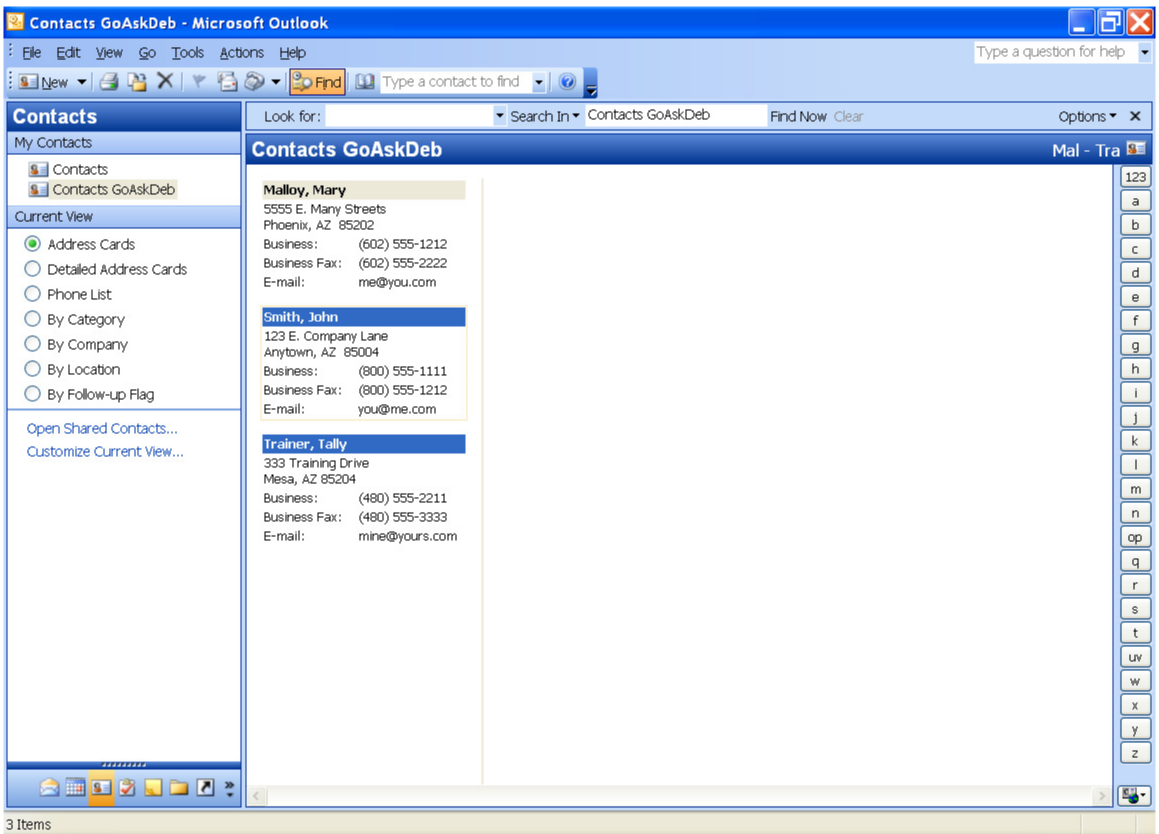
MICROSOFT OUTLOOK E-MAIL MERGE

USE MAIL MERGE TO DISTRIBUTE MERGED E-MAIL MESSAGES

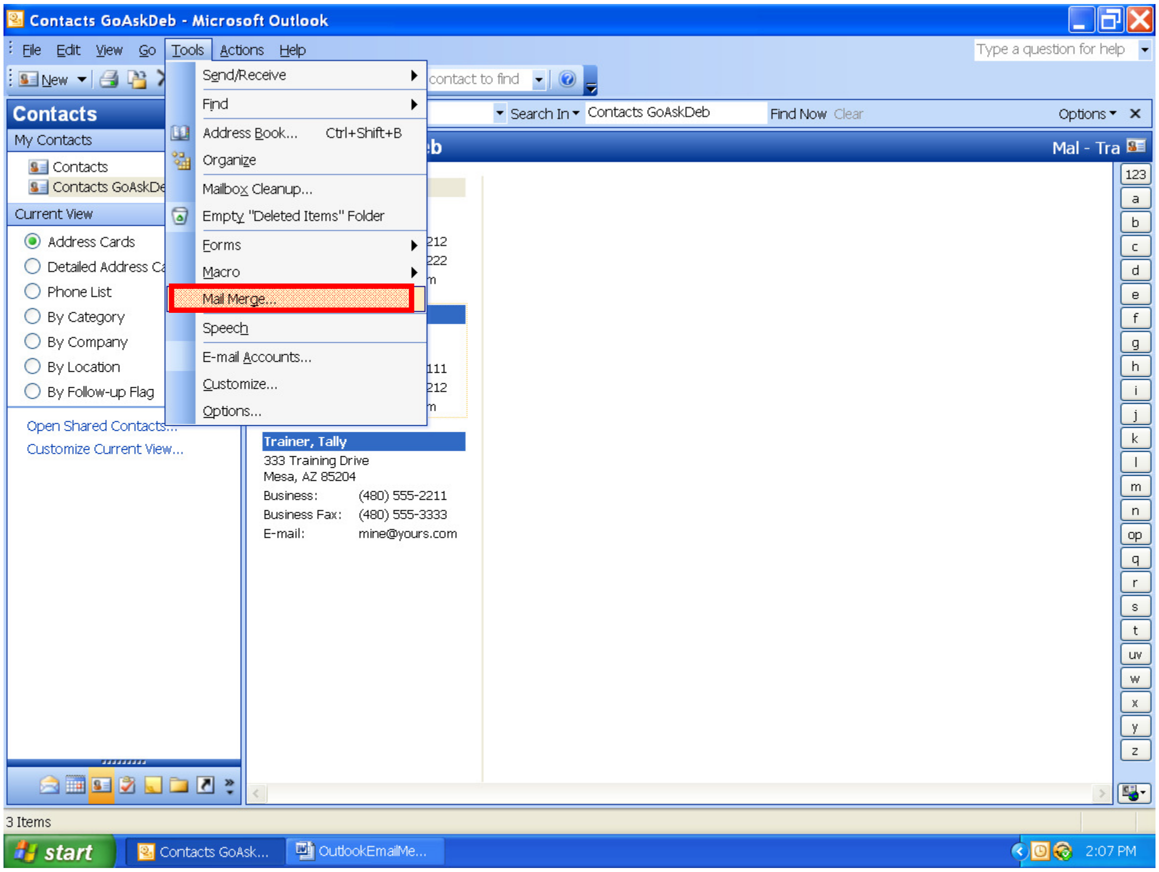
You can use the **Mail Merge** option in Outlook to create a group e-mail distribution.
