

# SENDING E-MAILS WITH MAIL MERGE

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You can use Mail Merge for Word and Outlook to create a brochure or newsletter and send it by e-mail to your Outlook contact list or to another address list, created in Excel or in Access. You can customise each message, for instance by inserting a different greeting line introduction for each recipient.

With Mail Merge, every e-mail is a separate message which is sent to a single recipient, a personalised mail as it were. This is not the same as sending out an e-mail message to a group of recipients or hiding the recipients in the BCC line of your message.

This manual shows you step by step how to do this, and how to make a selection in a list of recipients so that your e-mail message is only sent to the persons you have chosen.

The Mail Merge process consists of the following steps:

- 1. Create your e-mail message**

The main document contains the text that is identical for every e-mail message, such as the message text or signature.

- 2. Connect the document of your e-mail message to your address list**

Your address list is the data source that is used for the merge operation. This document contains the e-mail addresses to which the messages will be sent.

- 3. Refine the list of recipients or items**

Word generates a message for each of the recipients in your address list. If you want to generate messages only for a subset of recipients in your address list, you can choose which addresses (or records) you want to include.

- 4. Add placeholders, called mail merge fields, to your e-mail message**

When you perform the mail merge, the data from your address list are inserted into the mail merge fields.

- 5. Preview and complete the merge**

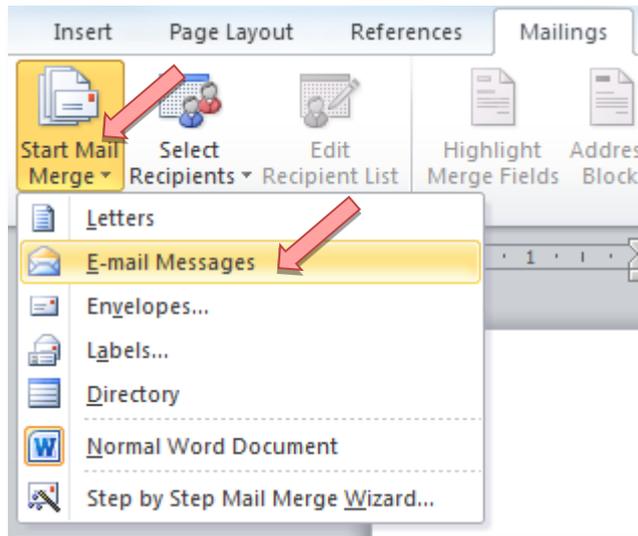
You can preview each separate message before you send off the whole set.

To perform a mail merge, you use commands on the **Mailings** tab.

## 1. CREATE THE MAIN DOCUMENT OF YOUR E-MAIL MESSAGE

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1. Start Word.
2. Open the document with the text you want to send or type the text of your message into the Word document.
3. On the **Mailings** tab, in the **Start Mail Merge** group, click **Start Mail Merge**.
4. Click **E-mail Messages**.



The display will automatically change to Web Layout.

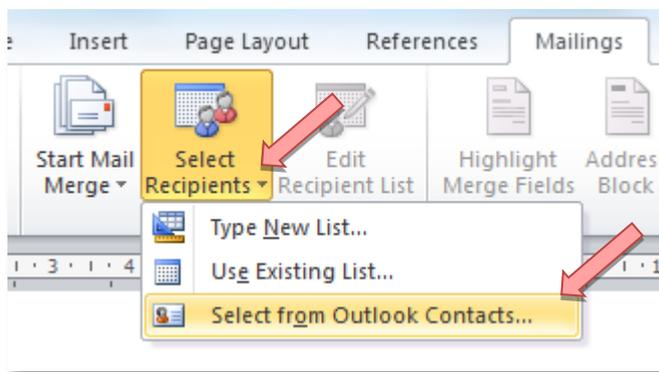
## 2. CONNECT THE E-MAIL MESSAGE DOCUMENT TO YOUR ADDRESS LIST

To merge information from your main document with your e-mail message, you have to connect the document to your address list, which is also called 'data source' or 'data file'. If you do not yet have a data file, you can create one during the mail merge process.

