

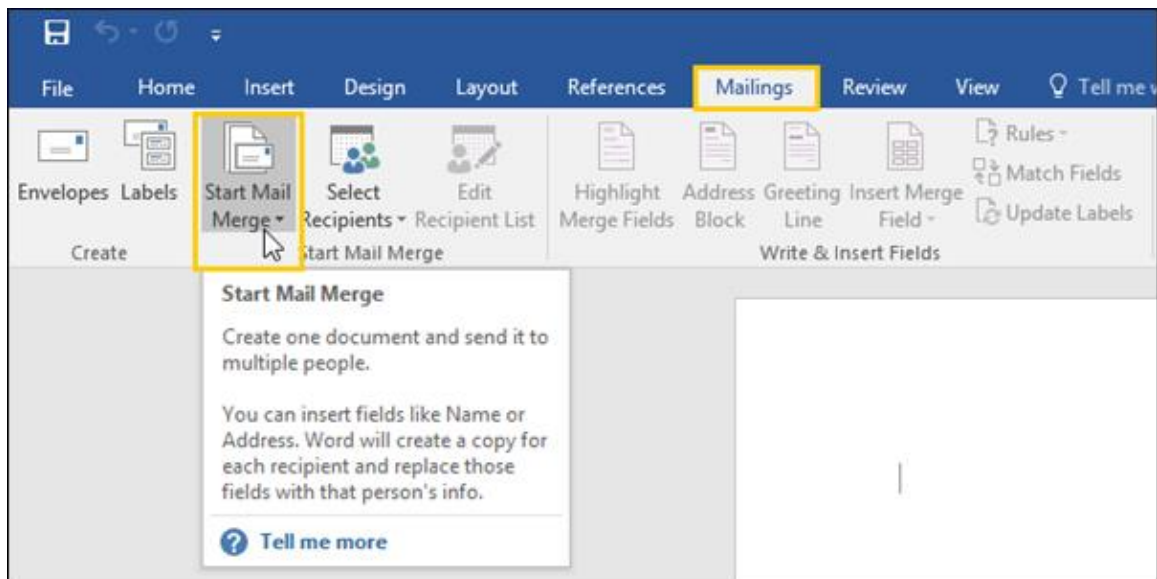
CREATING A MAIL MERGE DOCUMENT

The Mail Merge function provides the ability to create a personalized document that you will send to multiple recipients. To complete all the steps of the Mail Merge process, you will need both Microsoft Word and Microsoft Outlook 2016.

Creating a Mail Merge

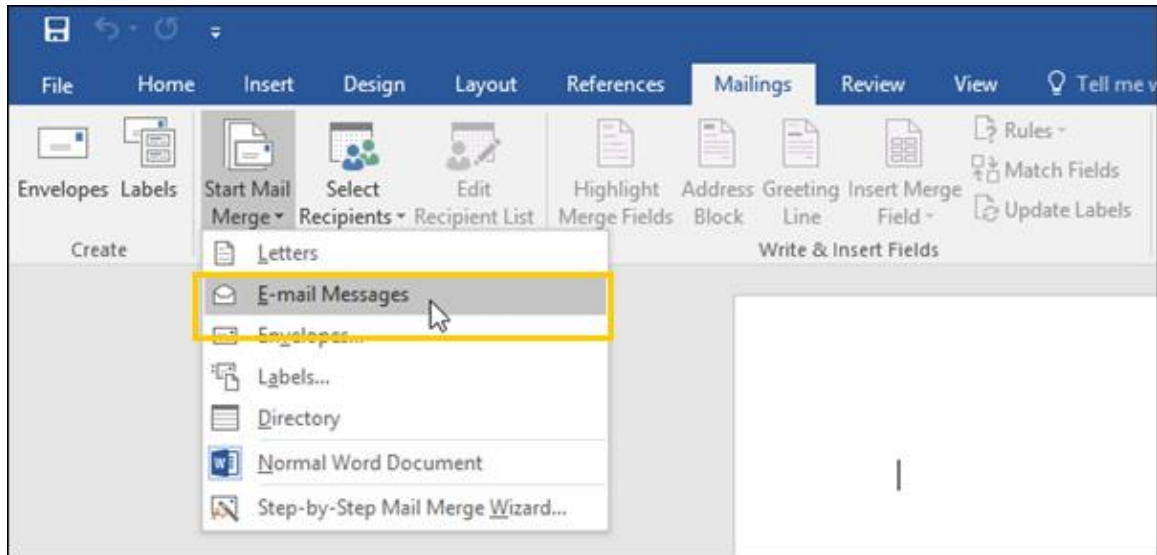
Complete the following steps to create a Mail Merge.

