

WANNA BE A WORD MAIL MERGE NINJA?



Step by step instructions to help you become a ninja at Word mail merge!

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INTRODUCTION

Hello and thanks for downloading my ebook!

First off a little bit about myself... originally from Leicestershire, UK I moved to Ireland back in 2007 with my other half and a suitcase!

After a few years in Ireland, not to mention the 18 years in the UK, of working in a variety of administrative roles for other people, I decided to take the plunge and start my own business in 2010.

And that's when <u>OutofhoursAdmin</u> was born; a virtual assistant service providing remote admin support to businesses throughout Ireland and the UK.

After receiving numerous questions about MS Office from clients, I decided to share my answers in the form of tutorials which I post regularly on my <u>blog</u>.

This ebook is a step by step guide to creating and carrying out a mail merge using Word 2010. It shows a mail merge done for both labels and letters. There is also a bonus tutorial at the end showing how to do a bulk email from Excel using the mail merge feature with Outlook. I hope you will find it useful.

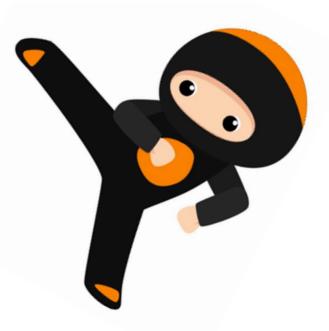
If you want an extra pair of hands to help with any of your administration, get in touch by emailing me at <u>sharon@outofhoursadmin.ie</u> or you can connect with me on <u>Facebook</u>, <u>LinkedIn</u> or subscribe to my <u>YouTube</u> channel.

Thanks,

Sharon









WHICH VERSION OF MICROSOFT OFFICE DO I HAVE?

I'm often asked how to do things in Excel or Word by clients. My first question is always "what version of Office do you use?" to which the response is usually "I have no idea, where does it tell me that?". So this short guide is to show you how to find it...

The following screen shots are all from using Word 2010, however the same would also apply if you were in Excel or PowerPoint.

Click on the **File** in the top left corner of the ribbon, then click **Help**, and the version is displayed over on the right...



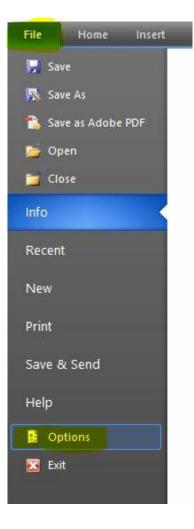
Alternatively, you can click the **search** icon on your desktop toolbar & type **Microsoft** into the search bar, which should then list all Microsoft programs along with the version that you're using.



HOW TO CUSTOMISE YOUR RECENT FILES LIST

It's always handy to have your most recent documents displayed at the top of the list when you click into **Recent Documents**, however you can customise this list so it contains as many documents as you wish.

Click on **File**, select **Options**, click on **Advanced** from the menu on the left, scroll down to the **Display** section, change the number of the **Recent Documents** and click **OK**...





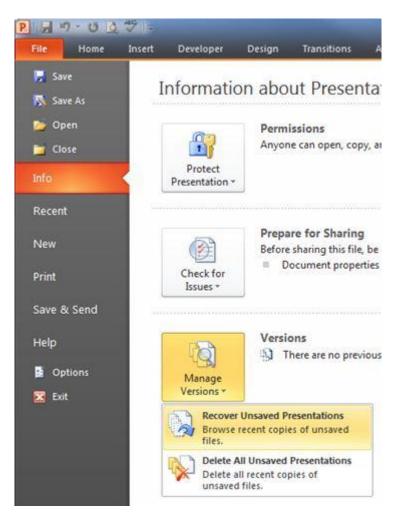
General	Use draft font	in Draft and Outline views	
	Nam <u>e</u> : Courie	er New 🗸	
Display	Size: 10	~	
Proofing	Eont Substitution	n	
Save	Disalau		
Language	Display		
Advanced	Show this number	of <u>Recent Documents</u> :	25 🔮 🛈
	Show measuremen	its in units of:	Centimeters 🗸
Customize Ribbon	Style ar <u>e</u> a pane wi	dth in Draft and Outline views:	0 cm
Quick Access Toolbar	Show pixels fo	r HTML features	
Add-Ins	Show all winde	ows in the Taskbar	
Add-Ins	Show shortcut	keys in ScreenTips	
Trust Center	Show horizont	al scroll bar	
	Show <u>v</u> ertical s	croll bar	
	Show vertical r	uler in Print Layout view	
	Optimize chara	cter positioning for layout rathe	er than readability
		are graphics acceleration	



HOW TO RECOVER AN UNSAVED FILE IN MS OFFICE 2010

This has happened to me a few times... you've spent a while working on a document in MS Office, go to close it & it asks if you want to save changes, and for some unknown reason you press No! Panic! What do you do?

Click File then Info and then click on the drop down arrow next to Manage Versions...



Select **Recover Unsaved Presentations** (in PowerPoint) / **Documents** (in Word) / **Workbooks** (in Excel), this will then open a dialog box listing any unsaved files. Select the file and click **Open**...



