Your easy, colorful,
SEE-HOW guide!

Microsoft

Plain & Simple

Microsoft Word 2013

Jay Freedman

Learn the simplest ways to get things done with Microsoft Word 2013

See it.
Learn it.
In color.

Here's WHAT You'll Learn

- Create any type of document, from memos to reports
- Perfect your text with editing and formatting tools
- Add graphics, data, tables, charts, and videos
- Manage page layout, style, and navigation
- Share, print, and publish your work online
- Finish documents faster using templates and themes

Here's HOW You'll Learn It

- Jump in wherever you need answers
- Follow easy *steps* and *screenshots* to see exactly what to do
- Get handy *tips* for new techniques and shortcuts
- Use *Try This!* exercises to apply what you learn right away

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Microsoft Office/
Microsoft Word

Office

Microsoft

Microsoft

Word 2013 Plain & Simple

Jay Freedman

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To Andi, my bashert.

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Most of all, I thank my wife, Andi Freedman, who thought I had retired months ago. Soon…

Mailing paper or pixels

12

One of the most common uses of Microsoft Word 2013 is the creation of documents that are to be sent to other people. The documents might be printed on paper and mailed in an envelope, or they might be attached to an email message. They can be generated one at a time or built in large numbers from information in a worksheet or a database.

The mail merge feature in Word 2013 has many more uses than just mailing letters. Any task that involves a standard format that you want to populate with many pieces of information is a candidate for a merge. Think of name labels for a meeting, certificates for completing a course, a catalog of items for sale, or a voter registration list—any of these could be created with an appropriate mail merge.

In this section:

- Printing a single envelope
- Printing multiple copies of an envelope
- Changing envelope address formatting
- Creating mailing labels and business cards
- Sending a document by email
- Starting a mail merge
- Choosing the recipients
- Adding merge fields
- Adding information with rules
- Finishing the merge

Printing a single envelope

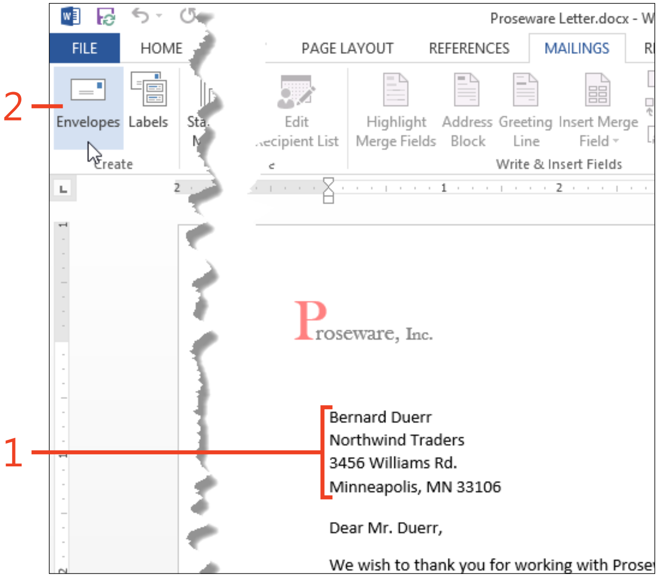
If you're addressing a letter, a greeting card, or other one-time item, you might want to print the envelope but not save it for future use. Word 2013 includes predefined layouts for many common envelope sizes, and you can define a custom size if necessary.

Address an envelope and print

1. If you're addressing a letter that contains the recipient's address, open the letter document. Otherwise, open any document (such as the default blank document).

   If you create an envelope while the cursor is in a letter document, and if the document starts with up to four single-line paragraphs that are left-aligned, those paragraphs will automatically appear as the delivery address in the Envelope dialog box. If you want to determine which paragraphs will appear in the Envelope dialog box, select those paragraphs in the letter document before you launch the dialog box.

2. On the Mailings tab, in the Create group, click Envelopes.


Proseware Letter.docx - W
FILE
HOME
PAGE LAYOUT
REFERENCES
MAILINGS
Envelopes
Labels
Create
Edit Recipient List
Highlight Merge Fields
Address Block
Greeting Line
Insert Merge Field
Write & Insert Fields
2
1
Proseware, Inc.

Bernard Duerr
Northwind Traders
3456 Williams Rd.
Minneapolis, MN 33106

Dear Mr. Duerr,

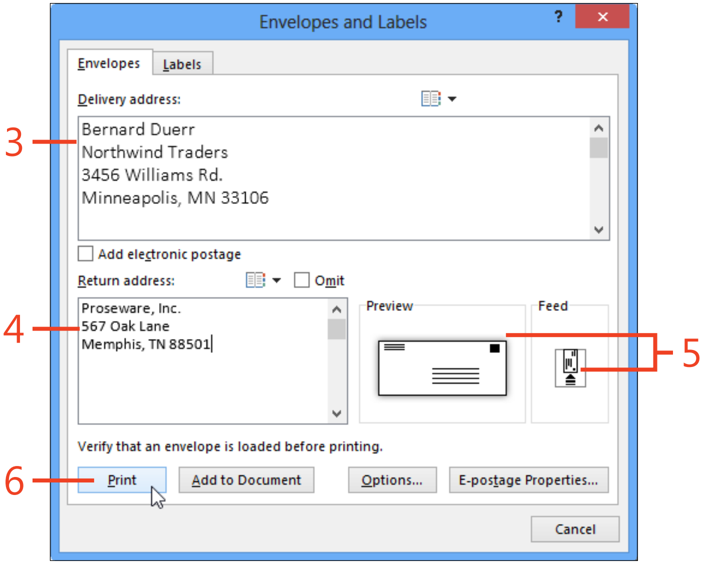
We wish to thank you for working with Prose

3 In the Envelopes And Labels dialog box, if the Delivery Address box is empty, or if the text is incomplete or incorrect, add or edit the text as needed.

4 If the Return Address box is empty, or if the text is incomplete or incorrect, add or edit the text as needed. If you don't want a return address to print on the envelope, select the Omit check box.

5 If the envelope size shown in the Preview thumbnail is incorrect, or if the orientation shown in the Feed thumbnail is incorrect, see "Change envelope size and print options" on page 318.

6 Click the Print button.



Delivery address:
Bernard Duerr
Northwind Traders
3456 Williams Rd.
Minneapolis, MN 33106

☐ Add electronic postage

Return address: ☐ Omit
Proseware, Inc.
567 Oak Lane
Memphis, TN 88501

Verify that an envelope is loaded before printing.

TRY THIS If you have an address book in Microsoft Outlook and it contains information for the envelope's recipient, you can click the Address Book icon above the Delivery Address box and select the recipient's name. The mailing address will be transferred from the address book entry to the Delivery Address box. You can also use the Address Book icon above the Return Address box to enter a return address from your address book.

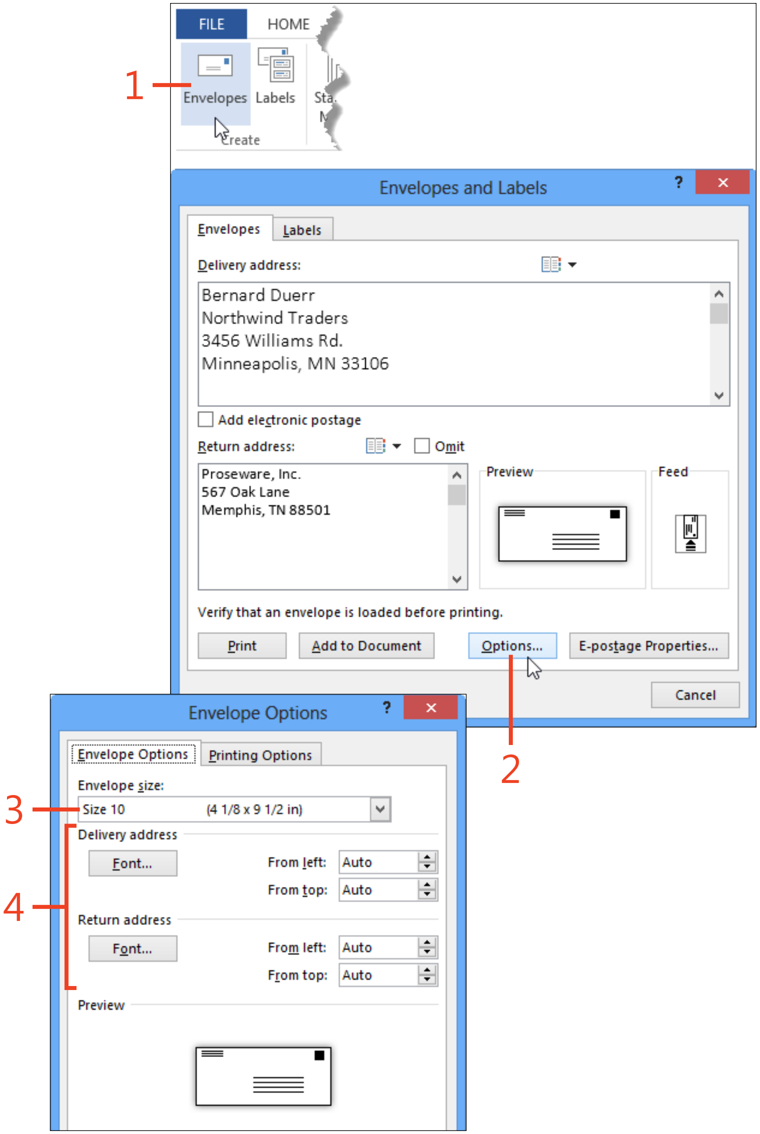
TIP To use the electronic postage option, you must first install an electronic postage program and subscribe to a service.

Change envelope size and print options

1. On the Mailings tab, in the Create group, click Envelopes.
2. If you want to change the size of the envelope or the feed orientation, click the Options button.
3. On the Envelope Options tab in the Envelope Options dialog box, click the Envelope Size box and click the desired size in the drop-down list.

   If none of the listed sizes match the envelope that you want to print, click Custom Size at the bottom of the list and enter the correct measurements.
4. If you want to change the font formatting of the delivery address, in the Delivery Address section in the Envelope Options dialog box, click the Font button, select the formatting in the Envelope Address dialog box, and then click OK. If you want to change the distance of the delivery address from the left and top edges of the envelope, in the From Left and From Top boxes enter the desired measurements.

   If you want to change the same settings for the return address, use the Font button and the From Left and From Top boxes in the Return Address section of the Envelope Options dialog box.



Delivery address:
Bernard Duerr
Northwind Traders
3456 Williams Rd.
Minneapolis, MN 33106

☐ Add electronic postage

Return address: ☐ Omit
Proseware, Inc.
567 Oak Lane
Memphis, TN 88501

Verify that an envelope is loaded before printing.

Envelope size: Size 10 (4 1/8 x 9 1/2 in)

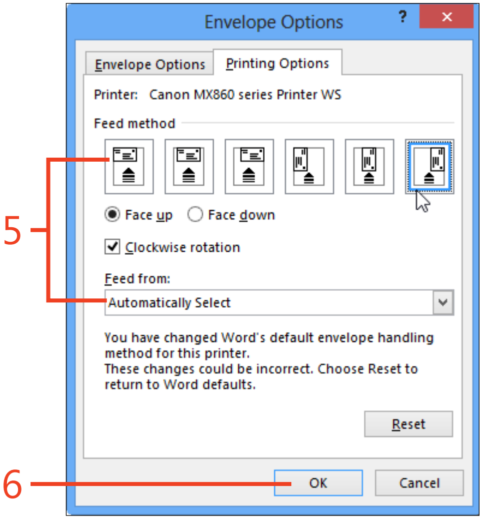
Delivery address — From left: Auto; From top: Auto

Return address — From left: Auto; From top: Auto

1
FILE
HOME
Envelopes
Labels
Create
Envelopes and Labels
Envelopes
Labels
Preview
Feed
Print
Add to Document
Options...
E-postage Properties...
Cancel
2
Envelope Options
Envelope Options
Printing Options
3
4
Font...
Font...
Preview

5 If you want to change the feed orientation, on the Printing Options tab, click the icon that matches the direction of your printer's envelope feed and the position of the envelope in the feed tray. If necessary, select whether the envelopes are placed in the feed tray with the printing side up or down, and which tray contains envelopes.

6 Click OK.



Printer: Canon MX860 series Printer WS

● Face up ○ Face down

☑ Clockwise rotation

Feed from: Automatically Select

You have changed Word's default envelope handling method for this printer.
These changes could be incorrect. Choose Reset to return to Word defaults.

SEE ALSO For more information about changing the formatting of the delivery address, see "Add direct formatting to one address" on page 323 and "Modify the Envelope Address style" on page 324.

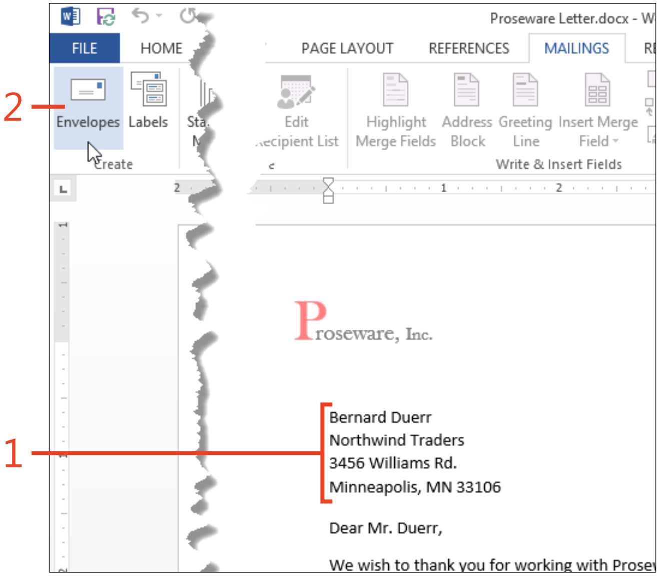
Printing multiple copies of an envelope

You might need to print several copies of the same envelope at one time, for instance as self-addressed envelopes to include with items to be returned to you. The Print button in the Envelopes And Labels dialog box can print only one copy at a time, so you need a different approach.

In Word 2013, you can add the envelope to the current document and save it as part of the document's file. The envelope appears as page 0 in a new Section 1 at the beginning of the document, formatted with the page size and margins appropriate for the envelope. Then, you can use the Print command in the Backstage view, which offers a setting for the number of copies to print.

Add an envelope to a document

1. If you're addressing a letter that contains the recipient's address, open the letter document. Otherwise, open any document (such as the default blank document).
2. On the Mailings tab, in the Create group, click Envelopes.


Proseware Letter.docx - W
FILE
HOME
PAGE LAYOUT
REFERENCES
MAILINGS
RI
Envelopes
Labels
Sta
M
Create
Edit Recipient List
Highlight Merge Fields
Address Block
Greeting Line
Insert Merge Field
Write & Insert Fields
2
1

Proseware, Inc.

Bernard Duerr
Northwind Traders
3456 Williams Rd.
Minneapolis, MN 33106

Dear Mr. Duerr,

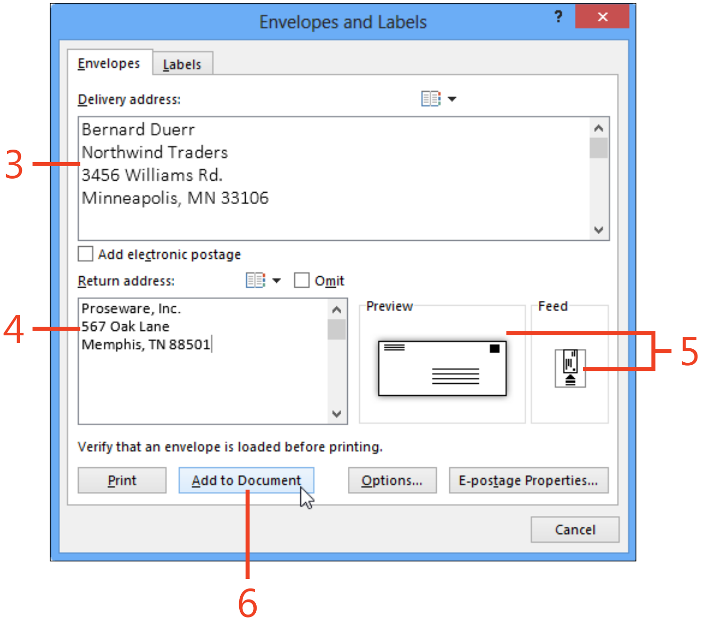
We wish to thank you for working with Prosew

3 If the Delivery Address text box is empty, or if the text is incomplete or incorrect, edit the text as needed.

4 If the Return Address text box is empty, or if the text is incomplete or incorrect, edit the text as needed. If you don't want a return address to print on the envelope, select the Omit check box.

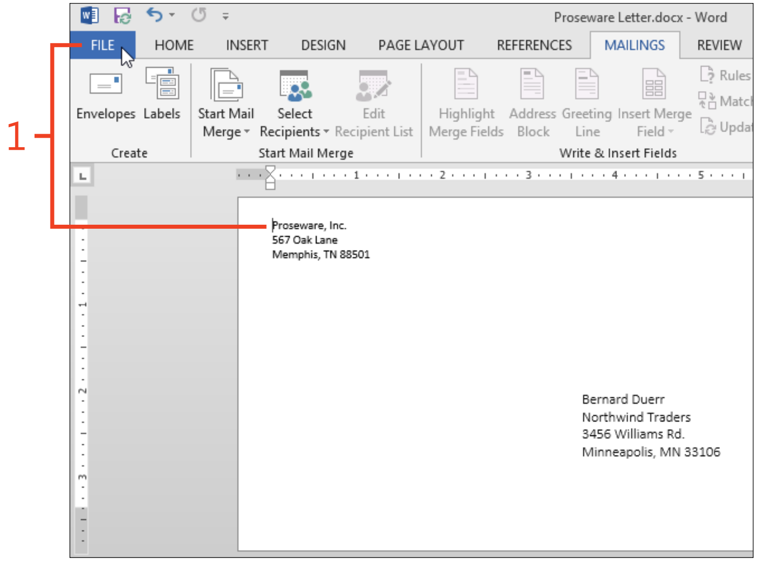
5 If the envelope size shown in the Preview thumbnail is incorrect, or if the orientation shown in the Feed thumbnail is incorrect, see "Change envelope size and print options" on page 318.