1. Open Microsoft Word.
2. Open a blank document.
3. Select the **Mailings** tab at the top of the screen. The *Mailings* toolbar displays

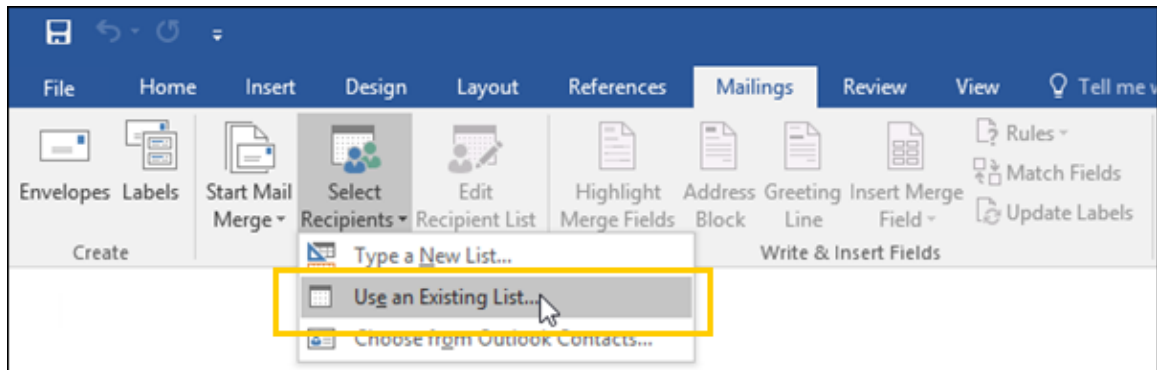


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4. Select the **Start Mail Merge** button, located in the *Mailings* toolbar. A drop-down menu displays. |



