WANNA BE A WORD MAIL MERGE NINJA?

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

By Sharon Sheppard, OutofhoursAdmin

CONTENTS

INTRODUCTION 2
MS OFFICE 3
Which Version of Microsoft Office Do I Have? 4
How To Customise Your Recent Files List 5
How to recover an unsaved file in MS Office 2010 7
WORD MAIL MERGE 9
How To Use Mail Merge with Letters/Documents 10
How To Use Mail Merge with Labels 20
How To Send Email Using Mail Merge with Excel 31
THANK YOU 36

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 OutofhoursAdmin 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 blog.

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 sharon@outofhoursadmin.ie or you can connect with me on Facebook, LinkedIn or subscribe to my YouTube channel.

Thanks,

Sharon

Microsoft® Office 2010

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.

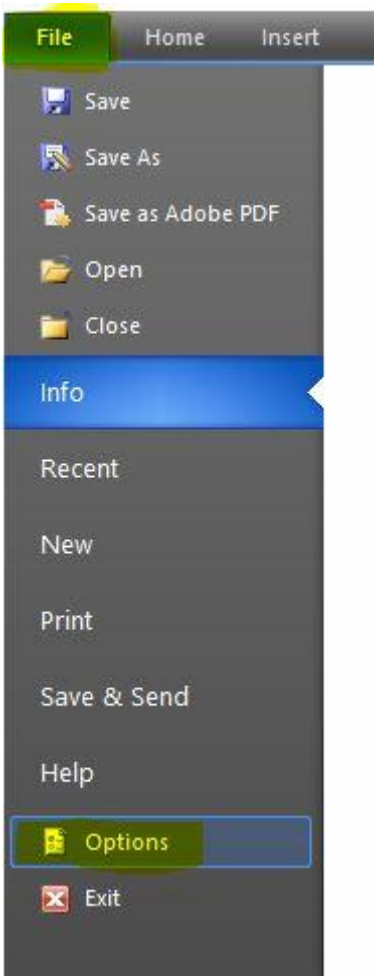
Click on the **File** in the top left corner of the ribbon, then click **Help**, and the version is displayed over on the right…

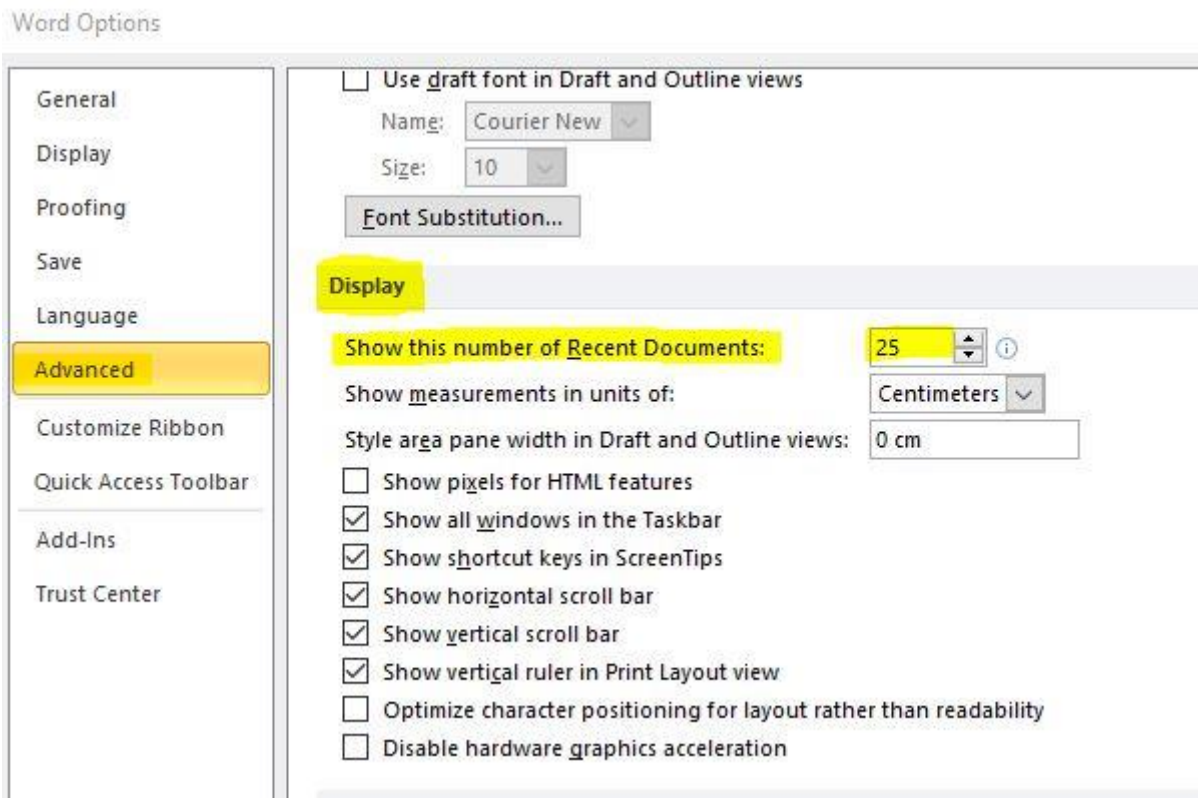
Alternatively, you can click the **search** icon on your desktop toolbar & type **Microsoft** into the search bar, which should then list all Microsoft programs along with the version that you're using.

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**…

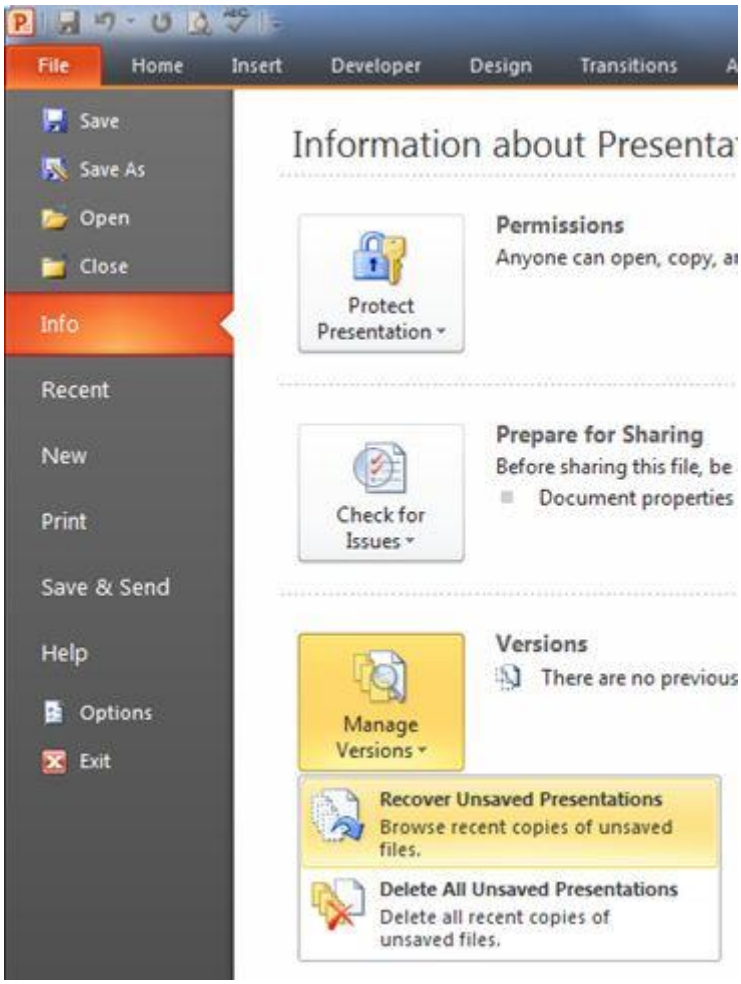



Word Options
General
Display
Proofing
Save
Language
Advanced
Customize Ribbon
Quick Access Toolbar
Add-Ins
Trust Center
Use draft font in Draft and Outline views
Name: Courier New
Size: 10
Font Substitution...
Display
Show this number of Recent Documents: 25
Show measurements in units of: Centimeters
Style area pane width in Draft and Outline views: 0 cm
Show pixels for HTML features
Show all windows in the Taskbar
Show shortcut keys in ScreenTips
Show horizontal scroll bar
Show vertical scroll bar
Show vertical ruler in Print Layout view
Optimize character positioning for layout rather than readability
Disable hardware graphics acceleration

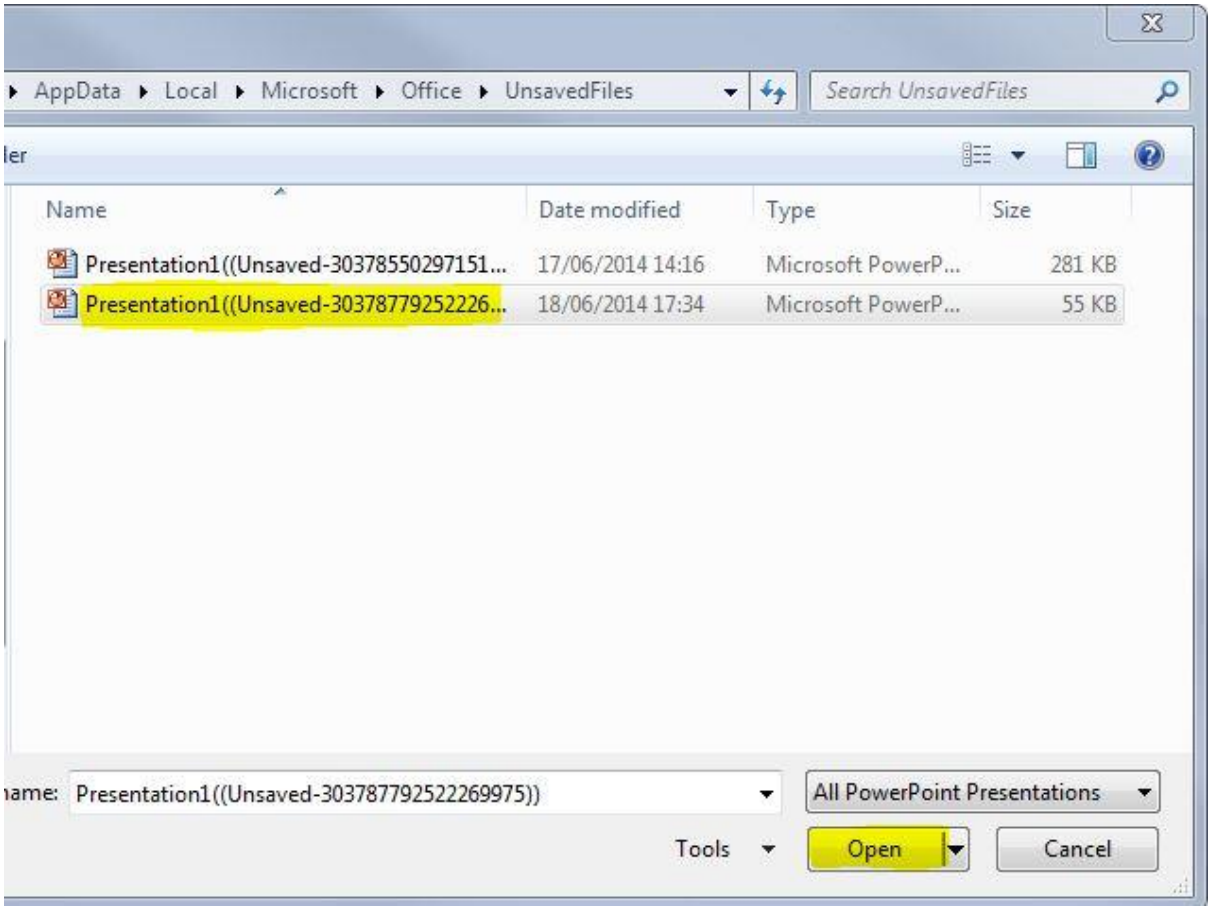
How to recover an unsaved file in MS Office 2010

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**…



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…

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.