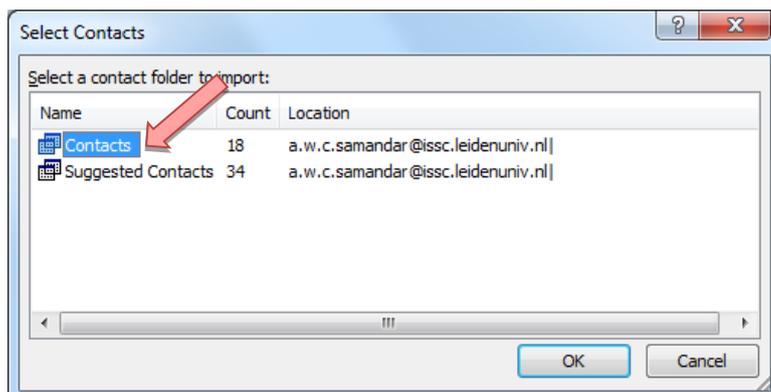
Note: Check that your data file has a column that contains the e-mail addresses and that the heading of this column is called E-mail Address. You will need this column later on in the process.

### Selecting addresses

1. On the **Mailings** tab, in the **Start Mail Merge** group, click **Select Recipients**.



2. Do one of the following:
  - **Use Outlook contacts**  
If you want to use your Contacts list in Microsoft Office Outlook, click **Select from Outlook Contacts**.
  - **Use an existing data source file**  
If you want to use a Microsoft Excel worksheet, a Microsoft Access database or another type of data file, click **Use Existing List**, and then locate the file in the **Select Data Source** dialogue box.  
For Excel you can select data from any worksheet or named range within a workbook. For Access, you can select data from any table or query that is defined in the database.
3. If you work with Outlook Contacts: Select a contact folder in the **Select Contacts** dialogue box. Click **OK**.



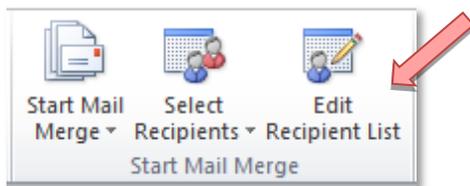
### 3. REFINE THE LIST OF RECIPIENTS OR ITEMS

When you connect your message to a certain data file, you might not want to merge information from all the persons in that data file into your main document.

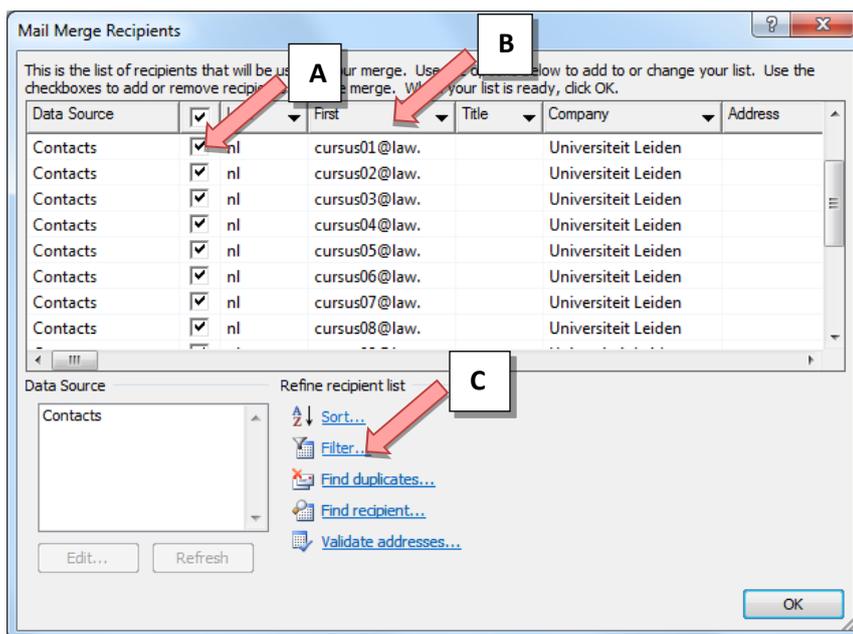
If you do plan to use the entire list, you can skip ahead to Section 4, *Add placeholders, called merge fields, to the document.*

To narrow down the list of recipients or to use a subset of the items in your data file, do the following:

1. Go to the **Mailings** tab, and in the **Start Mail Merge** group, click **Edit Recipients List**.



The **Mail Merge Recipients** dialogue box will appear:



2. In the **Mail Merge Recipients** dialogue box, do any of the following:

- **A) Select individual records**

This method is most useful if your list is short. Select the check boxes next to the recipients you want to include, and clear the check boxes next to the recipients you want to exclude. You can select all the recipients by selecting the check box in the header row.

