

Mail Merge with MS Office

What is Mail Merge?

Mail Merge is a tool in Word to send e-mail messages to multiple recipients. You can personalize the e-mail messages that each person receives.

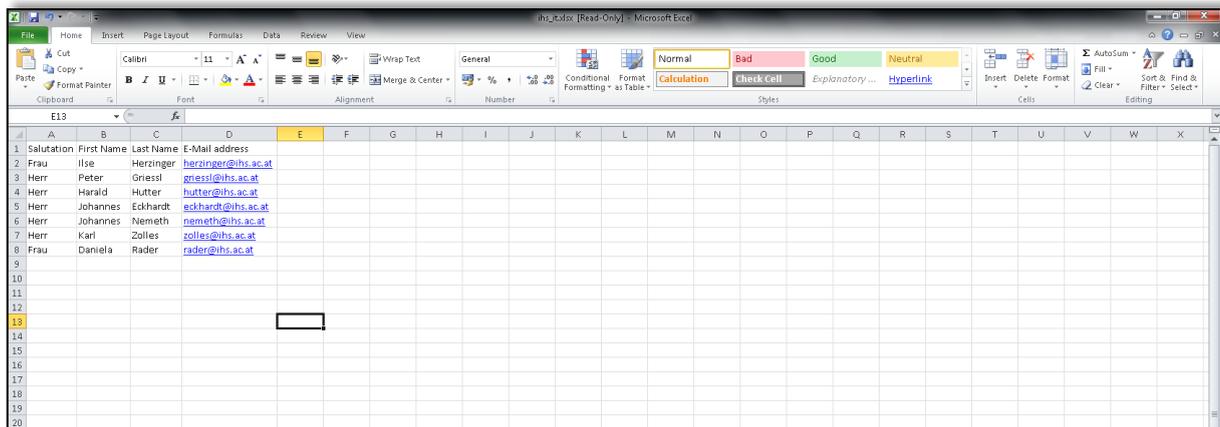
For writing a Mail Merge you have two options:

- start with a new, blank document >> open Word with a New Document
- having an existing document to send to multiple recipients >> open the document you want to send in Word

Preparation (optional but advised)

Excel Data File

In the Excel Data File, you have to create one column for each category. We advise you to create the columns salutation, first name, last name and e-mail address and to label them (like you see in the figure beneath).



The screenshot shows a Microsoft Excel spreadsheet with the following data:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X
1	Salutation	First Name	Last Name	E-Mail address																				
2	Frau	Ilse	Herzinger	herzinger@ihs.ac.at																				
3	Herr	Peter	Griessl	griessl@ihs.ac.at																				
4	Herr	Harald	Hutter	hutter@ihs.ac.at																				
5	Herr	Johannes	Eckhardt	eckhardt@ihs.ac.at																				
6	Herr	Johannes	Nemeth	nemeth@ihs.ac.at																				
7	Herr	Karl	Zolles	zolles@ihs.ac.at																				
8	Frau	Daniela	Rader	rader@ihs.ac.at																				
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Note: you can have a countless number of columns, but be careful not to overfill your Excel Data File.

1. Step by Step Mail Merge Wizard

1.1. Start Mail Merge

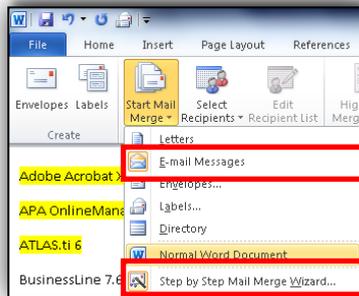
To create a Mail Merge open Word (new document or existing document) and switch to the Mailings ribbon. Click on the *Start Mail Merge* button to expand the submenu.



1.2. E-mail Message / Step by Step Mail Merge Wizard

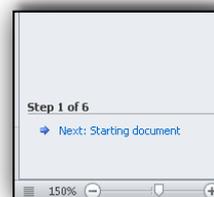
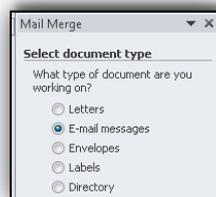
Make sure to select (and thereby activate) *E-Mail Messages*. Then click on *Step by Step Mail Merge Wizard ...*

The Wizard will appear as sidebar to the right of the opened document.



1.3. Starting Document

Skip the first step and click *Next: Starting document*. (We have selected *E-mail Messages* already.)



