

Creating an Email Merge

Mail Merge to email combines the personalization of form letters with the easy delivery of email. For example, advisors may send a personalized email to all of their advisees containing information regarding the date of their next visit. This email merge will only work on those computers set up with Microsoft Outlook.

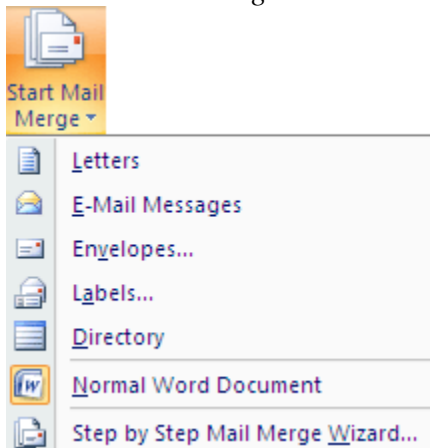
These instructions assume that you have an understanding of the Word *Mail Merge* process. If you need more information, refer to *Mail Merge: An Overview*.

The starting document contains the text for the email message with field references to the recipient list.

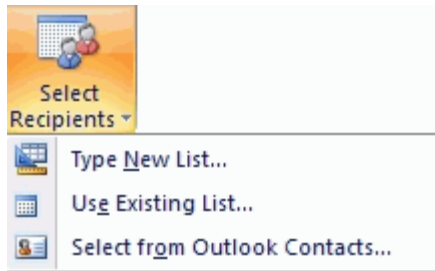
1. Open a blank Word document
2. From the *Mailings* tab, in the *Start Mail Merge* group, click **START MAIL MERGE**



The *Start Mail Merge* sub-menu appears.

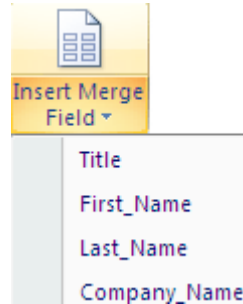


3. Select *E-mail Messages*
4. In the *Start Mail Merge* group, click **SELECT RECIPIENTS** » select *Use Existing List...*

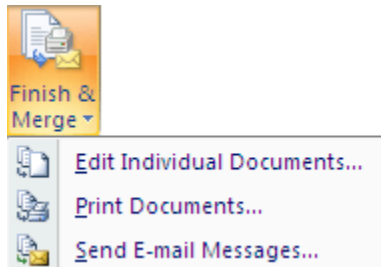


The *Select Data Source* dialog box appears.

5. From the *Look in* pull-down list, locate and select the file you will use for your list
6. Click **OPEN**
7. To select the recipient(s) you want to include in your mail merge,
 - a. In the *Start Mail Merge* group, click **EDIT RECIPIENT LIST**
 - b. Select the recipients
NOTE: A recipient is selected if the checkbox beside their entry is selected.
 - c. Click **OK**
NOTE: To edit the recipient information, refer to Working with the Recipients List.
8. If you have not already done so, in your document, type your message
9. To insert merge fields,
 - a. Position the insertion point at the proper place in your document
 - b. In the *Write & Insert Fields* group, click **INSERT MERGE FIELD** » select the desired field



10. When finished, click **PREVIEW RESULTS**
A preview of your first recipient appears.
NOTE: For more information on editing the recipient information, refer to Working with the Recipients List.
11. OPTIONAL: To preview your document with other recipients' information, in the *Preview Results* section, click the arrows
12. Click **FINISH & MERGE** » select *Send E-mail Messages...*



The *Merge to E-mail* dialog box appears.

The screenshot shows a dialog box titled "Merge to E-mail". It contains the following fields and options:

- Message options:**
 - To:** A pull-down menu with "Address" selected.
 - Subject line:** A text box containing "Today's meeting".
 - Mail format:** A pull-down menu with "HTML" selected.
- Send records:**
 - All
 - Current record
 - From: [] To: []

Buttons for "OK" and "Cancel" are located at the bottom right.

13. From the *To* pull-down list, select the field that contains the email addresses
14. In the *Subject line* text box, type a subject
15. From the *Mail format* pull-down list, select the desired format for your message
NOTE: To avoid being alerted on every record regarding an Outlook security measure, select **HTML**.
16. Under *Send records*, select which record(s) you want to include: **All** or **Current Record**
OR
To select only certain records, type in the appropriate values in the *Form* and *To* text boxes
17. Click **OK**
The email messages are now sent to your recipient(s).