To see the "Mail Merge" option in Outlook, you must be in your **Contacts** Folder.

1. First, choose the Contacts you wish to send the e-mail merge.

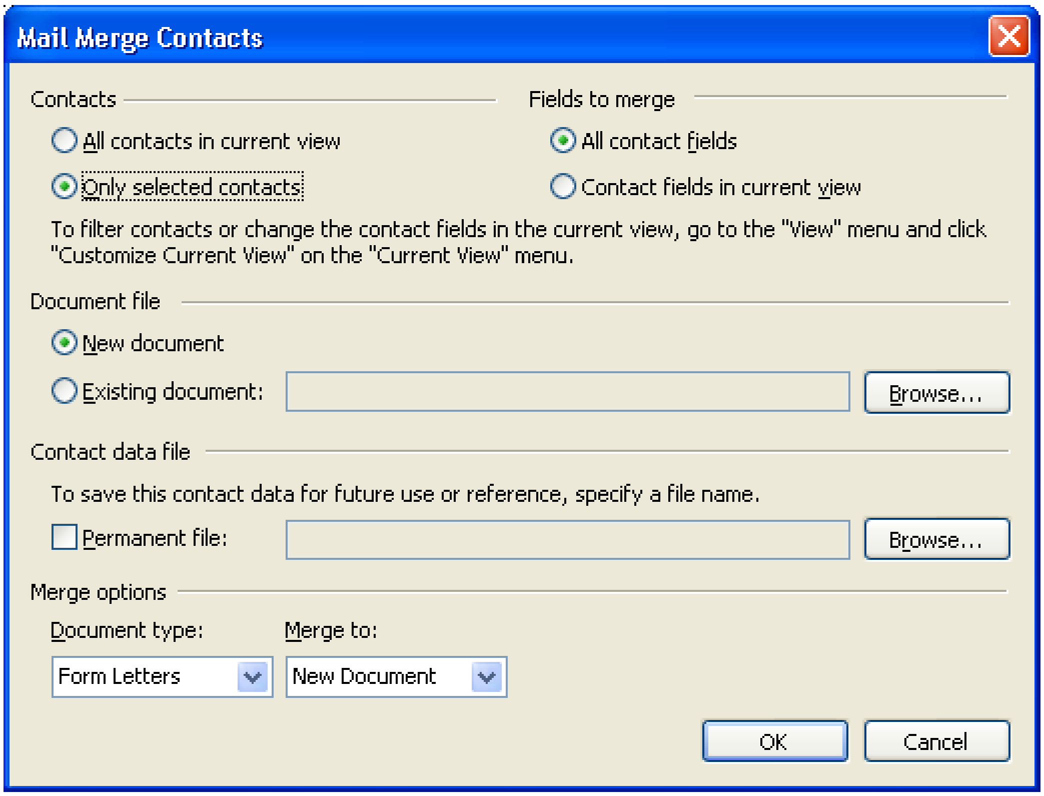
   You may do this by clicking each Contact and as you choose multiple Contacts, simply click while holding the **Control Key**.