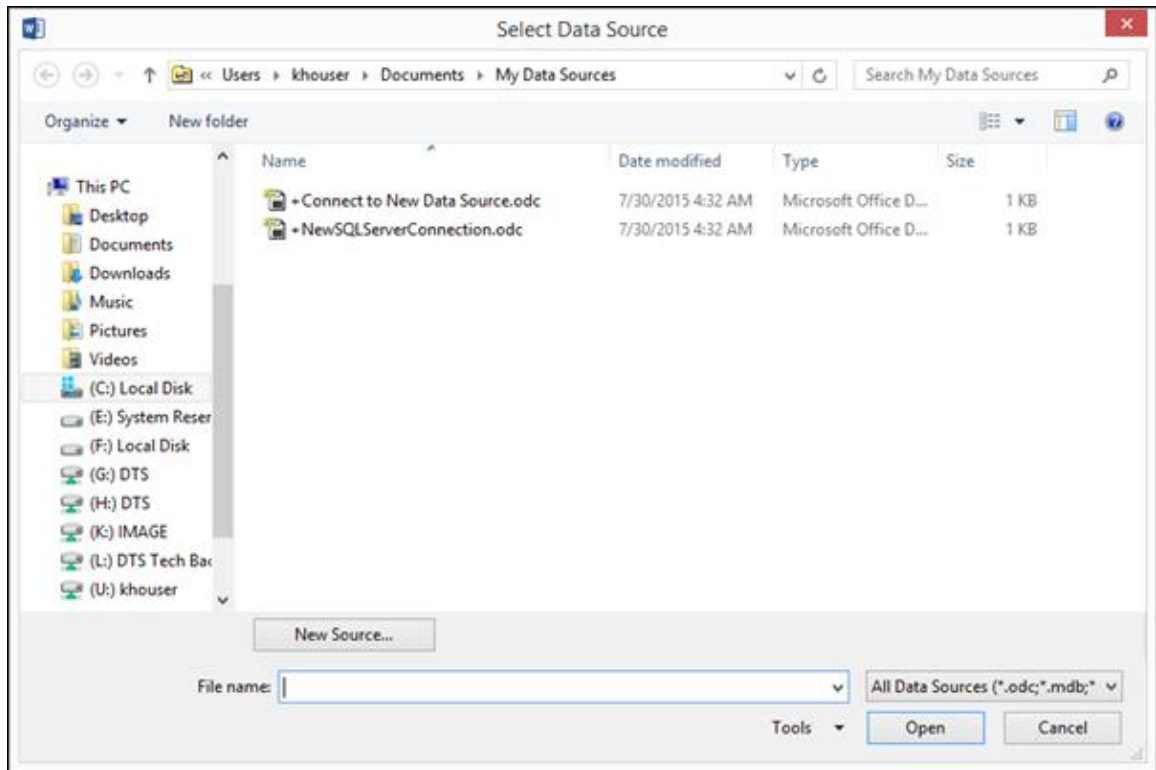
5. From the drop-down menu, select an option. Each option will be similar in process, but will contain individual steps that are specific to that process. For this example, **E-mail Messages** will be selected.
6. Next, select the **Select Recipients** button. A drop-down menu displays.



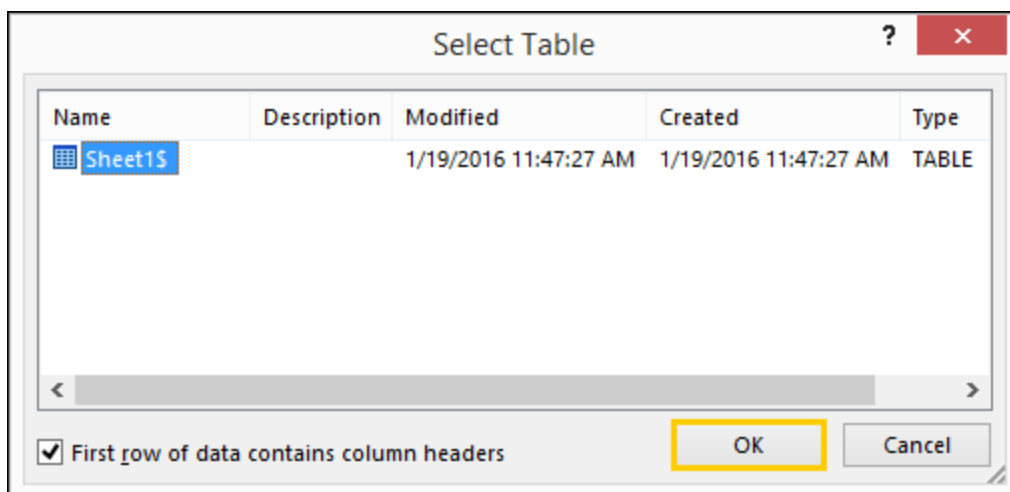
7. There are three (3) ways to select the recipients for your Mail Merge email. You can manually **Type a New List**, **Use an Existing List**, or **Choose from Outlook Contacts**. The recommended Mail Merge method is to use an Excel spreadsheet. This provides better control of the address information and how that information appears in your email. Create an Excel spreadsheet of the address data before you begin the Mail Merge process.

