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Word - Using Mail Merge

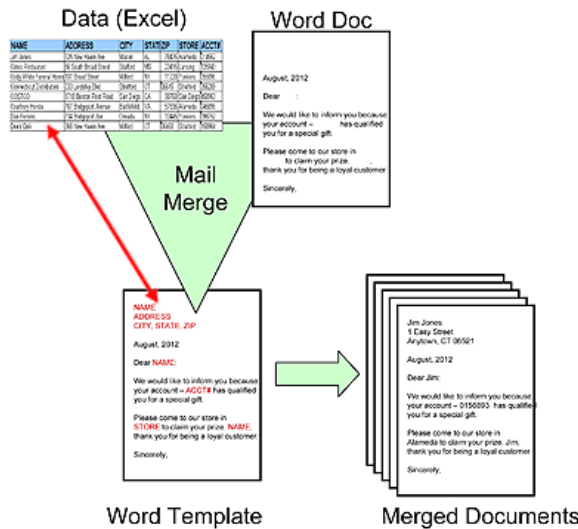
If you are not comfortable or familiar with using Mail Merge you are not alone. It can seem like a daunting task to under take, but it's actually quite simple if you understand the process and follow the steps that Word provides.

There are two parts to the merge – the data list file and the template document file.

The **data list** can be created in Excel, come from an existing data source, or be created within Word. I prefer Excel because it allows me to manipulate and update the data and save it for other uses. In Excel, each row is a record (or different person) and each column is a data field (address, zip code, etc). Think of it this way, if you are creating a mass mailing letter each row will create a separate letter.

The **template document** is your Word file that contains all the text, tables and graphics that make up your document.

These two files are then connected using the Mail Merge module to identify the data file and where each field will be placed. This then creates a reusable template that can be utilized to create the final merged documents. See graphic below.



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Below is an outline of the steps and hints to creating a mass mailing letter. Know that you are not limited to letters, you can use mail merge for so many other things, such as labels, envelopes, awards, forms, and so much more. Once you get the hang of it you will think of many ways to use it to save you time.

1. Create data list (in Excel) – hints to avoid problems with merging:

- Remember to include headers (column names), these will become the titles of the merge fields in your template.
- Break first and last names (see Issue 1 for instructions) into two columns if you need to use them as separate data fields.
- Be careful of zip codes or other data that might include leading zeros (see Issue 39 for advice)

- Your data can be a worksheet inside of a workbook – so be sure to name the worksheet (tab) with a name you can easily identify as being your data.
2. Create document (in Word) – hints to make things easier:
 - Set up the document with all the text, pictures, etc that are needed
 - To avoid making errors with your data, use capital letters in your document to indicate where you want the fields (column data) to be placed. This makes it easier to see where you need to replace those capital letters with the corresponding field.
 - Save the file – give it a name to indicate to you that it is a mail merge template
 3. Use Mail Merge to connect them both files:
 - To access Mail Merge in 2003 - Tools, Letters and Mailings, Mail Merge.
 - In 2007 or above – Mailings, Start Mail Merge.
 4. Choose the data list or create a list in Word – things to understand:
 - If you are using an external data file (like Excel) simply navigate to your data file.
 - If creating a data file in Word, choose that option and follow the steps.
 - If it is an Excel workbook file with many worksheets (tabs), choose the worksheet with the data needed. The data is now connected to the document with the merge fields, so if data changes or is added and the template is reopened, the new data will now be available for the merge.
 5. Add merge fields to document.
 - A merge field is a placeholder that you insert in the template (Main) document.
 - The field will appear with the data title encased in greater and less than signs (e.g., <Name>).
 - It creates a set of codes that instructs Microsoft Word to insert text, graphics, page numbers, and other material into a document automatically.
 6. Preview the merge and make adjustments – things to think about during review:
 - Create a file with all records so you can be sure everything is working correctly.
 - Due to the length of some of your data, words and paragraphs may not always appear in the same place.
 - Check to be sure there are no blank letters at the end of your document.
 7. Complete the merge.
 - Suggestion – create a file of the merged documents before printing them – too many times I have thought I had it right, went directly to print and then found an error!
 8. Save both document (template) and final merged documents.

If you have questions on this, or need help with a mass mailing, contact us at info@aapk.com

Steps to Social Marketing - Step 5 - Creating Your Message & Content

Previous Steps: [1](#) [2](#) [3](#) [4](#)

Hopefully you have created a schedule as suggested in last week's issue. That schedule is no good if you don't have content to use to promote your business. Your next step is to outline your message, create content and future ideas.

This is the largest hurdle for most clients. They often say "How or what do I use for content?" or "I can't write" or "I don't have the time to write" or "I will run out of content in no time".

To determine how or what to use for content, ask yourself the following questions:

- What do I want to achieve with this content? Visitors, Likes, contacts, etc.
- What will be my overall theme? For instance for this newsletter its tips on Microsoft popular products and using the Web.
- Who is my audience and what would be of interest to them? If your product is a toy, your audience would be parents and they would be interested in hearing tips on parenting or deals on products.

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- What type of conversation would I like to engage my audience in? Using the toy example, you would probably be interested in knowing their opinion on your product and have them recommend and “Like” the toy to their friends.
- Once the viewer has seen your message what is the next step for them to take? If it is to your web site, is the page you are sending them too specific and related to that message or you are just sending them to your home page?
- Do I have a specialty or expertise in a specific area that I can write easily about?
- Do I read a lot of industry related articles that would be of interest to my viewers?

With these questions answered you will begin to understand what your focus/message should be. The next battle is to create the content.

I suggest creating enough content and ideas initially to get you through 10 rounds of messaging. By doing this you are not dragging some weeks to come up with content and if you have a busy week and no time, you will have something to use without much effort. Also, keep a list of future ideas for content – I use an Excel sheet to jot down ideas and bookmarking in my browser to draw from when I don't have a specific topic to discuss.

Content can be a variety of things:

- Article you wrote
- Short (couple of lines) helpful tip
- Link to an article of interest
- Blog series
- Update on a project for your business
- Video tip
- Announcement of a new large contract or client
- Introducing a product or service
- Link to funny video clips
- Picture of your latest art piece
- News story that is related to your business
- A charity you are passionate about (related to your business)

See, content doesn't always have to be something you have to spend hours writing!

If you are stuck for ideas for your business, contact us at info@aapk.com we can help you strategize, plan, implement and track your social marketing efforts.

You Have To Laugh

Funny Video: Amy (yours truly) being interviewed with her Pez collection (video and article) ...
<http://orange.patch.com/articles/video-pez-showcases-collection-from-area-woman>

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Contact us - 203-305-3124 or at info@aapk.com

AAPK - 45 Shadyside Lane, Milford, CT 06460

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