Below is a typical example of a recipient list…

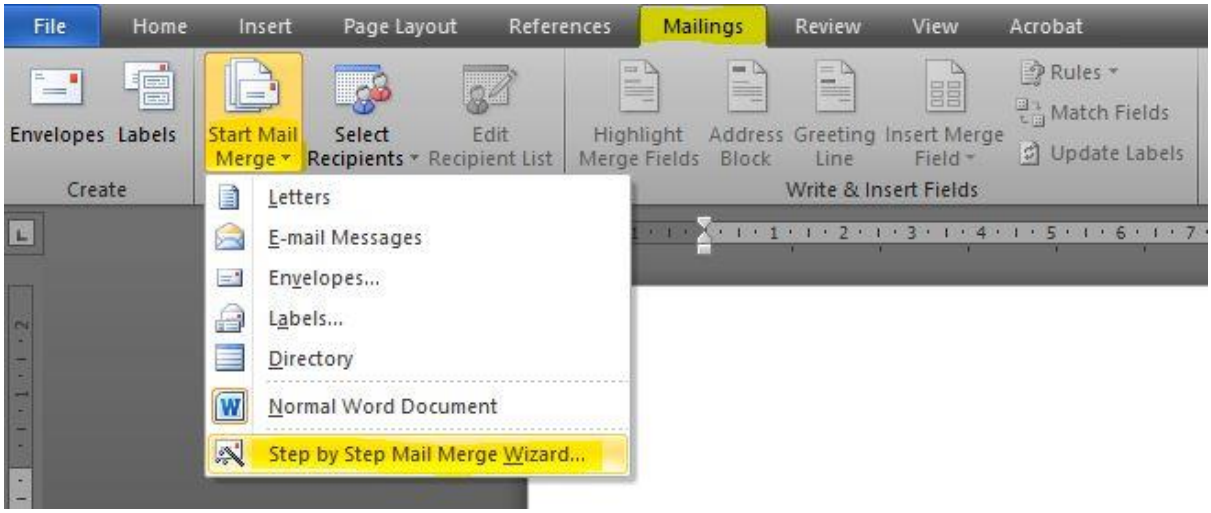
A5

	A	B	C	D	E	F	G	H	I	J
1	Title	First Name	Surname	Address1	Address2	Address3	Address4	Town	County	
2	Ms	Sharon	Sheppard	Ballydavis				Portlaoise	Co Laois	
3	Mr	A.	Nother	The House	Main Street			Bray	Co Wicklow	
4	Ms	Jane	Doe	The Bungalow	Long Road			Dublin	Co Dublin	
5										
6										
7										

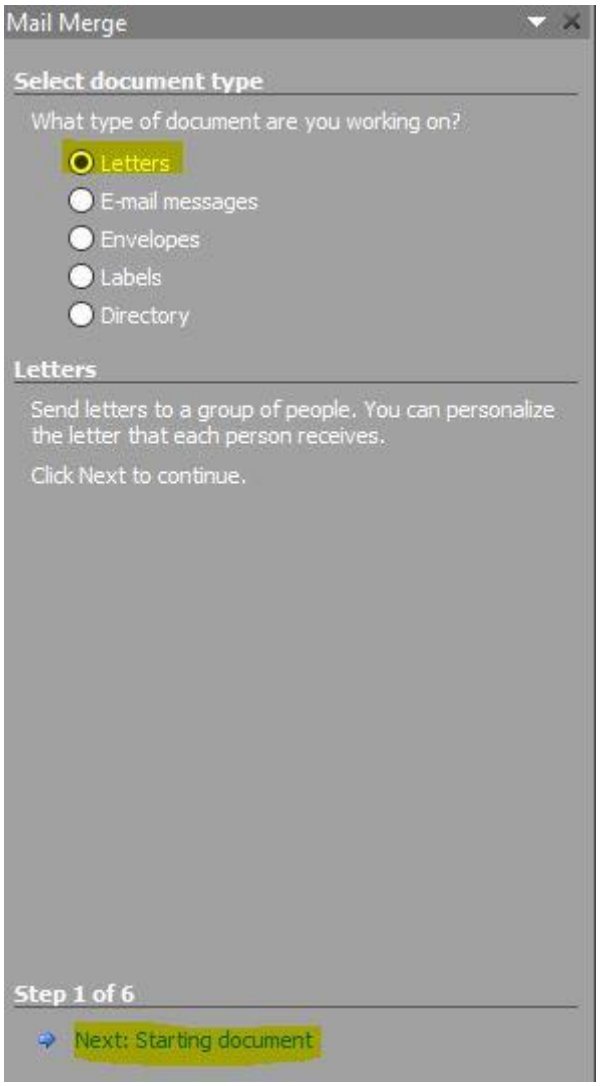
To start the mail merge either open a Word document that you have already started or create a new document.

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.

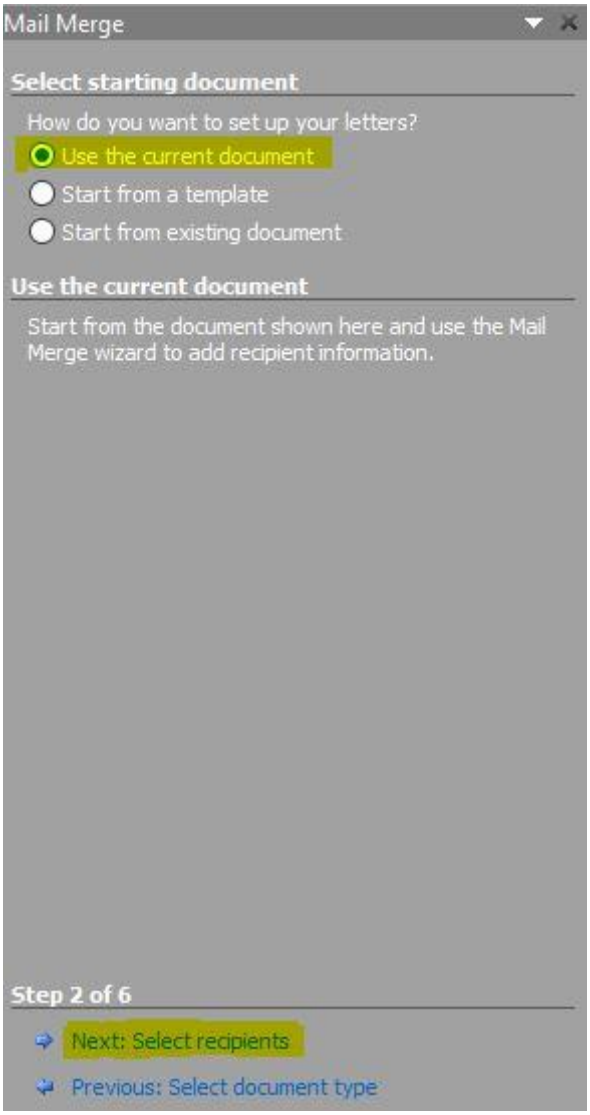
Click on **Mailings** in the ribbon, click the drop down arrow next to **Start Mail Merge**, and select **Step by Step Mail Merge Wizard**…



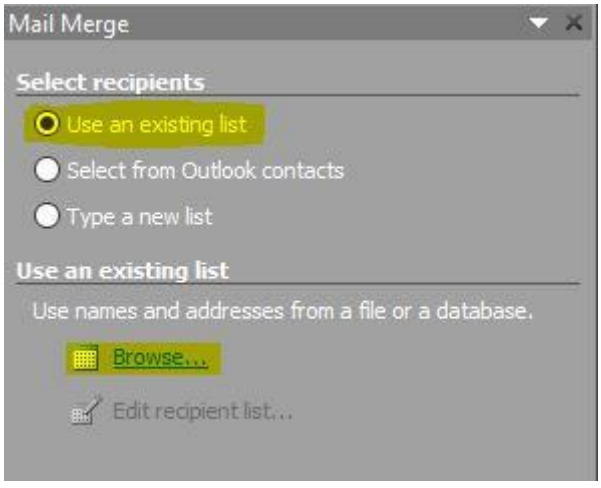
This will open the Mail Merge task pane which takes you through each step. Select which type of document you want to work on, in this example it's a **letter**, then click **Next**…



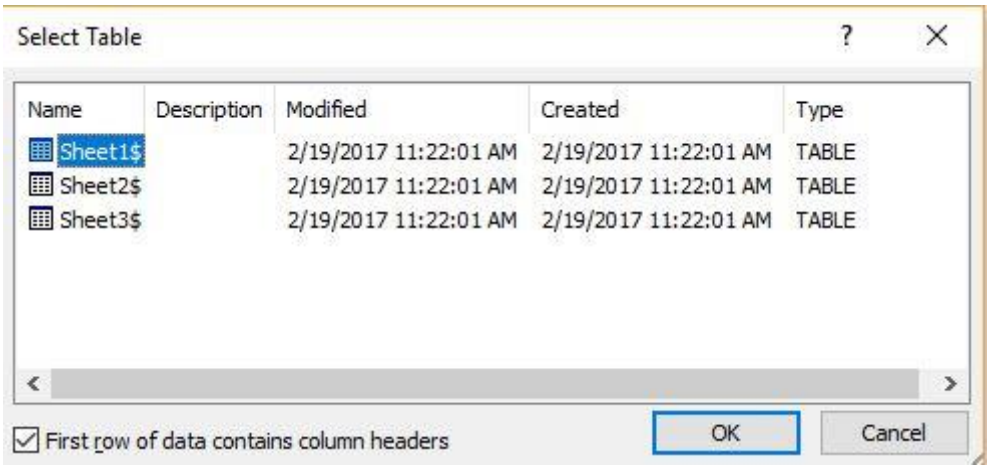
Choose whether you want to use the current document or a different one, in this example select **Use the current document**, then click **Next**…



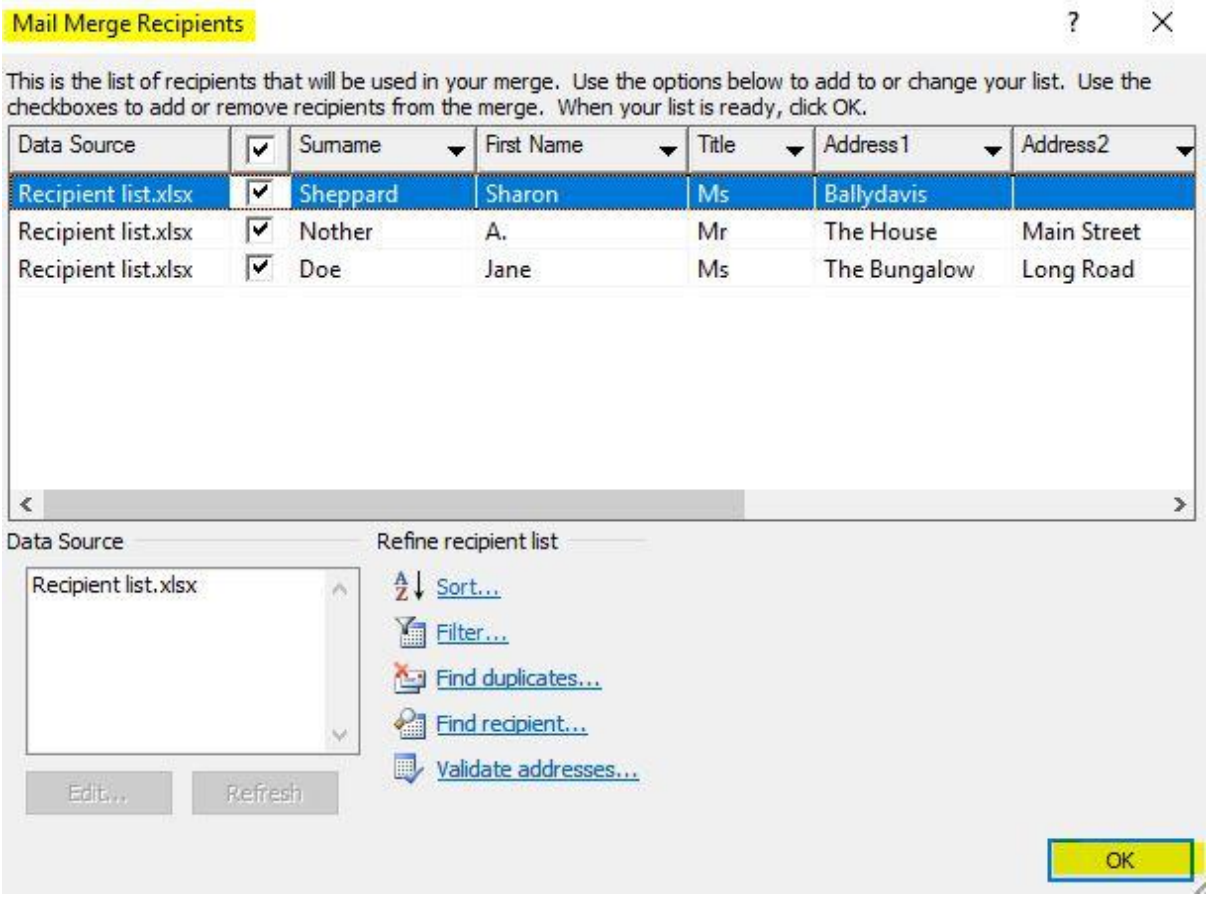
Select which recipient list you want to use. If you already have a list of contacts click Use an existing list and browse through the folders to where the file is stored. Another option is to select contacts from Outlook, or if you don't have a list then you could choose Type a new list. In our example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



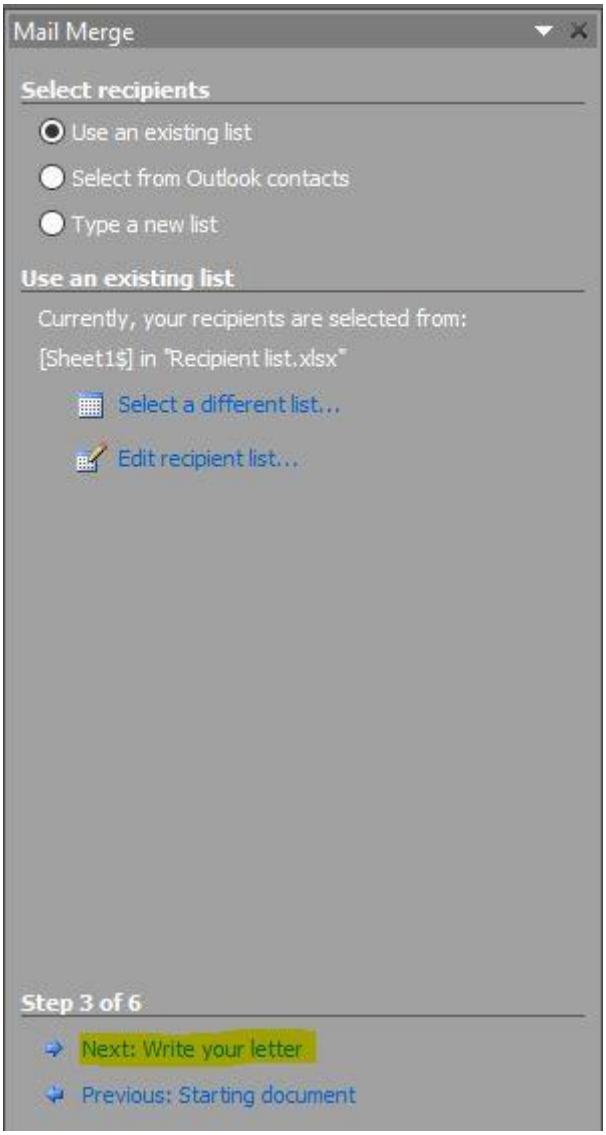
If the recipient list is an Excel spreadsheet, select the worksheet that contains the list, in our example it would be **Sheet 1**, tick the box **First row of data contains column headers**, and click **OK**…



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.



