated. This feature is covered in the first section of this chapter.

Form letters broadcast information, yet add a personal touch to your work. Even if you generate only a few form letters each day, this feature allows you to automate repetitive parts of your business and gives you time to improve the creative end of your work. You can also generate invoices, appointment reminders, and so on. Learning how to create form letters is challenging, but working through the process will pay great dividends.

You can create two types of form letters with Word: those that are filled in manually and those that are filled in from computer-generated lists. In this chapter, you learn to create an automated form letter that prompts you for information the document needs for creating an invoice. You learn also how to fill in the blanks in a form letter by merging a mailing list with the main document. Finally, you learn advanced Word techniques for document automation, including a form letter that combines manual fill-in with merging of information.

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Inserting a Name and Address from the Address Book



You can use Address Books and lists of contacts to manage the names and addresses of people you write to frequently. After you enter the names, addresses, and e-mail information about people, you can retrieve the information by clicking the Insert Address button in the Standard toolbar, then selecting to use names and addresses from an address book or a contact list. You also can paste a person's address into your document by clicking their name.

If the Insert Address button (it looks like an opened address book) is not displayed in the Standard toolbar, choose **V**iew, **T**oolbars, **C**ustomize, select Insert from the Categories list, select Address Book from the Commands list, and drag the Address Book icon onto the Standard toolbar.

• See Managing Names and Addresses with Address Books

Before you can use the Address Book on a network or with the Address Book in Outlook or Schedule+, you must gain access to the network and Outlook or Schedule+. If your computer is on a network and you use Outlook or Schedule+, you need to follow these steps:

1. Position the insertion point in the document where you want to paste a person's address.

2.



Click the Insert Address button in the Standard toolbar. If you are prompted, select an Exchange profile. The Select Name dialog box appears as shown in Figure 17.1.

3. Select the **S**how Names From The list and select the address book or contact list containing the address you want to insert into your document.

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