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Select **Use an Existing List...** from the drop-down menu. A *Browse* screen displays.



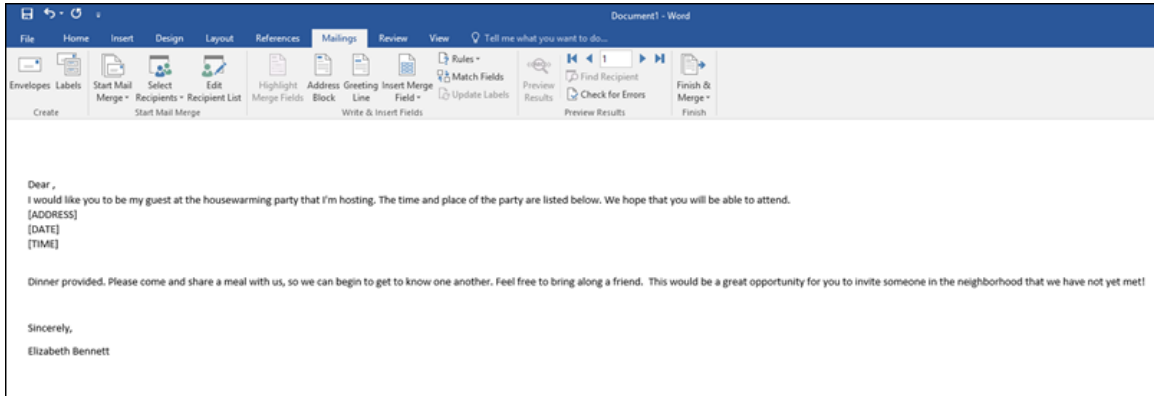
8. Navigate to the location of your Excel spreadsheet and select the file. Then, select the **Open** button. The *Select Table* screen displays.



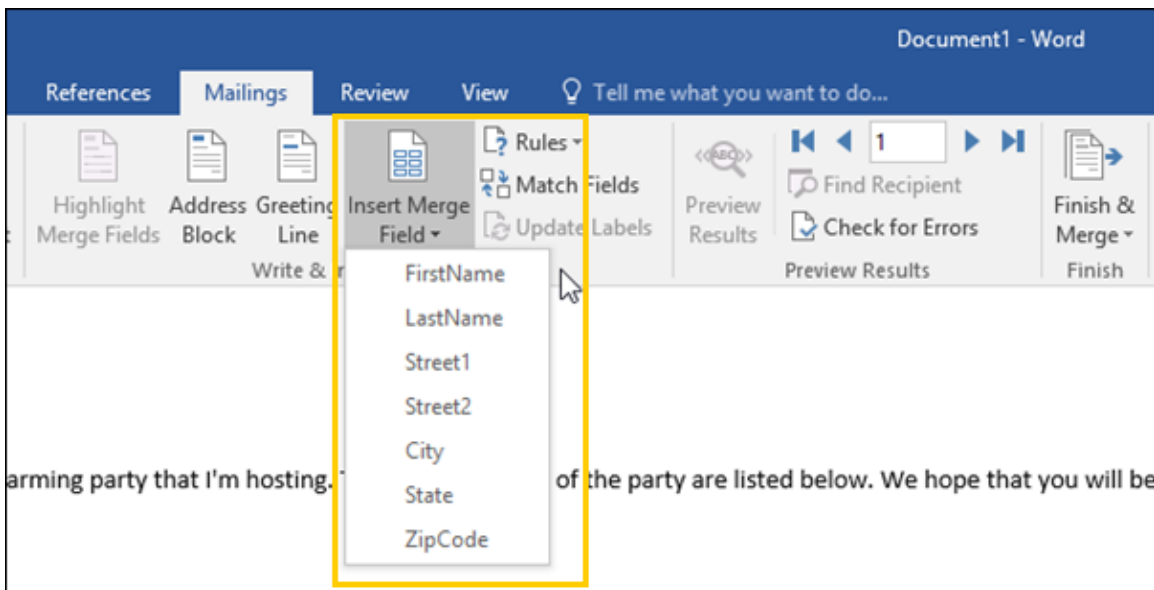
9. The *Select Table* screen displays the tab name that contains data in the Excel spreadsheet you selected.

