



MAIL MERGE:

INSTRUCTIONS

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

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



Step 2: Compose your message

- ❖ Write your draft email in Word
- ❖ 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.

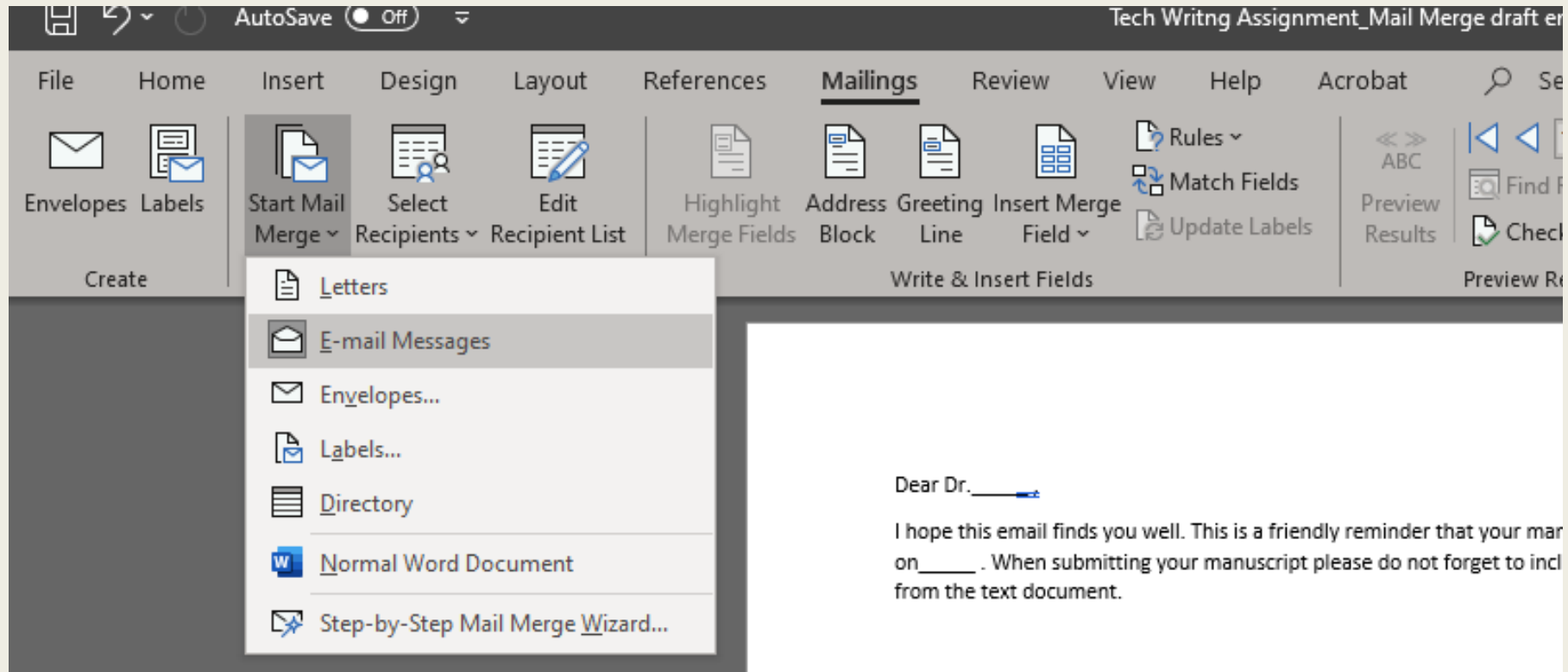
Thank you for your assistance and I hope you have a wonderful day.