- **B) Sort records**

Click the column heading of the item that you want to sort your data by. The list sorts in ascending alphabetical order (from A to Z). Click the column heading again to sort the list in descending alphabetical (from Z to A).

- **C) Filter records**

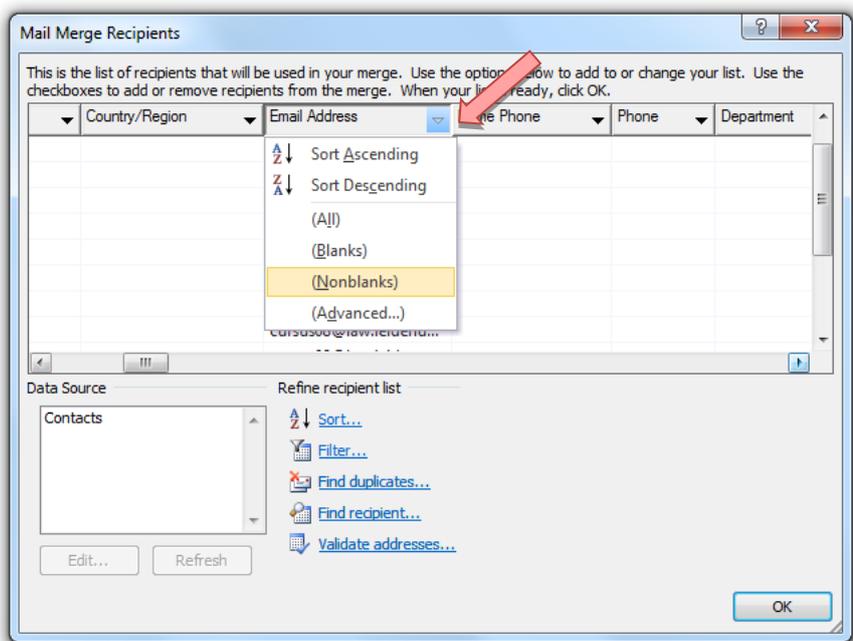
This is useful if the list contains records that you know you don't want to see or include in the merge operation. Once you filter the list, you can use the check boxes to include and exclude records.

To filter records, do the following:

1. Under **Refine recipient list**, click **Filter**.
2. On the **Filter Records** tab of the **Filter and Sort** dialogue box, choose the criteria you want to use for the filter.
3. To refine the filter further, click **AND** or **OR**, and then specify more criteria.

For example, to generate e-mail messages only for businesses in Leiden, you would filter on records whose **City** field contains **Leiden** and whose **Company** field is not blank. If you use **OR** instead of **AND** in this filter, your mail merge will include all Leiden addresses as well as all addresses that include a company name, regardless of city.

TIP: In the menu under the **Email Address** heading, select **(Nonblanks)**; in this way, you will only be selecting records that contain an e-mail address.



## 4. ADD PLACEHOLDERS, CALLED MAIL MERGE FIELDS, TO THE DOCUMENT

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After you connect the main document of your e-mail to your address list, you can add placeholders that indicate where the unique information will appear in each message.

These placeholders, such as an e-mail address or a greeting line, are called 'mail merge fields'. The fields in Word correspond to the column headings you selected in the data file.

### 4.1 What happens when you merge?

When you merge, information from the first row in the data file replaces the fields in your main document to create the first merged document. Information from the second row in the data file replaces the fields to create the second merged document and so on.

	A	B	C
1	Naam	Achternaam	Adres
2	Karin	Bakker	Van Ostadelaan 64
3	Karolien	Janssen	Langestraat 387
4			
5			
6			
7			
8			
9			

The diagram shows a document template with the following text:

Karin Bakker  
Van Ostadelaan 64

Beste Karin,

### 4.2 Working with fields: examples

You can add any column heading from your data file to the main document as a field. This gives you more flexibility when you design standard letters or other merged documents such as the set of e-mails in this document.