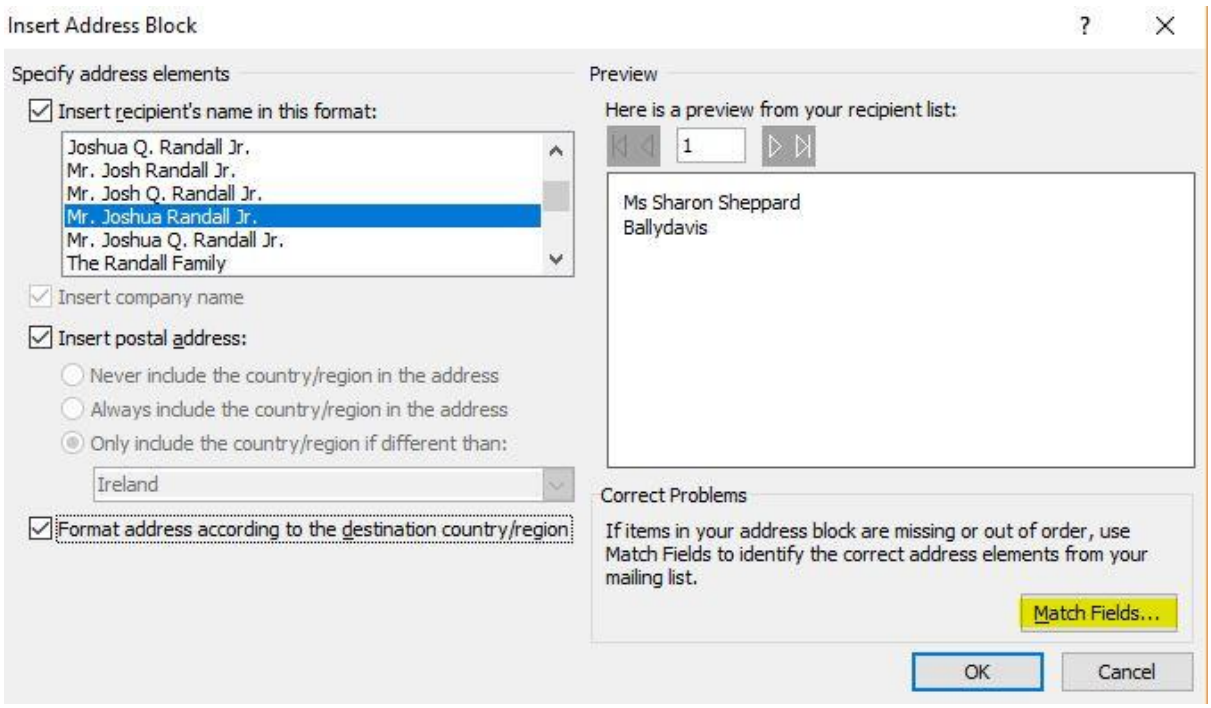
You'll notice the options have slightly changed in the Mail Merge task pane; it now tells you which file your list is taken from and you can select a different list, or edit the current recipient list if you wish. Click **Next**…



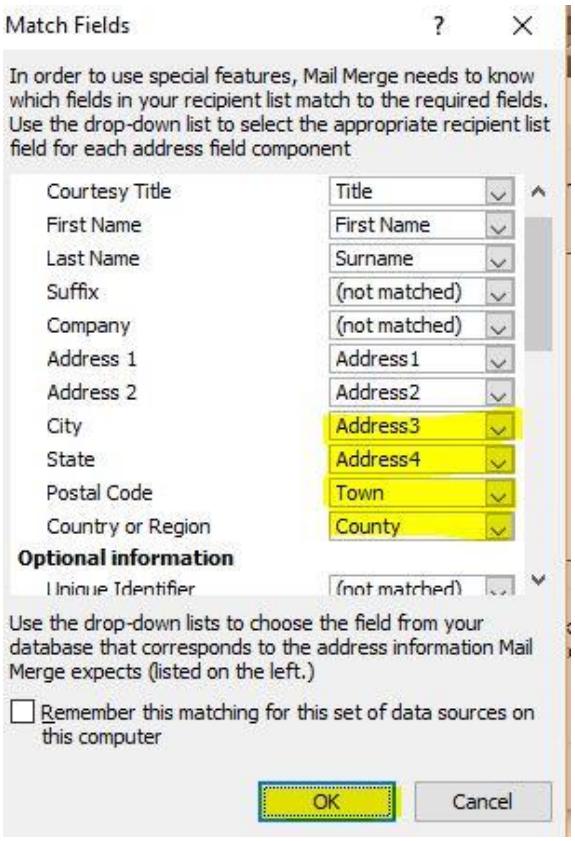
The next step is to prepare the letter ready for merging. In order for the Mail Merge to know where to add the relevant data, you have to insert placeholders e.g. name and address.

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**…

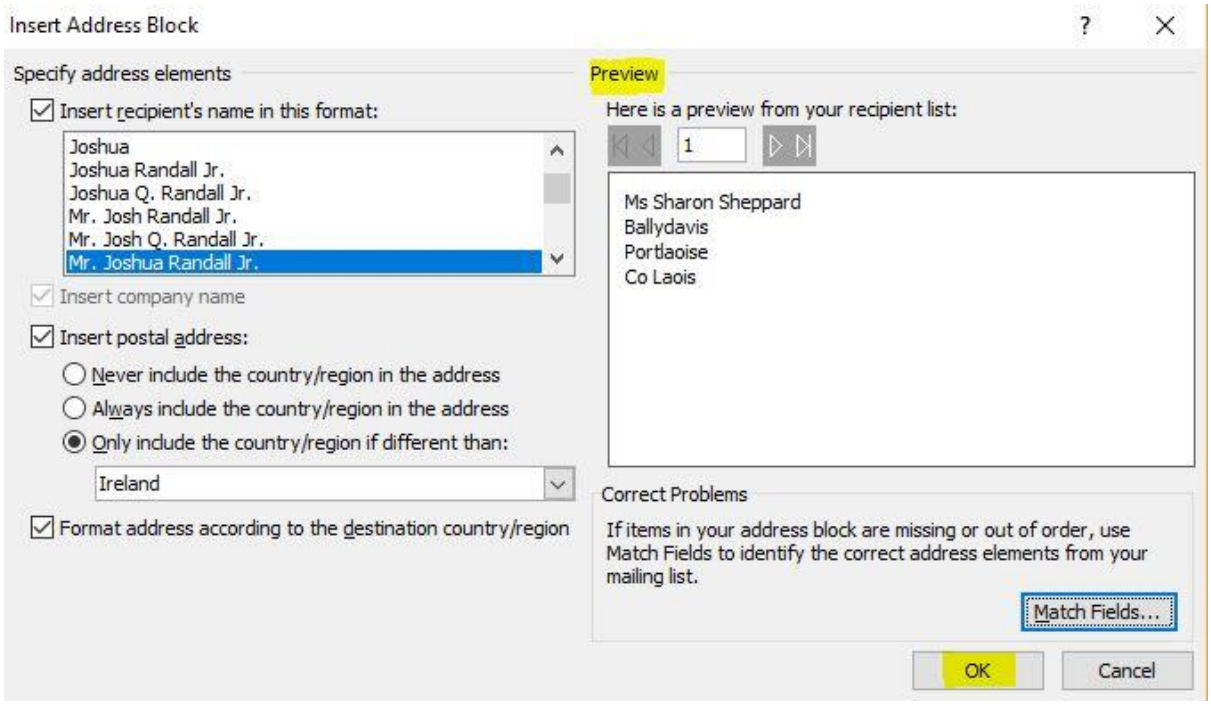
In our sample letter we want the address block in the top left corner. The **Insert Address Block** dialog box will open; here you can choose which format you prefer the name to be, and there is a handy preview on the right hand side. You can see in the example below that there are several lines missing 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**…



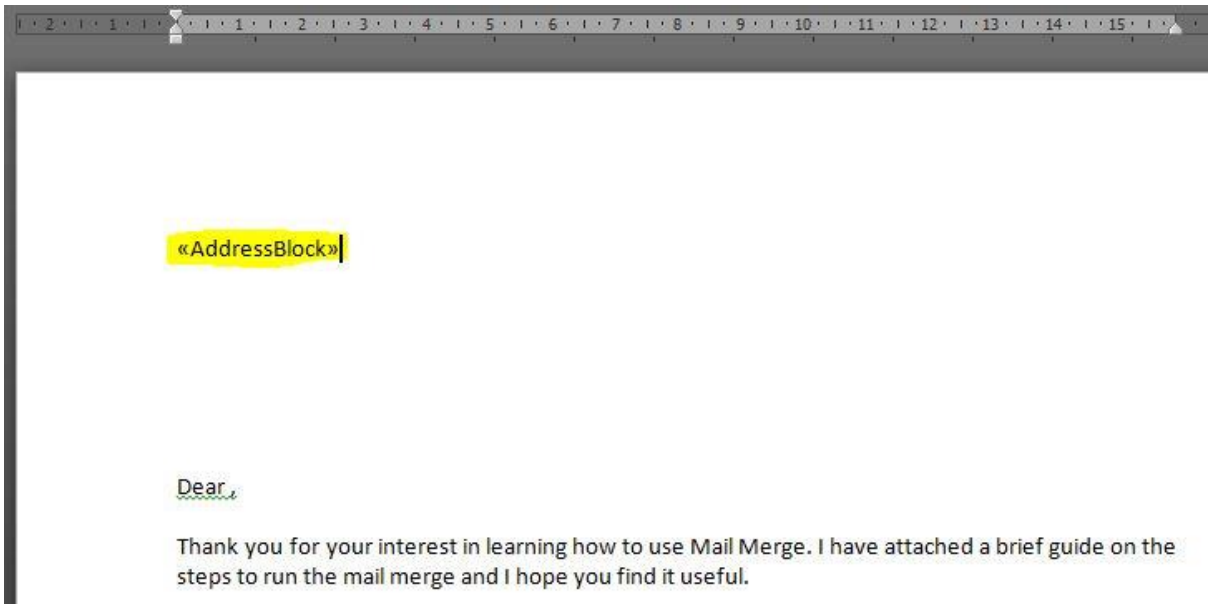
You'll see only address 1 and 2 are listed, you need to add **address 3, address 4**, **town** and **county** from the drop down arrows next to the ones saying not matched…



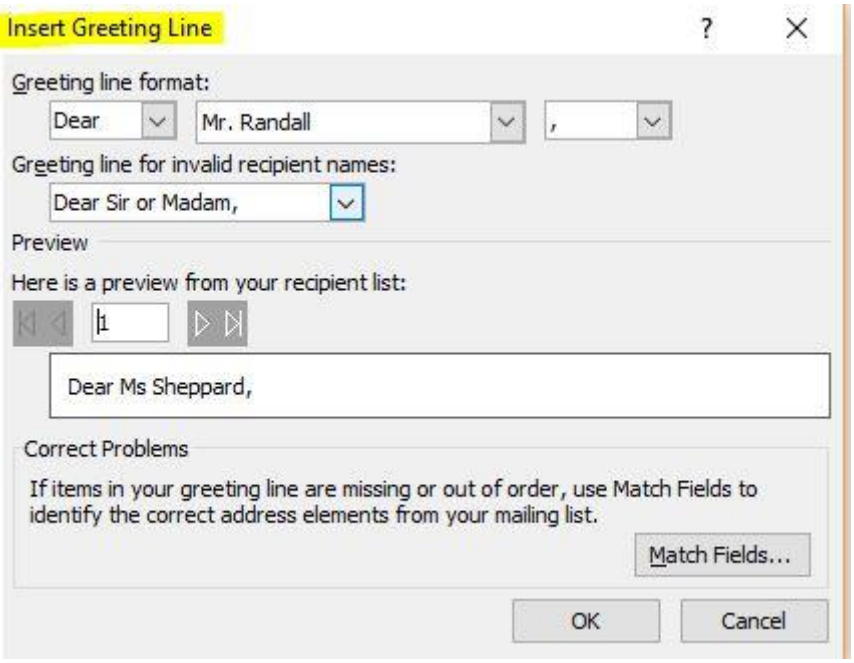
You'll now see the correct address shown in the Preview pane on the right hand side…