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10. Select the **First row of data contains column headers** checkbox to tell Excel to skip the first row of the spreadsheet because it contains column names, if applicable.
11. Select the **OK** button. The *Select Table* screen closes.
12. In the blank Word document that is displayed, begin typing the email you want to send. If you have already composed this email, you can copy and paste it from another source.

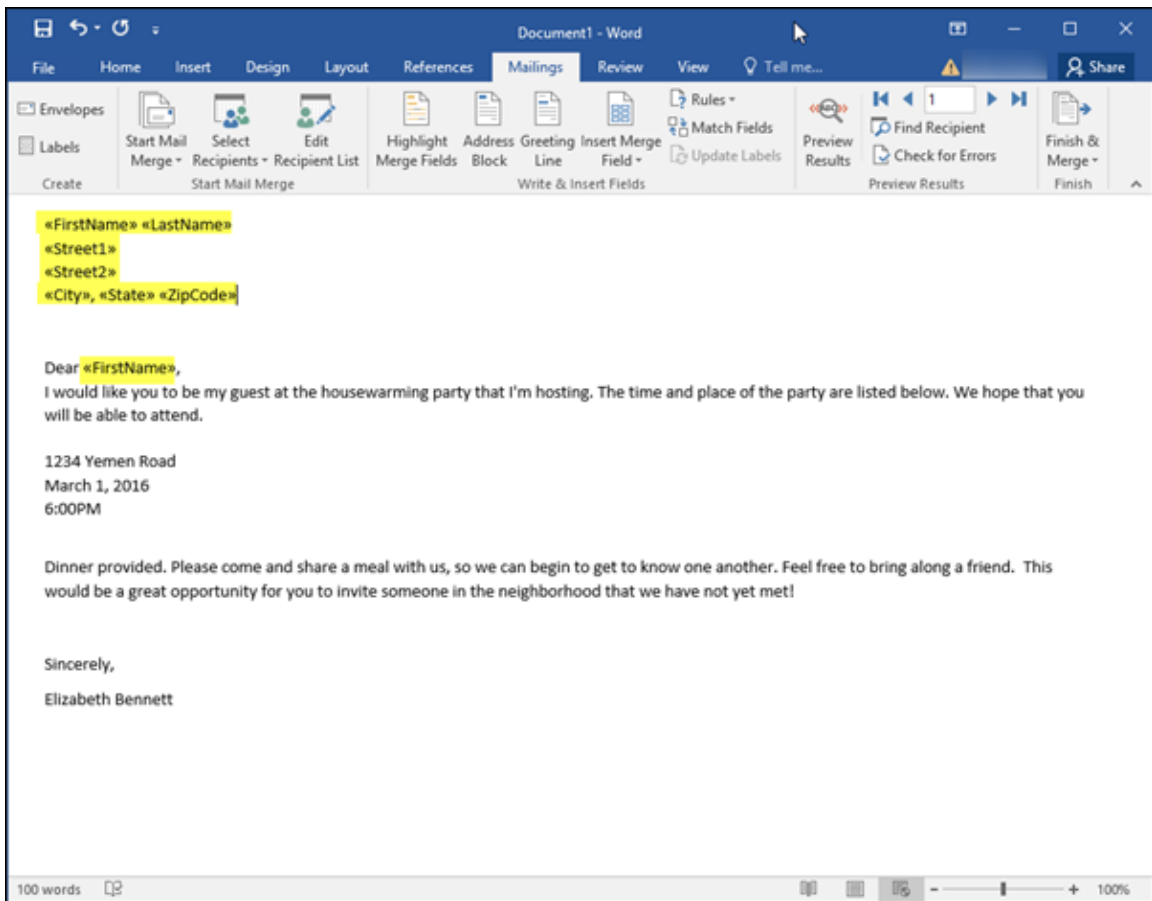


13. After you have composed the email, you will begin to insert the Mail Merge fields. This will map the data within your Excel spreadsheet to a location within your email.