Sincerely,

Jessica |

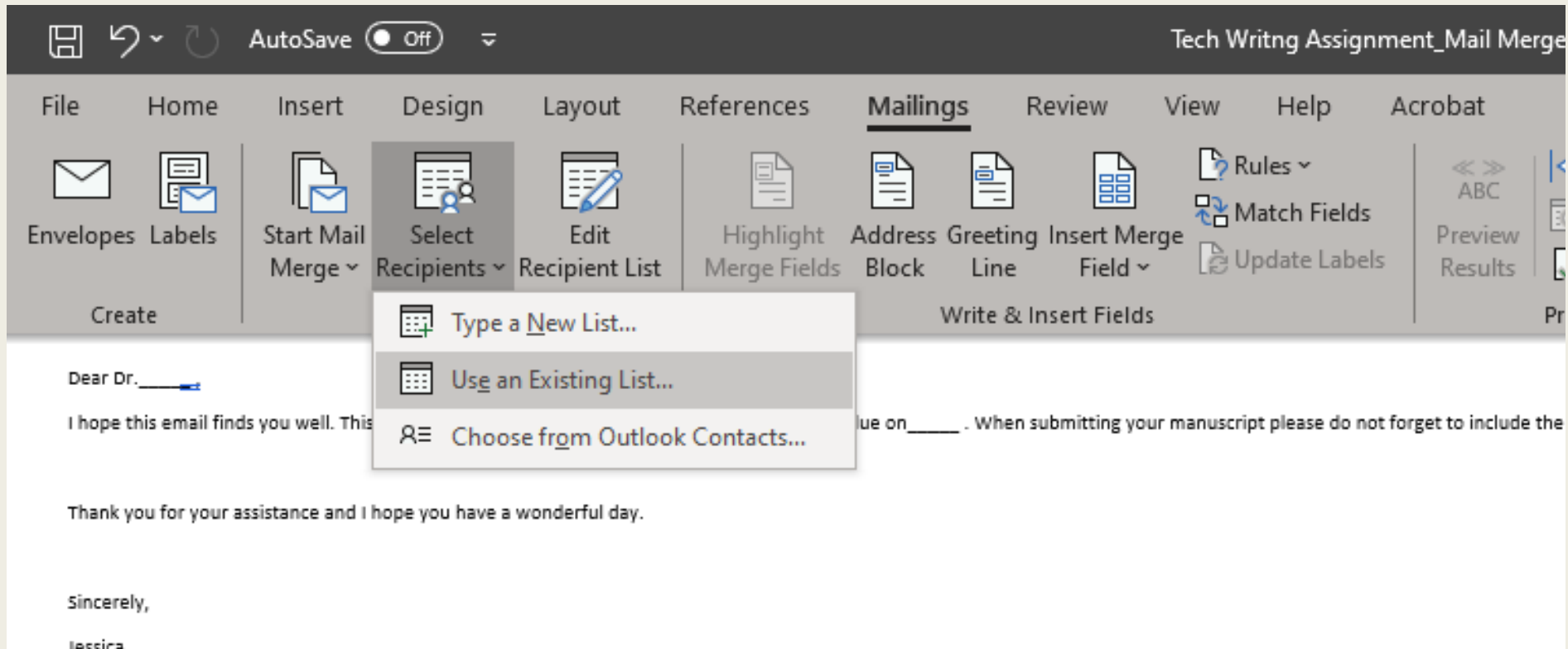
Step 3: Select the Mail Merge option

- ❖ 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**”