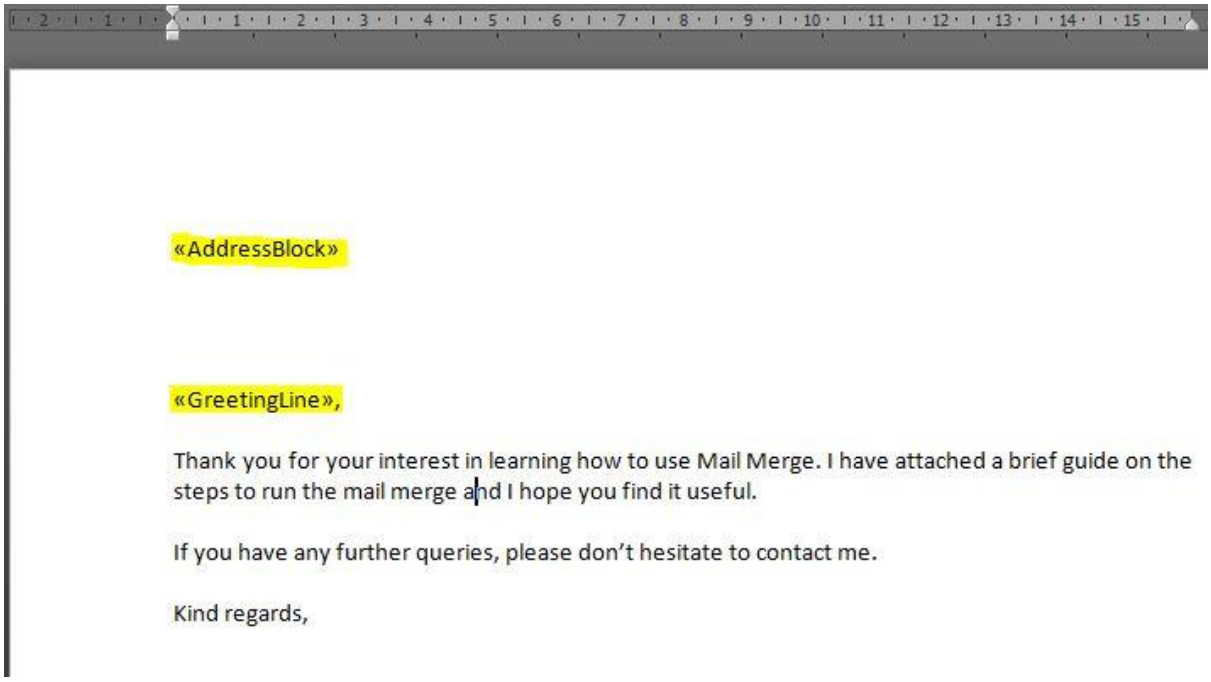
Click **OK** and it will take you back to your letter, you'll see the placeholder Address Block has been inserted in the top left corner of the letter…



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…

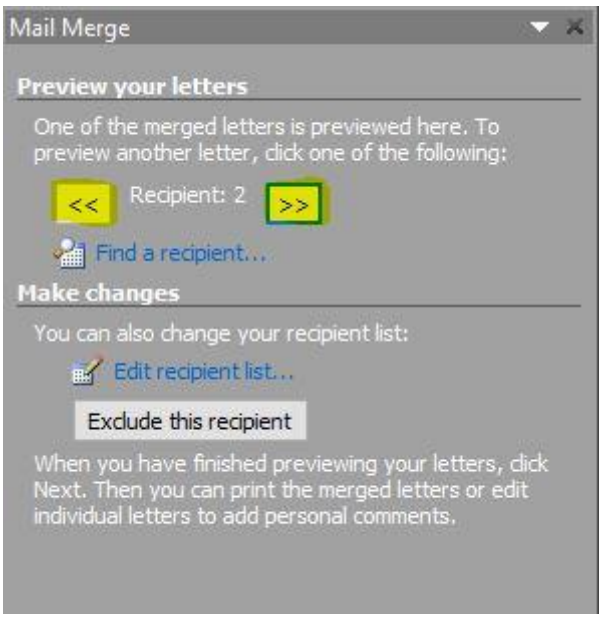


Again you choose which format you prefer and check the preview area. If you want to see a live preview of more than one recipient click on the left and right arrows to scroll through the list. Once you're happy with it, click **OK**.

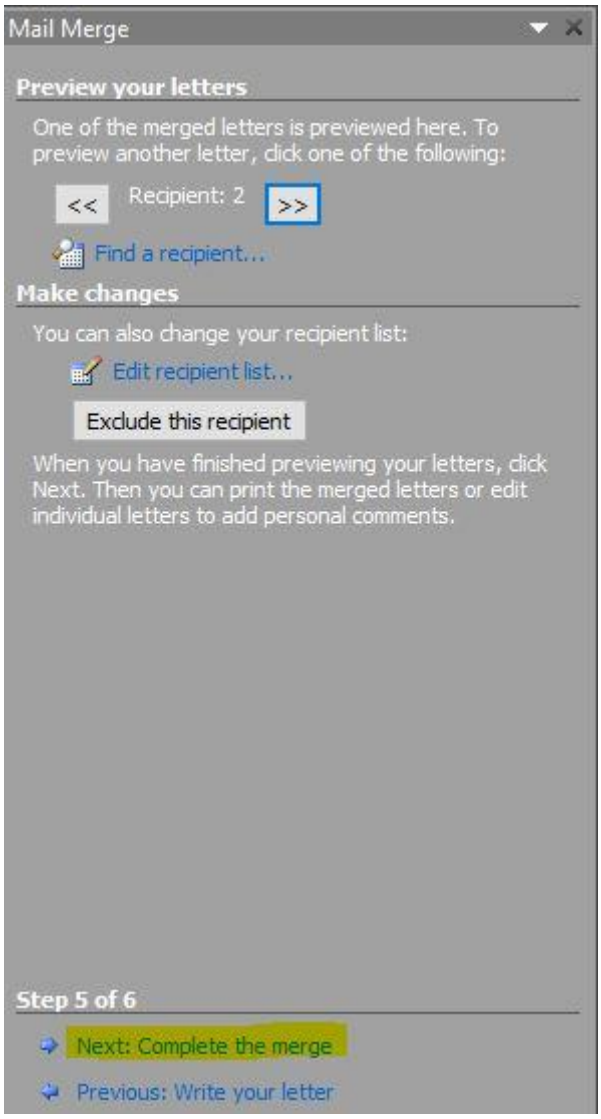


When you're happy with the letter, click **Next** on the Mail Merge task pane…

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…



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



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**…

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

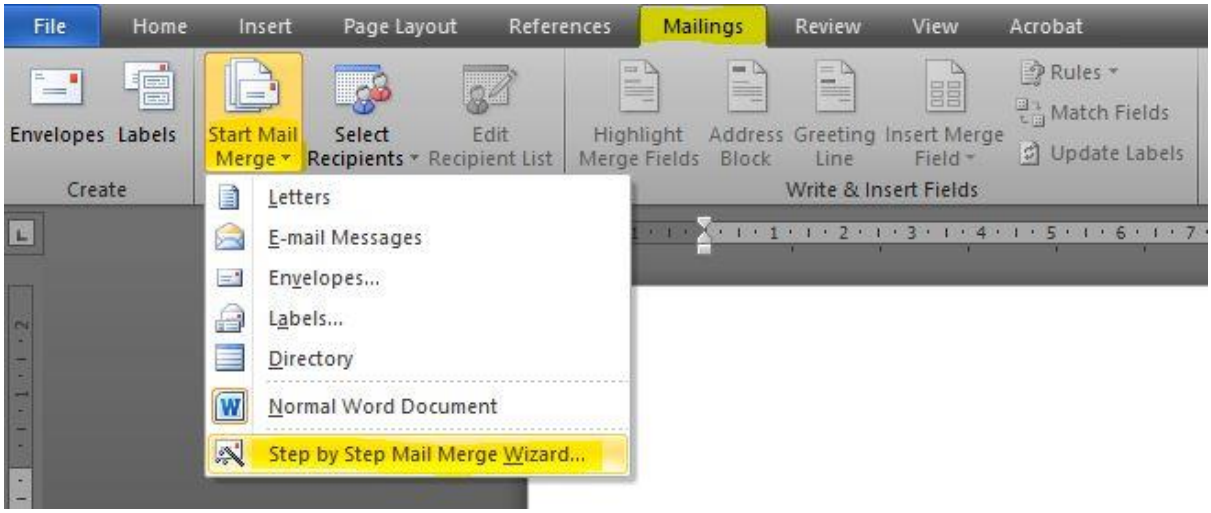
Before starting the mail merge to labels you should have a list of all the names and addresses ready for the labels. It's easier if this list is in an Excel spreadsheet and has specific column headers e.g. First name, surname, address 1, address 2 etc. Below is a short example of this…

A5

	A	B	C	D	E	F	G	H	I	J
1	Title	First Name	Surname	Address1	Address2	Address3	Address4	Town	County	
2	Ms	Sharon	Sheppard	Ballydavis				Portlaoise	Co Laois	
3	Mr	A.	Nother	The House	Main Street			Bray	Co Wicklow	
4	Ms	Jane	Doe	The Bungalow	Long Road			Dublin	Co Dublin	
5										
6										
7										

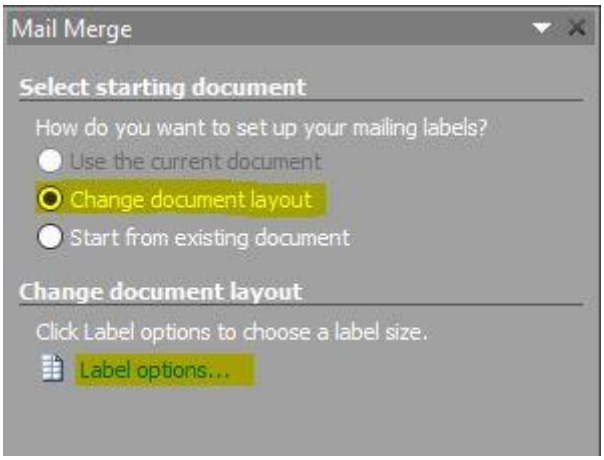
Ninja Note:
The following tutorial is using the Mail Merge Wizard as it is the easiest way to follow the steps. You can however do the same by choosing the relevant options within the Mailings tab on the ribbon as in the image below.

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**…

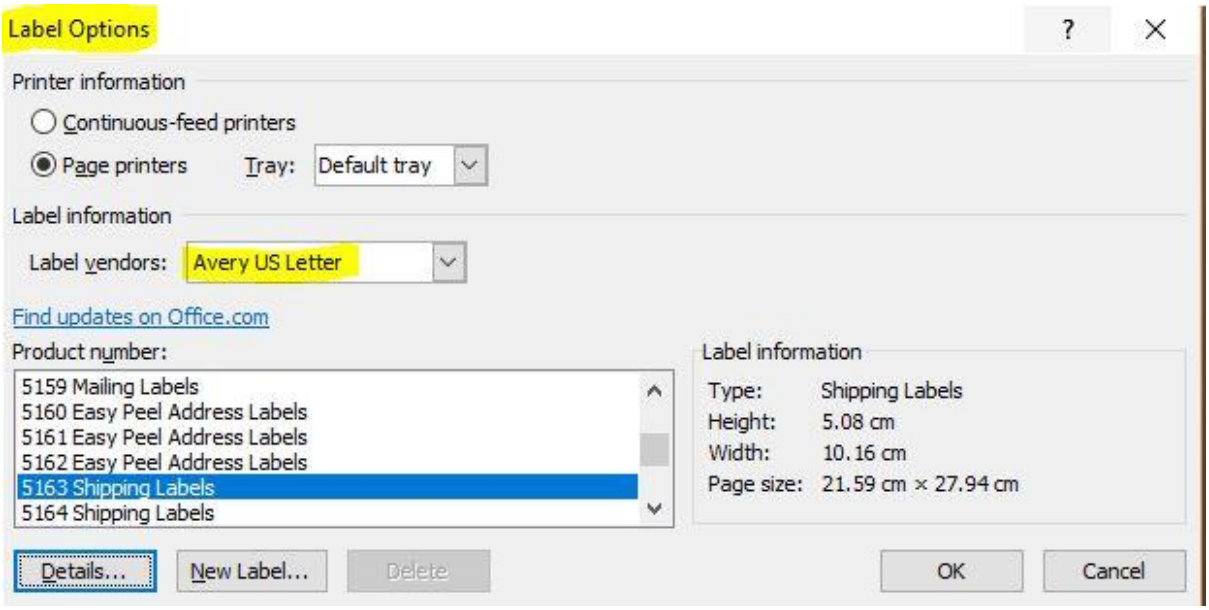


This will open the Mail Merge task pane which takes you through each step. Select which type of document you want to work on, in this example choose **labels**, and then click **Next**…