8== 💌	
Date modified Type Size	Name Date modified
151 17/06/2014 14:16 Microsoft PowerP 2	Presentation1((Unsaved-30378550297151 17/06/2014 14:16
226 18/06/2014 17:34 Microsoft PowerP	Presentation1((Unsaved-30378779252226 18/06/2014 17:34

There will be a yellow bar at the top of the page asking you to save the file, click **Save As** and continue as normal...

Recovered Unsaved File	This is a recovered file that is temporarily stored on your computer.	Save As	

And that's it... panic over!







HOW TO USE MAIL MERGE WITH LETTERS/DOCUMENTS

Mail Merge is a useful tool that allows you to easily produce multiple letters, labels, envelopes, and emails using information you have stored in a database or spreadsheet.

When you use Mail Merge, you will need a Word document (you can start with an existing one or create a new one) and a recipient list, which is usually an Excel workbook.

A5 • А Title **First Name** Surname Address1 Address2 Address3 Address4 Town County Sharon Ballydavis Portlaoise Ms Sheppard Co Laois Mr Nother The House Main Street Bray Co Wicklow Α. Ms Jane Doe The Bungalow Long Road Dublin Co Dublin

Below is a typical example of a recipient list...

To start the mail merge either open a Word document that you have already started or create a new document.



File	Home	Insert	Page La	yout Refere	ences Mai	lings	Review	View	Acrobat					_	_
Envelopes	Labels	Start Mail Merge *	Select Recipients	Edit Recipient List	Highlight Merge Fields		s Greeting Line	Insert Merge Field *	Rules + Match Fields Dupdate Labels	Preview Results		2 I Recipier O Check f	nt or Errors	Finish & Merge •	Merge to Adobe PDF
Crea	ite		Start Mail M	erge			Write & In	sert Fields			Preview	Results		Finish	Acrobat

Click on **Mailings** in the ribbon, click the drop down arrow next to **Start Mail Merge**, and select **Step by Step Mail Merge Wizard**...



File	Home	Insert	Page Layout	References	Mailings	Review	View	Acrobat
Envelopes	Labels	Start Mail Merge *	Select Recipients * Reci		ahlight Addre ge Fields Block		Insert Merge	Rules *
Crea	ite	Lette	ers			Write & In	sert Fields	
2		Enve	ail Messages elopes els ctory			1 • 1 • 2 • 1	.3.1.4.	1 • 5 • 1 • 6 • 1 • 7 •
		Nor	mal Word Docum	ent				
		🕵 Step	by Step Mail Me	rge <u>W</u> izard				
-		10			ed.			

This will open the Mail Merge task pane which takes you through each step. Select which type of document you want to work on, in this example it's a **letter**, then click **Next**...

Mail Merge 🗾 👻 🛪
Select document type
What type of document are you working on?
O Letters
 E-mail messages Envelopes
 Directory
Letters
Send letters to a group of people. You can personalize the letter that each person receives.
Click Next to continue.
Step 1 of 6
Next: Starting document

Choose whether you want to use the current document or a different one, in this example select **Use the current document**, then click **Next**...



1ail	Merge 🔻	20
5elo	ct starting document	
Ho	v do you want to set up your letters?	
0	Use the current document	
C	Start from a template	
C	Start from existing document	
Jse	the current document	
	rt from the document shown here and use the Ma ge wizard to add recipient information.	
-	Defe	
ле	2 of 6	_
7	Next: Select recipients	
*	Previous: Select document type	

Select which recipient list you want to use. If you already have a list of contacts click Use an existing list and browse through the folders to where the file is stored. Another option is to select contacts from Outlook, or if you don't have a list then you could choose Type a new list. In our example choose **Use an existing list**...

Mail Merge	-	×
Select recipients		
O Use an existing list		
 Select from Outlook contacts 		
🔵 Type a new list		
Use an existing list		
Use names and addresses from a file or a databa	ase.	
Browse		
📝 Edit recipient list		

If the recipient list is an Excel spreadsheet, select the worksheet that contains the list, in our example it would be **Sheet 1**, tick the box **First row of data contains column headers**, and click **OK**...



Name	Description	Modified	Created	Type	
III Sheet 1	\$	2/19/2017 11:22:01 AM	2/19/2017 11:22:01 AM	TABLE	
III Sheet2	2\$	2/19/2017 11:22:01 AM	2/19/2017 11:22:01 AM	TABLE	
III Sheet3	35	2/19/2017 11:22:01 AM	2/19/2017 11:22:01 AM	TABLE	
2					,

The **Mail Merge Recipients** dialog box will open where you can control which recipients are to be used in the merge by ticking or unticking each one. Once you're finished click **OK** to close the dialog box.

ata Source	1	Sumame	➡ First Name	➡ Title	→ Address1 →	Address2
Recipient list.xlsx	1	Sheppard	Sharon	Ms	Ballydavis	
Recipient list.xlsx	~	Nother	Α.	Mr	The House	Main Street
Recipient list.xlsx	•	Doe	Jane	Ms	The Bungalow	Long Road
		Refine	e recipient list	-		
ata Source			e recipient list			
			e recipient list Sort	-		
ata Source		^ ⊉↓				
ata Source		^ ≵ ↓	Sort			
< ata Source Recipient list.xlsx		^ ≵ ↓ ™	<u>Sort</u> <u>Filter</u>			

You'll notice the options have slightly changed in the Mail Merge task pane; it now tells you which file your list is taken from and you can select a different list, or edit the current recipient list if you wish. Click **Next**...



