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## Word - Mail Merge

If you have been reluctant to try a mail merge, don't be, it's fairly straightforward and Word has a wizard that will walk you through the steps. You can use it to create custom letters, envelopes, tickets, certificates and labels – just to name a few.

There are two things you need to create a mail merge – a list of names (or fields) and a document to put those names (fields) into.

You can create your list of fields (names) in either Word or Excel, I prefer to use Excel and will use that as my example. When creating your list of fields remember a few things:

- Be sure you have column headers (titles) for your fields – such as first name, last name, address, etc. If you don't use headers, when you go to add the mail merge to the document you will have to know that column A has first name, B last name, etc. If you are doing a merge with lots of fields this could create problems.
- Name the Excel Spreadsheet ([click here for how to do this](#)) for ease of finding when you get to Step 3 of the mail merge.
- Save the Excel file in a place that you remember. I know this sounds logical, but I still have clients that when they go to do the merge can't remember where the list is saved. My advice – create a folder on your computer that is specific for the mail merge.

Now that you have your list, you need to create your document. There are two ways to do this, start the Mail Merge Wizard first or create your document and then use the Mail Merge Wizard. I tend to use the second method – document first then mail merge.

When creating your document you can either leave the areas blank where you are going to add in the merged data or your can put in an indicator (using text that's bolded or colored) to remind you where the data goes.

Once your document is ready, click the Mailings tab in the menu and then click the down arrow next to Start Mail Merge – choose Step-by-Step Mail Merge Wizard. When you do that a window will open on the right side of your screen – this is the Wizard.

Each step is laid out for you in this window. The top part shows the current options, the middle explains them and the bottom area allows you to toggle back and forth between the steps.

Step 1 – Choose the type of document – letter, envelope, etc.

Step 2 – Select your starting document. If you have already created a document you will choose “Use the Current Document”.

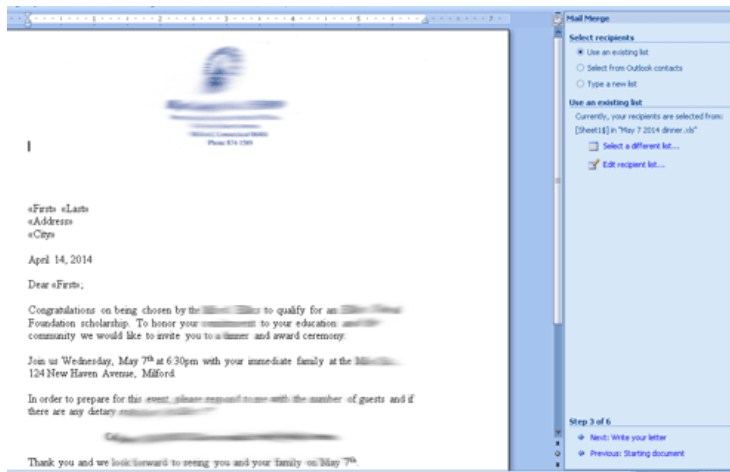
Step 3 – Select Recipients. Click browse to find the list you created in Excel or from your contacts list or create one of your own “Type a new list”. NOTE, when using an Excel file once you have chosen the file name Word will ask you to select the table to use. This really means what worksheet (if there are multiple ones) do you want to pick (that's why I suggested earlier you name your spreadsheet).

Then you will verify your data – first check to be sure it's correct and then decide if you want to use all the recipients or just some (uncheck the box next to the recipients name to not have them included). You can also sort, filter and find recipients from this window. Click OK when done.

Step 4 – Write Your Letter. If you have already created your letter it will appear and this is now where you are going to add in the merge fields from the data chosen in Step 3. You can use the window to the

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right to choose some options (address block, greeting line), but I prefer to add in the fields using the “More Items” option.

When you choose this option all available merge fields will be listed. To add them, go to the place on the document you want the merge field to appear and from the “Insert Merge Field” window check the field and then

hit Insert for field will appear as <<first name>> (double brackets begin and end the field name). Do this until all your fields have been added. NOTE: if you don’t hit the Close button after inserting a field, then next field you choose will be put right after the first one. You can cut and paste the field names, just remember to enclose the brackets when cutting or copying.

Step 5 – Preview Your Letters: Using the window to the right you can scroll through your letters to be sure they are correct. If you find a problem, just go to the bottom on the window on the right and go back a step or two to fix it. NOTE: At this point, save your letter template (because this is now a template that includes the merge fields). If you need to recreate the merge you don’t have to recreate the merge part.

Step 6 – Complete the Merge: Now you can print and save your merged documents. NOTE: before printing, go to the end of your merged letters and see if there are any blanks – documents that don’t include data. This is due to a funky error in Excel that will pull extra blank lines in the spreadsheet when it is merged.

If you have a project coming up that needs to be customized with data contact me at contact us at [info@aapk.com](mailto:info@aapk.com) I have done a ton of mail merges for many different document types and can help you.

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## LinkedIn Skills and Endorsements

Skills and endorsements in LinkedIn are important to your profile and networking – it lets viewers know that others recognize your talents. You can not create these yourself, so they create a major impact that outlines your abilities.

But did you know you can manage these so that people don’t endorse you for something you are not?

Social Media Examiner has outlined three ways you can guide people to make the correct recommendations for your profile. From setting your skills and endorsement to Managing Endorsements and finally asking for more endorsements. Read the article here:

<http://www.socialmediaexaminer.com/manage-linkedin-endorsements/>

If you need help with social marketing let me know, I can be reached at [@aapk.com](mailto:@aapk.com).

## You Have To Laugh

Funny Video: Lion King Cast Breaks Out in Song on Flight -

<http://www.cnn.com/video/data/2.0/video/showbiz/2014/04/02/mxp-australia-disney-broadway-sing-lion-king-plane.hln.html>

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