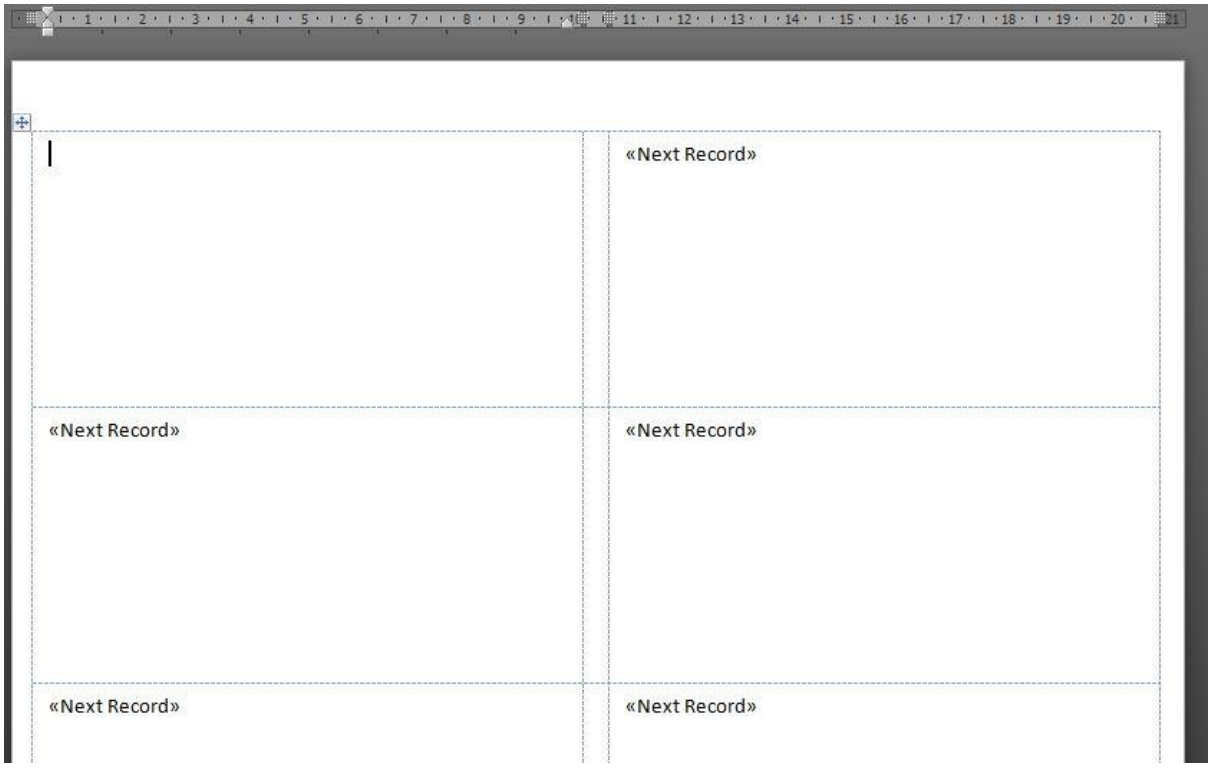
Next you want to change the layout of the document to match the labels you'll be using. Click on **Change document layout** and then click **Label options** to browse the label type you want to use…



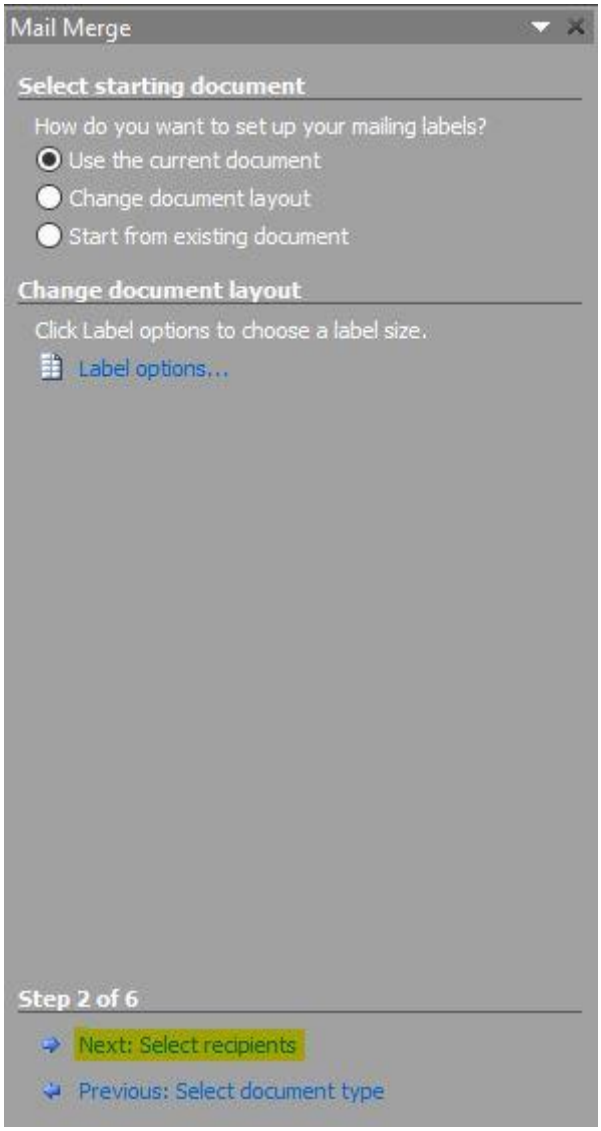
This will open the Label Options dialog box where you can select the label vendor and product number of the labels. Once you've chosen the right one click **OK**. In our example we're using Avery US Letter labels…



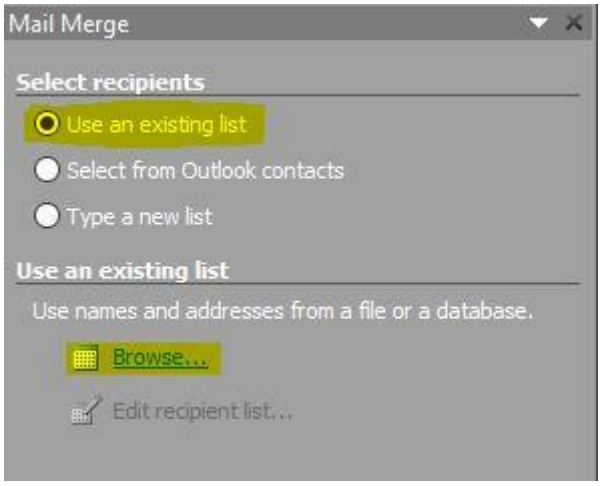
You'll notice the Word document now contains the outlines of the labels…



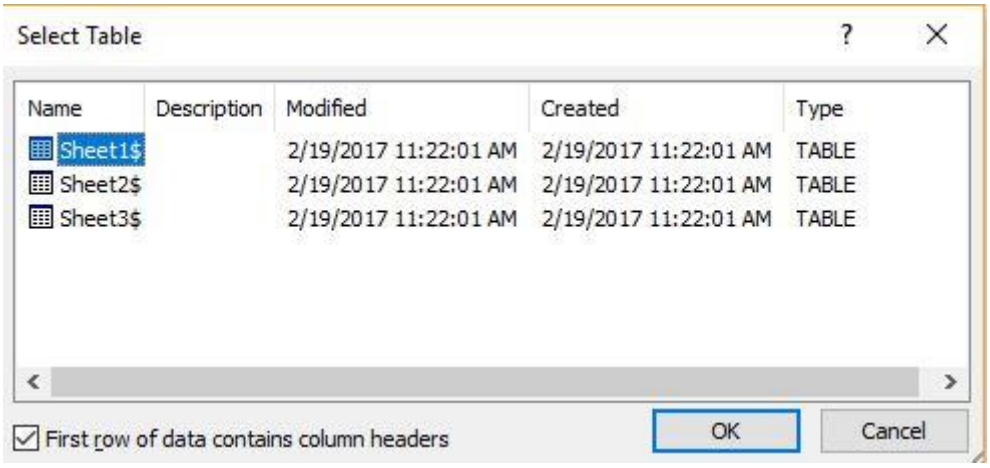
Click **Next** in the Mail Merge task pane and it takes you to the next step of selecting the recipients…



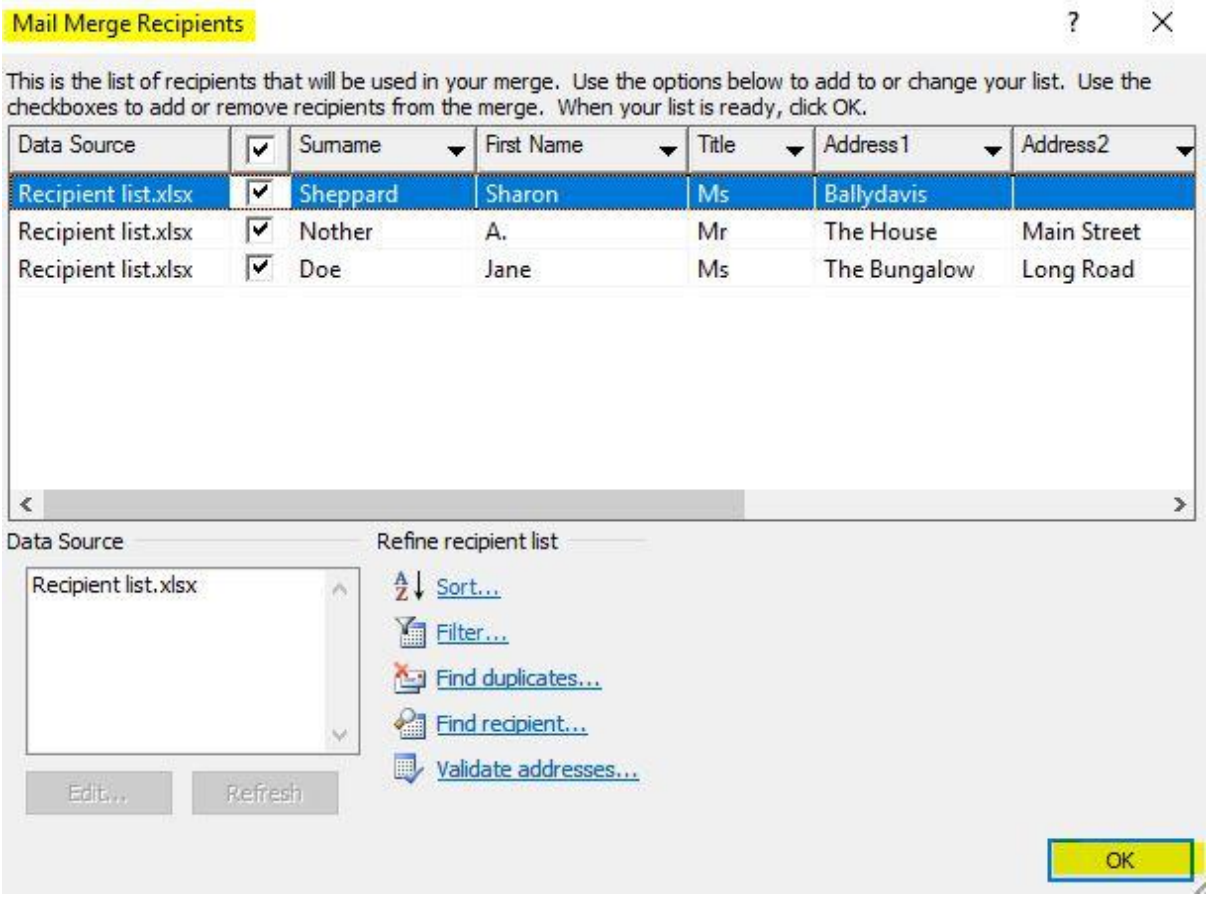
Select which recipient list you want to use. Click **Use an existing list** and browse through the folders to where the file is stored…



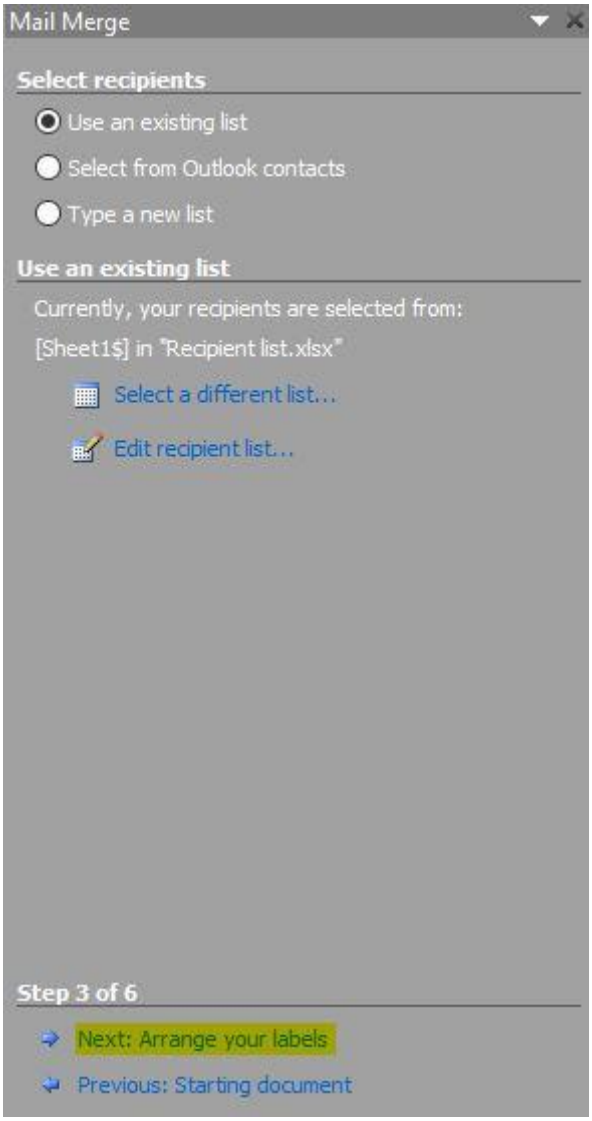
Select the worksheet that contains the list, in our example it would be **Sheet 1**, tick the box **First row of data contains column headers**, and click **OK**…



