Mail Merge Instructions

How to import your Customer Reference Numbers into a Microsoft Word invoice template

Step 1
Save your CRNs in a Microsoft Excel spreadsheet

Step 2
Save your Microsoft Word invoice template

Step 3
Open Microsoft Word and go to “Tools”, select “Letters and Mailings”, then select “Mail Merge”

Step 4
Select “Letter” as the type of document, then click “Next”

Step 5
Select “Existing Document”, then find your invoice

Step 6
Click on “Next: Select Recipients”

Step 7
Select “Use Existing List” and then find your Microsoft Excel spreadsheet containing the CRNs

Step 8
Ensure that your cursor is in the box where the CRN needs to appear

Step 9
Click “Write your letter”

Step 10
Select “More items...” click “Insert” on the pop up box

Step 11
Click on “Next: Preview letters” and the CRNs will be populated into the invoices

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