For example: Suppose you are creating a letter to notify local businesses that they have been selected for inclusion in your annual city guide. If your data file contains a Company column with the name of each business that you want to contact, you can insert the «Company» field instead of typing the name of each individual company.

You can combine fields and separate them by punctuation marks. For example, to create an address, you can set up the fields in your main document like this:

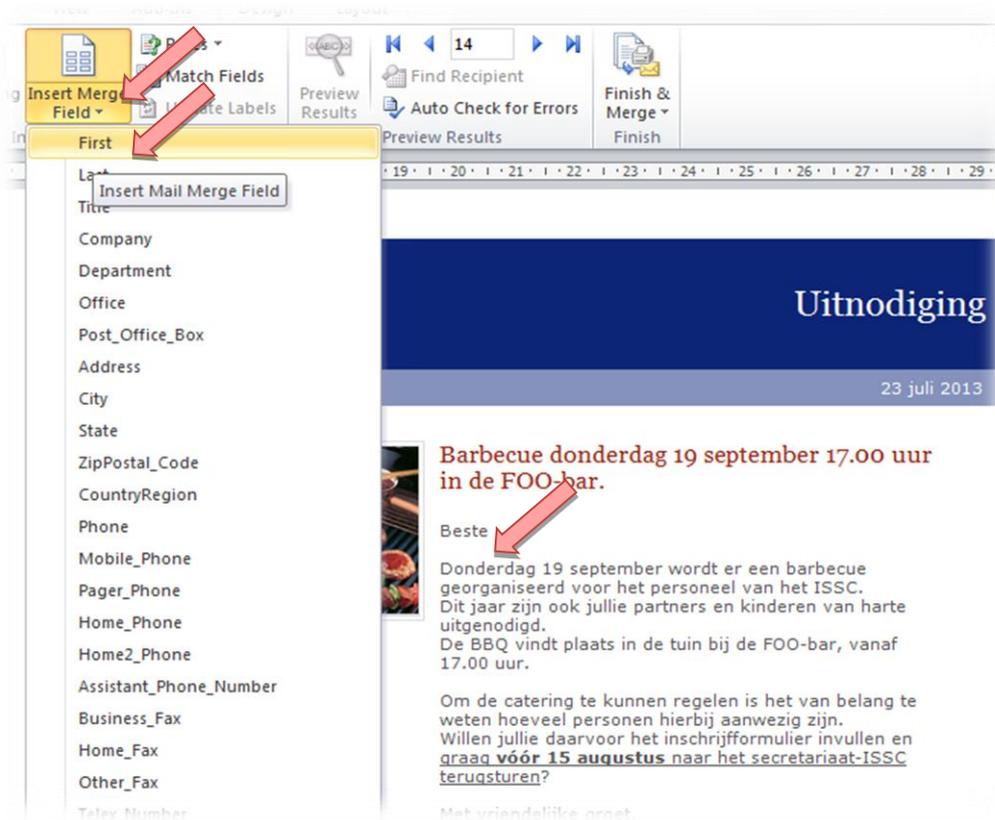
«First Name» «Last Name»

«Street»

«Postal code» «City»

### 4.3 Add the placeholders, or fields

2. Click where you want to insert the field.
3. Click on the text of the **Insert Merge Field** button in the **Write & Insert Fields** group on the **Mailings** tab.
4. Click the field name that you want to insert.



### 4.4 Format the merged data

Database and spreadsheet programmes, such as Microsoft Access and Microsoft Excel, store the information that you type in cells as raw data. Formatting that you apply in Access or Excel, such as fonts and colours, is not stored with the raw data. When you merge information from a data file into a Word document, you are merging the raw data without the applied formatting.

#### Add formatting

1. Select the mail merge field. Make sure that the selection includes the chevrons (« ») that surround the field.
2. On the **Home** tab in the **Font** group, apply the formatting that you want. Or click the Font dialogue box launcher for more options.

## 5. PREVIEW AND COMPLETE THE MERGE

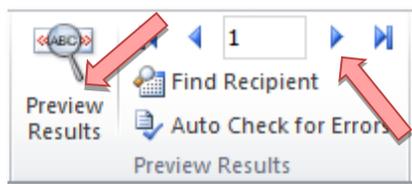
After you add fields to your main document with the e-mail message, you are ready to preview the merge results. Once you are satisfied with the preview, you can complete the merge.