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…



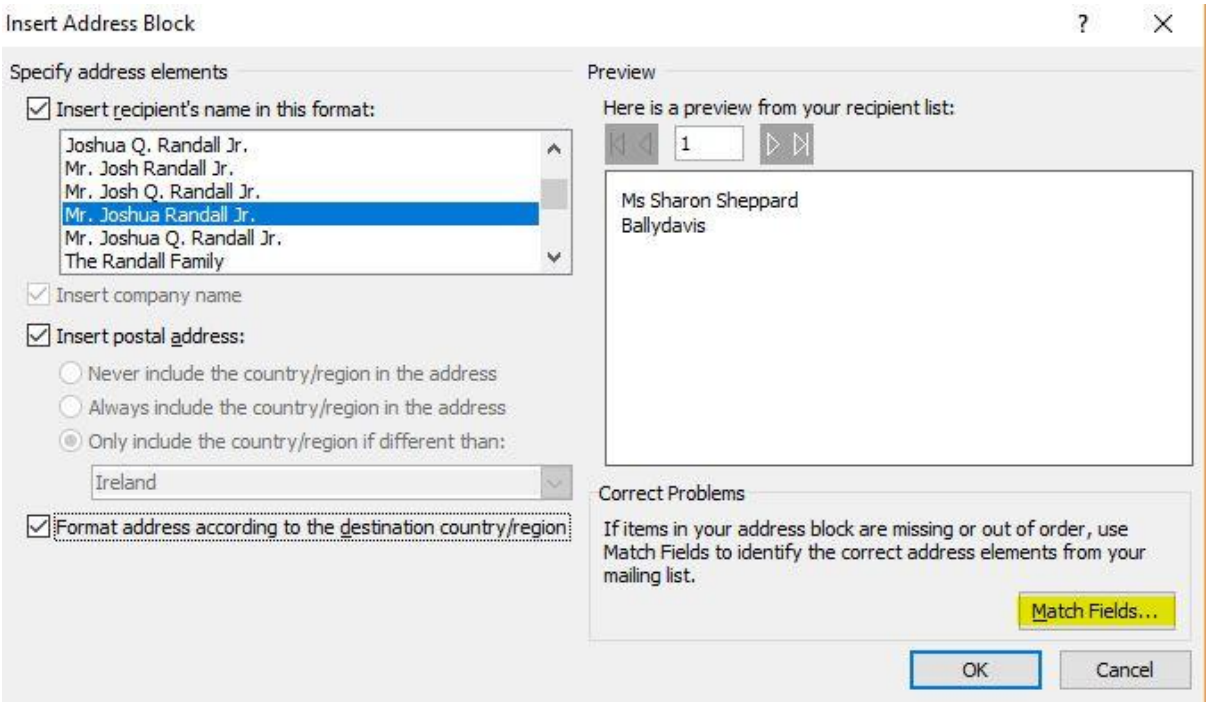
You'll notice the options have slightly changed in the Mail Merge task pane; it now tells you which file your list is taken from and you can select a different list, or edit the current recipient list if you wish. Click **Next**…



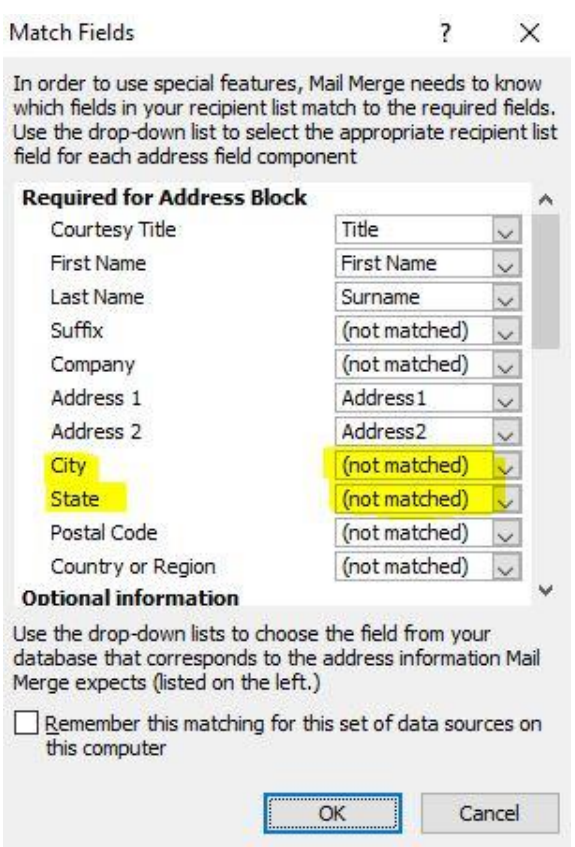
The next step is to prepare the first label ready for merging. In order for the Mail Merge to know where to add the relevant data, you have to insert placeholders e.g. name and address.

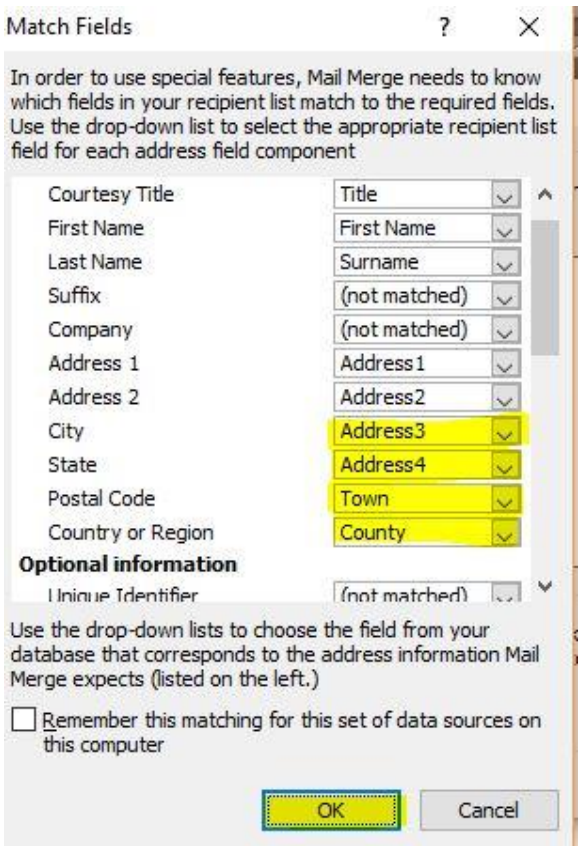
Place the cursor where you want the information to appear, and then select which type of data you want. Choose from **Address block**, **Greeting line, Electronic postage**, and **more**…

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**…

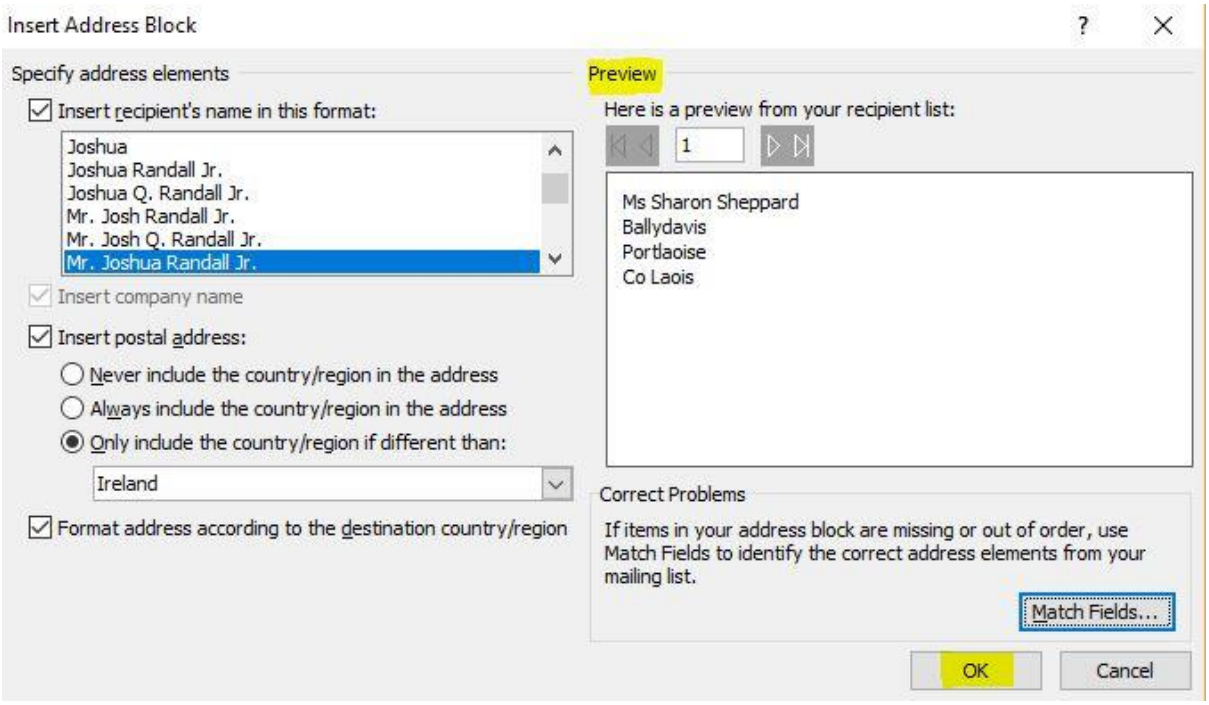


You'll see only address 1 and 2 are listed, you need to add **address 3**, **address 4**, **town** and **county** from the drop down arrows next to the ones saying not matched…

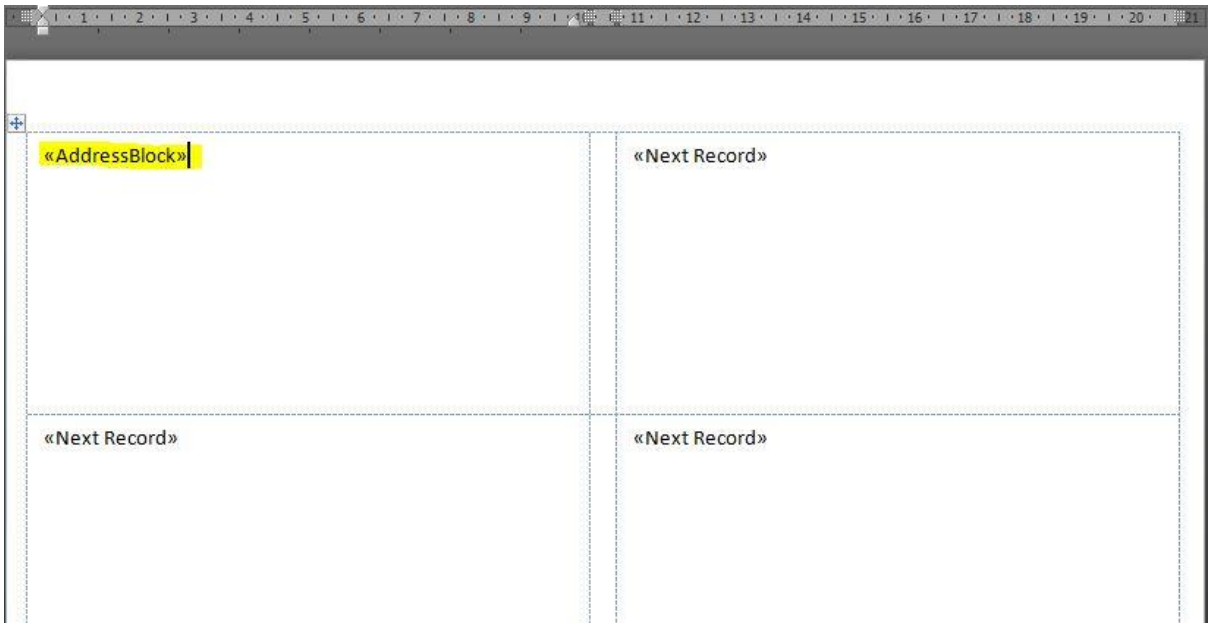




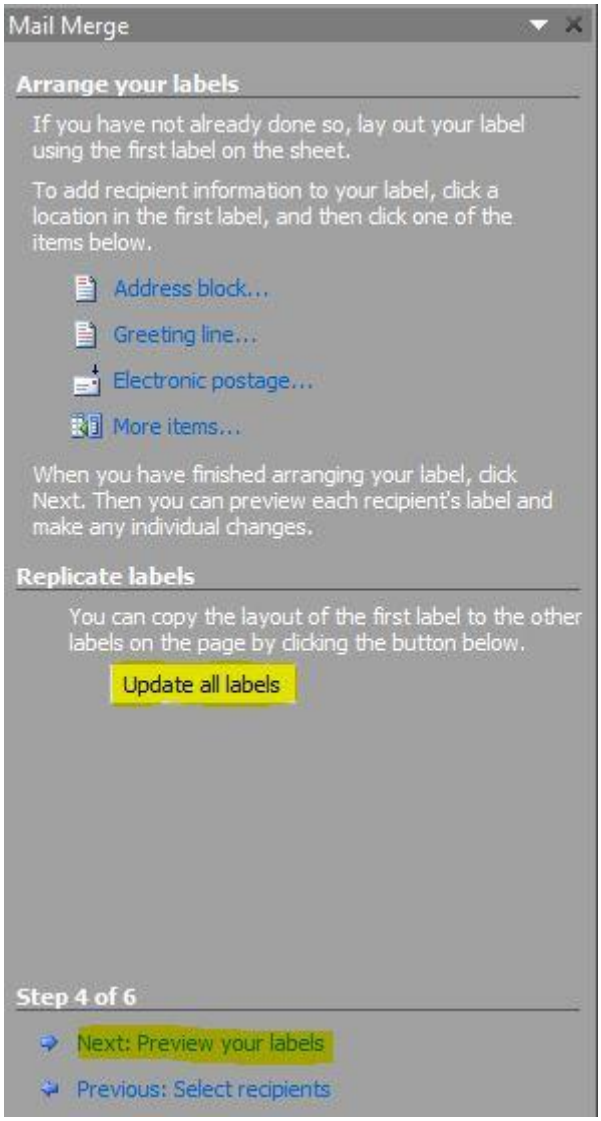
You'll now see the correct address shown in the Preview pane on the right hand side…



