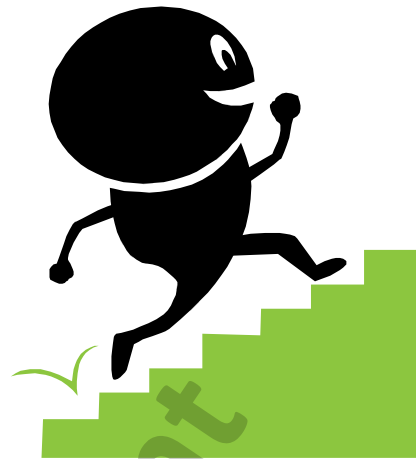


Easy Way



Style Guide for Business Documents

- ☒ Easy to follow
- ☒ Step-by-step instructions
- ☒ Written in plain English

A Cheryl Price Publication

Style Guide for Business Documents

“Style Guide for Business Documents” is designed as an informative reference book for anyone involved in creating business documents. This book will provide a quick reference to acceptable modern business practice for a range of commercial documents. Documents are presented in graphical format providing a quick reference to display and formatting styles which can be copied easily.

The book will assist in the teaching of the following educational qualifications:

- Unit Standards 107, 108, 109, 110, 111, 112 and 113 (text and word processing)
- Unit Standards 2788 and 2789 (desktop publishing)
- Polytechnic National Modules

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Published in New Zealand

Introduction

Style Guide for Business Documents has been written in response to requests for a reference book to assist in the presentation of business documents. The book has been written in graphical format with examples of different types of business documentation.

The material for the book has been researched and divided into sections relating to business correspondence, forms, website design, meeting, travel, financial, promotional and employment documents and business reports, presentations, essays, theses and the preparation of training manuals. We have included some theory notes and a list of interesting websites to visit. At the end of each section you will find hints for the layout of the documents within that section using Microsoft Word.

As a reference tool

This book will be useful for anyone involved in the creation of business documents on a computer. There are many examples of different types of documents and callout notes giving information on points to consider when displaying this material.

As a teaching resource

While the book has not been specifically written to include exercises for students to complete, there is no reason why students cannot create the documents from the visual examples given in this publication.

Acknowledgements

To company personnel who assisted by allowing us to use their corporate material.
Theory topics extracted from unit standard material written by Cheryl Price and Barbara Barry.

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Section

1

Business Correspondence

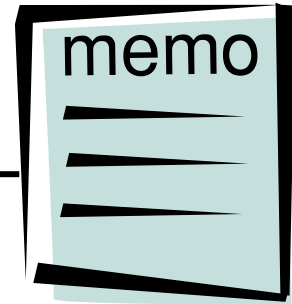
SECTION CONTENTS

This section contains examples of the following types of business correspondence -

- ☐ Memoranda
- ☐ Business Letters
- ☐ Confidential Letters
- ☐ Personal Letters
- ☐ Letters with Tear-Off Slips
- ☐ Letters to the Editor
- ☐ Circular Letters
- ☐ Standard Letters to Multiple Recipients
- ☐ Continuation Pages
- ☐ Addressing Envelopes
- ☐ Email Correspondence
- ☐ Hints for File Preparation

Sample Document

Memos



A memorandum (often referred to as a memo), is written communication used within an organisation, eg branch to branch, office to office.



Hints for layout of memos:

- Memos may be typed on A4 or A5, either on plain paper or printed memo forms.
- There is no salutation or complimentary close in a memo.
- There is no inside address.
- Formal or informal wording can be used.
- The headings at the top of a memo form should always include the words *To: From: Date: Subject*. Other information may be included, eg *Email address: CC:*
- Set a tab to the right of these headings for the relevant information to be entered or use a two column table.
- You may wish to print a line under the upper portion of the memo to separate this information from the message.
- Ensure all the necessary points have been included in the message and that the message is clear and unambiguous.