14. Select the **Mailings** tab, located in the *Word* toolbar, if it is not still selected.
15. Next, place your cursor in the location that you want to insert the first Mail Merge field.
16. Select the **Insert Merge Field** option. A drop-down menu displays.



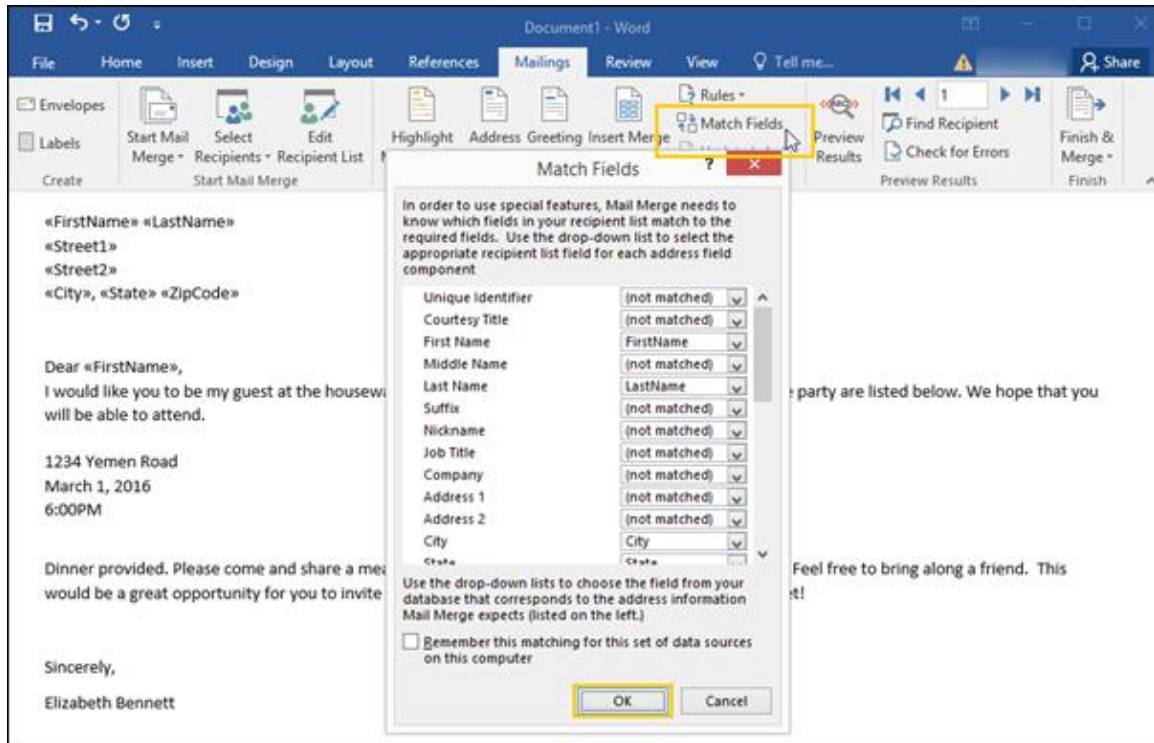
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17. The **Insert Merge Field** drop-down menu displays the names of your Excel spreadsheet column headings. If your spreadsheet does not contain column headings, you will want to add them, and then re-import the Excel spreadsheet before continuing.
18. Select the column name that you want to insert in the location where you previously placed your cursor in the Word document. The *Mail Merge* field is inserted.