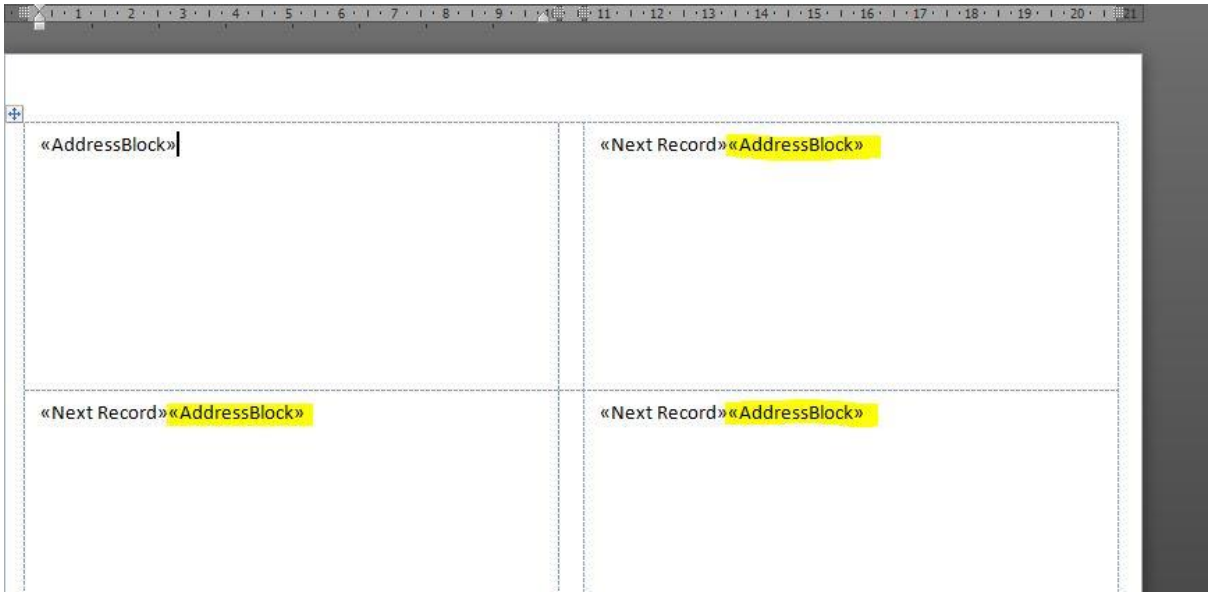
Click **OK** and it will take you back to your label, you'll see the placeholder Address Block has been inserted in the top left corner of the label…



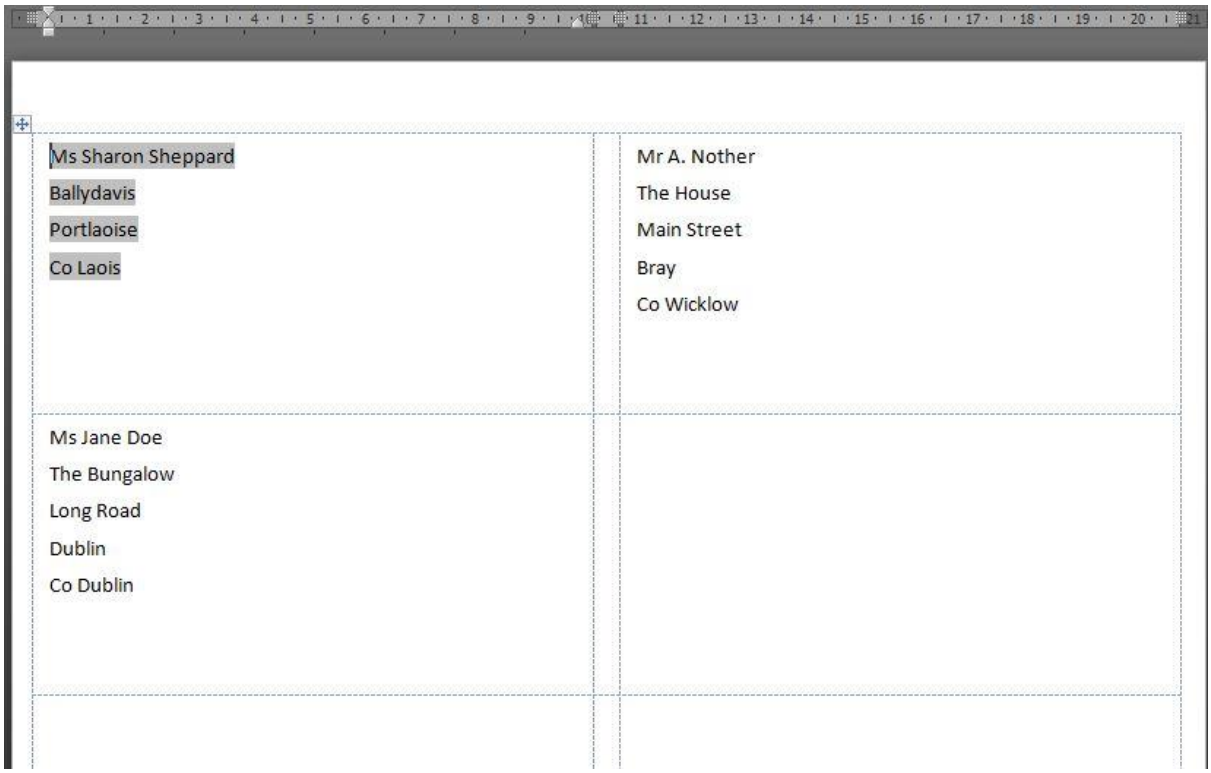
Once you're happy with the layout of the first label, click on **Update all labels** in the Mail Merge task pane…



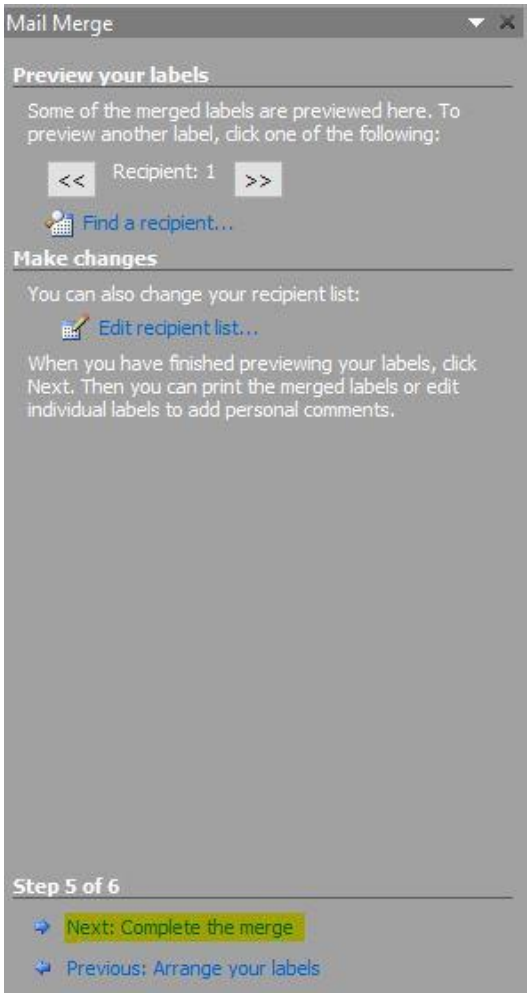
And the rest of the labels will now have the Address Block inserted on them…



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

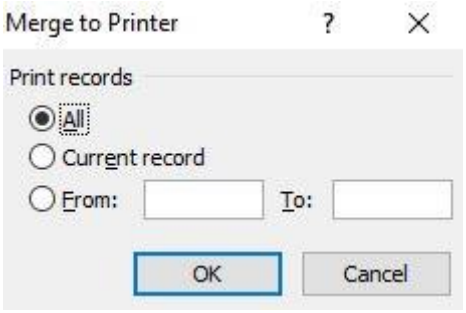


You can use the left and right scroll arrows to view each page of labels…



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…



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

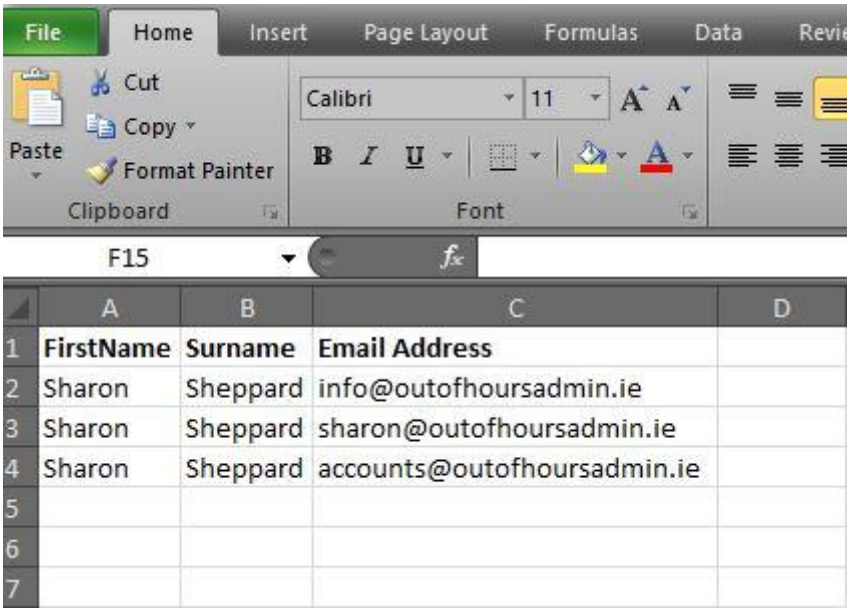
How To Send Email Using Mail Merge with Excel

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…

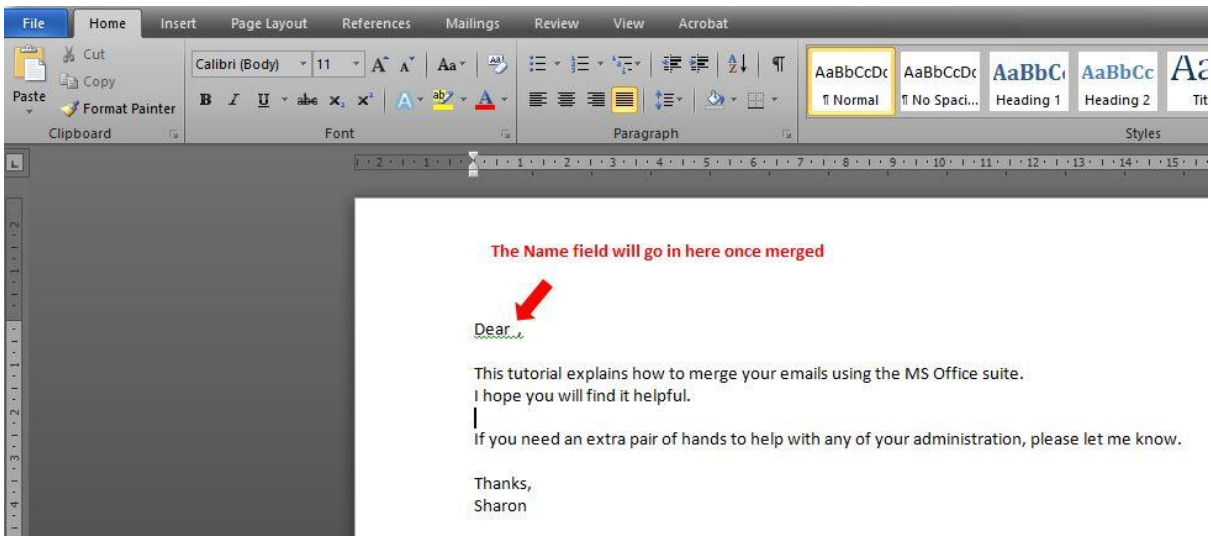


	A	B	C	D
1	FirstName	Surname	Email Address	
2	Sharon	Sheppard	info@outofhoursadmin.ie	
3	Sharon	Sheppard	sharon@outofhoursadmin.ie	
4	Sharon	Sheppard	accounts@outofhoursadmin.ie	
5				
6				
7				

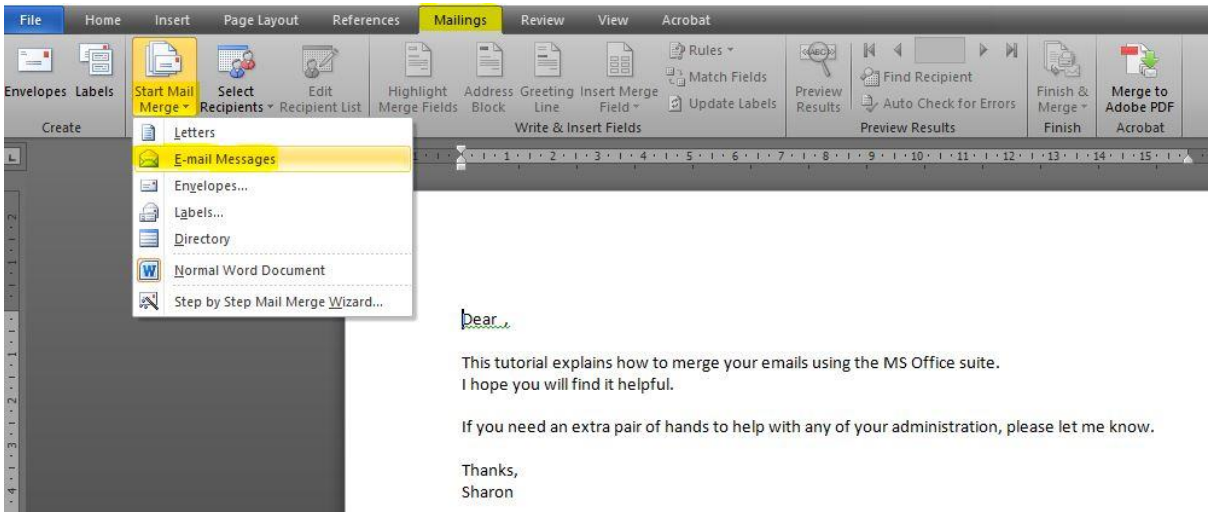
Save and close the file.