Mail Merge 🗸 👻
Select recipients
O Use an existing list
Select from Outlook contacts
 Type a new list
Use an existing list
Currently, your recipients are selected from:
[Sheet1\$] in "Recipient list.xlsx"
Select a different list
Edit recipient list
Step 3 of 6
Next: Write your letter
Previous: Starting document

The next step is to prepare the letter ready for merging. In order for the Mail Merge to know where to add the relevant data, you have to insert placeholders e.g. name and address.

Place the cursor where you want the information to appear, and select which type of data you want. Choose from **Address block**, **Greeting line**, **Electronic postage**, and **more**...

In our sample letter we want the address block in the top left corner. The **Insert Address Block** dialog box will open; here you can choose which format you prefer the name to be, and there is a handy preview on the right hand side. You can see in the example below that there are several lines missing from the address block. This is due to the column headings in our recipient list spreadsheet being named differently to what Mail Merge has listed. In order to fix this, click **Match Fields**...



nsert Address Block	? ×
pecify address elements	Preview
✓ Insert recipient's name in this format:	Here is a preview from your recipient list:
Joshua Q. Randall Jr. Mr. Josh Randall Jr. Mr. Josh Q. Randall Jr. Mr. Joshua Randall Jr. Mr. Joshua Q. Randall Jr. The Randall Family	Ms Sharon Sheppard Ballydavis
 Insert company name Insert postal address: Never include the country/region in the address Always include the country/region in the address Only include the country/region if different than: 	
Ireland 🗸	Correct Problems
Format address according to the destination country/region	If items in your address block are missing or out of order, use Match Fields to identify the correct address elements from your mailing list.
	OK Cancel

You'll see only address 1 and 2 are listed, you need to add **address 3, address 4, town** and **county** from the drop down arrows next to the ones saying not matched...

Match Fields	?	×	(Match Fields	?	2	×
In order to use special features which fields in your recipient list Use the drop-down list to select field for each address field com	t match to the require t the appropriate reci	d field	ls.	In order to use special feature which fields in your recipient lis Use the drop-down list to selec field for each address field con	at match to the require to the appropriate rec	ed fie	elds,
Required for Address Bloc	k		~	Courtesy Title	Title	~	~
Courtesy Title	Title 🔹	\sim		First Name	First Name	~	
First Name	First Name	~		Last Name	Surname	~	2
Last Name	Surname	~		Suffix	(not matched)	~	
Suffix	(not matched)	\sim		Company	(not matched)	~	
Company	(not matched)	\sim		Address 1	Address 1	~	
Address 1	Address1	\sim		Address 2	Address2	~	
Address 2	Address2	V		City	Address3	~	
City	(not matched)	V		State	Address4	~	
State	(not matched)	~		Postal Code	Town	~	
Postal Code	(not matched)	~		Country or Region	County	~	
Country or Region	(not matched)	~		Optional information			
Optional information			~	Unique Identifier	(not matched)		~
Use the drop-down lists to choo database that corresponds to t Merge expects (listed on the let	he address informatio		I	Use the drop-down lists to cho database that corresponds to Merge expects (listed on the le	the address informati		ail
Remember this matching for this computer	this set of data sour	ces or	1	Remember this matching for this computer	or this set of data sour	rces o	on
	OK Ca	ncel			OK Ca	ancel	

You'll now see the correct address shown in the Preview pane on the right hand side...



nsert Address Block	? X
Specify address elements	Preview Here is a preview from your recipient list:
Joshua Joshua Randall Jr. Joshua Q. Randall Jr. Mr. Josh Randall Jr. Mr. Josh Q. Randall Jr. Mr. Joshua Randall Jr. Insert company name Insert company name Insert postal address: Never include the country/region in the address Always include the country/region in the address Only include the country/region if different than:	Ms Sharon Sheppard Ballydavis Portlaoise Co Laois
Ireland 🗸	Correct Problems
✓ Format address according to the destination country/region	If items in your address block are missing or out of order, use Match Fields to identify the correct address elements from your mailing list.
	OK

Click **OK** and it will take you back to your letter, you'll see the placeholder Address Block has been inserted in the top left corner of the letter...

1+2+1+1+1	× · · · 1 · · · 2 · · · 3 · · · 4 · · · 5 · · · 6 · · · 7 · · · 8 · · · 9 · · · 10 · · · 11 · · · 12 · · · 13 · · · 14 · · · 15 · · · 人
	«AddressBlock»
	Dear,
	Thank you for your interest in learning how to use Mail Merge. I have attached a brief guide on the steps to run the mail merge and I hope you find it useful.

The next thing we want is the recipient's name in the greeting. Select **Greeting line** from the task pane and the **Insert greeting line** dialog box will open...



