Presented by Jessica Vega 10/2/2020

MAIL MERGE:

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INSTRUCTIONS

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Introduction:

What is a mail merge?

A shortcut to sending out bulk emails that have similar text, in an expedient manner

What do you need to do a mail merge?

- Microsoft Excel (Excel)
- Microsoft Word (Word)
- Microsoft Outlook (Outlook)

Step 1: Input the required data fields into Excel

The Excel document exists to:

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- help store the information needed for the mail merge
- > fill in the spaces that need to be customized in the Word document

	А	В	С	D
1	Name	book title	pub date	email address
2	Alpha Lyrae	Star Wars vs Star Trek	August 9th 2090	j.alphalyrae@gmail.com
3	Jessica Vega	Caring for your pet Dinosuar	January 12th 3015	Jessica.Vega@snhu.edu
4	J Vega97	The Best Video Games of the 2000s	December 25th 9999	jvega97@toromail.csudh.edu
5				

Step 2: Compose your message

Write your draft email in Word

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Make sure to leave a space for the customized data fields (e.g. name, title, date, etc.)

Dear Dr.____

I hope this email finds you well. This is a friendly reminder that your manuscript, ______ is due on_____. When submitting your manuscript please do not forget to include the images in a separate file from the text document.

Thank you for your assistance and I hope you have a wonderful day.

Sincerely,

Jessica

Step 3: Select the Mail Merge option

- In Word, Select the "Mailings" tab in the menu bar
- Select the "Start Mail Merge" option
- From the drop-down click on "E-mail Messages"

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Step 4: Select the Excel file

- In Word, click on "Select Recipients"
 - > In the drop-down menu select, "Use an Existing List..."

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Thank you for your assistance and I hope you have a wonderful day.

Sincerely,

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Step 5: Insert the data fields from Excel into the spaces in Word

- Highlight the space where the data field needs to be customized
- Select the "Insert Merge field"
- Click on the data that you want inserted

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Dear <u>Dr«Name</u> »,			book_title		
I hope this email find	s you well. This is a friendly reminder that your ma	nuscript, is due on When si	Dub date	at forget to include the images in a separate file from the il Merge Field	e text document.
Thank you for your a	ssistance and I hope you have a wonderful day.		email_address		

Sincerely,

Jessica

Step 6: Preview Results

- In Word, click on "ABC Preview Results"
- Click the triangles to filter through the drafts

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Step 7: Send

<u>All</u>

O From:

O Current record

<u>T</u>o:

OK

Cancel

In Word, click on "Finish & Merge"

> In the drop-down menu, select "Send Email Messages..."

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QUESTION SESSION