MEMORANDUM

TO: Georgia Paige
FROM: Kerry Christie
DATE: 19 June 2011
SUBJECT: Filing cabinets for offices

Side headings with information displayed at set tabs or in a table and in double line spacing.

I have obtained quotes for the 4-drawer filing cabinets we discussed earlier this week. General Office Furniture have indicated they will give us 15% discount for cash. The quotes are as follows:

General Office Furniture	\$285 + GST
Number One Furniture	\$278 + GST

Message usually displayed in single spacing.

The cabinets are available in grey, dark green, navy blue and beige. They are available for immediate delivery.

Memo

Global Enterprises

TO: Georgia Paige
CC: Hannah Shale
FROM: Kerry Christie
DATE: 19 June 2011
RE: Filing cabinets for offices

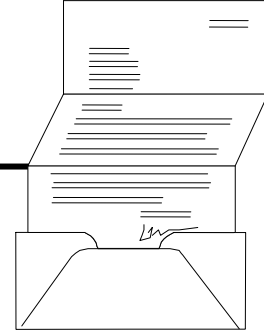
Company memo form - slight variation in side headings in top portion of memo.

I have obtained quotes for the 4-drawer filing cabinets we discussed earlier this week. General Office Furniture have indicated they will give us 15% discount for cash. The quotes are as follows:

General Office Furniture	\$285 + GST
Number One Furniture	\$278 + GST

The cabinets are available in grey, dark green, navy blue and beige. They are available for immediate delivery.

Letters



Letters are an important form of communication in business. They convey a message in writing and it is essential that the message is accurate both in terms of grammar and spelling. They should *always* be proofread prior to signing and sending. Your company is being represented on paper and it is vital to project a professional image.



Hints for layout of business letters:

- Business letters are usually sent on the letterhead of the company which is commonly printed on A4 paper. Often short letters will also be displayed on A4 using wider margins.
- It is an advantage to set up a template for the display. The template should contain the following:
 - Top, bottom, left and right margins.
 - Alignment for paragraphs (justified or left).
 - Field code for current day's date.
 - Any header or footer the company requires on correspondence.
 - An AutoText/Building Blocks entry for the complimentary close of the letter.
 - Font style and size.
 - Paragraph spacing.
- Ensure all the necessary points have been included in the message.
- Ensure the wording is businesslike and the message is very clear.
- Avoid abbreviations.
- Avoid repetition of words or instructions - use the Thesaurus if you find words are being repeated.
- Finish the letter with a closing paragraph.

Business Letters

Millenium Theatre Company

94 Symonds Street, Auckland
PO Box 21, Symonds Street, Auckland 1010

Phone: 307 9781
Fax: 307 9782
Subscriptions: 0800 MILLENIUM
Email: millennium@xtra.co.nz

Today's date

2 blank lines

Mr Richard Hunter
9 Wairoa Road
Papakura
Auckland 2110

2 blank lines

Dear Richard

1 blank line

Thank you for your subscription to this year's selection of plays produced by our Theatre Company.

We enclose tickets for the following productions you have chosen and also our recent newsletter.

Lone Wolf	10 August
Summer Nights	18 September
Chantilly Lace	24 October
Cinderella	8 December

We are also pleased to invite you to attend our Open Forum on Saturday 26 September from 10.00 am-3.00 pm at Montana Theatre. We hope you will be able to attend and meet cast, producers and friends of the Theatre Company.

Yours sincerely

2 blank lines

4-6 blank lines

Nicci Sommerville
Customer Services Manager

Encl

2 blank lines

Letterhead of company includes:

- name
- type of business
- physical address
- postal address
- phone/fax numbers
- email address



Current day's date under letterhead.

Name and address of addressee.

Salutation, ie Dear followed by information included in body of the letter.

Complimentary close, ie Yours sincerely and a space for signature - type name of signatory under the signature. Indicate enclosures by typing Enc.