Insert Greeting Line	e				?	×
Greeting line format	:					
Dear 🗸	Mr. Randall	~	,	\sim		
Greeting line for inva	alid recipient names	:				
Dear Sir or Mad	am, 🗸					
Preview						
Here is a preview fro	> N	it:				
Correct Problems						
	eeting line are missi t address elements			Match Fie	ds to	
				Match	n Fields.	
				- Louis		-

Again you choose which format you prefer and check the preview area. If you want to see a live preview of more than one recipient click on the left and right arrows to scroll through the list. Once you're happy with it, click **OK**.

1 + 2 + 1 + 1 + 1	· · · · · · · · · · · · · · · · · · ·
	«AddressBlock»
	«GreetingLine»,
	Thank you for your interest in learning how to use Mail Merge. I have attached a brief guide on the steps to run the mail merge and I hope you find it useful.
	If you have any further queries, please don't hesitate to contact me.
	Kind regards,

When you're happy with the letter, click Next on the Mail Merge task pane...



Mail Merge 🗾 👻 🛪
Write your letter
If you have not already done so, write your letter now.
To add recipient information to your letter, click a location in the document, and then click one of the items below.
Address block
Greeting line
Electronic postage
More items
When you have finished writing your letter, dick Next. Then you can preview and personalize each recipient's letter.
Step 4 of 6
Next: Preview your letters
Previous: Select recipients

Preview the letters to make sure information from the recipient list appears correctly in the letter. You can use the left and right scroll arrows to view each document...



WORD MAIL MERGE



Make any necessary changes to the letter and click **Next** on the task pane to complete the mail merge...

Mail Merge 🛛 👻 🗙
Preview your letters
One of the merged letters is previewed here. To preview another letter, click one of the following:
<< Recipient: 2 >>
Find a recipient
Make changes
You can also change your recipient list:
Edit recipient list
Exclude this recipient
When you have finished previewing your letters, dick Next. Then you can print the merged letters or edit individual letters to add personal comments.
Step 5 of 6
Next: Complete the merge
🤪 Previous: Write your letter

This takes you to the next step of printing the letters. Click **Print** and the **Merge to printer** dialog box will open. Choose whether you want to print all of the letters or specific ones, and click **OK**...

Merge to Print	ter	10	? ×
Print records All Current records	ecord		
O <u>Erom</u> :		<u>T</u> o:	
Ē	OK		Cancel

And that's it – the letters will be merged to your printer and will print each one off with individual names and addresses.



HOW TO USE MAIL MERGE WITH LABELS

Before starting the mail merge to labels you should have a list of all the names and addresses ready for the labels. It's easier if this list is in an Excel spreadsheet and has specific column headers e.g. First name, surname, address 1, address 2 etc. Below is a short example of this...

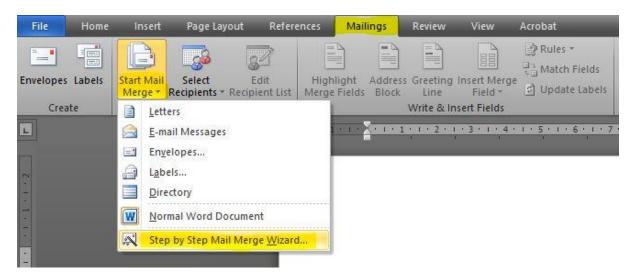
А	В	С	D						
Title	First Name	Surname	Address1	Address2	Address3	Address4	Town	County	
Ms	Sharon	Sheppard	Ballydavis				Portlaoise	Co Laois	
Mr	Α.	Nother	The House	Main Street			Bray	Co Wicklow	
Ms	Jane	Doe	The Bungalow	Long Road			Dublin	Co Dublin	



Ninja Note: The following tutorial is using the Mail Merge Wizard as it is the easiest way to follow the steps. You can however do the same by choosing the relevant options within the Mailings tab on the ribbon as in the image below.

File	Home	Insert	Page La	yout Refere	ences Mai	lings	Review	View	Acrobat		-	_		_
Envelopes	i Labels	Start Mail Merge *	Select Recipients	Edit Recipient List	Highlight Merge Fields		s Greeting Line	Insert Merge Field *	Rules + Match Fields Dpdate Labels	Preview Results		2 Recipient Check for Errors	Finish & Merge •	Merge to Adobe PDF
Crea	ate		Start Mail M	lerge			Write & In	sert Fields			Preview R	esults	Finish	Acrobat

To start the mail merge, create a new Word document, click on **Mailings** in the ribbon, click the drop down arrow next to **Start Mail Merge**, and select **Step by Step Mail Merge Wizard**...



This will open the Mail Merge task pane which takes you through each step. Select which type of document you want to work on, in this example choose **labels**, and then click **Next**...



Mail Merge 🗾 👻 🗙
Select document type
What type of document are you working on?
Letters
E-mail messages
Envelopes
O Labels
 Directory
Labels
Print address labels for a group mailing.
Click Next to continue.
Step 1 of 6
Next: Starting document

Next you want to change the layout of the document to match the labels you'll be using. Click on **Change document layout** and then click **Label options** to browse the label type you want to use...