Note: As you can see in the screenshot above the Mail Merge Wizard works on (a) Letters, (b) E-mail Messages, (c) Envelopes, (d) Labels or (e) Directories.

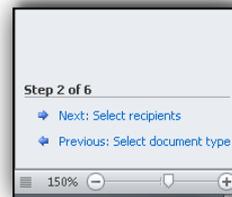
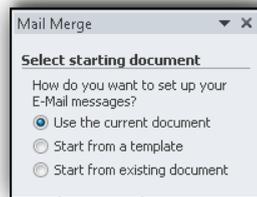
1.4. Select Starting Document

Now choose between the given options:

- a) Use the current document
Start from the currently opened document.
- b) Start from a template
Start from a ready-to-use mail merge template that can be customized to suite your needs.
- c) Start from existing document
Start from an existing mail merge document and make changes to the content or recipients.

Note: For our demonstration the currently active document, option (a), will be used.

Make your choice and then click *Next: Select recipients*.



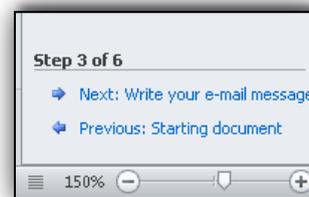
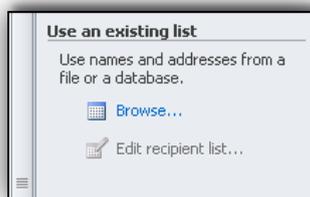
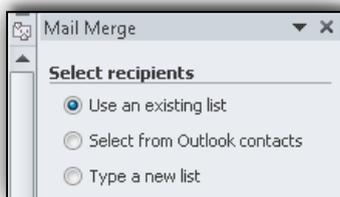
1.5. Select Recipients

Again you have to make your choice between

- a) Use existing list,
- b) Select from Outlook contacts or
- c) Type a new list.

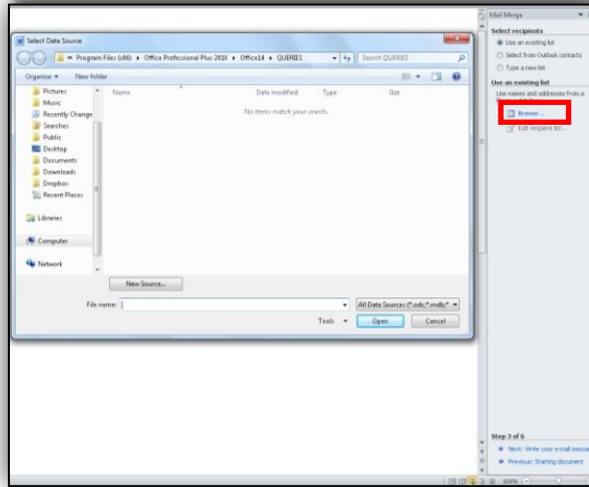
1.5.1. Navigating to the existing list

Note: For our demonstration we choose option (a) and are using an Excel Data file, which contains columns with the previously recommended data types: salutation, first name, last name, e-mail address. Click *Browse* to navigate to your Excel Data file.



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Clicking *Browse* will open Windows Explorer. Navigate to the folder containing the Excel Data file with your addressees.



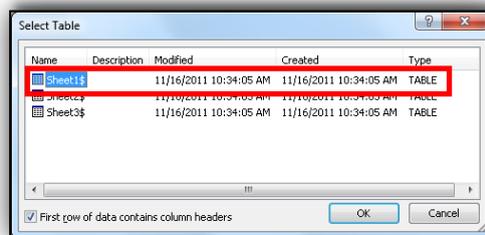
Note: In our demonstration the Excel Data file called test.xlsx can be found in the desktop folder. Confirm your choice by clicking *Open*.



1.5.1.1. Select Table

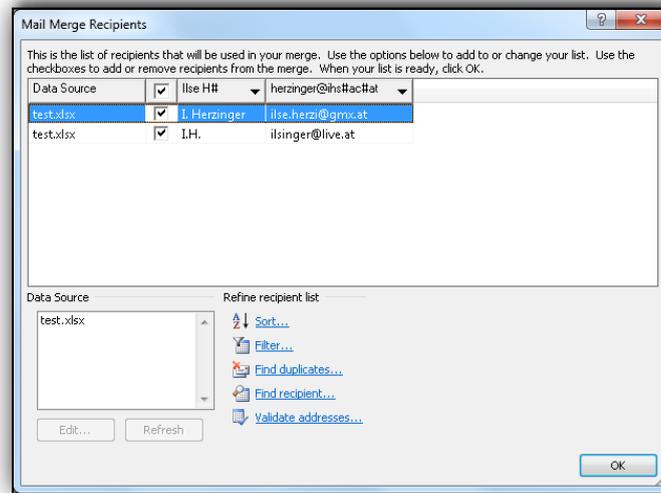
Now the Select Table window will pop up. You have to select the correct Worksheet from your Excel Data file which contains the desired data.