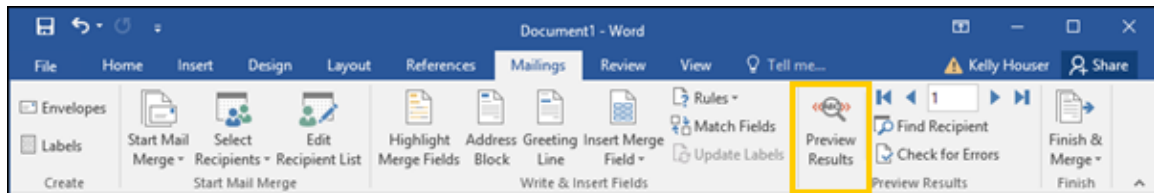


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19. Next, select the **Match Fields** button, located in the *Write & Insert Fields* area of the Word toolbar. The *Match Fields* screen displays.

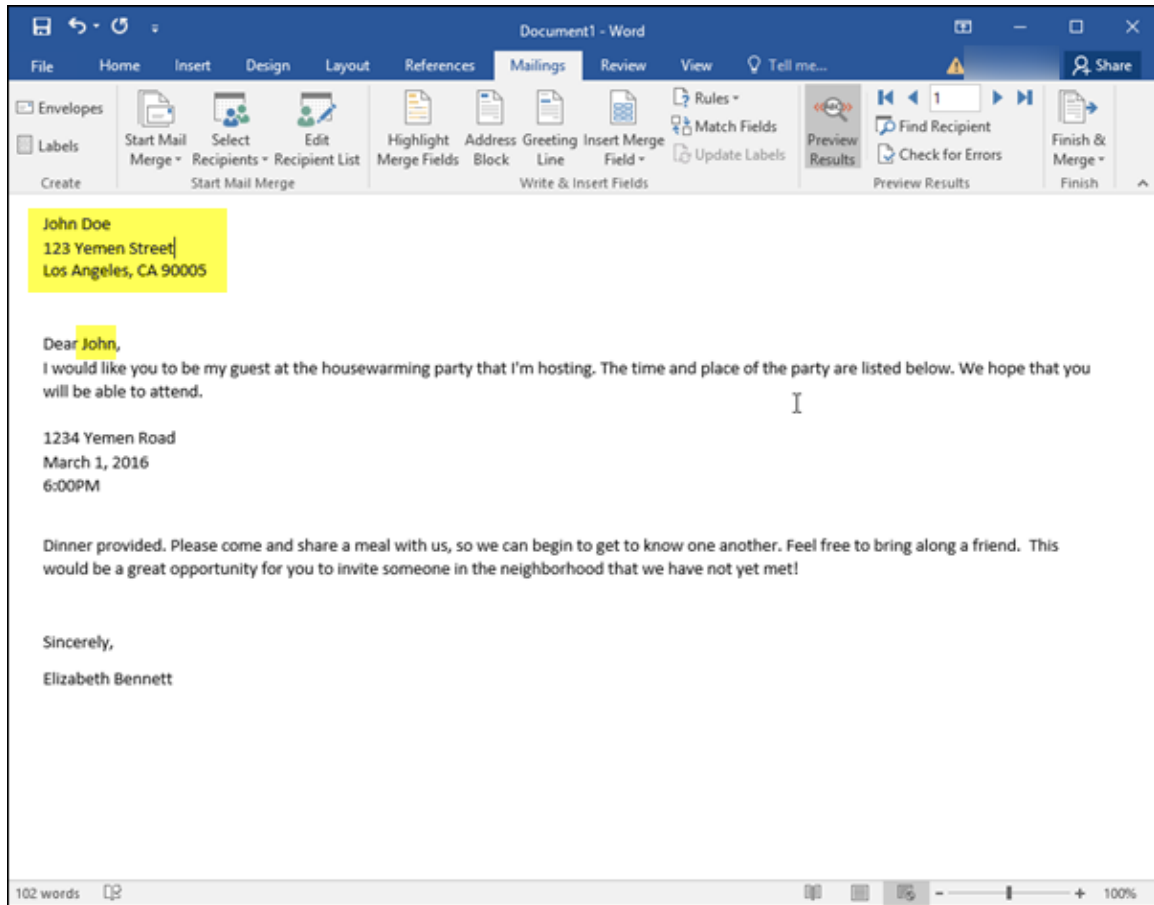


20. Scroll through the fields listed on the *Match Fields* screen. Verify that the spreadsheet headings have been correctly correlated to the *Mail Merge* fields. When you have completed the verification of the field matches, select the **OK** button.
21. You are now ready to preview the Mail Merge. You do not have to preview the Mail Merge, but it is a good idea to make certain that the Mail Merge has worked successfully. Select the **Preview Results** option in the Word toolbar.

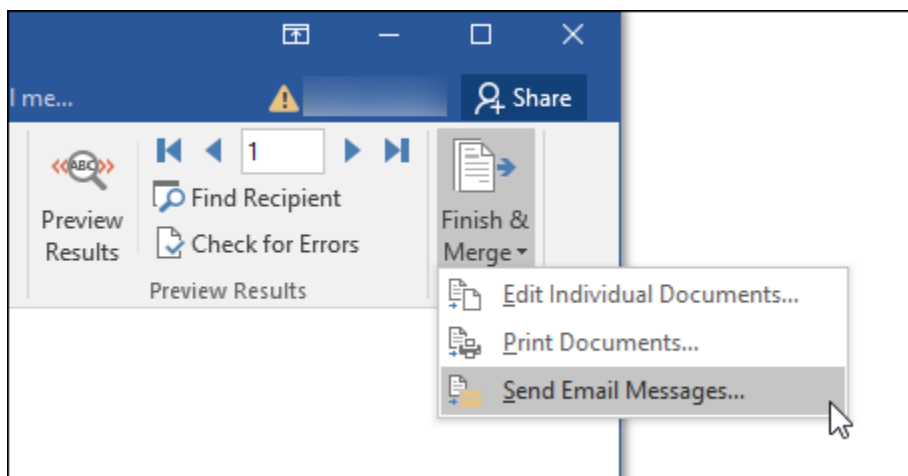


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22. Word displays a preview of how the Mail Merged documents will appear. The Mail Merge fields have been converted to actual data.



23. If the Mail Merge preview look accurate, then you are now ready to complete the Mail Merge process. Select the **Finish & Merge** option from the *Word* toolbar. A drop-down menu displays.



24. From the drop-down menu, select the way in which you would like to send your messages.

- **Edit Individual Documents:** Select this item to edit each individual letter within the Mail Merge.
- **Print Documents:** Select this item to send the Mail Merge documents to the printer.
- **Send Email Messages...:** Select this item to send the letter via email.

For this example, **Send Email Messages...** will be selected. The *Merge to E-mail* screen displays

25. The *Merge to E-mail* screen provides the ability to designate to whom the emails will be sent. Your Excel spreadsheet should contain a column containing the email address of each recipient. In the example below, the **To:** field is set to **Email**, because that is the header name in the Excel spreadsheet. After selecting the appropriate Excel spreadsheet column name, enter a **Subject line** in the corresponding field. Then, you will need to select a **Mail format**. **HTML** is selected by default. You may leave that option as-is or you may select a new option from the corresponding drop-down menu.

The *Send records* section provides the ability to select which documents in your Mail Merge to send via email. You can select **All**, to email all of the documents in the Mail Merge. You can select **Current record** which will send only the document currently displayed on your screen. You can select the **From:** and **To:** option to designate a page range to be emailed.

26. Select the options that are appropriate for your needs, and then select the **OK** button.

The documents should begin being emailed from Microsoft Outlook. The Mail Merge process is complete. Repeat these steps to create additional Mail Merges.