Mail Merge	×
Select starting document	_7
How do you want to set up your mailing labels? Use the current document Change document layout Start from existing document	
Change document layout	
Click Label options to choose a label size.	

This will open the Label Options dialog box where you can select the label vendor and product number of the labels. Once you've chosen the right one click **OK**. In our example we're using Avery US Letter labels...



Label Options	? ×
Printer information O Continuous-feed printers O Page printers Tray: Default tray Label information Label vendors: Avery US Letter	
Find undates on Office com	
Find updates on Office.com Product number:	Label information
	Label information Type: Shipping Labels Height: 5.08 cm Width: 10.16 cm Page size: 21.59 cm × 27.94 cm

You'll notice the Word document now contains the outlines of the labels...

x 1 • 1 • 1 • 2 • 1 • 3 • 1 • 4 • 1 • 5 • 1 • 6 • 1 •	7、1、8、1、9、1、4時 時11、1、12、1、13、1、14、1、15、1、16、1、17、1、18、1、19、1、20、1
	«Next Record»
«Next Record»	«Next Record»
«Next Record»	«Next Record»

Click **Next** in the Mail Merge task pane and it takes you to the next step of selecting the recipients...



Mail Merge	8.	×
Select starting document		
How do you want to set up your mailing labels?		
• Use the current document		
 Change document layout 		
 Start from existing document 		
Change document layout		_
Click Label options to choose a label size.		
Label options		
Step 2 of 6		
Next: Select recipients		
Previous: Select document type		

Select which recipient list you want to use. Click **Use an existing list** and browse through the folders to where the file is stored...

Mail Merge	¥ ×
Select recipients	
O Use an existing list	
 Select from Outlook contacts 	
🔘 Type a new list	
Use an existing list	
Use names and addresses from a file or a database	
Browse	
Edit recipient list	

Select the worksheet that contains the list, in our example it would be **Sheet 1**, tick the box **First row** of data contains column headers, and click OK...



Name	Description	Modified	Created	Type	
III Sheet1	\$	2/19/2017 11:22:01 AM	2/19/2017 11:22:01 AM	TABLE	
III Sheet2	\$	2/19/2017 11:22:01 AM	2/19/2017 11:22:01 AM	TABLE	
III Sheet3	\$	2/19/2017 11:22:01 AM	2/19/2017 11:22:01 AM	TABLE	
C					2

The **Mail Merge Recipients** dialog box will open where you can control which recipients are to be used in the merge by ticking or unticking each one. Once you're finished click **OK** to close the dialog box...

Data Source	1	Sumame	➡ First Name	➡ Title	✓ Address1	Address2
Recipient list.xlsx	7	Sheppard	Sharon	Ms	Ballydavis	
Recipient list.xlsx	~	Nother	А.	Mr	The House	Main Street
Recipient list.xlsx	~	Doe	Jane	Ms	The Bungalow	Long Road
		Refine	e recipient list	-		
ata Source						
		^ ⊉↓	Sort			
≪ lata Source Recipient list.xlsx		^ ⊉↓				
ata Source		^ ≵↓	Sort			
ata Source	_	^ ≵↓ ™	Sort Filter			

You'll notice the options have slightly changed in the Mail Merge task pane; it now tells you which file your list is taken from and you can select a different list, or edit the current recipient list if you wish. Click **Next**...



Mail Merge 🔹 👻
Select recipients
O Use an existing list
 Select from Outlook contacts
 Type a new list
Use an existing list
Currently, your recipients are selected from:
[Sheet1\$] in "Recipient list.xlsx"
Select a different list
🛃 Edit recipient list
Step 3 of 6
Next: Arrange your labels
Previous: Starting document

The next step is to prepare the first label ready for merging. In order for the Mail Merge to know where to add the relevant data, you have to insert placeholders e.g. name and address.

Place the cursor where you want the information to appear, and then select which type of data you want. Choose from **Address block**, **Greeting line**, **Electronic postage**, and **more**...

In our sample labels we want to insert the address block on each label. The **Insert Address Block** dialog box will open; here you can choose which format you prefer the name to be, and there is a handy preview on the right hand side. You can see in the example below that there are several lines missing from the address block. This is due to the column headings in our recipient list spreadsheet being named differently to what Mail Merge has listed. In order to fix this, click **Match Fields**...



nsert Address Block	? ×
Specify address elements	Preview
✓ Insert recipient's name in this format:	Here is a preview from your recipient list:
Joshua Q. Randall Jr. Mr. Josh Randall Jr. Mr. Josh Q. Randall Jr. Mr. Joshua Randall Jr. Mr. Joshua Q. Randall Jr. The Randall Family	Ms Sharon Sheppard Ballydavis
 Insert company name Insert postal address: Never include the country/region in the address Always include the country/region in the address Only include the country/region if different than: 	
Ireland	Correct Problems
Format address according to the destination country/region	If items in your address block are missing or out of order, use Match Fields to identify the correct address elements from your mailing list. Match Fields
	OK Cancel

You'll see only address 1 and 2 are listed, you need to add **address 3**, **address 4**, **town** and **county** from the drop down arrows next to the ones saying not matched...