Letters with continuation pages

<div data-bbox="236 277 406 439"></div> <div data-bbox="421 277 754 300">BLUE LAGOON YACHT CLUB INC</div> <div data-bbox="520 313 699 387"><p>Blue Lagoon Beach PO Box 7889 Paradise Bay Napier 4112</p></div> <div data-bbox="488 405 700 441"><p>Telephone/Fax 437 6554 Email: blagoon@clear.net.nz</p></div> <div data-bbox="791 277 932 358"></div> <div data-bbox="233 508 346 528"><p>Today's Date</p></div> <div data-bbox="233 571 375 649"><p>Mr Fraser White Vice Commodore 8 Lees Crescent Napier 4112</p></div> <div data-bbox="233 692 336 710"><p>Dear Fraser</p></div> <div data-bbox="233 732 908 772"><p>To ensure our database records are kept up-to-date, please confirm your address as above, and other details as follows:</p></div> <div data-bbox="233 792 600 936"><p>Home Telephone/Fax: 4345767 Mobile Telephone: (025) 789876 Yacht name: Dark Secret Boat Type: Wright 39</p></div> <div data-bbox="233 956 496 974"><p>THIS SEASON'S RACE ENTRY</p></div> <div data-bbox="233 996 912 1057"><p>We acknowledge your entry for the Line Seven race. Please complete the official entry form at the foot of this letter and tear off and return with your cheque for \$40.00.</p></div> <div data-bbox="233 1077 304 1095"><p>RULES:</p></div> <div data-bbox="233 1120 912 1261"><p>2.1 The series will be conducted under the Racing Rules of Sailing 1997/2001, the Prescriptions of Yachting New Zealand, the Notice of Race, the Sailing Instructions, and the respective Class Rules when racing as a Class.</p><p>2.2 All keelboats shall comply with Y.N.Z. Safety Regulations Part II, Category 5. Part 3.2 is replaced by the signed declaration in the Entry Form. All trailer yachts shall comply with Y.N.Z. Safety Regulations Part V Category B.</p></div>	<div data-bbox="1026 927 1217 1211"><p>Display first page as normal but leave sufficient text to take over to page 2, eg at least one paragraph of information and complimentary close.</p></div>
<div data-bbox="365 1429 585 1480"><p>Use plain paper and head with:</p></div> <div data-bbox="365 1491 588 1646"><ul style="list-style-type: none">• Page number• Name of person or company letter is being sent to• Date</div> <div data-bbox="362 1657 590 1767"><p>Leave approximately 2 cm under date before displaying remainder of text.</p></div>	<div data-bbox="708 1330 839 1429"><p>2</p><p>Mr Fraser White</p><p>Date</p></div> <div data-bbox="708 1487 880 1505"><p>STARTING SIGNALS</p></div> <div data-bbox="708 1527 1308 1585"><p>Please be aware of the starting signals for your race which are as follows:</p><p>All races will be started in variations of R.R.S. 35 with the following procedure:</p></div> <div data-bbox="708 1606 1106 1783"><p>05 mins Preparatory Code 'K' or 'M' or 'X' or 'Yellow' raised</p><p>01 mins Preparatory Lowered - Sound Signal</p><p>00 mins Start Class Flat 1st Start Lowered Class Flag 2nd Class to Start Raised - Sound Signal With Preparatory 'K' or 'M' or Yellow Flat</p></div> <div data-bbox="708 1800 1331 1841"><p>Subsequent starts will continue at 6 minute intervals; start when your class flag is lowered.</p></div> <div data-bbox="708 1881 831 1899"><p>Yours sincerely</p></div> <div data-bbox="708 1998 831 2038"><p>P Smith Race Secretary</p></div>

Confidential Letters

Institute of Business Studies

Level 4, 113 Willis Street
PO Box 19 063
Wellington 6011

Phone: (04) 802 3108
Fax: (04) 802 3109
Email: bus-study@extra.co.nz

CONFIDENTIAL

Today's date

Mr Jason Clark
93 Everton Way
Johnsonville
Wellington 6037

Dear Jason

We are pleased to inform you that you have been accepted onto the Marketing Course for Semester 1. Classes commence on 12 February.