6 Click the Add To Document button.


Envelopes and Labels
Envelopes
Labels
Delivery address:
Bernard Duerr
Northwind Traders
3456 Williams Rd.
Minneapolis, MN 33106
☐ Add electronic postage
Return address:
☐ Omit
Proseware, Inc.
567 Oak Lane
Memphis, TN 88501
Preview
Feed
Verify that an envelope is loaded before printing.
Print
Add to Document
Options...
E-postage Properties...
Cancel
3
4
5
6

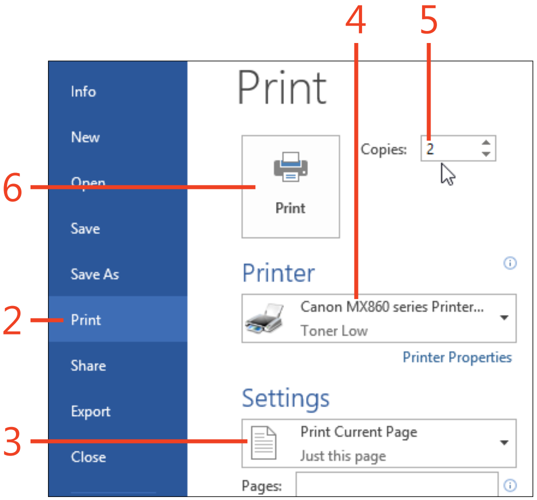
Print the envelope

1. Click in the envelope page in the document, and then click File to display the Backstage view.
2. Click the Print tab.
3. In the Settings section, click the first box and click Print Current Page.
4. If the selected printer is not the one on which you want to print the envelope, click the Printer box and select the correct printer.
5. Click the Copies box and enter the desired number of copies of the envelope.
6. Click the Print button.


Proseware Letter.docx - Word
FILE
HOME
INSERT
DESIGN
PAGE LAYOUT
REFERENCES
MAILINGS
REVIEW
Envelopes
Labels
Create
Start Mail Merge
Select Recipients
Edit Recipient List
Start Mail Merge
Highlight Merge Fields
Address Block
Greeting Line
Insert Merge Field
Write & Insert Fields
Rules
Match
Update
1

Proseware, Inc.
567 Oak Lane
Memphis, TN 88501

Bernard Duerr
Northwind Traders
3456 Williams Rd.
Minneapolis, MN 33106


Info
New
Open
Save
Save As
Print
Share
Export
Close
Print
Print
Printer
Printer Properties
Settings
4
5
6
2
3

Copies: 2

Canon MX860 series Printer...
Toner Low

Print Current Page
Just this page

Pages:

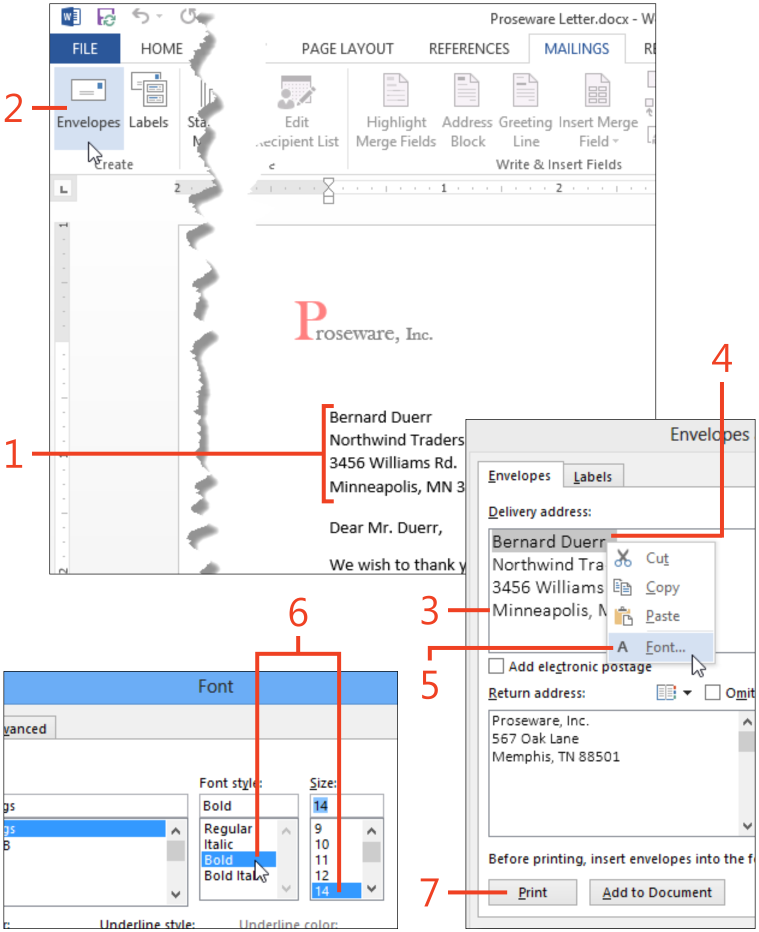
TIP If you save the document that includes the envelope, you can print the envelope again at any time.

Changing envelope address formatting

If you want to change the formatting of the address on an envelope that you'll print only once, you can apply direct character formatting to it. If you want to change the formatting for all future envelopes, you'll save time and effort by modifying the address styles in the Normal.dotm template.

Add direct formatting to one address

1. Open the document for which you want to create an envelope.
2. On the Mailings tab, in the Create group, click Envelopes.
3. If the Delivery Address text box in the Envelopes And Labels dialog box is empty, or if the text is incomplete or incorrect, add or edit the text as needed.
4. Select the part of the address for which you want to change the formatting.
5. Right-click the selected text and then, on the shortcut menu that appears, click Font.
6. In the Font dialog box, change the font name, font size, bold, italic, color, or other formats as desired, and then click OK.
7. Click the Print button.


Proseware Letter.docx - W
FILE
HOME
PAGE LAYOUT
REFERENCES
MAILINGS
Envelopes
Labels
Create
Edit Recipient List
Highlight Merge Fields
Address Block
Greeting Line
Insert Merge Field
Write & Insert Fields
Proseware, Inc.
Envelopes
Envelopes
Labels
Delivery address:
Cut
Copy
Paste
Font...
Add electronic postage
Return address:
Omit
Print
Add to Document
Font
Advanced
Font style:
Size:
Bold
14
Regular
Italic
Bold
Bold Italic
9
10
11
12
14
Underline style:
Underline color:
1
2
3
4
5
6
7

Bernard Duerr
Northwind Traders
3456 Williams Rd.
Minneapolis, MN 3

Dear Mr. Duerr,

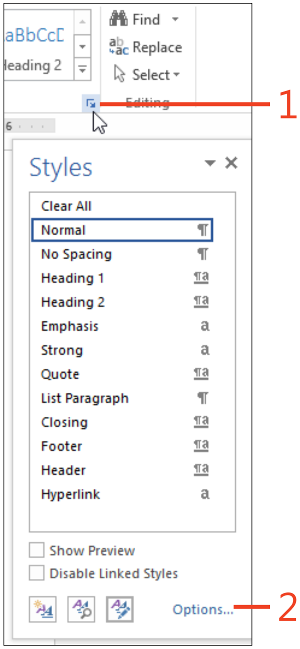
We wish to thank y

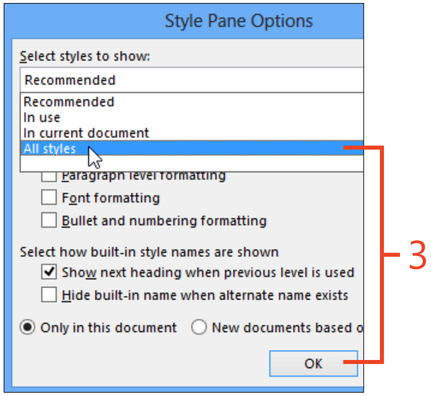
Proseware, Inc.
567 Oak Lane
Memphis, TN 88501

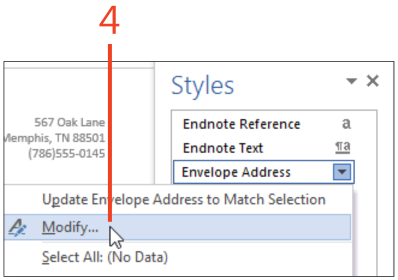
Before printing, insert envelopes into the f

Modify the Envelope Address style

1. On the Home tab, in the Styles group, click the dialog box launcher (shortcut, Ctrl+Alt+Shift+S).
2. In the Styles pane, if the Envelope Address style and the Envelope Return styles are listed, continue with step 4. If the two styles are not listed, click the Options link at the bottom of the pane and continue with step 3.
3. In the Style Pane Options dialog box, click the Select Styles To Show list box, select All Styles, and then click OK.
4. In the Styles pane, right-click the name of the Envelope Address style and then, on the shortcut menu that appears, click Modify.

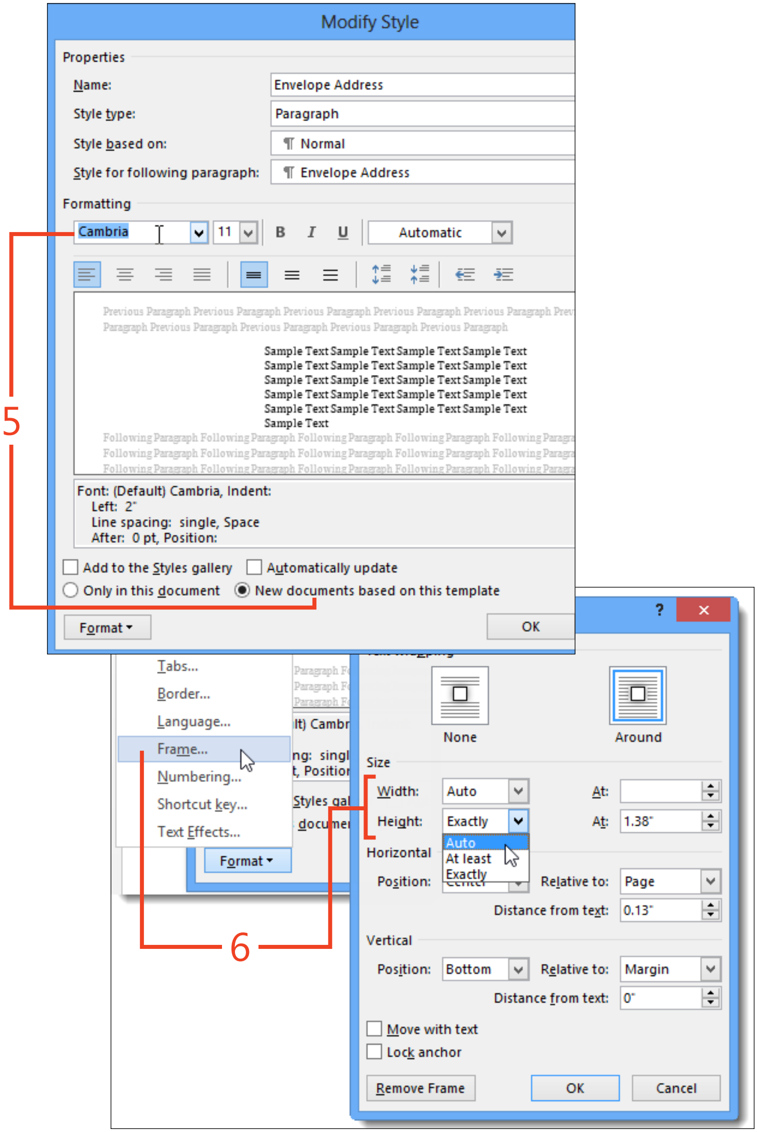

aBbCcD
Heading 2
Find
Replace
Select
Editing
1
Styles
Clear All
Normal ¶
No Spacing ¶
Heading 1 ¶a
Heading 2 ¶a
Emphasis a
Strong a
Quote ¶a
List Paragraph ¶
Closing ¶a
Footer ¶a
Header ¶a
Hyperlink a
☐ Show Preview
☐ Disable Linked Styles
Options...
2


Style Pane Options
Select styles to show:
Recommended
Recommended
In use
In current document
All styles
☐ Paragraph level formatting
☐ Font formatting
☐ Bullet and numbering formatting
Select how built-in style names are shown
☑ Show next heading when previous level is used
☐ Hide built-in name when alternate name exists
● Only in this document ○ New documents based o
OK
3


4
567 Oak Lane
Memphis, TN 88501
(786)555-0145
Styles
Endnote Reference a
Endnote Text ¶a
Envelope Address
Update Envelope Address to Match Selection
Modify...
Select All: (No Data)

5 In the Modify Style dialog box, click the New Documents Based On This Template option. Then, select the font and paragraph formatting you want for the delivery address in all new envelopes. For more information about changing the definition of a style, see “Modify an existing style by using a dialog box” on page 95.

6 The definition of the Envelope Address style includes a borderless frame with a fixed size that positions the text on the envelope page. If the frame is too small to hold your typical addresses, at the bottom of the Modify Style dialog box, click the Format button and then, on the shortcut menu that appears, click Frame. In the Frame dialog box, change the Width and Height list boxes from Exactly to Auto.



Modify Style

Properties

Name: Envelope Address

Style type: Paragraph

Style based on: ¶ Normal

Style for following paragraph: ¶ Envelope Address

Formatting

Cambria 11 Automatic

Font: (Default) Cambria, Indent:
Left: 2"
Line spacing: single, Space
After: 0 pt, Position:

☐ Add to the Styles gallery ☐ Automatically update

○ Only in this document ● New documents based on this template

Size

Width: Auto At:

Height: Exactly At: 1.38"

Horizontal

Position: Center Relative to: Page

Distance from text: 0.13"

Vertical

Position: Bottom Relative to: Margin

Distance from text: 0"

☐ Move with text

☐ Lock anchor

TIP You can repeat steps 4 and 5 to modify the Envelope Return style to change the formatting of the return address in all new envelopes. The Envelope Return style does not include a frame.

SEE ALSO For more information about modifying the Envelope Address and Envelope Return styles, see *www.gmayor.com/changing_envelope_layout.htm* and *www.gmayor.com/alternative_return_addresses.htm*.

Creating mailing labels and business cards

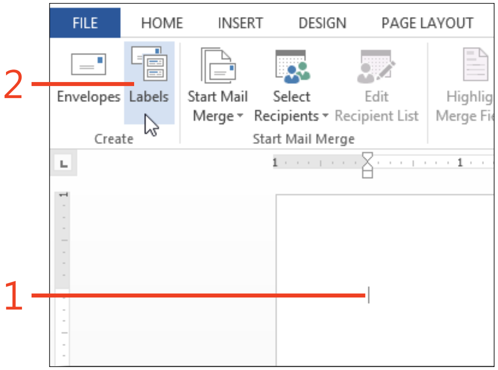
Printed labels are useful for such things as mailing packages, creating personalized book plates, and labeling the wires plugged into the back of your computer. Stationers sell label paper in hundreds of sizes, colors, and shapes.

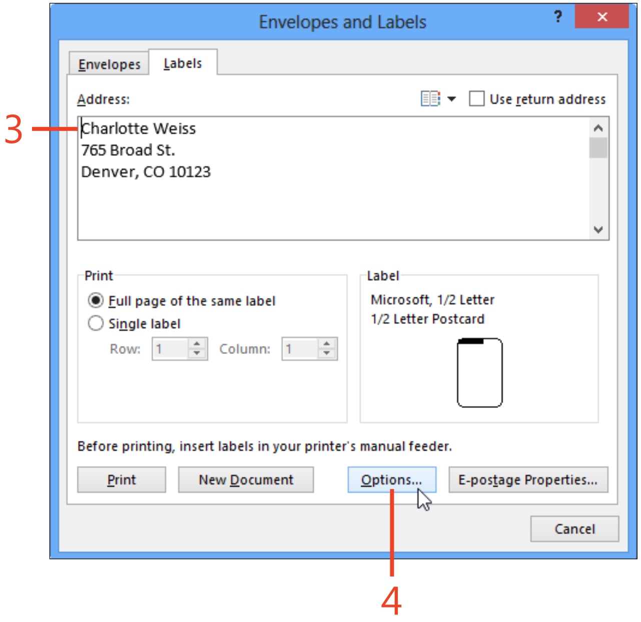
You can print business cards on perforated card paper, which is available from the same sources that sell label sheets. Word 2013 uses the same feature to create both labels and business cards—the only difference is your selection of the format to use.

If you don’t want to create your own design, you can download label templates from Office.com and other online sources. For information about downloading templates, see “Get templates from Office.com” on page 159.

Print one label or a full page of labels

1. If you’re creating a mailing label for a letter that contains the recipient’s address, open the letter document. Otherwise, open any document (such as the default blank document).
2. On the Mailings tab, in the Create group, click Labels.
3. In the Envelopes And Labels dialog box, if the Address box is empty, or if the text is incomplete or incorrect, add or edit the text as needed.
4. If the product name and number shown in the Label section of the dialog box match the label paper in the printer, skip to step 9. Otherwise, at the bottom of the dialog box, click the Options button and continue at step 5.


FILE
HOME
INSERT
DESIGN
PAGE LAYOUT
Envelopes
Labels
Start Mail Merge
Select Recipients
Edit Recipient List
Highlig Merge Fi
Create
Start Mail Merge
2
1


Envelopes and Labels
Envelopes
Labels
Address:
☐ Use return address
3
Print
● Full page of the same label
○ Single label
Row: 1
Column: 1
Label
Print
New Document
Options...
E-postage Properties...
Cancel
4

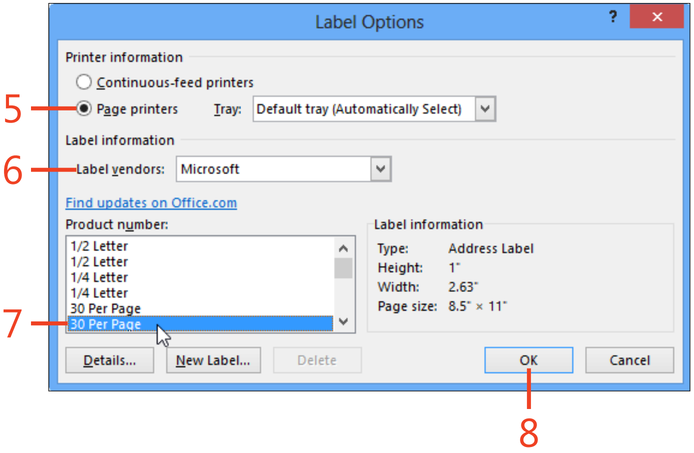
Charlotte Weiss
765 Broad St.
Denver, CO 10123

Microsoft, 1/2 Letter
1/2 Letter Postcard

Before printing, insert labels in your printer's manual feeder.