Match Fields	?	×		Match Fields	?	3	×
In order to use special features, N which fields in your recipient list m Use the drop-down list to select th field for each address field compo	atch to the require ne appropriate reci	ed field	s.	In order to use special features which fields in your recipient list Use the drop-down list to selec field for each address field com	match to the require t the appropriate rec	ed fie	elds.
Required for Address Block			~	Courtesy Title	Title	\sim	~
Courtesy Title	Title	~		First Name	First Name	~	
First Name	First Name	~		Last Name	Surname	~	
Last Name	Surname	~		Suffix	(not matched)	~	
Suffix	(not matched)	~		Company	(not matched)	\sim	
Company	(not matched)	~	-	Address 1	Address 1	~	
Address 1	Address 1	~		Address 2	Address2	~	
Address 2	Address2	V		City	Address3	\sim	
City	(not matched)	~		State	Address4	~	
State	(not matched)	~		Postal Code	Town	~	
Postal Code	(not matched)	~		Country or Region	County	~	
Country or Region	(not matched)	~		Optional information			
Optional information			¥.	Unique Identifier	(not matched)		~
Use the drop-down lists to choose database that corresponds to the Merge expects (listed on the left.) Remember this matching for the this computer	address informatio	on Mail		Use the drop-down lists to choo database that corresponds to t Merge expects (listed on the le <u>Remember this matching for</u> this computer	he address informati ft.) • this set of data sour	on M	

You'll now see the correct address shown in the Preview pane on the right hand side...



Insert Address Block	? ×
Specify address elements ☑ Insert recipient's name in this format:	Preview Here is a preview from your recipient list:
Joshua Joshua Randall Jr. Joshua Q. Randall Jr. Mr. Josh Randall Jr. Mr. Josh Q. Randall Jr. Mr. Josh Q. Randall Jr. Mr. Josh Q. Randall Jr. ✓ Insert company name ✓ Insert postal address: ○ Never include the country/region in the address ○ Always include the country/region in the address ● Only include the country/region if different than:	I I Ms Sharon Sheppard Ballydavis Portlaoise Co Laois
Ireland	Correct Problems
☑ Format address according to the destination country/region	If items in your address block are missing or out of order, use Match Fields to identify the correct address elements from your mailing list.
	OK

Click **OK** and it will take you back to your label, you'll see the placeholder Address Block has been inserted in the top left corner of the label...

AddressBlock»	«Next Record»	
Next Record»	«Next Record»	

Once you're happy with the layout of the first label, click on **Update all labels** in the Mail Merge task pane...



Mail Merge	
Arrange your labels	
If you have not alread using the first label or	dy done so, lay out your label 1 the sheet.
To add recipient inform location in the first lab items below.	mation to your label, click a bel, and then click one of the
Address block	
Greeting line.	**
Electronic pos	tage
More items	
	ed arranging your label, dick review each recipient's label and nanges.
Replicate labels	-
You can copy the labels on the name	layout of the first label to the other by dicking the button below.
Update all la	
3	
Step 4 of 6	
Next: Preview yo	ur labels
😔 Previous: Select i	

And the rest of the labels will now have the Address Block inserted on them...

ord» <mark>«AddressBlock»</mark>
20

Click **Next** to preview the labels to make sure information from the recipient list appears correctly in them.



Ms Sharon Sheppard Ballydavis Portlaoise Co Laois	Mr A. Nother The House Main Street Bray Co Wicklow	
Ms Jane Doe The Bungalow Long Road Dublin Co Dublin		

You can use the left and right scroll arrows to view each page of labels...

Mail Merge	•	×
Preview your labels		
Some of the merged labels are previewed here. To preview another label, click one of the following:		
<< Recipient: 1 >>		
Find a recipient		
Make changes		
You can also change your recipient list:		
🛃 Edit recipient list		
When you have finished previewing your labels, cli Next. Then you can print the merged labels or edit individual labels to add personal comments.		
Step 5 of 6		
	_	-
Next: Complete the merge		
Previous: Arrange your labels		



When you're happy with the labels click Next.

This takes you to the final stage of printing the labels. Click **Print** and the **Merge to printer** dialog box will open. Choose whether you want to print all of the labels or specific ones, and click OK...

Merge to Print	ter	?	×
Print records ⓐ <u>All</u> ○ Curr <u>ent</u> r	ecord		
O Erom:		<u>T</u> o:	
Г	OK		Cancel

And that's it – the labels will be merged to your printer and will print each one off as required.



HOW TO SEND EMAIL USING MAIL MERGE WITH EXCEL

There is a way of sending a bulk/group email in Outlook using a list of names & email addresses in Excel – the following tutorial shows you how.

There are a couple of steps to prepare before sending the email.