We are enclosing an invoice for the total fees of \$371.25 to be paid for this course. The full amount is required to be paid prior to the commencement of classes on 12 February.

The textbook list is also enclosed. Students are encouraged to purchase all textbooks before the commencement of classes. Our campus bookshop offers generous student discounts for all course materials.

Yours sincerely

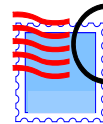
Annette Milne
Student Services Manager

Enc

'Confidential' should be the first typed line (above the date) to warn others NOT to read further.

CONFIDENTIAL

Mr Jason Clark
93 Everton Way
Johnsonville
Wellington 6037



NZ Post specifies that special instructions such as **'Attention'** or **'Confidential'** should be inserted above the address on envelopes.

Personal Letters

24 Katuna Road
Thames 3500

Today's date

Dear Tony

I am sorry it has taken me so long to reply to your letter. Over the past month I have been working extra hours and our rugby team now practises on Tuesday and Thursday evenings. I am finding that spare time seems to be a luxury these days.

I have decided that I will spend New Year in the South Island. Jill and Sean have rented a place in Queen Charlotte Sound and they have invited me down for five days. After that I may spend some time visiting the wineries around Marlborough and I thought I may investigate the possibility of kayaking part of the Abel Tasman. A friend of ours organised a group to do the trip last year and apparently it was really successful.

If you are interested in joining me for the trip around Marlborough or Abel Tasman I would be glad of your company. Think about it and let me know.

Cheers

Richard

2

We thought that we might spend our Easter break in Queenstown next year. I know it is a little early to be thinking about Easter but the thought of a holiday in Queenstown is very appealing.

Personal letters are typed on blank paper with the writer's address at the top of the page followed by the date, the salutation and the remainder of the letter

Continuation pages:
Insert page number and leave approximately 2 cm before completing letter.

Richard Morris

24 Katuna Road
Thames 3500

Phone/Fax: (07) 786 598
Mobile: 021 543 672
Email: richard@extra.co.nz

Today's date

Dear Tony

I am sorry it has taken me so long to reply to your letter. Over the past month I have been working extra hours and our rugby team now practises on Tuesday and Thursday evenings. I am finding that spare time seems to be a luxury these days.

I have decided that I will spend New Year in the South Island. Jill and Sean have rented a place in Queen Charlotte Sound and they have invited me down for five days. After that I may spend some time visiting the wineries around Marlborough and I thought I may investigate the possibility of kayaking part of the Abel Tasman. A friend of ours organised a group to do the trip last year and apparently it was really successful.

If you are interested in joining me for the trip around Marlborough or Abel Tasman I would be glad of your company. Think about it and let me know.

Cheers

Richard

Alternatively, prepare a personal letterhead in a template file and use it for your personal letters.

Letters to the Editor

19 Maritime Terrace
Orakei
Auckland 1071

Today's date

The Editor
New Zealand Herald
Private Bag
Auckland 1011

Dear Sir

I wish to express my strong feelings about the removal of native trees from the subdivision being developed in Newmarket. This area of land was originally bequeathed to the city in 1961. Unfortunately, the City Council never took action to designate it as a recreational area and the result of this is that a developer has been able to purchase the land for a residential subdivision. I would have thought that bylaws would have been in place to prevent the removal of the native trees. Why couldn't the building lots be planned around the stands of trees? Part of this area could have been made into a park where everyone could enjoy the beautiful surroundings.

What other pieces of land are we going to lose in order for the City Council to make monetary gains?