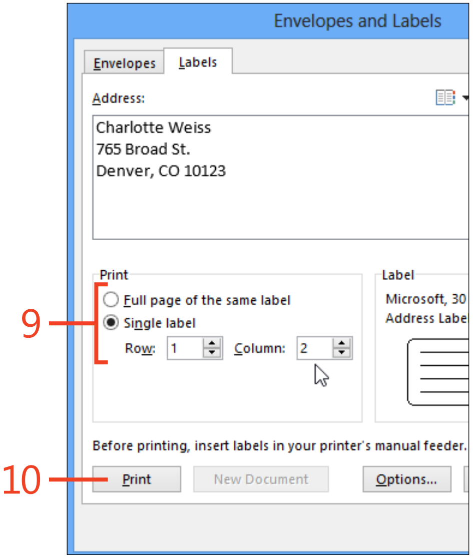
5. Click the option button that describes the type of printer attached to your computer. (Laser printers and most inkjet printers are page printers; dot-matrix printers are usually continuous-feed printers.) If the printer has more than one input tray, select the one that contains the label paper.
6. If the Label Vendors list box doesn't display the manufacturer of the label paper that you're using, click the box and select the correct vendor.
7. If the item selected in the Product Number list box doesn't match the label paper's description, select the correct item.
8. Click OK.
9. In the Print section of the Envelopes And Labels dialog box, click either the Full Page Of The Same Label option or the Single Label option, as needed.

   If you select Single Label, you can specify the row and column in which to print the address. This is useful if you're printing on a sheet of label paper that is already partially used.
10. Click the Print button.


Label Options
?
×
Printer information
Label information
Find updates on Office.com
Product number:
1/2 Letter
1/2 Letter
1/4 Letter
1/4 Letter
30 Per Page
Details...
New Label...
Delete
OK
Cancel
5
6
7
8

○ Continuous-feed printers
● Page printers Tray: Default tray (Automatically Select)
Label vendors: Microsoft
Product number: 30 Per Page

Label information
Type: Address Label
Height: 1"
Width: 2.63"
Page size: 8.5" × 11"


Envelopes and Labels
Envelopes
Labels
Print
Label
New Document
Options...
9
10

Address:
Charlotte Weiss
765 Broad St.
Denver, CO 10123

○ Full page of the same label
● Single label
Row: 1 Column: 2

Microsoft, 30
Address Labe

Before printing, insert labels in your printer's manual feeder.

Print

TIP The entries in the Product Number list box are in alphabetical order, not numeric order. That is, all the entries that begin with the digit 1 precede the first entry that begins with the digit 2, regardless of how many digits are in each number.

Print a page of business cards

1 On the Mailings tab, in the Create group, click Labels.

2 In the Envelopes And Labels dialog box, if text appears in the Address box, delete it.

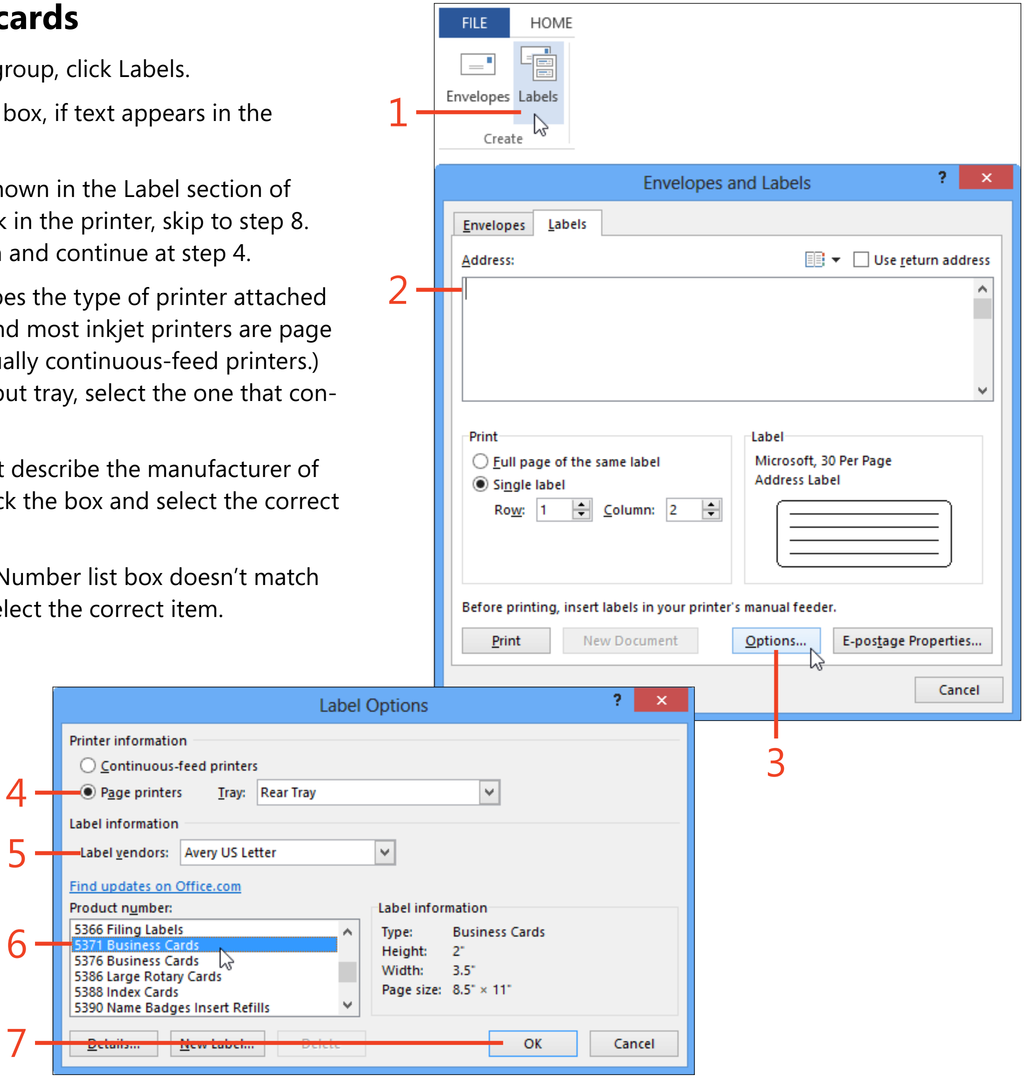
3 If the product name and number shown in the Label section of the dialog box match the card stock in the printer, skip to step 8. Otherwise, click the Options button and continue at step 4.

4 Click the option button that describes the type of printer attached to your computer. (Laser printers and most inkjet printers are page printers; dot-matrix printers are usually continuous-feed printers.) If the printer has more than one input tray, select the one that contains the card stock.

5 If the Label Vendors list box doesn't describe the manufacturer of the card stock that you're using, click the box and select the correct vendor.

6 If the item selected in the Product Number list box doesn't match the description of the card stock, select the correct item.

7 Click OK.


FILE
HOME
Envelopes
Labels
Create
1
Envelopes and Labels
Envelopes
Labels
Address:
☐ Use return address
2
Print
Label
Print
New Document
Options...
E-postage Properties...
Cancel
3
Label Options
Printer information
Label information
4
5
Find updates on Office.com
Product number:
6
7
Details...
New Label...
Delete
OK
Cancel

○ Full page of the same label
● Single label
Row: 1 Column: 2

Microsoft, 30 Per Page
Address Label

Before printing, insert labels in your printer's manual feeder.

○ Continuous-feed printers
● Page printers Tray: Rear Tray

Label vendors: Avery US Letter

5366 Filing Labels
5371 Business Cards
5376 Business Cards
5386 Large Rotary Cards
5388 Index Cards
5390 Name Badges Insert Refills

Type: Business Cards
Height: 2"
Width: 3.5"
Page size: 8.5" × 11"

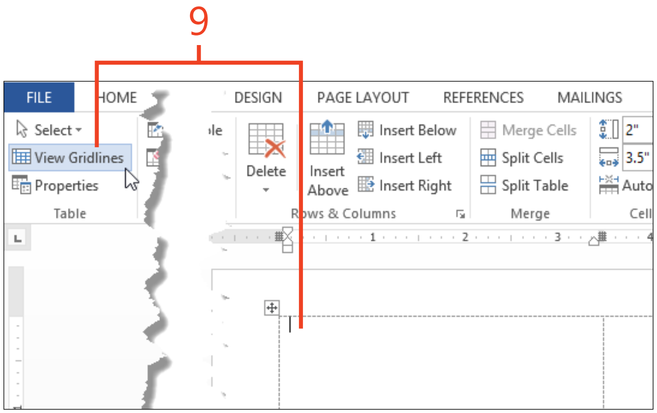
8 In the Envelopes And Labels dialog box, click the option button for Full Page Of The Same Label, and then click New Document.

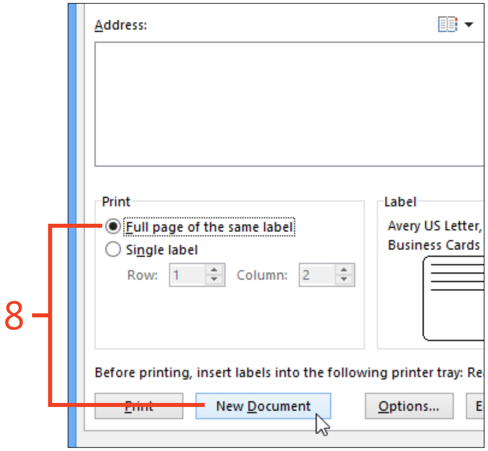
9 The new document contains a table in which each cell's height and width match those of the cards in the selected card stock. The table's borders are set not to print. If you don't see the table cells, on the Table Tools | Layout contextual tab, in the Table group, click View Gridlines.

10 In the upper-left cell of the table, insert the text and graphics that you want on your business card.

11 Select the entire upper-left cell of the table and copy it to the clipboard (shortcut, Ctrl+C).

It's helpful to display nonprinting characters by clicking the Show/Hide ¶ button in the Paragraph group on the Home tab. This way, you can see and select everything in the cell, including the cell marker (¤).

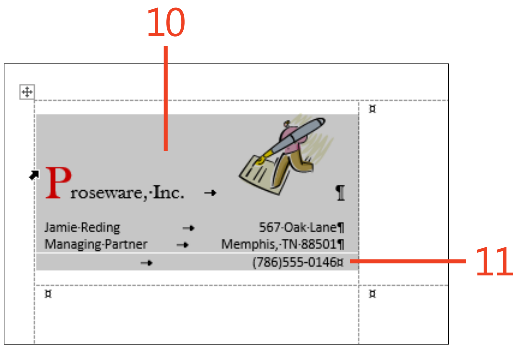

9
FILE
HOME
DESIGN
PAGE LAYOUT
REFERENCES
MAILINGS
Select
View Gridlines
Properties
Table
Delete
Insert Above
Insert Below
Insert Left
Insert Right
Rows & Columns
Merge Cells
Split Cells
Split Table
Merge
2"
3.5"
Auto
Cell


8
Address:
Print
Label
Print
New Document
Options...
E

● Full page of the same label
○ Single label
Row: 1 Column: 2

Avery US Letter, Business Cards

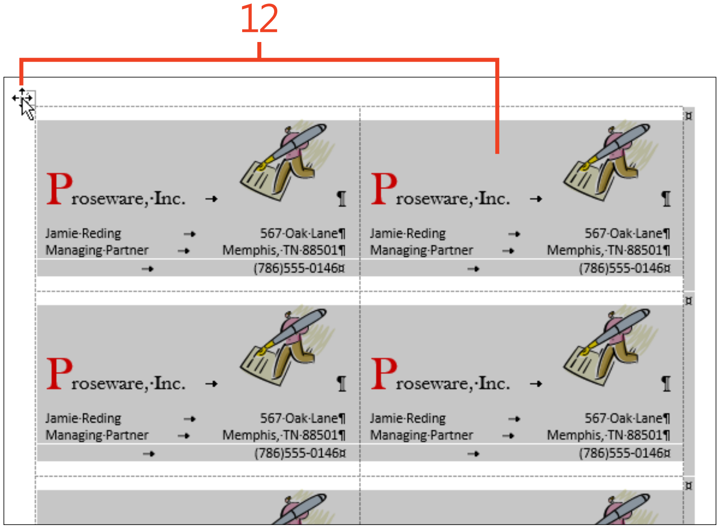
Before printing, insert labels into the following printer tray: Re



Proseware, Inc. ¶
Jamie Reding 567 Oak Lane¶
Managing Partner Memphis, TN 88501¶
(786)555-0146¤

12 Click the table handle in the left margin to select the entire table. Then, paste the contents of the clipboard (shortcut, Ctrl+V).

13 Click the File tab to display the Backstage view. Click the Print tab and then click the Print button.



Proseware, Inc.
Jamie Reding
Managing Partner
567 Oak Lane
Memphis, TN 88501
(786)555-0146

Proseware, Inc.
Jamie Reding
Managing Partner
567 Oak Lane
Memphis, TN 88501
(786)555-0146

Proseware, Inc.
Jamie Reding
Managing Partner
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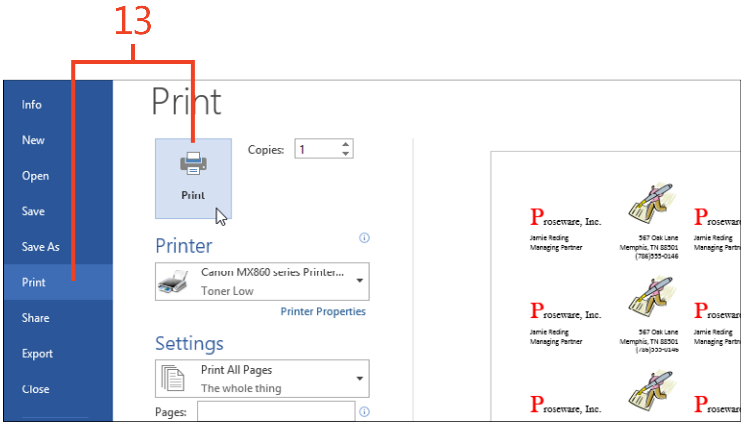
Memphis, TN 88501
(786)555-0146

Proseware, Inc.
Jamie Reding
Managing Partner
567 Oak Lane
Memphis, TN 88501
(786)555-0146


13
Info
New
Open
Save
Save As
Print
Share
Export
Close
Print
Print
Printer
Printer Properties
Settings
Pages:

Copies: 1

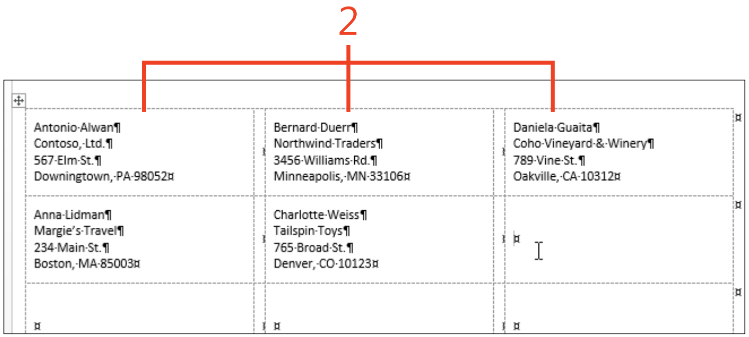
Canon MX860 series Printer...
Toner Low

Print All Pages
The whole thing

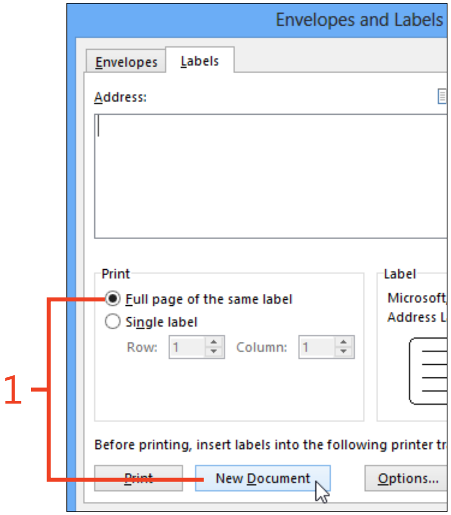
TIP Microsoft Publisher is another good choice for creating great-looking business cards.

Print a page of different labels

1. In the procedure “Print one label or a full page of labels” on page 326, perform steps 1 through 8. In the Envelopes And Labels dialog box, click the option button for Full Page Of The Same Label and then click New Document. Continue with step 2 below.
2. In the table cell that corresponds to each label, type or paste the information for that label.
3. Click the File tab to display the Backstage view, click the Print tab, and then click the Print button.

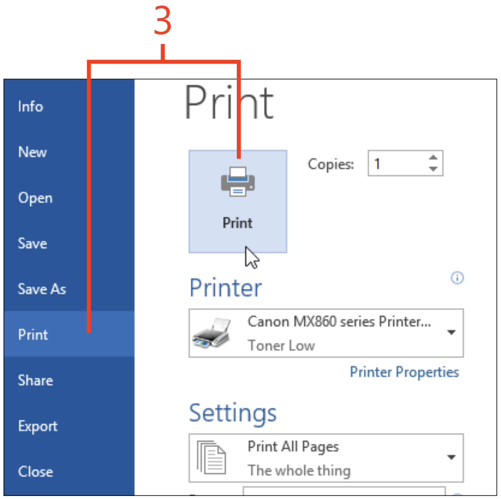


Antonio Alwan Contoso, Ltd. 567 Elm St. Downingtown, PA 98052	Bernard Duerr Northwind Traders 3456 Williams Rd. Minneapolis, MN 33106	Daniela Guaita Coho Vineyard & Winery 789 Vine St. Oakville, CA 10312
Anna Lidman Margie’s Travel 234 Main St. Boston, MA 85003	Charlotte Weiss Tailspin Toys 765 Broad St. Denver, CO 10123	


1
Envelopes and Labels
Envelopes
Labels
Address:
Print
Label
Microsoft
Address L
Row: 1
Column: 1
Print
New Document
Options...

