

Step-by-Step Mail Merge Demonstration

Stage 1—Get the documents ready

- 1 Save the documents from the email in a place you can remember (Desktop, Downloads, My Documents, etc.).
- 2 Open the following programs: Outlook, Word and Excel.
- 3 Open Basic_message.docx (in Word), this is your message.
- 4 Open Sample_workbook.xlsx (in Excel), this is your data.

Stage 2—Label the data in Excel

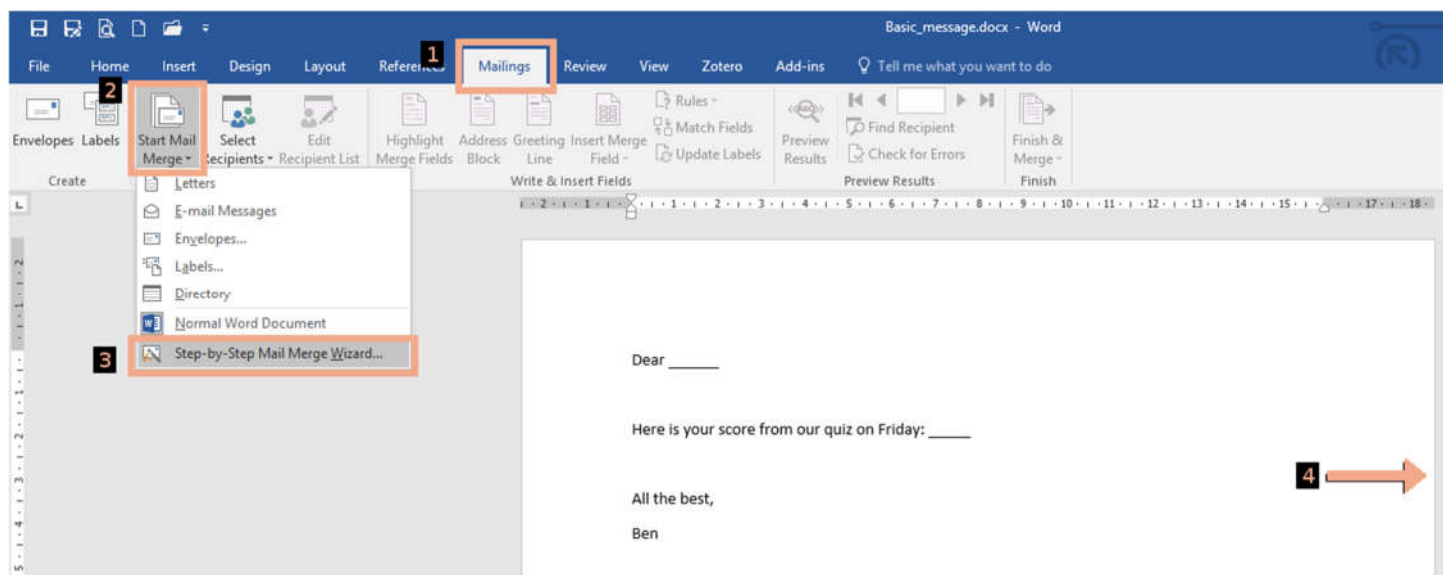
- 1 The names of the different data points are always taken from the first row of the spreadsheet. Sample_workbook.xlsx is provided with an empty first row. Type a useful name into the top cell in each column—name, email, score for example.
- 2 Do not use any spaces in the names of the columns, spaces can cause problems in some versions of Office.

Stage 3—Save your Excel file

- 1 Save your changes.
- 2 Make sure you remember where you saved the document, you will need to select this file during the mail merge.

Stage 4—Use the Step-by-Step Mail Merge Wizard in Word

- 1 Click on the “Mailings” tab at the top.
- 2 Click “Start Mail Merge” on the Ribbon.
- 3 Choose “Step-by-Step Mail Merge Wizard...”



- 4 The wizard will open in the space to the right of the document. You can advance forward or backward through the steps by clicking the steps at the bottom of this pane.

Stage 4 (cont'd)—Use the Step-by-Step Mail Merge Wizard in Word

Step 1: Select document type—Choose “E-mail messages” in the pane that has opened on the right.

Step 2: Starting document—Choose “Use the current document”.

Step 3: Select recipients—Choose “Use an existing list”. Below, click “Browse...”

- Now is when you need to select the Excel sheet that has the data in it
- Navigate to where your document is saved and choose “sample_workbook.xlsx”
- Click OK on the next 2 windows that pop up

Step 4: Write your e-mail message—Your message is already written, you just need to connect the data to the gaps.

- Highlight the first line of your message and click “Greeting line...” from the right-hand pane.
 - You will see a new dialogue box and everything should be set up appropriately (we will look at a more complicated greeting line later), click OK
 - Now you should see “Dear Aaron,” on the first line of your message
- Highlight the gap where you want to put the quiz score and click “More items...” on the right
 - In the window that opens, choose the name that you gave the column with the quiz scores in the spreadsheet
 - Now you should see some text like «score» in your document.

Step 5: Preview your e-mail messages—This step lets you see how the merged documents look.

- Click the arrows in the right-hand pane to see the messages to each of the 5 recipients. Now you will see the different names and «score» is replaced with the actual numbers.

Step 6: Complete the merge—In the right-hand pane, click “Electronic Mail...”, a new window opens

- In the “To” field, it should already show the name of the column in the spreadsheet with the email addresses.
- Add a subject line in the next field
- In “Mail format”, choose HTML. This will allow your message to have bold, italics, images, embedded links and/or all the normal stuff you use to make your messages look nice. Plain text will look OK but any text formatting you have done will be lost.
- Below the line, you can choose to send messages to a restricted set of your recipients if you want to.

Stage 5: Send your mails

- Click “OK” to send your emails!