Note: In our example we select Sheet1\$.



1.5.1.2. Mail Merge Recipients

The Mail Merge Recipients window will open and all your e-mail recipients from the Excel Data file will show up. Now you have the chance to check the recipients' list for misspellings and so on. Use the checkboxes to add or remove recipients from the merge. Click OK when your list is ready.

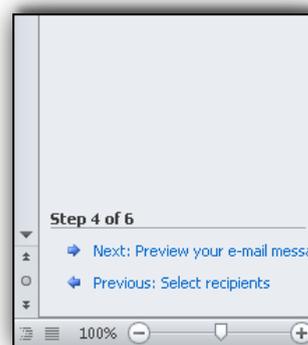
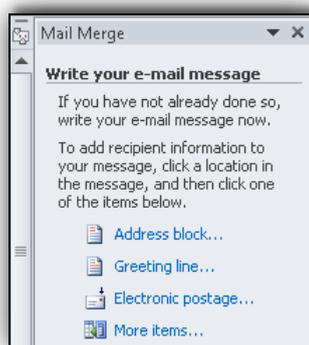


1.6. Write your e-mail message (optional)

Write your e-mail message now unless you have already done so.

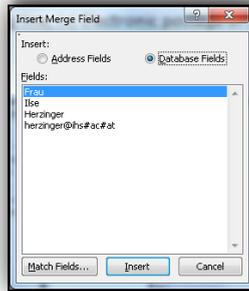
To add recipient information to your message, click a location in the message, and then click one of the items:

- a) Address block,
- b) Greeting line,
- c) Electronic postage or
- d) More items.



More items will open a window where all your columns from the Excel Data file are listed. To insert a merge just double click the field.

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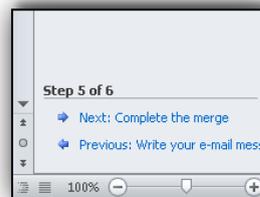


When are done writing your e-mail message, click *Next: Preview your e-mail message*.

Note: If you have already typed the text and are using an existing document skip this step and press *Next: Preview your e-mail message*.

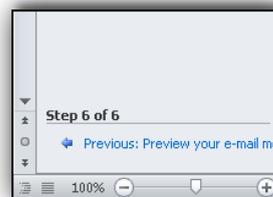
1.7. Preview your e-mail messages

One example of the merged e-mail messages is previewed now. If everything looks okay click *Next: Complete the merge*.



1.8. Complete the merge

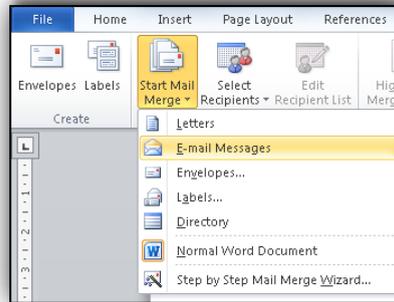
Now the Mail Merge is ready to produce your e-mail messages. To send your Word document click *Electronic Mail*



2. Mail Merge without using the Wizard

2.1. Start Mail Merge

To start a Mail Merge, click the *Start Mail Merge* button on the Mailings ribbon and select *E-mail Messages* in the submenu.



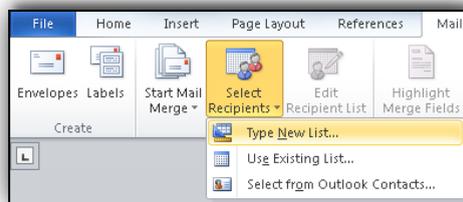
Note: You can also choose the *Step by Step Mail Merge Wizard* for more help with the creation of your document, described in Chapter 1.

2.2. Select Recipients

Click the *Select Recipients* button on the Mailings ribbon to add recipients to the Mail Merge.