● Full page of the same label
○ Single label

Before printing, insert labels into the following printer tr


3
Info
New
Open
Save
Save As
Print
Share
Export
Close
Print
Print
Printer
Printer Properties
Settings

Copies: 1

Canon MX860 series Printer... Toner Low

Print All Pages The whole thing

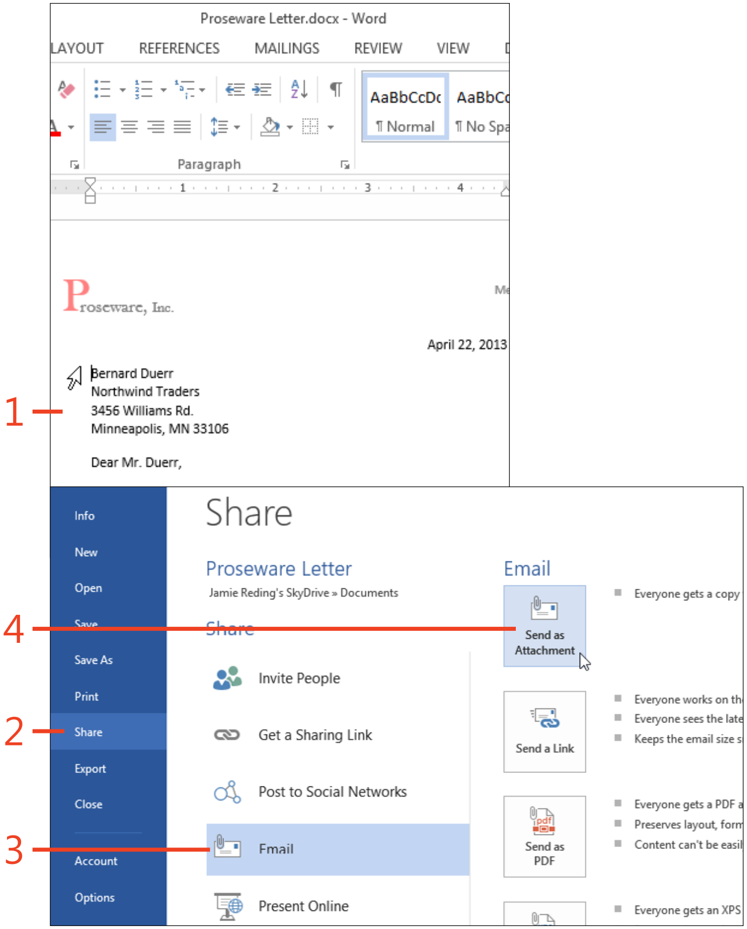
SEE ALSO If you already have the information for the labels stored in a Word table, a Microsoft Excel worksheet, a Microsoft Access database, or an Outlook contact list, a mail merge is an alternative way to print mailing labels. For information about using a mail merge, see “Starting a mail merge” on page 334.

Sending a document by email

You can share your documents with other Word users in several ways, and one of those ways is to send a copy of a document file by email. If you have an email program on your computer, you can send an open Word 2013 document as an attachment to a message directly from the Backstage view. You can send the document as an editable Word file, a PDF file, or an XPS file.

Send a document as an attachment

1. Open a document that you want to send to another person.
2. Click File to display the Backstage view and then click the Share tab.
3. Click Email.
4. To send the document as an editable Word file, click Send As Attachment. If you prefer to send a PDF file or an XPS file, instead, click Send As PDF or Send As XPS.



Proseware, Inc.

April 22, 2013

Bernard Duerr
Northwind Traders
3456 Williams Rd.
Minneapolis, MN 33106

Dear Mr. Duerr,

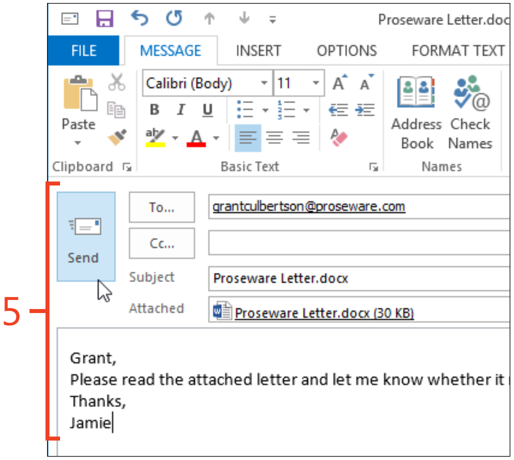
Share

Proseware Letter
Jamie Reding's SkyDrive » Documents

Proseware Letter.docx - Word
LAYOUT
REFERENCES
MAILINGS
REVIEW
VIEW
AaBbCcDc
¶ Normal
AaBbCc
¶ No Spa
Paragraph
1
4
2
3
Info
New
Open
Save
Save As
Print
Share
Export
Close
Account
Options
Share
Invite People
Get a Sharing Link
Post to Social Networks
Email
Present Online
Email
Send as Attachment
Everyone gets a copy
Send a Link
Everyone works on th
Everyone sees the late
Keeps the email size s
Send as PDF
Everyone gets a PDF a
Preserves layout, form
Content can't be easil
Everyone gets an XPS

TIP The entries in the middle pane for Get A Sharing Link and Post To Social Networks appear only if the document file is stored on SkyDrive or a SharePoint server. In the pane on the right, the Send A Link button is available only if the document file is stored on SkyDrive or a SharePoint server.

5 In the email program's window, type the recipient's address, the subject, and the body of the message, and then click the Send button.


Proseware Letter.doc
FILE
MESSAGE
INSERT
OPTIONS
FORMAT TEXT
Paste
Calibri (Body)
11
Clipboard
Basic Text
Address Book
Check Names
Names
Send
To...
Cc...
Subject
Attached
5

To...: grantculbertson@proseware.com

Subject: Proseware Letter.docx

Attached: Proseware Letter.docx (30 KB)

Grant,
Please read the attached letter and let me know whether it
Thanks,
Jamie

CAUTION To be able to send a document as an email attachment, a default email program must be configured on your computer. If your edition of Office doesn't include Outlook, you can use a third-party program. If your computer runs Windows 8, you might be able to use the Microsoft Mail app. If the only available mail service is a web mail interface, save the document to a local disk drive and then use the web mail program's command to attach the file to a message.

SEE ALSO For more information about sharing documents in Word 2013, see "Sharing with SkyDrive" on page 370.

Starting a mail merge

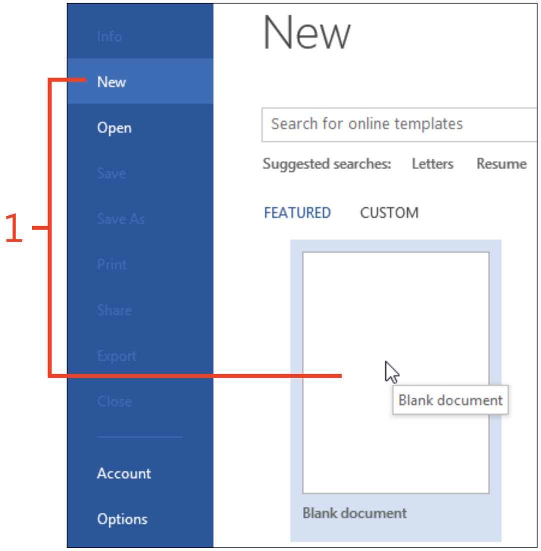
In Word 2013, a mail merge starts with a *main document*, which contains the formatting that you want in the final output. It might also contain text that you want to appear in each output document. You insert *merge fields* in the main document to reserve places for the *variable data*. You select a document or a database as the *data source* for the merge, and you can select which of the *recipients* listed in the data source will be used to create output. If you want, you can preview the output. Finally, you can send the output to a file, to the printer, or to an email program.

The mail merge feature in Word 2013 is quite flexible; you can use any of several kinds of data sources, you can sort and select the names or other items that you want to include, and you can create the output in several formats. However, this flexibility comes at the cost of some complexity. Completing a mail merge requires a sequence of steps, as described on the following pages.

The commands on the Mailings tab use the term *recipients* to refer to the names of people in a mailing list. You can also use Word's mail merge feature to work with other kinds of lists, such as product catalogs, in which case the term recipients refers to the items in the list.

Create the main document

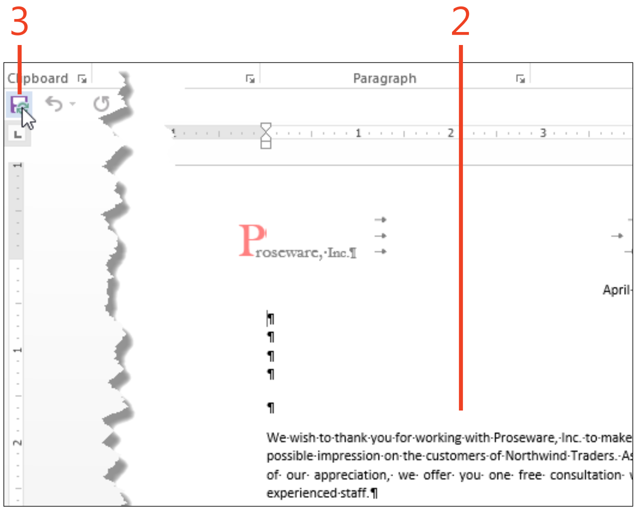
1 Click File to display the Backstage view. Click the New tab and then click Blank Document or a custom template.


1
Info
New
Open
Save
Save As
Print
Share
Export
Close
Account
Options
New
Search for online templates
Suggested searches:
Letters
Resume
FEATURED
CUSTOM
Blank document
Blank document

2 If you want to create a letter or an email message to send to multiple addresses, use the new document to write the body of the letter or message (that is, everything that will be the same in all of the letters).

If you're creating labels, envelopes, or a directory merge (called a *catalog* merge in some earlier versions of Word), leave the document blank.

3 When the main document is complete, on the Quick Access Toolbar, click the Save button. Then, while the document remains open, continue at "Select the merge type," which follows this task.

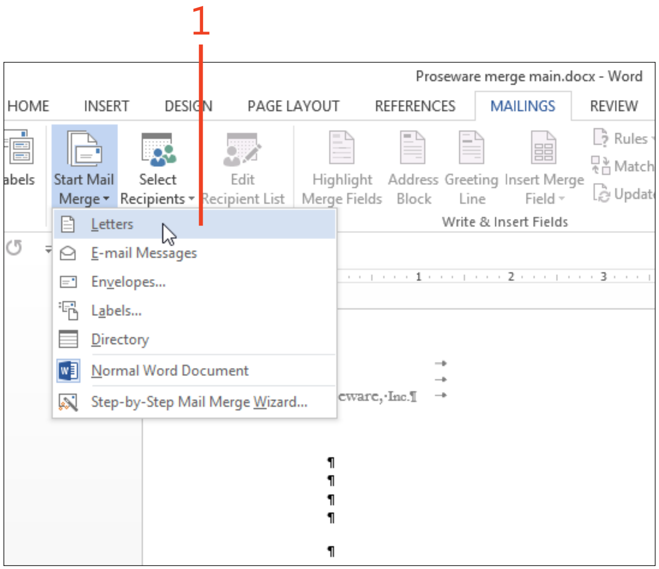

3
2
Clipboard
Paragraph
Proseware, Inc.¶
April

We·wish·to·thank·you·for·working·with·Proseware,·Inc.·to·make
possible·impression·on·the·customers·of·Northwind·Traders.·As
of· our· appreciation,· we· offer· you· one· free· consultation·
experienced·staff.¶

Select the merge type

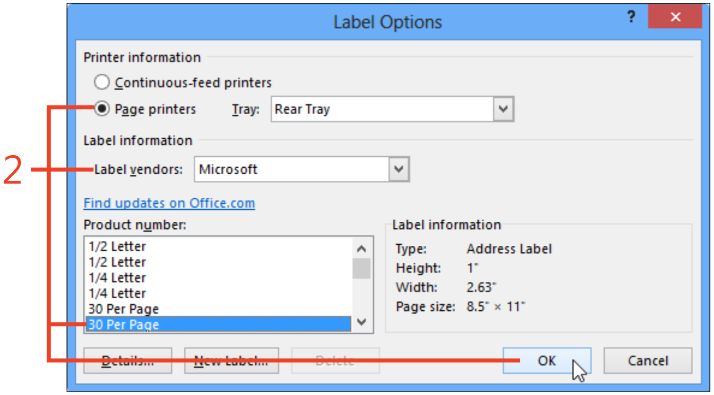
1 On the Mailings tab, in the Start Mail Merge group, click Start Mail Merge. On the drop-down list that appears, click one of the following commands:

- **Letters** Creates an output document containing a separate section for each recipient, with each section starting on a new page
- **E-Mail Messages** Creates an email message to each recipient
- **Envelopes** Creates an output document containing an envelope for each recipient
- **Labels** Creates an output document containing labels, with one label for each recipient
- **Directory** Creates an output document in which each recipient's data starts a new paragraph


1
Proseware merge main.docx - Word
HOME
INSERT
DESIGN
PAGE LAYOUT
REFERENCES
MAILINGS
REVIEW
abels
Start Mail Merge
Select Recipients
Edit Recipient List
Highlight Merge Fields
Address Block
Greeting Line
Insert Merge Field
Rules
Match
Updat
Write & Insert Fields
Letters
E-mail Messages
Envelopes...
Labels...
Directory
Normal Word Document
Step-by-Step Mail Merge Wizard...
eware, Inc.¶

2 If you clicked Labels in step 1, the Label Options dialog box opens automatically. Select the printer tray, label vendor, and product number, and then click OK. While the document remains open, continue at “Choosing the recipients” on page 337.

3 If you clicked Envelopes in step 1, the Envelope Options dialog box opens automatically. Select the envelope size, choose the printing options, and then click OK. While the document remains open, continue at “Choosing the recipients.”



Label Options

Printer information

○ Continuous-feed printers

● Page printers Tray: Rear Tray

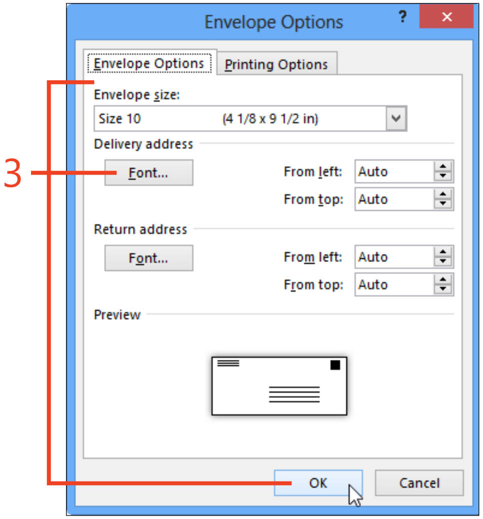
Label information

Label vendors: Microsoft

Find updates on Office.com

Product number:
1/2 Letter
1/2 Letter
1/4 Letter
1/4 Letter
30 Per Page
30 Per Page

Label information
Type: Address Label
Height: 1"
Width: 2.63"
Page size: 8.5" × 11"



Envelope Options

Envelope size: Size 10 (4 1/8 x 9 1/2 in)

Delivery address
From left: Auto
From top: Auto

Return address
From left: Auto
From top: Auto

Preview

TIP If you prefer the software to guide you through the same procedures described in this book, click the Step-By-Step Mail Merge Wizard command at the bottom of the Start Mail Merge gallery. The wizard leads you through each step.

Choosing the recipients

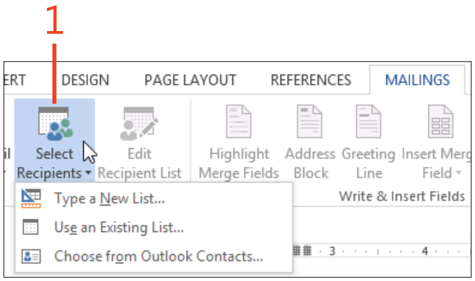
When you create a mail merge in Word 2013, you must choose the information that Word puts into the output document. The information could be stored in one of a number of places—as a table in a Word document, in an Excel worksheet, in an Access or Microsoft SQL Server database, or in an Outlook contact list.

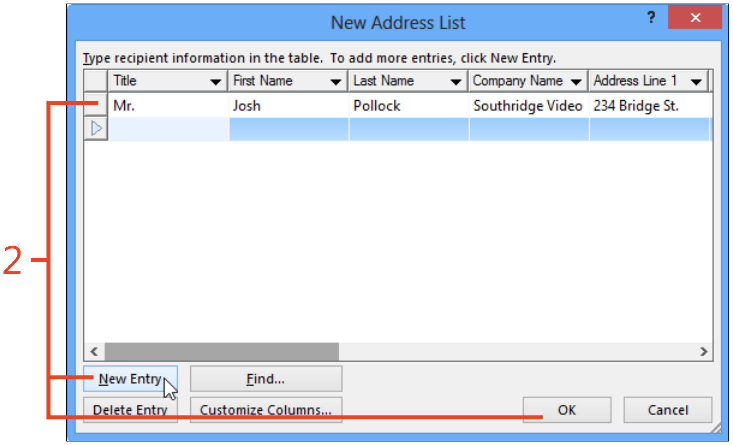
After you select the file or other source of the data, Word provides tools with which you can refine the list of recipients or other records, to sort them on one or more fields, and to edit the list entries if necessary.

Select a data source

1 On the Mailings tab, in the Start Mail Merge group, click Select Recipients. On the menu that appears, click one of the following commands:
  - **Type A New List** Opens the New Address List dialog box, in which you can type entries for a list and then save them as a database (.mdb) file
  - **Use An Existing List** Opens the Select Data Source dialog box, in which you can select an existing file (a Word or plain text document, an Excel worksheet, or an Access or SQL Server database) containing the entries
  - **Choose From Outlook Contacts** Opens the Select Contacts dialog box, in which you can select which contact folder to use, if your Office edition includes Outlook

2 If you clicked Type A New List in step 1, in the New Address List dialog box, type the names, addresses, and other information. To add each entry after the first one, click New Entry. When the list is complete, click OK and continue at step 3.


1
ERT
DESIGN
PAGE LAYOUT
REFERENCES
MAILINGS
Select Recipients
Edit Recipient List
Highlight Merge Fields
Address Block
Greeting Line
Insert Merg Field
Write & Insert Fields
Type a New List...
Use an Existing List...
Choose from Outlook Contacts...


New Address List
2
New Entry
Find...
Delete Entry
Customize Columns...
OK
Cancel

Type recipient information in the table. To add more entries, click New Entry.

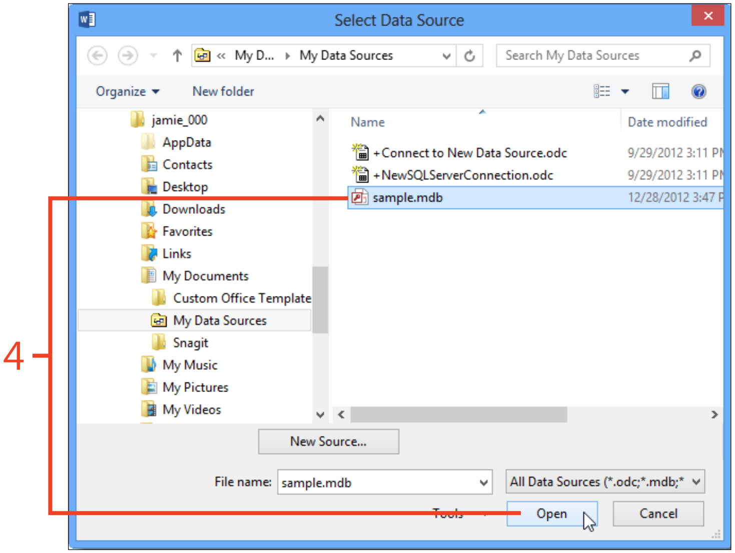
Title	First Name	Last Name	Company Name	Address Line 1
Mr.	Josh	Pollock	Southridge Video	234 Bridge St.