Step 2: Word document

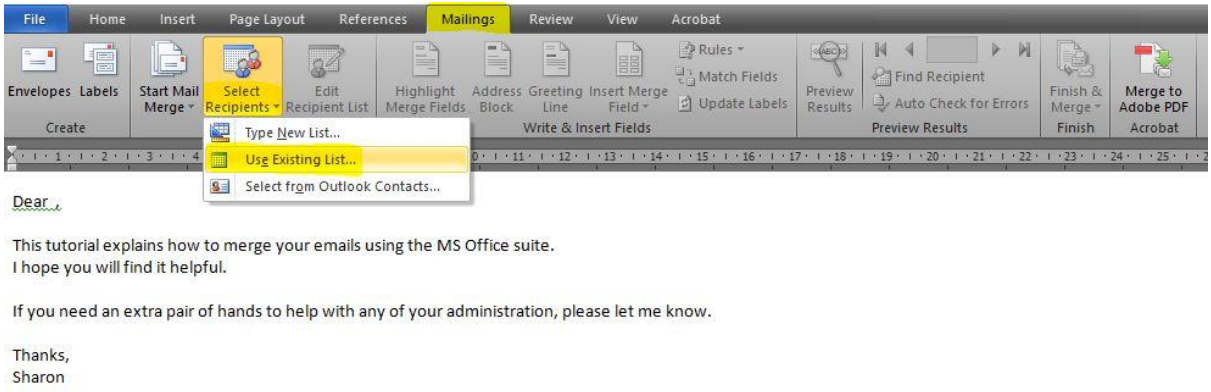
Open up a Word document and type your email. Leave space where you want to insert fields to personalise the email, e.g. “Dear (first name will be personalised)…



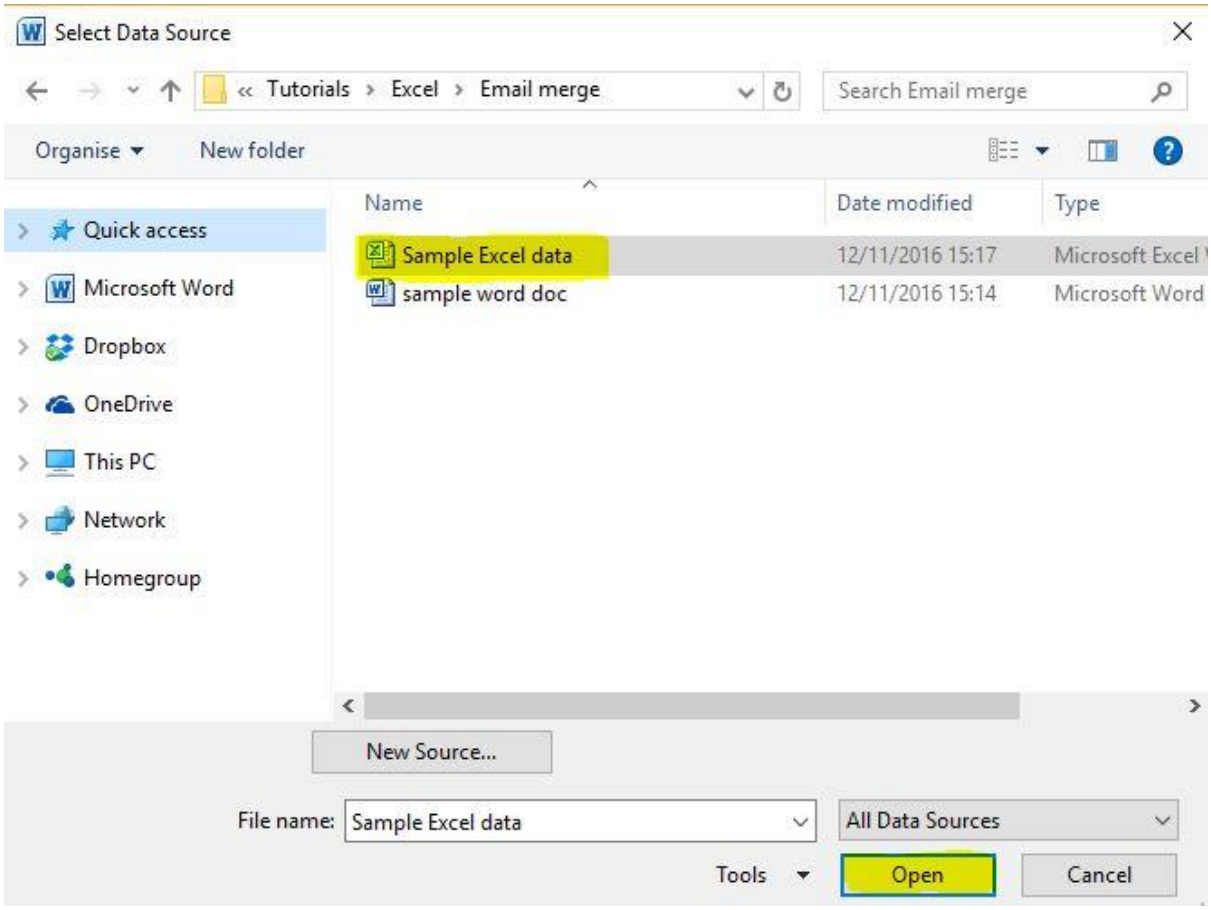
Click on **Mailings** on the ribbon, then click on the drop down arrow next to **Start Mail Merge**, and select **E-Mail Messages**…



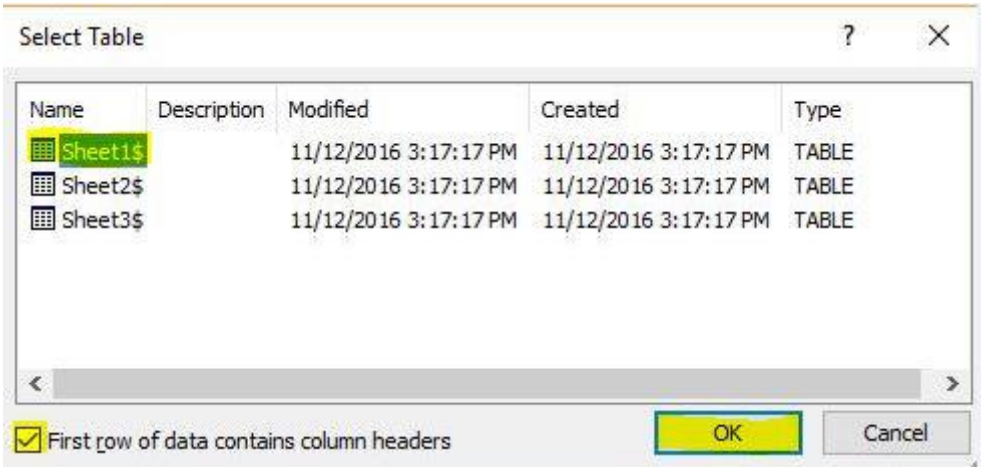
This changes the document to Web Layout. Staying in the **Mailings** tab on the ribbon, click on **Select Recipients** and choose **Use Existing List**…



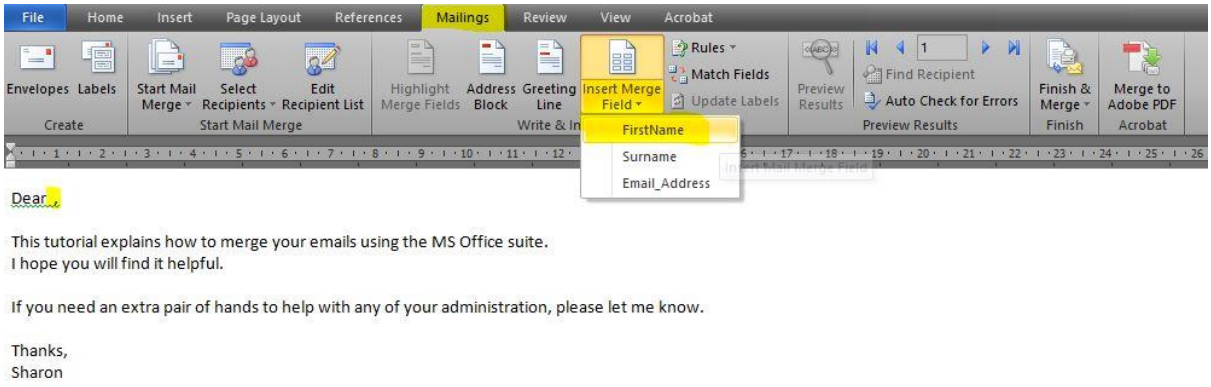
Navigate to where your Excel file containing the data is saved and click **Open**…



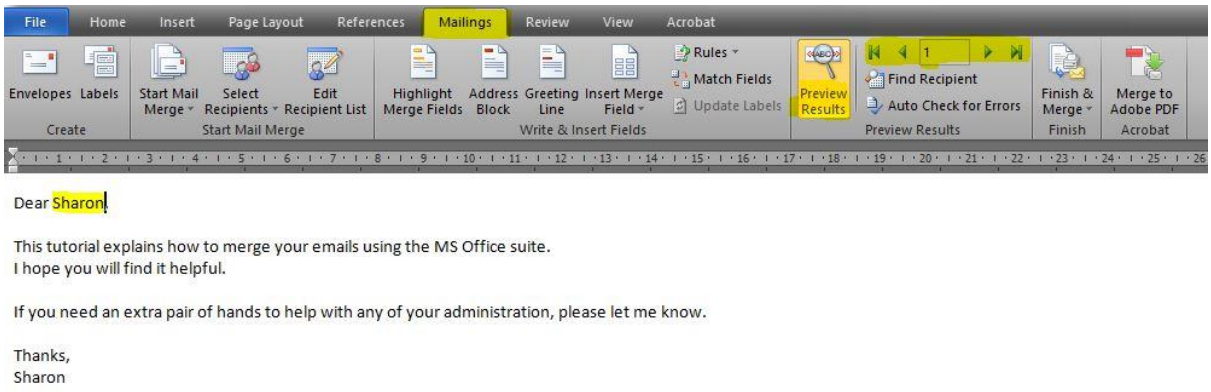
Choose the sheet which contains the relevant data, in our example above the data was in **Sheet 1**, tick the box **First row of data contains column headers**, and click **OK**…



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

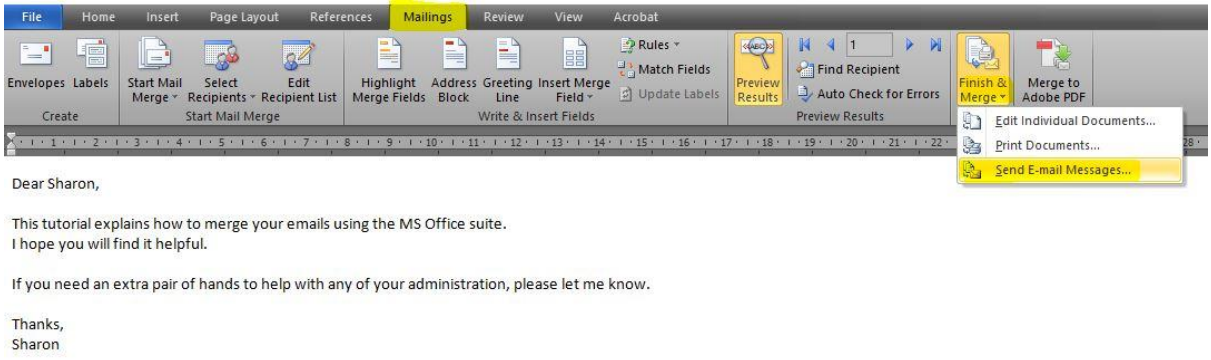


This inserts the Field "**FirstName**"; it's always a good idea to preview the results before sending the email to make sure it's bringing over the data correctly. Click the arrows to move through the results…

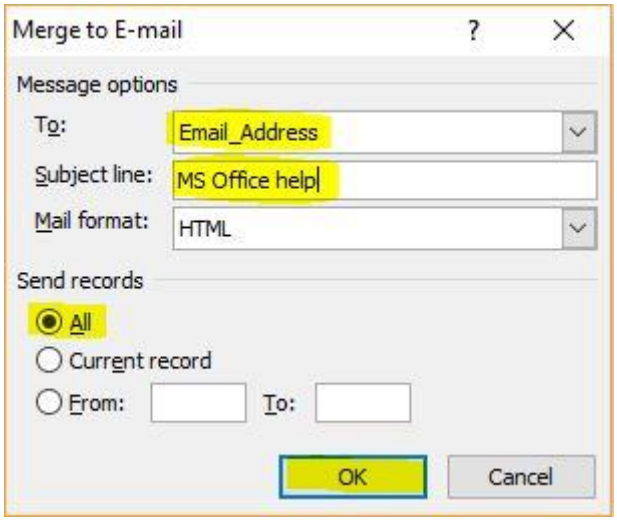


Step 3: Email

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



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**…



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

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 blog 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