Step 1: Excel worksheet

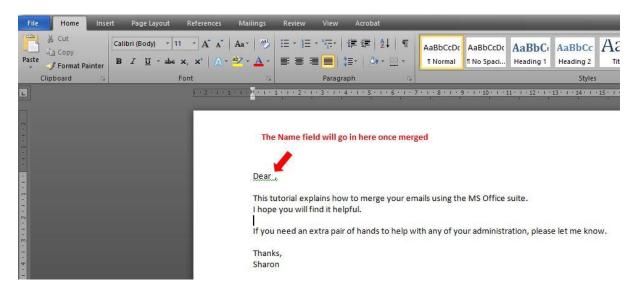
Your Excel worksheet must contain the data required for the merge e.g. email address, name, company name etc., each in a separate column...

F Pa	Copy	•	Page Layout Formulas D Calibri \cdot 11 \cdot A^* A^* B I \underline{U} \cdot $\boxed{\Box}$ \checkmark $\boxed{\Delta}$ \checkmark Font $\boxed{\Box}$ $\boxed{\Box}$ $\boxed{\Box}$ $\boxed{\Box}$ $\boxed{\Box}$ $\boxed{\Box}$	ata Revie
_	F15	•	f _x	
4	A	В	с	D
1	FirstName	Surname	Email Address	
2	Sharon	Sheppard	info@outofhoursadmin.ie	
3	Sharon	Sheppard	sharon@outofhoursadmin.ie	
4	Sharon	Sheppard	accounts@outofhoursadmin.ie	
5				
6				
7				

Save and close the file.

Step 2: Word document

Open up a Word document and type your email. Leave space where you want to insert fields to personalise the email, e.g. "Dear (first name will be personalised)...





Click on **Mailings** on the ribbon, then click on the drop down arrow next to **Start Mail Merge**, and select **E-Mail Messages**...

File	Home	Insert Page Layou	t References	Mailings	Review	View	Acrobat					
				and the second second		100	Rules *		Find Red	cipient		5
Envelopes	Labels	Start Mail Select Merge * Recipients * Re	Edit High cipient List Merge		s Greeting Line	Insert Merg Field *	e 🔄 Update Labels	Preview Results	🔍 Auto Ch	eck for Errors	Finish & Merge *	Merge to Adobe PDF
Crea	ate	Letters			Write & Ir	nsert Fields			Preview Res	ults	Finish	Acrobat
L		🔒 E-mail Messages		• • • <mark>X</mark> • • • •	1 1 . 2 .	1 • 3 • 1 • 4	1 . 5 . 1 . 6 . 1 . 7	7 • 1 • 8 • 1	9 1 10	1 - 11 - 1 - 12 -	1 13 1 1 1	14 1 15 1
		En <u>v</u> elopes			16.	ne ne	112 112	116	ni: 115	112	112	12 12
~		Labels										
-		Directory										
t.		Normal Word Docu	ment									
		🔊 Step by Step Mail N	lerge <u>W</u> izard	I hope	itorial exp you will f	find it helpf	to merge your em ul. f hands to help w				ease let m	e know.
. 4 . 1 . 3				Thank Sharo								

This changes the document to Web Layout. Staying in the **Mailings** tab on the ribbon, click on **Select Recipients** and choose **Use Existing List**...

File	Home	Insert	Page La	ayout Refer	ences Mail	ings	Review	View	Acrobat				
Envelopes	Labels	Start Mail Merge		Edit Recipient List	Highlight Merge Fields		Greeting	Insert Merge	Rules * Match Fields	Preview	Find Recipient	Finish & Merge *	Merge to Adobe PDF
Creat	te		(internal)	<u>N</u> ew List	Intergentites			nsert Fields			Preview Results	Finish	Acrobat
× 1 + 1 +	1 • 2 • 1	3 1 4	Us <u>e</u> I	Existing List		0 · 1 · 11	• 1 • 12 •	1 13 1 14	1 • 15 • 1 • 16 • 1 • 1	7 • • • 18 •	1 • 19 • 1 • 20 • 1 • 21 • 1 • 22	1 23 - 1 -	24 1 25 1
Dear,			Selec	t fr <u>o</u> m Outlook	Contacts								

This tutorial explains how to merge your emails using the MS Office suite. I hope you will find it helpful.

If you need an extra pair of hands to help with any of your administration, please let me know.

Thanks, Sharon

Navigate to where your Excel file containing the data is saved and click **Open**...



👿 Select Data Source				×
$\leftarrow \rightarrow \checkmark \uparrow$ $\square \ll$ Tutori	als → Excel → Email merge	v ℃	Search Email merge	م
Organise 👻 New folder				• 🔳 🔞
10:1	Name		Date modified	Туре
> 📌 Quick access	Sample Excel data		12/11/2016 15:17	Microsoft Excel
> 👿 Microsoft Word	🗐 sample word doc		12/11/2016 15:14	Microsoft Word
> 🐉 Dropbox				
> 🐔 OneDrive				
> 📃 This PC				
> 💣 Network				
> 🔩 Homegroup				
	<			>
	New Source			
File name	e: Sample Excel data		All Data Sources	~
		Tools	Open	Cancel

Choose the sheet which contains the relevant data, in our example above the data was in **Sheet 1**, tick the box **First row of data contains column headers**, and click **OK**...