TIP Click the Customize Columns button to add, remove, rename, or reorder columns in the New Address List dialog box. To sort the entries on any column, click the header of that column.

3 In the Save Address List dialog box that automatically opens, enter a file name and click Save. Then, continue at “Edit the list of recipients” on page 339.

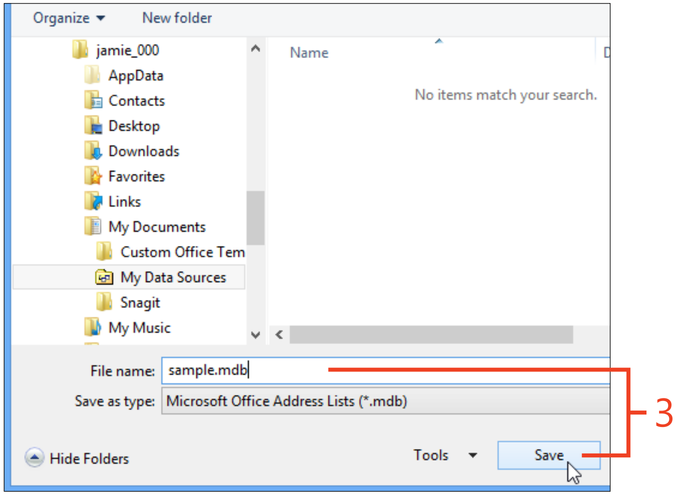
4 If you clicked Use An Existing List in step 1, the Select Data Source dialog box initially displays the contents of the My Data Sources folder in your user profile. If the data source that you want to use is a Word or plain text document, an Excel worksheet, or an Access (.mdb or .accdb) database, navigate to the correct folder and select the file containing the data. Then, click Open and continue at “Edit the list of recipients.”

5 If you clicked Choose From Outlook Contacts in step 1, click the contact folder that contains the data that you want to use and click OK. Then, continue at “Edit the list of recipients.”


Select Data Source
« My D... › My Data Sources
Search My Data Sources
Organize ▾
New folder
jamie_000
AppData
Contacts
Desktop
Downloads
Favorites
Links
My Documents
Custom Office Template
My Data Sources
Snagit
My Music
My Pictures
My Videos
Name
Date modified
New Source...
Tools
Open
Cancel
4

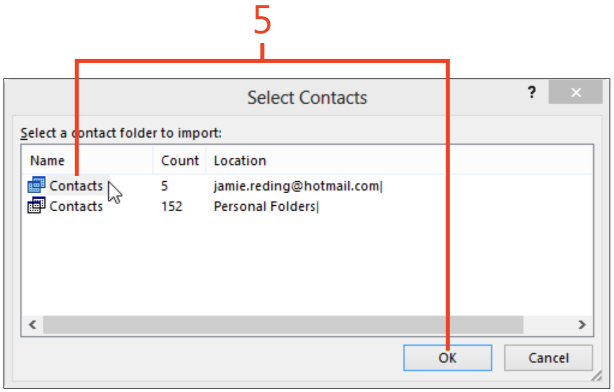
Name	Date modified
+Connect to New Data Source.odc	9/29/2012 3:11 PM
+NewSQLServerConnection.odc	9/29/2012 3:11 PM
sample.mdb	12/28/2012 3:47 P

File name: sample.mdb
All Data Sources (*.odc;*.mdb;*


Organize ▾
New folder
jamie_000
AppData
Contacts
Desktop
Downloads
Favorites
Links
My Documents
Custom Office Tem
My Data Sources
Snagit
My Music
Name
Hide Folders
Tools
Save
3

No items match your search.

File name: sample.mdb
Save as type: Microsoft Office Address Lists (*.mdb)


5
Select Contacts
?
OK
Cancel

Select a contact folder to import:

Name	Count	Location
Contacts	5	jamie.reding@hotmail.com|
Contacts	152	Personal Folders|

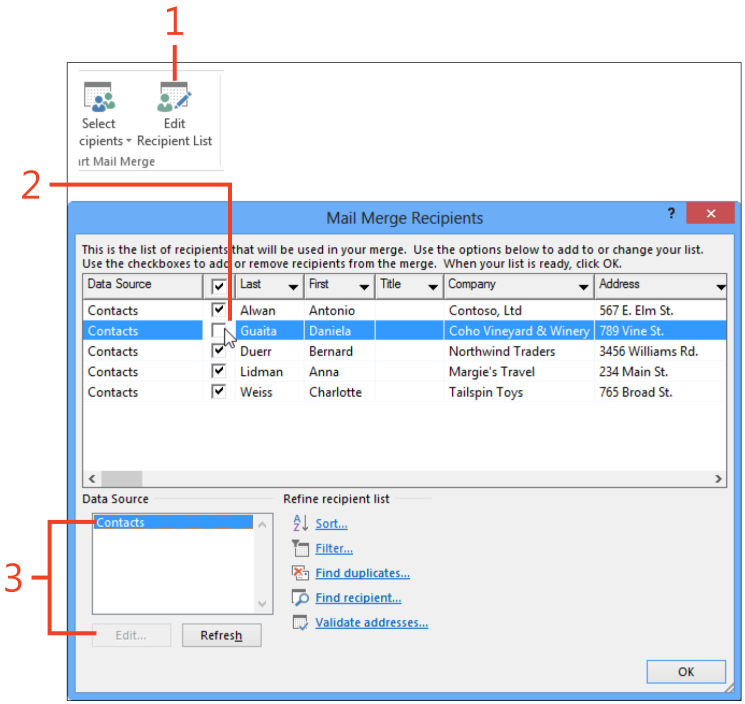
TIP The two default items in the My Data Sources folder launch the Data Connection Wizard, which can help you attach the mail merge document to an Access or SQL Server database.

Edit the list of recipients

1. If you chose an Outlook contacts folder as your data source, the Mail Merge Recipients dialog box opens automatically. Otherwise, on the Mailings tab, in the Start Mail Merge group, click Edit Recipient List to open the Mail Merge Recipients dialog box.
2. Clear the check boxes next to entries that you do not want to include in the mail merge; select the check boxes for those that you do want to include.

   Selecting or clearing the check box in the header row of the list causes all of the entries to become selected or cleared, respectively. If you want to keep only a few entries selected, first clear the entire list and then select those that you want.
3. If you want to add or delete entries in the list of recipients, click the name of the source file in the Data Source box and click Edit. The Edit Data Source dialog box that appears is the same as the New Address List dialog box shown in step 2 of “Select a data source” on page 337.

   If the data source is an Outlook contact list, the Edit button does not become available. To edit entries in a contact list, you must use Outlook’s contact editor.


1
2
3
Select
cipients
Edit
Recipient List
ırt Mail Merge
Mail Merge Recipients
?
×
Data Source
Contacts
Refine recipient list
Sort...
Filter...
Find duplicates...
Find recipient...
Validate addresses...
Edit...
Refresh
OK

This is the list of recipients that will be used in your merge. Use the options below to add to or change your list. Use the checkboxes to add or remove recipients from the merge. When your list is ready, click OK.

Data Source	☑	Last	First	Title	Company	Address
Contacts	☑	Alwan	Antonio		Contoso, Ltd	567 E. Elm St.
Contacts	☐	Guaita	Daniela		Coho Vineyard & Winery	789 Vine St.
Contacts	☑	Duerr	Bernard		Northwind Traders	3456 Williams Rd.
Contacts	☑	Lidman	Anna		Margie's Travel	234 Main St.
Contacts	☑	Weiss	Charlotte		Tailspin Toys	765 Broad St.

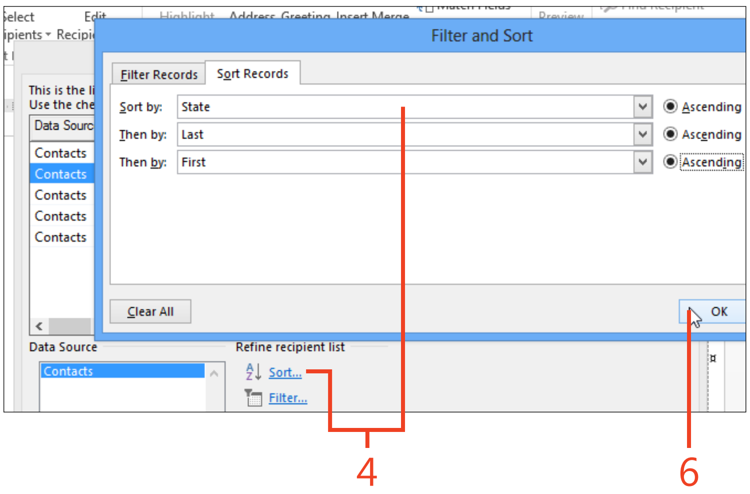
4 The order in which the merge's results appear is determined by the order of the entries in the list of recipients. If you want to sort the list of recipients on a single column, click that column's header. To sort on two or three columns, click the Sort link in the Refine Recipient List section to open the Filter And Sort dialog box. On the Sort tab, in each drop-down list, select the name of the column on which to sort, and whether to sort it in ascending or descending order.

For example, you can sort the recipients by state, then by last name, and finally by first name. In the merge's results, someone named Smith who lives in Arizona would be listed before someone named Jones who lives in Wyoming.

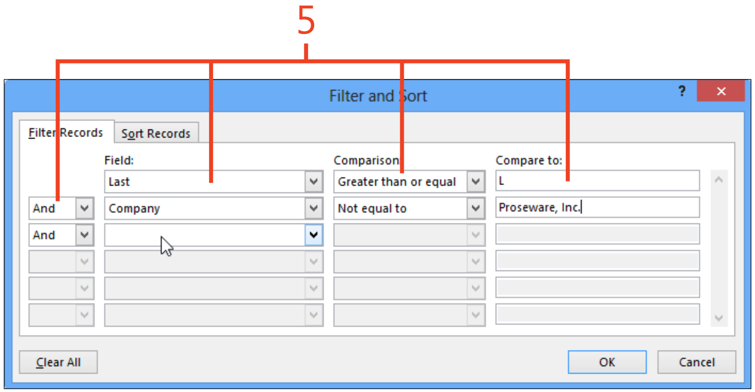
5 If you want to include in the merge only the entries that satisfy certain criteria, click the Filter link in the Refine Recipient List section to open the Filter And Sort dialog box. On the Filter tab, select the name of a column in the Field drop-down list, select a condition in the Comparison drop-down list, and if necessary enter a value in the Compare To list box. You can continue adding criteria, connected by *And* or *Or*, as needed to specify the set of recipients to include.

For example, to limit the list of recipients to those whose last names start with the letter M, select the criteria **Last | Greater than or equal to | M | And | Last | Less than | N**.

6 When the list of recipients is complete and correctly sorted, click OK.


Filter and Sort
Filter Records
Sort Records
Clear All
OK
Data Source
Contacts
Refine recipient list
Sort...
Filter...
4
6

Sort by: State ● Ascending
Then by: Last ● Ascending
Then by: First ● Ascending


5
Filter and Sort
Filter Records
Sort Records
Clear All
OK
Cancel

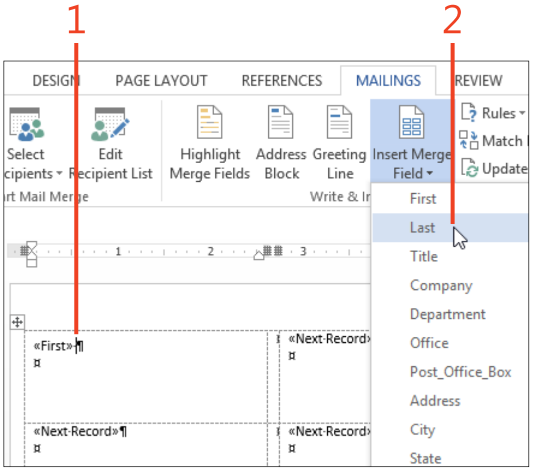
	Field:	Comparison	Compare to:
	Last	Greater than or equal	L
And	Company	Not equal to	Proseware, Inc.
And			

Adding merge fields

For a mail merge to place values from the data source into the output, you must insert one or more merge fields into the main document. During the merge, each merge field is replaced by the corresponding value in the data source for the current recipient. For example, suppose a recipient's record in the data source contains the values First_Name = John and Last_Name = Clarkson. In the main document for a letter merge, a line might contain the merge fields «First_Name» «Last_Name». When the record is processed during the merge, those fields will be replaced with the text John Clarkson.

You can insert copies of the same merge field into the main document in multiple places. For example, the merge field «First_Name» could be used in the address, in the greeting line, and in the body of the letter.

Insert merge fields in the document


1
2
DESIGN
PAGE LAYOUT
REFERENCES
MAILINGS
REVIEW
Select
cipients
Edit
Recipient List
rt Mail Merge
Highlight
Merge Fields
Address
Block
Greeting
Line
Write & Ir
Insert Merge
Field
Rules
Match
Update
First
Last
Title
Company
Department
Office
Post_Office_Box
Address
City
State
«First»¶
«Next·Record»
«Next·Record»¶
«Next·Record»

1 Click in the main document at the location where you want information from the data source to be inserted during the merge.

2 On the Mailings tab, in the Write & Insert Fields group, click the drop-down arrow on the Insert Merge Field button and then, in the list that appears, click the name of a column from the data source. Repeat steps 1 and 2 until the main document contains all the necessary merge fields.

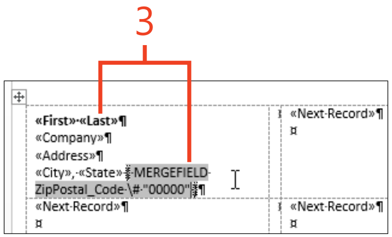
   If you selected a label merge, insert merge fields and other text only in the upper-left cell of the table in the main document. During this step, the other cells contain only a «Next Record» merge field. The other cells will be filled in step 4 of this procedure.

   If you place another merge field on the same line as the first merge field, type a space, text, or punctuation between them as necessary. Otherwise, there won't be any separation between the values in the output. If you want the next merge field to appear on the next line, press Enter at the end of the first line.

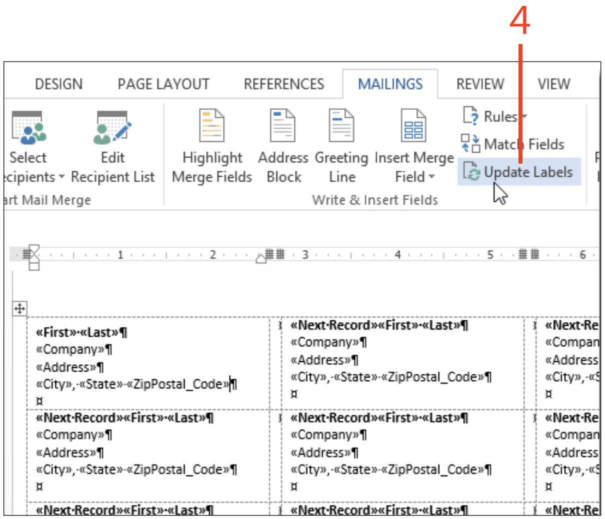
3 If you want, apply character formatting to some of the merge fields in the main document, either directly or by using a character style.

You can right-click a merge field in the main document and click Toggle Field Codes to display the complete field code. Then, you can insert formatting switches to control the appearance of the results in the output. For information about inserting formatting switches, see “Controlling field formatting by using switches” on page 205.

4 If you selected a label merge, on the Mailings tab, in the Write & Insert Fields group, click Update Labels. This copies the merge fields and text that you entered in the upper-left cell of the table into all the other cells.



«First»·«Last»¶
«Company»¶
«Address»¶
«City»,·«State»·{·MERGEFIELD·ZipPostal_Code·\#·"00000"·}¶
«Next·Record»¶


4
DESIGN
PAGE LAYOUT
REFERENCES
MAILINGS
REVIEW
VIEW
Select Recipients
Edit Recipient List
Highlight Merge Fields
Address Block
Greeting Line
Insert Merge Field
Rules
Match Fields
Update Labels
Write & Insert Fields

«First»·«Last»¶
«Company»¶
«Address»¶
«City»,·«State»·«ZipPostal_Code»¶

«Next·Record»«First»·«Last»¶
«Company»¶
«Address»¶
«City»,·«State»·«ZipPostal_Code»¶

TRY THIS On the Mailings tab, in the Write & Insert Fields group, click either Address Block or Greeting Line to insert special merge fields. These merge fields combine data from several columns of the recipient’s record. When you insert one of these fields, Word displays a dialog box in which you can select options for the formatting of the output. If you use either of these merge fields, be sure to preview the results for every recipient and correct any unexpected output.

CAUTION If the style applied to the merge fields includes paragraph formatting with extra space before or after the paragraphs, the lines might be spaced too widely. This particularly affects label and envelope merges, in which addresses with more than three or four lines might not fit. If necessary, apply another style such as No Spacing to the main document.

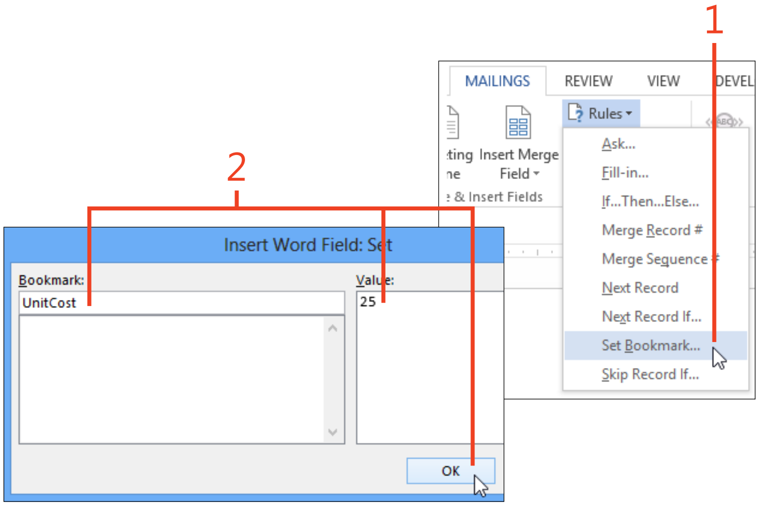
Adding information with rules

The entries in the Insert Merge Field gallery represent only the columns that are present in the data source. In addition, you can use the fields in Word 2013 to perform comparisons and calculations during a mail merge, so you can display additional information, depending on the data in the data source.