### 5.1 Preview the merge

You can preview your e-mail messages and make changes before you actually complete the merge.



To preview, do any of the following in the **Preview Results** group of the **Mailings** tab:



- Click **Preview Results**.
- Page through each merged document by using the **Next Record** and **Previous Record** buttons in the **Preview Results** group.
- Preview a specific document by clicking **Find Recipient**.

### 5.2 Complete the merge

If you are planning to use the main document of the e-mail again later, you can save it before you send out the e-mails.

#### 5.2.1 Save the main document of the e-mail

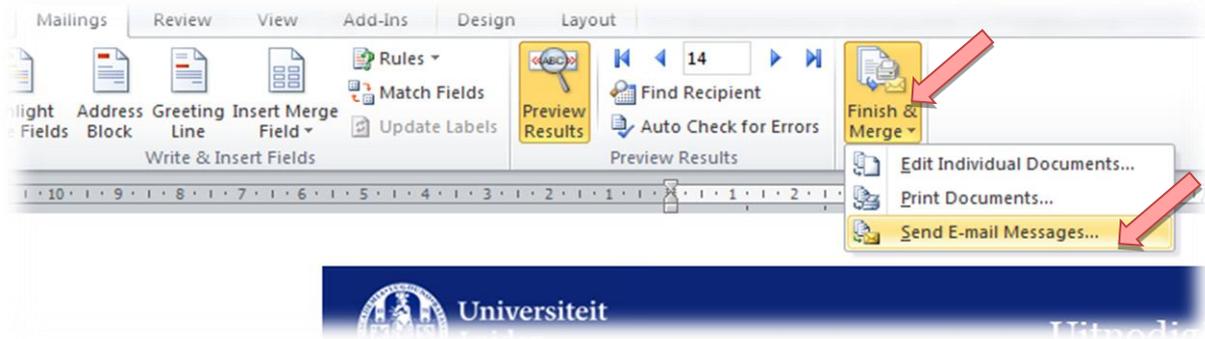
Keep in mind that the email messages you send are not the same as the main document of the e-mail. We advise you to also save the main document of the e-mail, so that you can use again later for another mail merge operation.

When you save the main document of the e-mail, you are also saving the connection with the data file. The next time you open the main document of the e-mail, you will be asked whether you again want to merge the information from the data file in the main document of the e-mail.

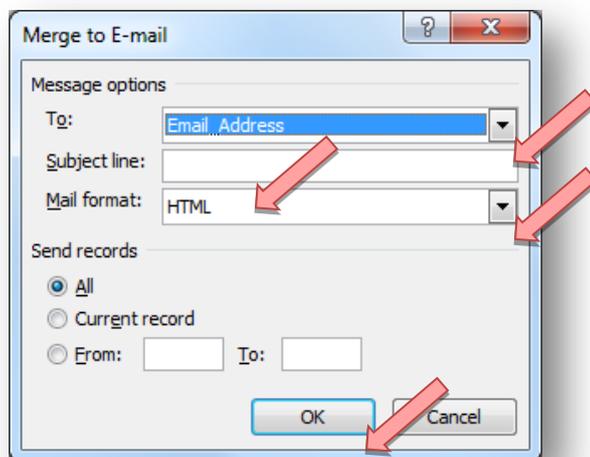
- If you click **Yes**, the document will be opened with the information of the first merged record.
- If you click **No**, the main document will be disconnected from the e-mail. The main document of the e-mail will be a regular Word document and the fields will be replaced by the unique information from the first record.

## 5.2.2 Send the e-mails

1. On the **Mailings** Tab, click **Finish & Merge**, and then click **Send E-mail messages**.



2. In the **To** field, select the name of the field where the e-mail address of the recipient is saved.



3. In the **Subject** field type a subject for your message. This will be the subject of all the e-mail messages you send.
4. In the **Mail Format** field, click **HTML** or **Unformatted Text** to send the document as the message text of the e-mail message or click Attachment to send the document as an attachment.  
Note: If you send the document as an e-mail message with **Unformatted Text**, your e-mail message will contain no formatting or images.
5. Click **OK**.

The e-mail messages are sent immediately. Check in Outlook, under Sent Items, to see whether this was indeed the case.