You can opt between

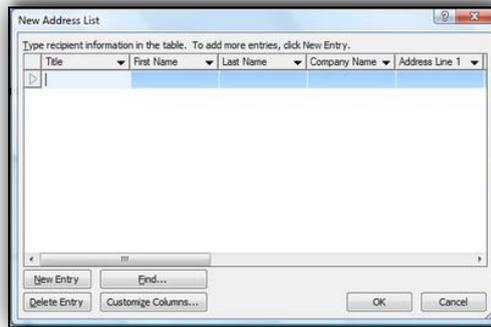
- a) Type New List,
- b) Use Existing List or
- c) Select from Outlook Contacts.



2.2.1. Type New List

If you have chosen *Type New List* enter your contacts in the New Address List window.

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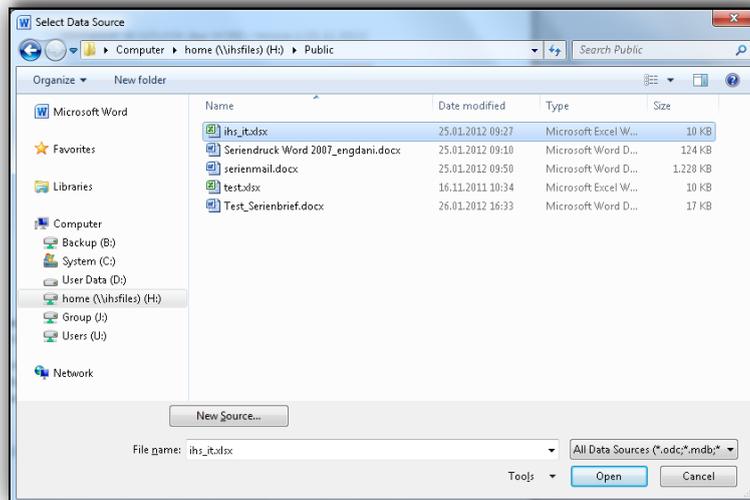
Once you have added all your recipients, click OK on the New Address List window. Name the data source and click Save.

If you want to delete or add field types to your mail merge document you will have to customize your Address List.

You can do that easily by clicking the *Customize Columns* button. The Customize Columns dialog box opens. Then, click Add, Delete or Rename to alter the field types. You can also use the Move Up and Move Down buttons to rearrange the order of fields. When you're done, click OK.

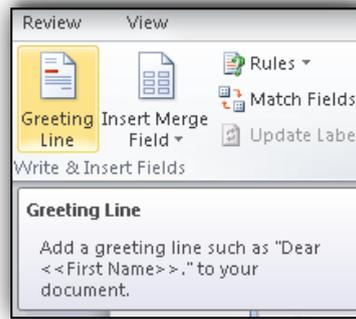
2.2.2. Use Existing List

If you have chosen *Use Existing List* navigate to the Excel Data file and just click *Open*.



2.3. Greeting Line (optional)

You can add a greeting line to your document:



2.4. Insert Merge Field

To insert a merge field for e.g. name, e-mail address etc. into your document, click the *Insert Merge Field* button on the Mailings ribbon.

Insert Merge Field is only available if you have typed a new address list or if you have chosen an existing list.



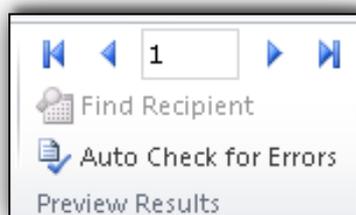
Select the field you would like to insert. The field name appears where you have the cursor located in your document.

You can edit and format the text surrounding the field. Formats applied to the field will carry over to your finished document. You can continue to add fields to your document.

Before you send or print your letters, you should preview them to check for mistakes and typos. In particular, pay attention to spacing and punctuation next to the fields. You will also want to make sure you have the correct fields in the correct places.

2.5. Preview Results

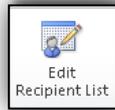
To preview the e-mail messages click *Preview Results* in the Mailings ribbon. Use the arrows to navigate through the letters.



Note: If you have noticed a mistake in the recipients' data for one of your documents you cannot alter this data directly in the merge document. Instead you will need to fix it in the data source.

2.5.1. Edit Recipient List

To do this click *Edit Recipient List* on the Mailings ribbon. A window will open where you can alter the data for any of your recipients.



2.6. Finish & Merge

Having reviewed your documents, you are ready to finalize them by completing the merge.

Click the *Finish & Merge* button on the Mailings ribbon. You can opt

- a) to Edit Individual Documents,
- b) to Print Documents or
- c) to Send E-mail Messages.