Modify the merge with rules

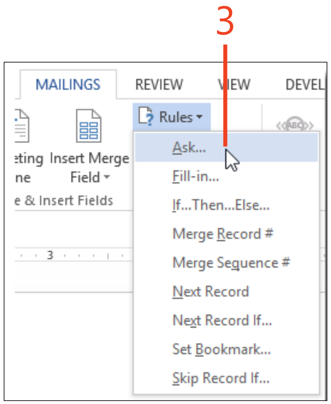
1. Insert a SET field if you want to store an unchanging number or text that can be used to perform comparisons or calculations for all of the recipients in a merge. On the Mailings tab, in the Write & Insert Fields group, click Rules and then, on the list that appears, click Set Bookmark. Continue at step 2.
2. In the Insert Word Field: Set dialog box, type a bookmark name in the Bookmark list box, type the number or text in the Value text box, and then click OK.

   The bookmark is located inside the SET field, which doesn't display any result in the document. However, the bookmark can be referenced in other fields elsewhere in the document, such as a REF field that will display the value, or a formula field that will use the value in a calculation.
3. Insert an ASK field if you want to store a number or text that might be different for each recipient. On the Mailings tab, in the Write & Insert Fields group, click Rules and then, on the list that appears, click Ask. Continue at step 4.


1
2
MAILINGS
REVIEW
VIEW
DEVEL
Rules
Insert Merge Field
& Insert Fields
Ask...
Fill-in...
If...Then...Else...
Merge Record #
Merge Sequence #
Next Record
Next Record If...
Set Bookmark...
Skip Record If...
Insert Word Field: Set
OK

Bookmark: UnitCost

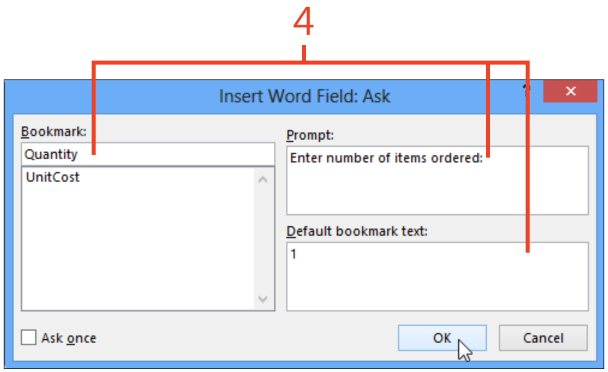
Value: 25


3
MAILINGS
REVIEW
VIEW
DEVEL
Rules
Insert Merge Field
& Insert Fields
Ask...
Fill-in...
If...Then...Else...
Merge Record #
Merge Sequence #
Next Record
Next Record If...
Set Bookmark...
Skip Record If...

4 In the Insert Word Field: Ask dialog box, type a bookmark name in the Bookmark box, type a question in the Prompt box, type a default value if desired, and then click OK.

During the merge, the prompt will be displayed for each recipient, and the value you enter will overwrite any previous value in the bookmark. If you want to use the same value for all of the recipients during the current merge, select the Ask Once check box.

The bookmark is located inside the ASK field, which doesn't display any result in the document. However, the bookmark can be referenced in other fields elsewhere in the document, such as a REF field that will display the value, or a formula field that will use the value in a calculation.


4
Insert Word Field: Ask
?
✕

Bookmark: Quantity
UnitCost
Prompt: Enter number of items ordered:
Default bookmark text: 1
☐ Ask once

OK
Cancel

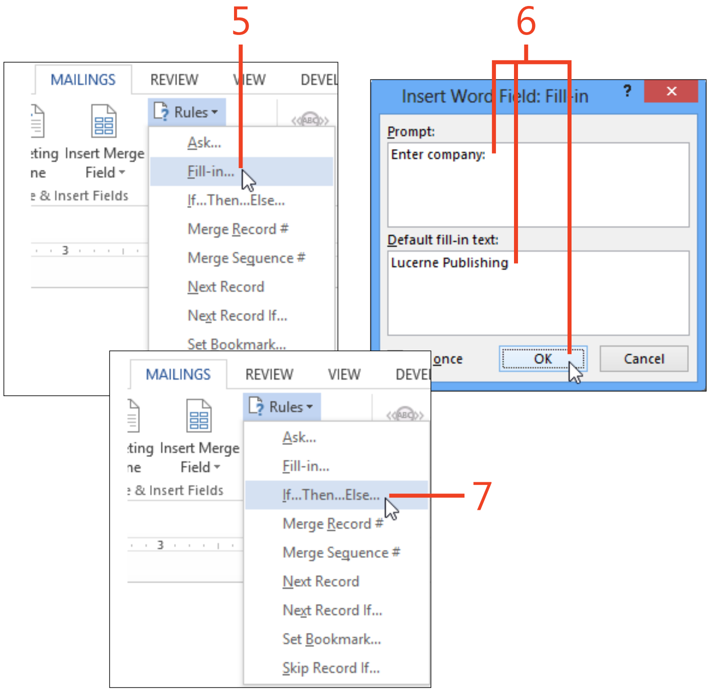
5 If you want to display a number or text that might be different for each recipient, insert a FILLIN field. On the Mailings tab, in the Write & Insert Fields group, click Rules and then, on the list that appears, click Fill-in. Continue at step 6.

6 In the Insert Word Field: Fill-in dialog box, type a question in the Prompt text box, type a default value if desired, and then click OK.

The FILLIN field is similar to the ASK field, except that the FILLIN field displays its value in the document and doesn't store its value in a bookmark.

7 Insert an IF...THEN...ELSE field where you need to display different results in the document, depending on the value of a merge field or other field. If you want to base the decision on a bookmark value (such as one in a SET field or an ASK field), continue at step 9.

On the Mailings tab, in the Write & Insert Fields group, click Rules and then, on the list that appears, click If...Then...Else. Continue at step 8.


5
6
7
MAILINGS
REVIEW
VIEW
DEVEL
Insert Merge Field
Rules
& Insert Fields
Ask...
Fill-in...
If...Then...Else...
Merge Record #
Merge Sequence #
Next Record
Next Record If...
Set Bookmark...
Skip Record If...
Insert Word Field: Fill-in
?
✕
OK
Cancel

Prompt: Enter company:
Default fill-in text: Lucerne Publishing
once

8 In the Insert Word Field: If dialog box, select a merge field in the Field Name list box, select a condition in the Comparison box and, if necessary, enter a value in the Compare To list box. In the Insert This Text box, enter the result that the field will display if the comparison is true. In the Otherwise Insert This Text box, enter the result that the field will display if the comparison is false. Click OK.

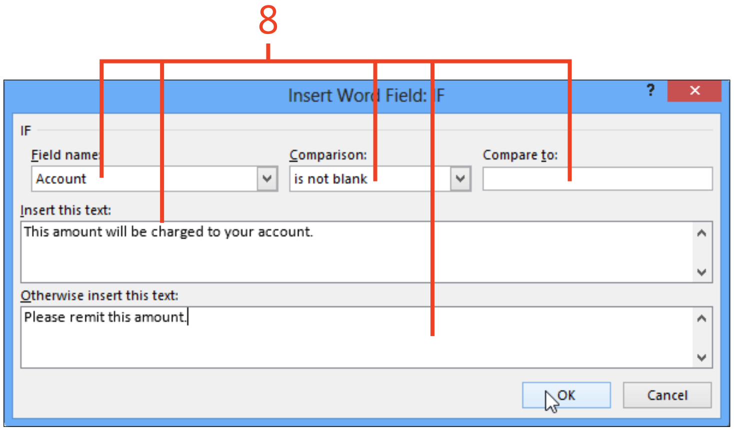
9 If you want to base the decision on a bookmark value (such as one in a SET field or an ASK field), click the Insert tab. In the Text group, click Quick Parts and then click Field. Continue at step 10.

10 In the Field dialog box, in the Field Name list box, click If. Then, click the Options button.

In the Field Options dialog, click the desired bookmark name and then click Add To Field. Click at the end of the expression in the Field Codes box and type the rest of the code.

For example, suppose the selected bookmark is Quantity, and you want the result to display *copy* if Quantity is 1 or *copies* if Quantity is greater than 1. The completed code for this field is **IF Quantity = 1 “copy” “copies”**.

Click OK in the Field Options dialog box and then click OK in the Field dialog box.


8
Insert Word Field: IF
?
IF
OK
Cancel

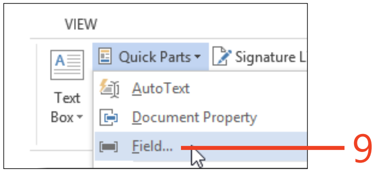
Field name: Account

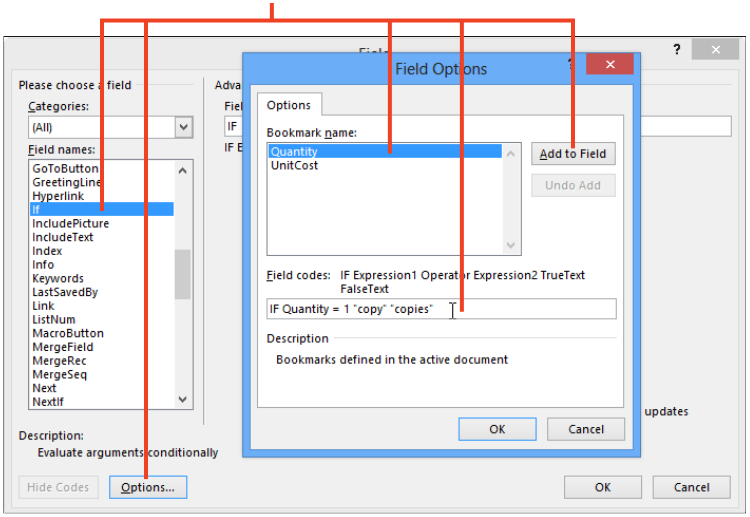
Comparison: is not blank

Compare to:

Insert this text: This amount will be charged to your account.

Otherwise insert this text: Please remit this amount.


VIEW
Text Box
Quick Parts
Signature L
AutoText
Document Property
Field...
9


10
?
Please choose a field
Adva
Fiel
IF
IF E
Field Options
Options
Add to Field
Undo Add
Description
OK
Cancel
updates
Hide Codes
Options...
OK
Cancel

Categories: (All)

Field names: GoToButton, GreetingLine, Hyperlink, If, IncludePicture, IncludeText, Index, Info, Keywords, LastSavedBy, Link, ListNum, MacroButton, MergeField, MergeRec, MergeSeq, Next, NextIf

Description: Evaluate arguments conditionally

Bookmark name: Quantity, UnitCost

Field codes: IF Expression1 Operator Expression2 TrueText FalseText

IF Quantity = 1 "copy" "copies"

Bookmarks defined in the active document

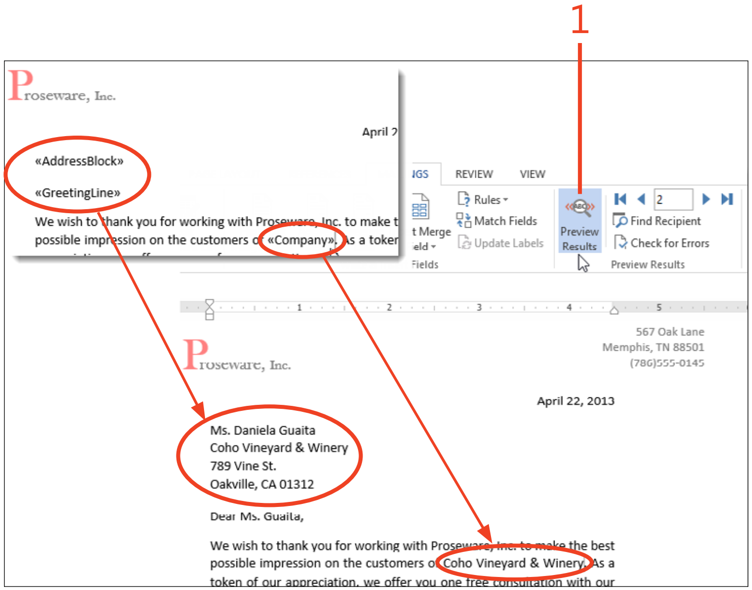
Finishing the merge

When the main document contains all of the merge fields, other fields, text, and graphics needed to prepare the output, it's time to perform the final steps. Because of the length and complexity of the setup, you should first examine a preview to ensure that everything is in place. When you're confident of the correctness of the document and the sorting and filtering of the data source, you can run the final merge.

Merge to special outputs

1 On the Mailings tab, in the Preview Results group, click Preview Results. If you selected a label merge, the preview shows the pages of labels. For any other kind of merge, the preview shows the output for only one recipient at a time. You can use the arrow buttons in the Preview Results group to display previews of the rest of the output.

   If unwanted information appears in any of the previews or information is missing, click Preview Results to turn it off. Then, edit the main document or the records in the data source to correct the problem and repeat the preview.



April 2

«AddressBlock»

«GreetingLine»

We wish to thank you for working with Proseware, Inc. to make t
possible impression on the customers of «Company». As a toker

567 Oak Lane
Memphis, TN 88501
(786)555-0145

April 22, 2013

Ms. Daniela Guaita
Coho Vineyard & Winery
789 Vine St.
Oakville, CA 01312

Dear Ms. Guaita,

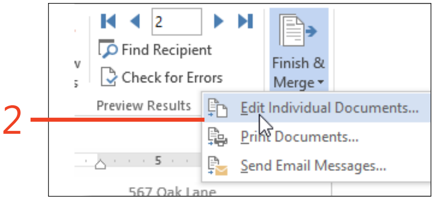
We wish to thank you for working with Proseware, Inc. to make the best possible impression on the customers of Coho Vineyard & Winery. As a token of our appreciation, we offer you one free consultation with our

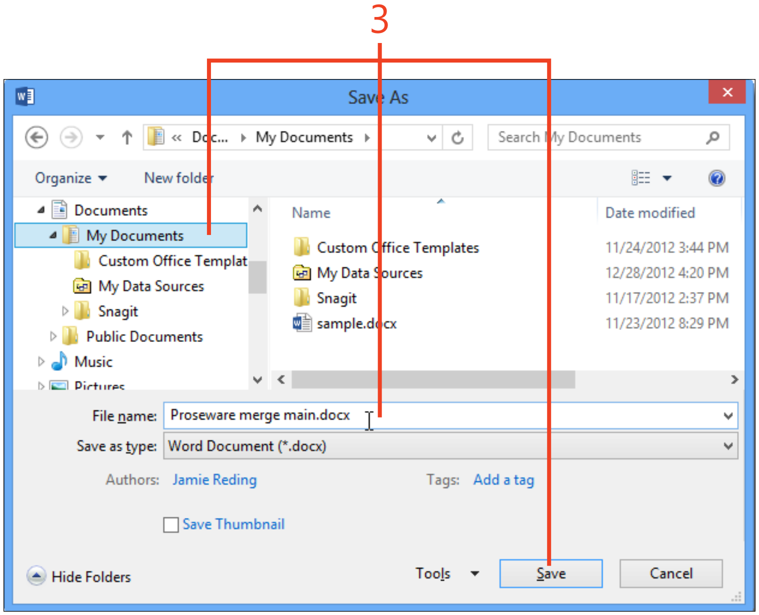
TIP If you preview a label merge and only the first recipient's label appears, you have skipped the step of clicking the Update Labels button (step 4 in "Insert merge fields in the document" on page 342).

2 On the Mailings tab, in the Finish group, click Finish & Merge and then, in the list that appears, click one of the following:

- **Edit Individual Documents** Merges the data from the data source into the merge fields to create a new document. You can edit this document, save it for later use, or print it like any other document.
- **Print Documents** Merges the data from the data source into the merge fields and sends the result to the printer. The Print dialog box appears so that you can set the printer properties, the number of copies, and other options. Click OK to print.
- **Send Email Messages** Merges the data from the data source into the merge fields and sends the result to the default email program. The Merge To Email dialog box appears so that you can enter the subject line and select the merge field that contains the email address. Click OK to send.

3 When the merge runs successfully, save the main document so that it can be used again.


2
Find Recipient
Check for Errors
Preview Results
Finish & Merge
Edit Individual Documents...
Print Documents...
Send Email Messages...
567 Oak Lane


3
Save As
Doc... › My Documents ›
Search My Documents
Organize
New folder
Documents
My Documents
Custom Office Templat
My Data Sources
Snagit
Public Documents
Music
Pictures
Name
Date modified
Custom Office Templates
My Data Sources
Snagit
sample.docx
11/24/2012 3:44 PM
12/28/2012 4:20 PM
11/17/2012 2:37 PM
11/23/2012 8:29 PM
Add a tag
Save Thumbnail
Hide Folders
Tools
Save
Cancel

File name: Proseware merge main.docx

Save as type: Word Document (*.docx)

Authors: Jamie Reding

Tags: Add a tag

SEE ALSO For more information about mail merges, see *www.gmayor.com/merge_labels_with_word_2007.htm.* The descriptions presented there also apply to Word 2013.

Reviewing documents

13

When you prepare a document with input from many coworkers, you might use any of several methods. In one style, each person works alone on one or a few sections. Then somebody puts all the pieces together, smooths out differences in formatting and writing style, and publishes the result. Another method involves writing a draft, passing it around for review and comments, and editing the document to resolve any questions.

The Comments and Track Changes features provided by Microsoft Word 2013 are ideal for multiple rounds of reviews, and the new Simple Markup view makes even heavily revised documents more readable.

In another scenario, perhaps your workflow results in several copies of the same document from different reviewers, with or without change tracking. The Compare and Combine features can pull together those multiple versions into a single document so that you can see all the changes at once.

In this section:

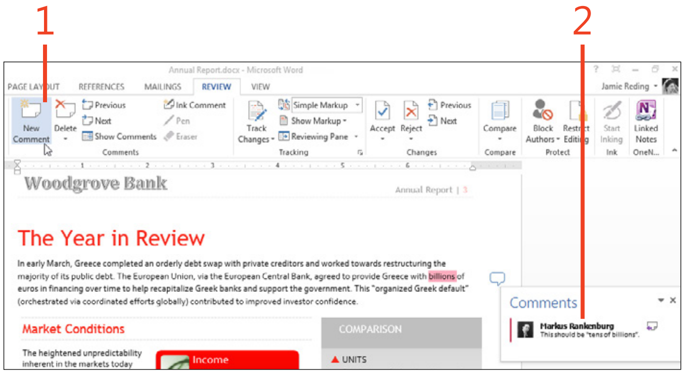
- Adding comments
- Showing and hiding comments
- Tracking changes
- Showing and hiding tracked changes
- Setting options for tracked changes
- Accepting and rejecting changes
- Comparing reviewed versions
- Merging reviewed versions

Adding comments

If you send your document out for review, you or the other Word users can insert comments that don't become part of the text. In Word 2013, you can also reply to a comment as you might in an email conversation. When you've settled the issue raised by a comment, you can delete the comment or you can mark the comment as completed. The completed comment and its replies remain in the document as a record of the issue's resolution.