Sheet15 11/12/2016 3:17:17 PM 11/12/2016 3:17:17 PM TABLE III Sheet2\$ 11/12/2016 3:17:17 PM 11/12/2016 3:17:17 PM TABLE III Sheet3\$ 11/12/2016 3:17:17 PM 11/12/2016 3:17:17 PM TABLE III Sheet3\$ 11/12/2016 3:17:17 PM 11/12/2016 3:17:17 PM TABLE	Name	Description	Modified	Created	Туре	
	III Sheet1	\$	11/12/2016 3:17:17 PM	11/12/2016 3:17:17 PM	TABLE	
III Sheet3\$ 11/12/2016 3:17:17 PM 11/12/2016 3:17:17 PM TABLE	III Sheet2	\$	11/12/2016 3:17:17 PM	11/12/2016 3:17:17 PM	TABLE	
	III Sheet3	\$	11/12/2016 3:17:17 PM	11/12/2016 3:17:17 PM	TABLE	

To personalise the email, place the cursor to where you want the name typed, click **Insert Merge Field** and choose **FirstName**...





This tutorial explains how to merge your emails using the MS Office suite. I hope you will find it helpful.

If you need an extra pair of hands to help with any of your administration, please let me know.

Thanks, Sharon

This inserts the Field "FirstName"; it's always a good idea to preview the results before sending the email to make sure it's bringing over the data correctly. Click the arrows to move through the results...

File	Home	Insert	Page Layout	References	Mailings	Review	View	Acrobat					
Envelopes		100000000000000000000000000000000000000	Select Recipients * Reci	Edit Hig ipient List Merg	hlight Addres e Fields Block	Line	Insert Merg Field *	Rules + Match Fields	Preview Results	Image: Auto Check for Errors	Finish & Merge *	Merge to Adobe PDF	
Crea	ate	2	Start Mail Merge			Write & I	nsert Fields		1	Preview Results	Finish	Acrobat	
Dear <mark>Sh</mark>	aron	.3.1.4	• 1 • 5 • 1 • 6 •	1 • 7 • 1 • 8 • 1 •	9 • • • 10 • • • •	11 • 1 • 12 •	1 • 13 • 1 • 14	· · · 15 · · · 16 · · · 1	7 1 18	1 • 19 • 1 • 20 • 1 • 21 • 1 • 22	1 23 1	24 1 25 1 2	6

This tutorial explains how to merge your emails using the MS Office suite.
I hope you will find it helpful.

If you need an extra pair of hands to help with any of your administration, please let me know.

Thanks, Sharon

🐝 Step 3: Email

Once you're happy with it, click on Finish & Merge and select Send E-Mail Messages...

File	Home	Insert	Page Layou	t Refere	nces Ma	ilings	Review	View	Acrobat				-	
Envelopes	Labels	Start Mail Merge *	Select Recipients * Re	Edit cipient List	Highlight Merge Field		Greeting Line	Insert Merge Field *	Rules * Match Fields	Preview Results	Image: Auto Check for Errors	Finisl	Merge to	
Crea	te	Start Mail Merge				Write & Insert Fields				Preview Results		Edit Individual Documents		
1 + 1 + 1 + 1 + 2 + 1 + 3 + 1 + 4 + 1 + 5 + 1 + 6 + 1 + 7 + 1 + 8 + 1 + 9 + 1 + 10 + 1 + 11 + 1 + 12 + 1 + 13 + 1 + 14 + 1 + 15 + 1 + 16 + 1 + 17 + 1 + 18 + 1 + 19 + 1 + 20 + 1 + 21 + 1 + 22 + 1 + 12 + 1 + 12 + 1 + 1									Print Documents 28					
Dear Sh	aron												Send E-mail Me	ssages
Dearon	aron,													
		lains how ind it help	to merge you ful.	ır emails u	sing the MS	Office s	suite.							

If you need an extra pair of hands to help with any of your administration, please let me know.

Thanks, Sharon

Make sure **Email Address** is selected in the **To**:, type in a relevant subject line and choose which records you want to use, in this example we'll send to **All**...



Merge to E-ma	ail	?	×					
Message option	IS							
T <u>o</u> :	Email_Address		~					
Subject line:	MS Office help							
<u>M</u> ail format:	HTML							
Send records	14							
() <u>A</u> ll								
O Current re	ecord							
O <u>F</u> rom:	Ţo:							
	ОК	Ca	ncel					

This will now send the emails from your Outlook, and the messages will appear in your Sent folder...

! \$ B 0	To Subject	Sent 💌	Size
Date: T	íoday info@outofhoursa MS Office help	Sat 12/11/2016 16:00	8 KB
Lange of the lange	'accounts@outofh MS Office help	Sat 12/11/2016 16:00	
	'sharon@outofho MS Office help	Sat 12/11/2016 16:00	6 KB

That's it! I hope you've found this useful to know.



Thanks for downloading this free ebook – I hope you have found it useful and have learnt at least one little nugget of information!

I update my <u>blog</u> with MS Office tutorials on a regular basis, so please keep checking back for any others that you might find useful.

If you find you need any help with MS Office, feel free to contact me via OutofhoursAdmin.

Thanks again,

Sharon