Yours sincerely

M J Swanson

Mary Swanson

In general, letters to the editor of publications must fulfil certain criteria before they are published. These include the following:

- Writer's full address must be supplied, (box numbers are not usually acceptable).
- Writer must provide their full name, (not initials or pen names).
- Writers must sign a legible signature.
- The length of the letter is restricted (eg maximum 200 words).
- The letter should be addressed to "The Editor" not "To all readers" etc as this will not be published.
- It is unnecessary to send a covering letter.

Letterheads

Plants Galore



Wholesale Nursery
Richard Wilson, Dip Hort


146 Albany Highway
PO Box 302 167
Albany
Auckland 0632

Phone: 415 5672
Fax: 415 5673
Email: plantsgalore@xtra.co.nz

Ensure all important information is included, for example:


- Name of company
- Type of business
- Company logo
- Name of partners/manager
- Qualifications
- Physical address
- Mailing address, eg PO Box
- Telephone/fax numbers
- Email address

Letters with Tear-off Slips



BLUE LAGOON YACHT CLUB INC
Blue Lagoon Beach
PO Box 7889
Paradise Bay
Napier 4112

Telephone/Fax 437 6554
Email: blagoon@clear.net.nz



Current Date

Mr Mark Hall
Club Vice Captain
9 Raptley Street
Napier 4112

Dear Mark

Membership No. 910-052

Membership subscriptions are due for payment by 20 April. Your current membership category is Family. The subscription for the next 12 months is \$150.00.

To ensure that our database records are kept up-to-date, please confirm your address and other details on the form at the end of this letter.

Yours sincerely

P Smith

P Smith
Race Secretary

----- ✂ ----- ✂ -----

Name:

Address: (if changed)
.....

Type of boat:

Name of boat:

I enclose membership fee of \$..... (if paying by cheque)

Or

Please debit my Bankcard/Credit Card Number Type:

--	--	--	--	--	--	--	--	--	--

Expires: Signature:

Indicate tear-off slip by drawing a broken line across page (scissor symbol can be inserted to indicate cut-off line).

Ensure that there is plenty of space left at the bottom of the letter for the tear-off slip - if not, display the slip on a new page.

Use leader dots for information - leave enough space between lines for information to be written clearly (1½, double or paragraph spacing).

Draw boxes and copy or insert box symbols for credit card details or, alternatively, create a one line table with blank columns.

Circular Letters



At-Home Security

Beach Road
Whitianga 3510
Phone: (07) 862 972
Fax: (07) 862 973
Email: security@xtra.co.nz

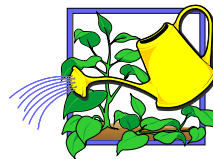
Dear Householder

Are you going to be away over Christmas/New Year? Do you worry about the security of your property in your absence? Perhaps we can assist. We offer the following services to assist homeowners:

- Mail, circulars, papers cleared from letterbox.
- Plants watered
- Feeding of pets
- Lawns cut
- Garden maintenance
- General checks on security of property

Our charges are reasonable and our staff are honest and reliable. Call me for a quote.

Ron Brady
Manager

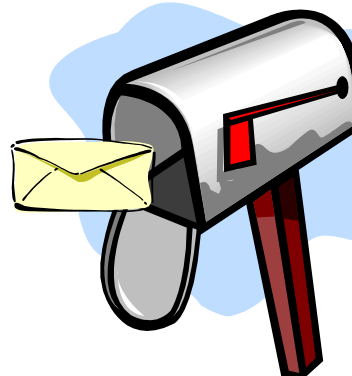


There are no firm rules about the display of circular letters. They are often typed as advertisements with white space and graphics to enhance reader interest.

- Date is usually omitted to prolong life of the letter.
- Salutation is always general, eg Dear Householder.
- Signature is often typed as circulars are not generally signed individually.