Insert a comment

1. On the Review tab, in the Comments group, click New Comment.
2. Type your comment under your name in the Comments balloon.


1
2
Annual Report.docx - Microsoft Word
PAGE LAYOUT
REFERENCES
MAILINGS
REVIEW
VIEW
Jamie Reding
New Comment
Delete
Previous
Next
Show Comments
Ink Comment
Pen
Eraser
Comments
Track Changes
Simple Markup
Show Markup
Reviewing Pane
Tracking
Accept
Reject
Previous
Next
Changes
Compare
Compare
Block Authors
Restrict Editing
Protect
Start Inking
Ink
Linked Notes
OneN...
Woodgrove Bank
Annual Report | 3
The Year in Review
Market Conditions
COMPARISON
Income
UNITS
Comments

In early March, Greece completed an orderly debt swap with private creditors and worked towards restructuring the majority of its public debt. The European Union, via the European Central Bank, agreed to provide Greece with billions of euros in financing over time to help recapitalize Greek banks and support the government. This "organized Greek default" (orchestrated via coordinated efforts globally) contributed to improved investor confidence.

The heightened unpredictability inherent in the markets today

Markus Rankenburg
This should be "tens of billions".

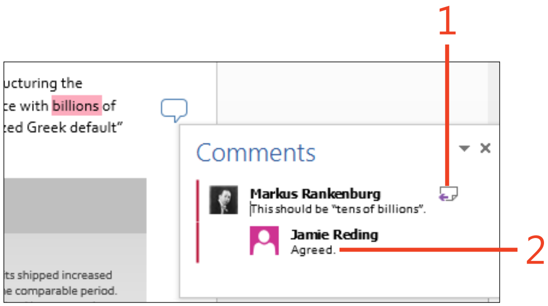
TIP To remove a comment, click it, and then on the Review tab, in the Comments group, click Delete.

TIP If you use a tablet or a drawing pad, you can click Ink Comment and handwrite or draw your comment.

TRY THIS If your Office 2013 installation includes Microsoft OneNote, you can type notes in OneNote about your Word document. OneNote automatically links the note to the current location your document. To make a note in OneNote, select the Review tab in Word and click Linked Notes.

Reply to a comment

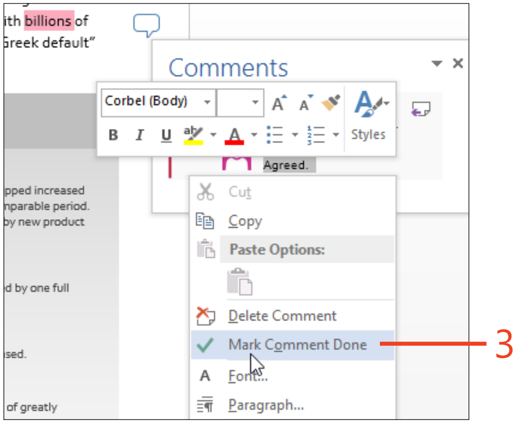
1. Click the reply icon at the right side of the Comment balloon.
2. Type your reply in the Comment balloon under your name.
3. To mark a comment as completed, right-click the Comment balloon and click Mark Comment Done.



Markus Rankenburg
This should be "tens of billions".

Jamie Reding
Agreed.

1
2
ucturing the
e with billions of
ed Greek default"
Comments
ts shipped increased
e comparable period.



3
ith billions of
reek default"
Comments
Corbel (Body)
B I U
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Agreed.
Cut
Copy
Paste Options:
Delete Comment
Mark Comment Done
Font...
Paragraph...
pped increased
nparable period.
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TRY THIS When you're reviewing your own documents, you might want to show some of your comments with a different color as a way of separating comments into categories. You can do this by slightly changing your user name in Word. On the Review tab, in the lower-right corner of the Tracking group, click the dialog box launcher (the small arrow). In the Track Changes Options dialog box, click Change User Name. In the User Name box, add a digit or other text to your user name. Select the Always Use These Values Regardless Of Sign In To Office check box and then click OK. Add a new comment or reply to an existing comment. (Don't forget to change back to your real user name after adding your comments.)

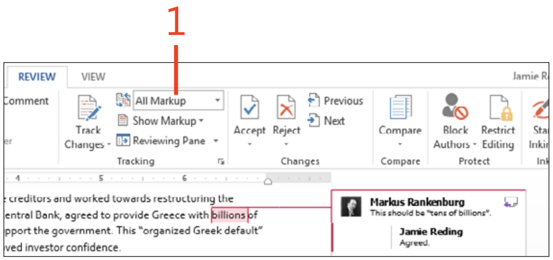
Showing and hiding comments

When you're reading and responding to comments, you'll want to see all of them. When you're reading the document for other purposes, though, the lines and balloons can be distracting.

Word 2013 has a new Simple Markup view that hides the clutter and shows just an icon in the margin to indicate the presence of a comment.

View all markup

1 On the Review tab, at the top of the Tracking group, click the drop-down list and select All Markup, if it isn't already selected.


1
REVIEW
VIEW
Jamie R
Comment
All Markup
Show Markup
Reviewing Pane
Track Changes
Tracking
Accept
Reject
Previous
Next
Changes
Compare
Compare
Block Authors
Restrict Editing
Protect
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4
5
6

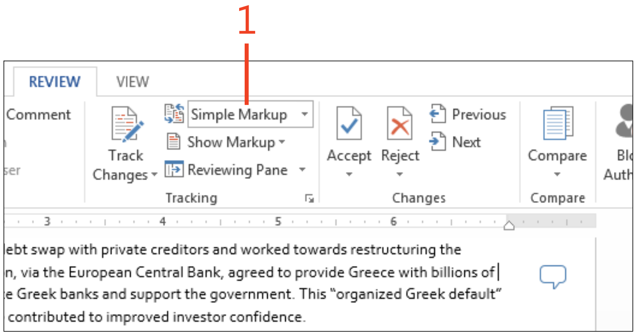
creditors and worked towards restructuring the
entral Bank, agreed to provide Greece with billions of
pport the government. This "organized Greek default"
ved investor confidence.

Markus Rankenburg
This should be "tens of billions".

Jamie Reding
Agreed.

View simple markup

1 On the Review tab, at the top of the Tracking group, click the drop-down list and select Simple Markup, if it isn't already selected. Click any Comment balloon to see its complete comment.


1
REVIEW
VIEW
Comment
Simple Markup
Show Markup
Reviewing Pane
Track Changes
Tracking
Accept
Reject
Previous
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ebt swap with private creditors and worked towards restructuring the
n, via the European Central Bank, agreed to provide Greece with billions of
e Greek banks and support the government. This "organized Greek default"
contributed to improved investor confidence.

TIP When All Markup is selected, the comments appear in Outline or Draft view as tags in the text. You can position the cursor on a tag to see the comment or, on the Review tab, click Reviewing Pane.

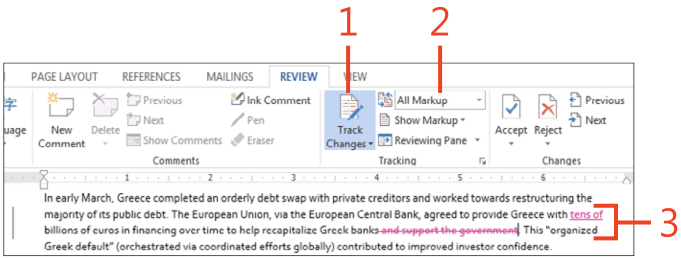
TIP To control what items are shown in balloons, on the Review tab, in the Tracking group, click Show Markup, point to Balloons, and then choose a setting from the menu.

Tracking changes

Whether you work on a document alone or with others, it's often important to keep a record of what's been changed, who made the changes, and when the changes were made. In Word 2013, the Track Changes feature handles those details.

Turn on Track Changes

1. On the Review tab, in the Tracking group, click Track Changes, if it isn't already selected.
2. Click the drop-down list at the top of the Tracking group and select All Markup, if it isn't already selected.
3. Edit or reformat the text.


1
2
3
PAGE LAYOUT
REFERENCES
MAILINGS
REVIEW
VIEW
uage
New Comment
Delete
Previous
Next
Show Comments
Ink Comment
Pen
Eraser
Comments
Track Changes
All Markup
Show Markup
Reviewing Pane
Tracking
Accept
Reject
Previous
Next
Changes

In early March, Greece completed an orderly debt swap with private creditors and worked towards restructuring the majority of its public debt. The European Union, via the European Central Bank, agreed to provide Greece with tens of billions of euros in financing over time to help recapitalize Greek banks ~~and support the government~~. This "organized Greek default" (orchestrated via coordinated efforts globally) contributed to improved investor confidence.

TIP In Outline or Draft view, you can position the cursor on a change to see its information or, on the Review tab, click Reviewing Pane.

CAUTION The built-in keyboard shortcut to switch Track Changes on and off is Ctrl+Shift+E. If you suddenly start seeing red text in a document while you're editing, you might have pressed that combination by mistake.

SEE ALSO For information about how to show the Track Changes indicator on the status bar, see "Customizing the screen" on page 414.

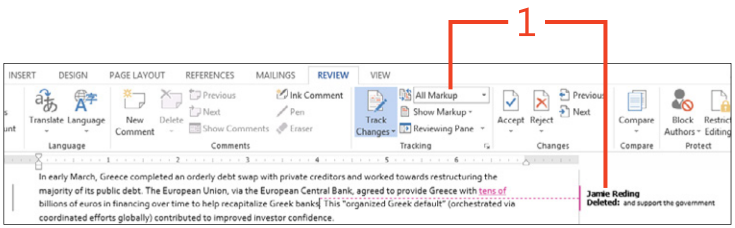
Showing and hiding tracked changes

When you're revising a document, you'll want to show the details for tracked changes to decide which ones to keep or reject. Conversely, when you just want to read a document without distraction, you can use the new Simple Markup view to hide the lines and balloons, leaving just an unobtrusive change bar in the margin.

Whichever markup view you select, you can list all the changes and comments in the Reviewing Pane. Double-clicking an entry in that pane moves the cursor to the location in the document so that you can navigate quickly through the changes.

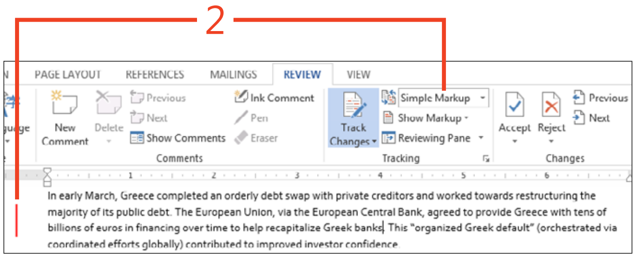
View all markup or simple markup

1. On the Review tab, at the top of the Tracking group, click the drop-down list and select All Markup, if it isn't already selected.
2. At the top of the Tracking group, click the drop-down list and select Simple Markup. Click any change bar to return to All Markup view.


1
INSERT
DESIGN
PAGE LAYOUT
REFERENCES
MAILINGS
REVIEW
VIEW
Translate
Language
Language
New Comment
Delete
Previous
Next
Show Comments
Ink Comment
Pen
Eraser
Comments
Track Changes
All Markup
Show Markup
Reviewing Pane
Tracking
Accept
Reject
Previous
Next
Changes
Compare
Compare
Block Authors
Restrict Editing
Protect

In early March, Greece completed an orderly debt swap with private creditors and worked towards restructuring the majority of its public debt. The European Union, via the European Central Bank, agreed to provide Greece with tens of billions of euros in financing over time to help recapitalize Greek banks. This "organized Greek default" (orchestrated via coordinated efforts globally) contributed to improved investor confidence.

Jamie Reding
Deleted: and support the government


2
PAGE LAYOUT
REFERENCES
MAILINGS
REVIEW
VIEW
New Comment
Delete
Previous
Next
Show Comments
Ink Comment
Pen
Eraser
Comments
Track Changes
Simple Markup
Show Markup
Reviewing Pane
Tracking
Accept
Reject
Previous
Next
Changes

In early March, Greece completed an orderly debt swap with private creditors and worked towards restructuring the majority of its public debt. The European Union, via the European Central Bank, agreed to provide Greece with tens of billions of euros in financing over time to help recapitalize Greek banks. This "organized Greek default" (orchestrated via coordinated efforts globally) contributed to improved investor confidence.

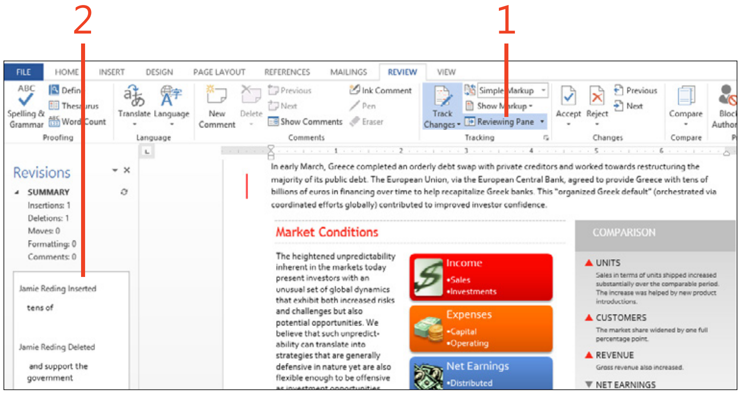
TIP When many reviewers have added changes to the document, you can show the changes from only one or a selected few of them. On the Review tab, in the Tracking group, click Show Markup, point to Specific People, and then clear the check boxes next to the names of reviewers whose changes you want to hide.

CAUTION When tracked changes and comments are hidden, they're still stored in the document and can be seen by anyone who receives a copy of the document. In some cases, that can be extremely embarrassing! Before you send out final copies of your document, use the procedures in "Accepting and rejecting changes" on page 358 to remove all changes and comments.

Display the Reviewing pane

1 On the Review tab, in the Tracking group, click Reviewing Pane.

2 Double-click an item in the Revisions list.


2
1
FILE
HOME
INSERT
DESIGN
PAGE LAYOUT
REFERENCES
MAILINGS
REVIEW
VIEW
Spelling & Grammar
Define
Thesaurus
Word Count
Proofing
Translate
Language
Language
New Comment
Delete
Previous
Next
Show Comments
Ink Comment
Pen
Eraser
Comments
Track Changes
Simple Markup
Show Markup
Reviewing Pane
Tracking
Accept
Reject
Previous
Next
Changes
Compare
Compare
Block Authors

Revisions

SUMMARY

Insertions: 1

Deletions: 1

Moves: 0

Formatting: 0

Comments: 0

Jamie Reding Inserted

tens of

Jamie Reding Deleted

and support the government

In early March, Greece completed an orderly debt swap with private creditors and worked towards restructuring the majority of its public debt. The European Union, via the European Central Bank, agreed to provide Greece with tens of billions of euros in financing over time to help recapitalize Greek banks. This "organized Greek default" (orchestrated via coordinated efforts globally) contributed to improved investor confidence.

Market Conditions

The heightened unpredictability inherent in the markets today present investors with an unusual set of global dynamics that exhibit both increased risks and challenges but also potential opportunities. We believe that such unpredictability can translate into strategies that are generally defensive in nature yet are also flexible enough to be offensive

Income
- Sales
- Investments

Expenses
- Capital
- Operating

Net Earnings
- Distributed

COMPARISON

▲ UNITS
Sales in terms of units shipped increased substantially over the comparable period. The increase was helped by new product introductions.

▲ CUSTOMERS
The market share widened by one full percentage point.

▲ REVENUE
Gross revenue also increased.

▼ NET EARNINGS

TRY THIS Click the arrow next to Reviewing Pane to open the drop-down list and choose Reviewing Pane Horizontal. You can also drag the edges of the pane to resize it, or drag the pane's title to make the pane "float" over the document.

Setting options for Track Changes

The Track Changes feature works well with the default settings, but it also offers a lot of flexibility for different ways of working with reviewed documents. You can turn on tracking in your document and lock it so that the reviewers are required to record all of their changes. You can determine how changes and comments are displayed, and easily change those settings at will.

Lock tracking

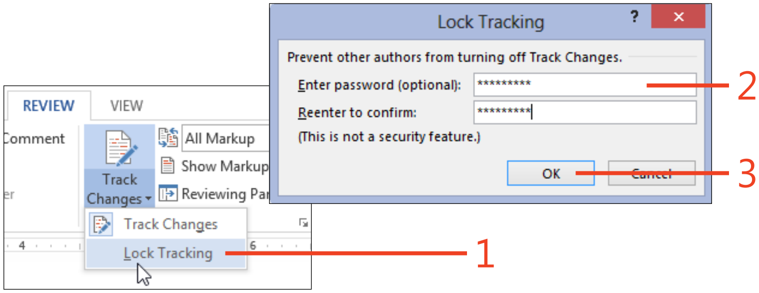
1 On the Review tab, in the Tracking group, click the bottom half of Track Changes and click Lock Tracking.

The Lock Tracking dialog box opens.

2 Enter a password in the top text box. Enter the password again in the second box.

If you don't want to protect Lock Tracking with a password, leave both boxes blank.

3 Click OK.


REVIEW
VIEW
Comment
Track Changes
All Markup
Show Markup
Reviewing Pane
Track Changes
Lock Tracking
Lock Tracking
?
OK
Cancel
1
2
3

Prevent other authors from turning off Track Changes.

Enter password (optional): *********

Reenter to confirm: *********

(This is not a security feature.)

Set common options and advanced options

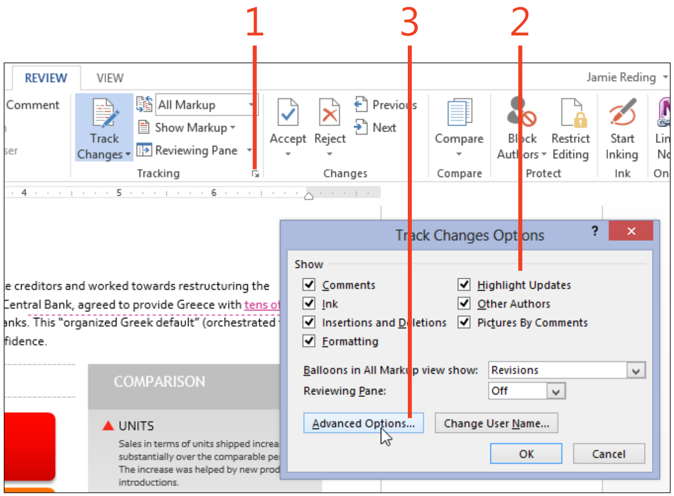
1 On the Review tab, in the lower-right corner of the Tracking group, click the dialog box launcher.