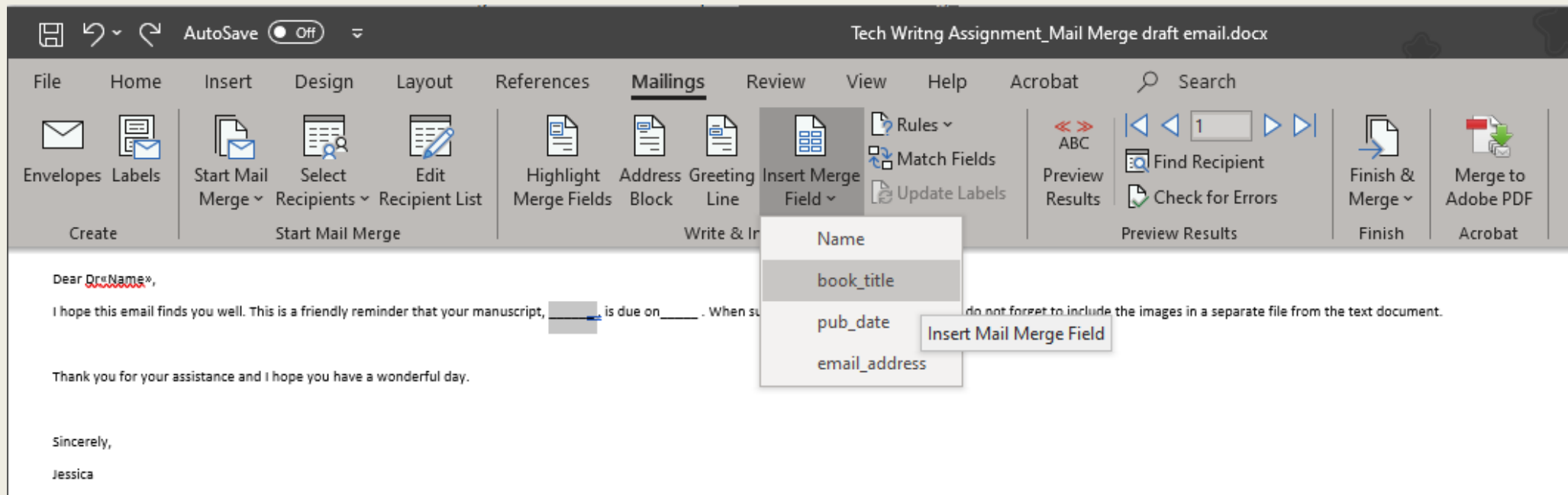
Step 4: Select the Excel file

- ❖ In Word, click on **“Select Recipients”**
 - In the drop-down menu select, **“Use an Existing List...”**



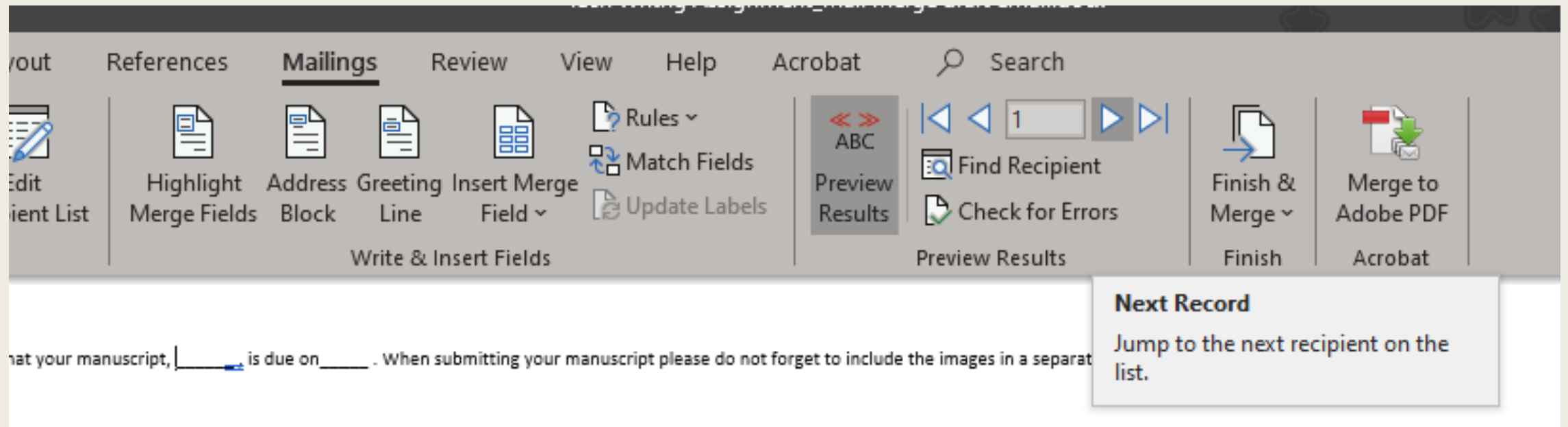
Step 5: Insert the data fields from Excel into the spaces in Word