Circular letters are often folded and delivered but can be placed in an envelope for a more professional image. The envelope could be addressed with a label:

To the Householder



Standard letters to multiple recipients

Institute of Business Studies

Level 4, 113 Willis Street
PO Box 19 063
Wellington 6011

Phone: (04) 802 3108
Fax: (04) 802 3109
Email: bus-study@xtra.co.nz

{ DATE *MERGEFORMAT }

{ MERGEFIELD FirstName } { MERGEFIELD LastName }
{ MERGEFIELD Address1 }
{ MERGEFIELD Address2 }
{ MERGEFIELD City }

Dear { MERGEFIELD FirstName }

We are pleased to inform you that you have been accepted onto the { MERGEFIELD Course } Course for Semester 1. Classes commence on 12 February.

We are enclosing an invoice for the total fees of \${ MERGEFIELD Fees } to be paid for this course. The full amount is required to be paid prior to the commencement of classes on 12 February.

Institute of Business Studies

Level 4, 113 Willis Street
PO Box 19 063
Wellington 6011

Phone: (04) 802 3108
Fax: (04) 802 3109
Email: bus-study@xtra.co.nz

Today's date

Lynn Douglas
35 Norway Place
Sumner
Christchurch 8081

Dear Lynn

We are pleased to inform you that you have been accepted onto the Tourism Course for Semester 1. Classes commence on 12 February.

We are enclosing an invoice for the total fees of \$371.25 to be paid for this course. The full amount is required to be paid prior to the commencement of classes on 12 February.

Institute of Business Studies

Level 4, 113 Willis Street
PO Box 19 063
Wellington 6011

Phone: (04) 802 3108
Fax: (04) 802 3109
Email: bus-study@xtra.co.nz

Today's date

Sean Carter
11a Ridge Road
Matakana 0985

Dear Sean

We are pleased to inform you that you have been accepted onto the Marketing Course for Semester 1. Classes commence on 12 February.

We are enclosing an invoice for the total fees of \$393.25 to be paid for this course. The full amount is required to be paid prior to the commencement of classes on 12 February.

Institute of Business Studies

Level 4, 113 Willis Street
PO Box 19 063
Wellington 6011

Phone: (04) 802 3108
Fax: (04) 802 3109
Email: bus-study@xtra.co.nz

Today's date

Mary Martin
PO Box 1942
Albany 0632

Dear Mary

We are pleased to inform you that you have been accepted onto the Advertising Course for Semester 1. Classes commence on 12 February.

We are enclosing an invoice for the total fees of \$405.25 to be paid for this course. The full amount is required to be paid prior to the commencement of classes on 12 February.

Mary Martin
PO Box 1942
Albany 0632

Use the Mail Merge feature in your word processing system to combine a list of names, addresses and other data with a letter to produce a personalised letter for each person on the list.

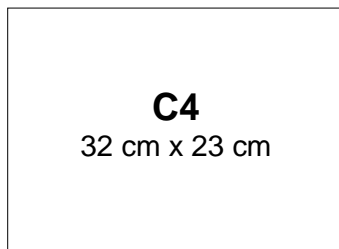
Create the main document with the merge fields.

Create a data document with the variable information and merge the documents to produce the letters.

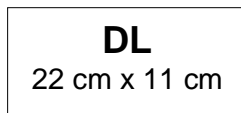
Labels can be printed from the data source to address envelopes for all of the letters

Addressing Envelopes

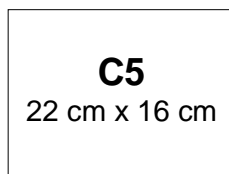
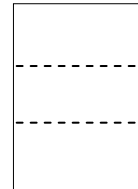
Use the correct sized envelopes for correspondence.



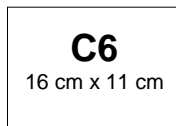
For a sheet of A4 unfolded



For a sheet of A4 paper folded in three



For a sheet of A5 paper unfolded



For a sheet of A5 paper folded in half



The address should be in the "Address Zone" -