The Track Changes Options dialog box opens.

2 Select or clear the check boxes for the kinds of changes that you want to display.

3 Click Advanced Options to change other settings, or click OK to return to the document.

TIP Most of the items in the Track Changes Options dialog box also appear on the Show Markup menu. The Advanced Options, however, are accessible only through the dialog box.


1
3
2
REVIEW
VIEW
Jamie Reding
Comment
Track Changes
All Markup
Show Markup
Reviewing Pane
Tracking
Accept
Reject
Previous
Next
Changes
Compare
Compare
Block Authors
Restrict Editing
Protect
Start Inking
Ink
Track Changes Options
?
Advanced Options...
Change User Name...
OK
Cancel
COMPARISON
UNITS

Show

☑ Comments

☑ Ink

☑ Insertions and Deletions

☑ Formatting

☑ Highlight Updates

☑ Other Authors

☑ Pictures By Comments

Balloons in All Markup view show: Revisions

Reviewing Pane: Off

4 In the Markup section of the Advanced Track Changes Options dialog box, select the color and formatting you want to use for insertions and deletions, the location of the change lines, and the color of the shading applied to commented text.

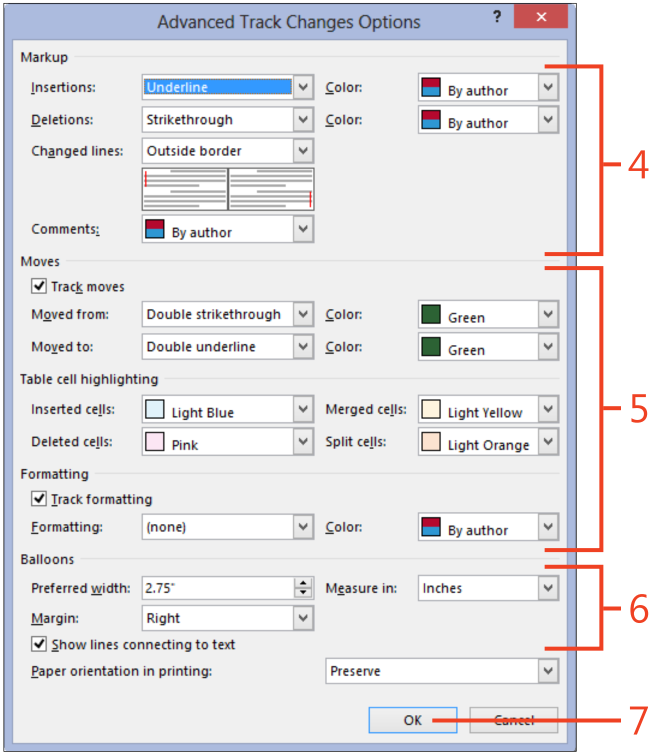
   You can choose the same color for all reviewers, or you can let Word choose a different color for each reviewer.

5 In the Moves, Table Cell Highlighting, and Formatting sections, choose the way you want those types of changes to appear. If you prefer not to track Moves and Formatting at all, clear their check boxes.

6 In the Balloons section, set the width of the column in which balloons are shown, the margin at which you want balloons to appear, and whether you want a line leading from each balloon to its corresponding change in the document.

   For a document in portrait orientation, you can instruct Word to print in landscape orientation to avoid compressing the text column.

7 Click OK.



Advanced Track Changes Options

Markup
Insertions: Underline Color: By author
Deletions: Strikethrough Color: By author
Changed lines: Outside border
Comments: By author

Moves
☑ Track moves
Moved from: Double strikethrough Color: Green
Moved to: Double underline Color: Green

Table cell highlighting
Inserted cells: Light Blue Merged cells: Light Yellow
Deleted cells: Pink Split cells: Light Orange

Formatting
☑ Track formatting
Formatting: (none) Color: By author

Balloons
Preferred width: 2.75" Measure in: Inches
Margin: Right
☑ Show lines connecting to text
Paper orientation in printing: Preserve

TIP Whether you set a specific color for changes by all reviewers or select By Author, that setting applies only on your computer. Other reviewers who open the document will see colors according to their settings. You can't be sure that a particular color will be assigned to a specific reviewer on other computers.

Accepting and rejecting changes

If a document contains tracked changes, all the information about each change will stay in the document until you accept or reject the change. Setting the markup view or the options so that you can't see the changes only hides them—it doesn't remove them. Anyone else who opens the document can easily show the changes again. That isn't necessarily a good thing. For example, you might not want a client to see that you copied part of a report for another client and just changed the names. To protect yourself against such possibly embarrassing situations, you must review the changes and accept or reject them before you send your documents to others.

Accept or reject changes

1 Open a document that has been reviewed. If it's a Read-Only document, save it with a different name or in a different folder.

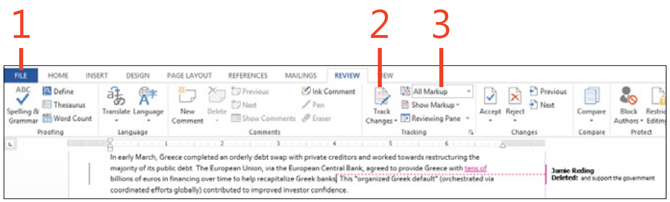
2 On the Review tab, in the Tracking group, ensure that Track Changes is not selected. If it is selected, click Track Changes to turn it off.

3 At the top of the Tracking group, click the drop-down list and select All Markup, if it isn't already selected.

4 Click Next or Previous in the Changes group to locate a change, or click a change in the text or in a balloon. Select Accept to make the change permanent, or Reject to remove the change. Continue clicking Accept or Reject until you've handled all the changes in the document.

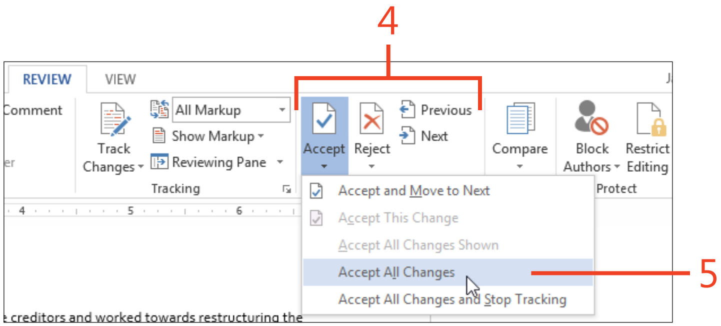
5 Instead of working through the changes one at a time, you can click the bottom half of Accept or Reject and choose one of the other actions from the menu.

The Accept All Changes and Reject All Changes actions affect all the changes in the document at once. If you first use the Show Markup menu to hide some types of changes, the Accept All Changes Shown and Reject All Changes Shown actions affect only the changes that haven't been hidden.


1
2
3
FILE
HOME
INSERT
DESIGN
PAGE LAYOUT
REFERENCES
MAILINGS
REVIEW
VIEW
ABC
Spelling & Grammar
Define
Thesaurus
Word Count
Proofing
Translate
Language
Language
New Comment
Delete
Previous
Next
Show Comments
Ink Comment
Pen
Eraser
Comments
Track Changes
All Markup
Show Markup
Reviewing Pane
Tracking
Accept
Reject
Previous
Next
Changes
Compare
Compare
Block Authors
Restrict Editing
Protect

In early March, Greece completed an orderly debt swap with private creditors and worked towards restructuring the majority of its public debt. The European Union, via the European Central Bank, agreed to provide Greece with tens of billions of euros in financing over time to help recapitalize Greek banks. This "organized Greek default" (orchestrated via coordinated efforts globally) contributed to improved investor confidence.

Jamie Reding
Deleted: and support the government


4
5
REVIEW
VIEW
Comment
Track Changes
All Markup
Show Markup
Reviewing Pane
Tracking
Accept
Reject
Previous
Next
Compare
Block Authors
Restrict Editing
Protect
Accept and Move to Next
Accept This Change
Accept All Changes Shown
Accept All Changes
Accept All Changes and Stop Tracking
creditors and worked towards restructuring the

SEE ALSO For information about comparing two versions of the same document and marking the differences between them, see "Comparing reviewed versions" on page 359.

SEE ALSO For information about ensuring that the document doesn't contain any revisions or comments, see "Using the Document Inspector" on page 392.

Comparing reviewed versions

If you receive a reviewed copy of your document but the reviewer didn't have Track Changes turned on, you can have Word 2013 mark the changes for you. All you need is the original document, the reviewed copy, and the Compare feature.

Set up a comparison

1 On the Review tab, in the Compare group, click Compare and choose Compare in the gallery.

The Compare Documents dialog box opens in its collapsed view.

2 Specify the original document by clicking the down-arrow and selecting it from the list of recently used documents, or you can select the folder icon to browse for another file. In the same way, specify the revised document.

3 If both versions of the document contain markup from the same reviewer, you can keep the two sets separated by entering a different name or other text in the Label Changes With text box.

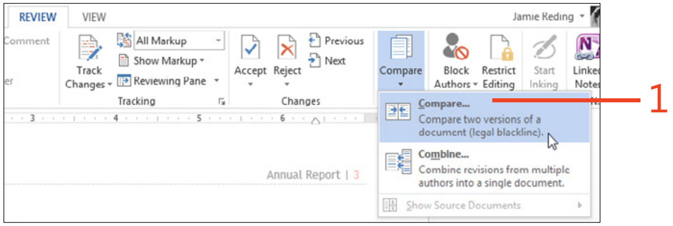
4 If the dialog box is not expanded, click More.

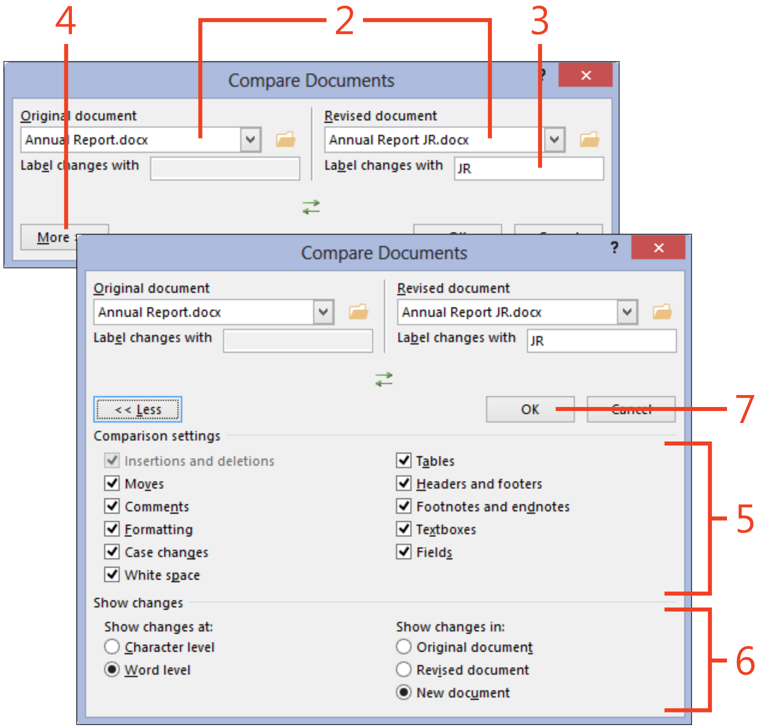
5 Leave the check boxes selected in the Comparison settings section for only the types of changes that you want to have marked in the result of the comparison.

6 Choose whether the comparison will be made character by character or word by word. Also choose where the changes will be shown. You can choose for the changes to appear in one or the other of the documents being compared, or in a new third document.

7 Click OK.

TIP You can use the Compare feature to create "legal blacklining" in contracts; this way, each party can see what revisions were made.


REVIEW
VIEW
Jamie Reding
Comment
Track Changes
All Markup
Show Markup
Reviewing Pane
Tracking
Accept
Reject
Previous
Next
Changes
Compare
Block Authors
Restrict Editing
Start Inking
Linked Notes
Compare...
Compare two versions of a document (legal blackline).
Combine...
Combine revisions from multiple authors into a single document.
Show Source Documents
Annual Report | 3
1


4
2
3
Compare Documents
More
<< Less
OK
Cancel
7
5
6

Compare Documents

Original document: Annual Report.docx
Label changes with:
Revised document: Annual Report JR.docx
Label changes with: JR

Comparison settings

☑ Insertions and deletions
☑ Moves
☑ Comments
☑ Formatting
☑ Case changes
☑ White space
☑ Tables
☑ Headers and footers
☑ Footnotes and endnotes
☑ Textboxes
☑ Fields

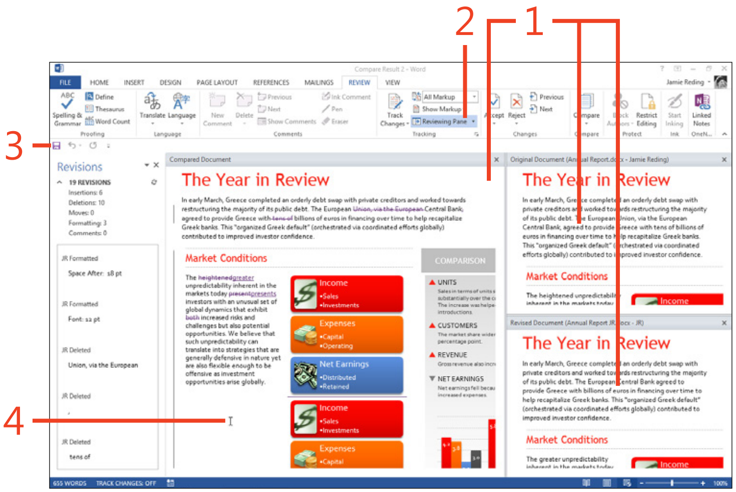
Show changes

Show changes at:
○ Character level
● Word level

Show changes in:
○ Original document
○ Revised document
● New document

View the results of comparing documents

1. Examine the compared document (the one containing tracked changes) in the large pane. The two source documents are in smaller panes.
2. On the Review tab, in the Tracking group, click Reviewing Pane to show or hide the pane.
3. Save the compared document with the marked changes as a separate file.
4. Scroll through the compared document, accepting or rejecting the changes as you would for any document that has tracked changes. As you scroll the compared document, the source documents scroll to the same position so that you can see where the changes originated.



TIP To hide one or both of the source documents, click Compare, point to Show Source Documents, and then select which source documents you want to see.

Merging reviewed versions

If you've sent your document to several reviewers who edited it separately, but with Track Changes turned on, you can use the Combine feature to merge the versions into one document with marked changes. You can then use the merged document to prepare a final version.

Merge reviews

1 On the Review tab, in the Compare group, click Compare and choose Combine in the gallery.

2 Specify the first document containing review changes by clicking the down-arrow and selecting from the list of recently used documents, or you can select the folder icon to browse for another file. In the same way, specify the second document containing changes.

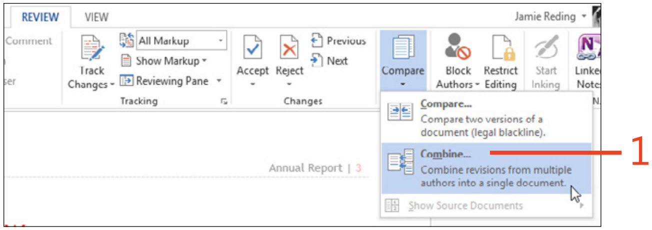
3 In each Label Unmarked Changes With text box, type a name or other text to identify the source of the changes in the corresponding version of the document.

4 If the dialog box isn't expanded, click More.

5 Leave the check boxes selected in the Comparison settings section for only the types of changes that you want to have marked in the result of the combination.

6 Choose whether the combination will be made character by character or word by word. Also, choose where the changes will be shown. You can choose for the changes to appear in one or the other of the documents being combined, or in a new third document.

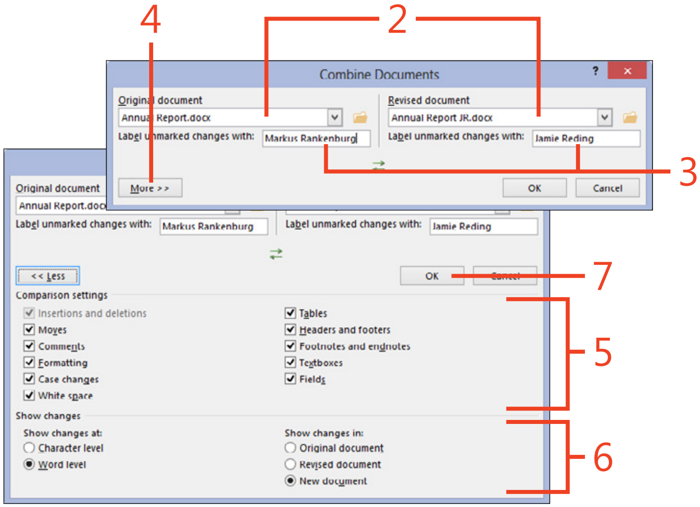
7 Click OK and save the combined document.



Compare...
Compare two versions of a document (legal blackline).

Combine...
Combine revisions from multiple authors into a single document.

Show Source Documents



Original document: Annual Report.docx
Label unmarked changes with: Markus Rankenburg

Revised document: Annual Report JR.docx
Label unmarked changes with: Jamie Reding

Comparison settings
☑ Insertions and deletions
☑ Moves
☑ Comments
☑ Formatting
☑ Case changes
☑ White space
☑ Tables
☑ Headers and footers
☑ Footnotes and endnotes
☑ Textboxes
☑ Fields

Show changes
Show changes at:
○ Character level
● Word level

Show changes in:
○ Original document
○ Revised document
● New document

TIP You can combine only two documents at a time. If you have several reviewed versions to combine, first combine two of them and then combine the result with a third reviewed version, and so on.

TIP When you combine documents, the result can contain formatting changes from only one of them. If Word detects formatting changes in either source document, a dialog box gives you a choice of which set of formatting changes to keep in the result.

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About the author

Jay Freedman has worked as a textbook editor, technical writer, and software engineer. He has answered users' online questions about Microsoft Word for more than 15 years, and has been awarded as a Microsoft Most Valuable Professional every year since 2001.

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