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



Step 6: Preview Results

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



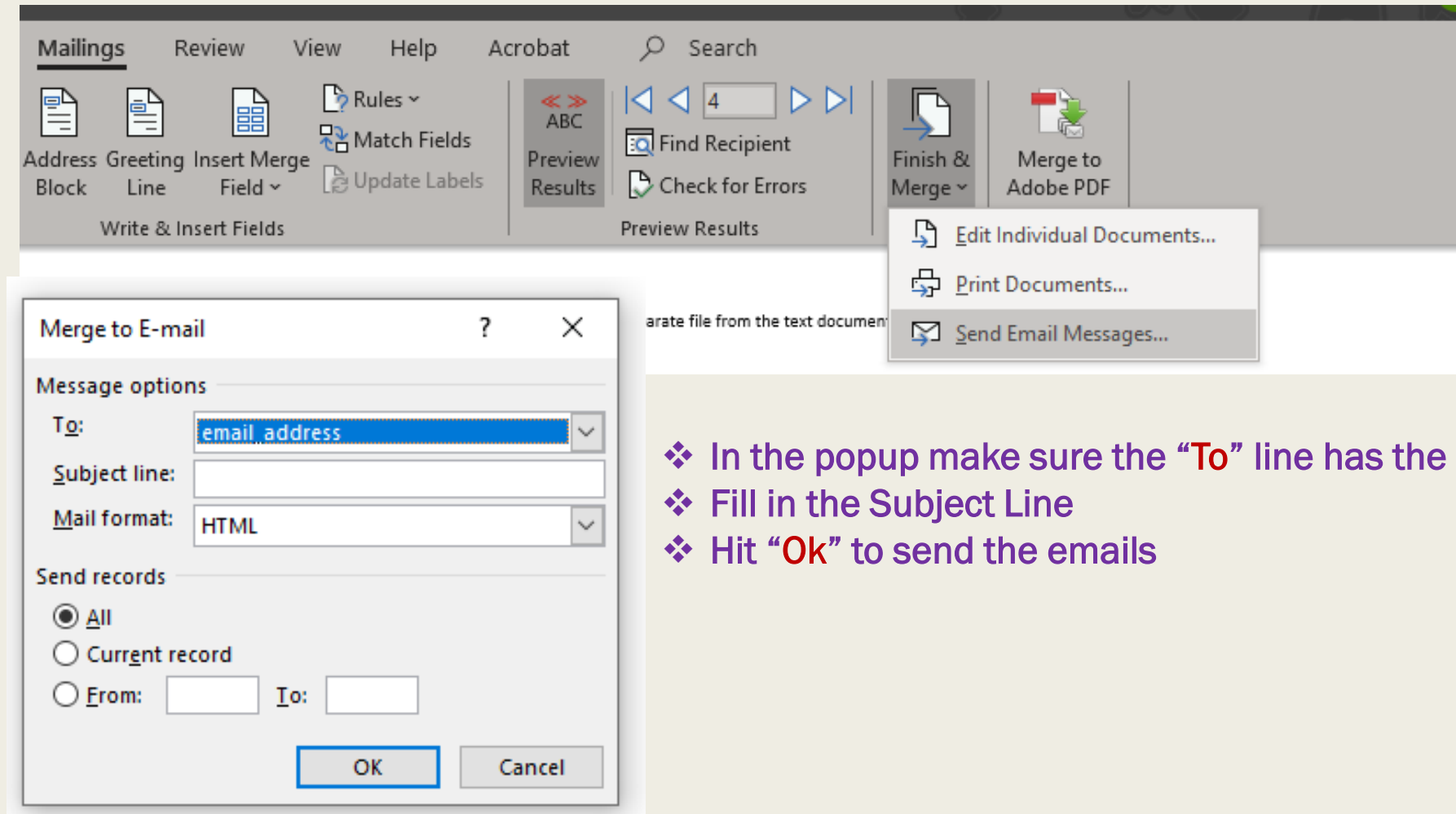
The screenshot shows the Microsoft Word ribbon with the 'Mailings' tab selected. The ribbon includes the following groups and buttons:

- Write & Insert Fields:** Highlight Merge Fields, Address Block, Greeting Line, Insert Merge Field.
- Rules:** Rules, Match Fields, Update Labels.
- Preview Results:** ABC Preview Results (highlighted), Find Recipient, Check for Errors.
- Finish:** Finish & Merge.
- Acrobat:** Merge to Adobe PDF.

A tooltip is displayed over the 'Next Record' button (represented by a right-pointing triangle) in the 'Preview Results' group. The tooltip text reads: "Next Record: Jump to the next recipient on the list." Below the ribbon, a portion of a document is visible, showing the text: "at your manuscript, _____ is due on _____. When submitting your manuscript please do not forget to include the images in a separat

Step 7: Send

- ❖ In Word, click on **“Finish & Merge”**
 - In the drop-down menu, select **“Send Email Messages...”**



The screenshot shows the Microsoft Word interface. The **Mailings** ribbon is active, with the **Finish & Merge** group expanded to show the **Send Email Messages...** option. The **Merge to E-mail** dialog box is open, showing the following options:

- Message options:**
 - To:** email_address
 - Subject line:** (empty)
 - Mail format:** HTML
- Send records:**
 - All
 - Current record
 - From: [] To: []

Buttons for **OK** and **Cancel** are visible at the bottom of the dialog box.

- ❖ In the popup make sure the **“To”** line has the email address
- ❖ Fill in the Subject Line
- ❖ Hit **“Ok”** to send the emails



QUESTION SESSION