2. On the **Tools** menu, click on **Mail Merge**.



3. The Mail Merge Contacts Dialog Box will appear.



Notice you have many different options.

As a rule of thumb, you will be choosing "**Only selected contacts**", since you chose your contacts in the previous step.

In the "Fields to merge" area, you may want to choose "**Contact fields in current view**". This will give you fields such as Name, Address, Phone number, and e-mail address.

In the "**Document file**" area, you have the option of creating a New Document or using an Existing Document. If you choose to use an Existing Document, you will need to click on the "Browse" button and locate your document. (The document type Outlook will allow is a Word document ".doc")

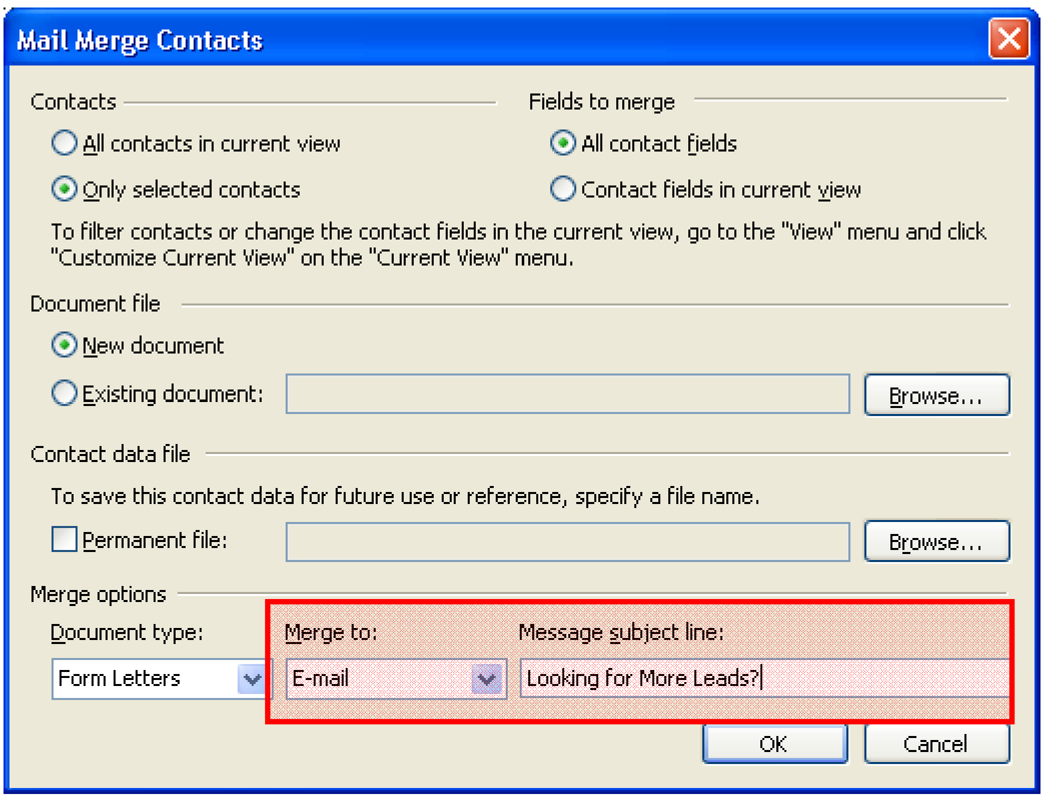
Next, you'll want to click on the "Merge to:" Drop Down.

For this class, you want to choose "E-mail", as we are learning how to E-mail merge to your customers.

Once you choose "E-mail" from the Drop Down, a field for the Subject Line will appear.

Type your Subject Line as you would normally type the Subject Line in a single e-mail.

> ✍ ***NOTE:*** *It is VERY IMPORTANT to make a Relative and Actionable Subject Line to get the e-mail Opened.*



Once completed, click the "OK" button.

If the Office Assistant is Open, you may receive the following message:

If you have chosen to create a New Document, simply click “Edit Mail Merge document”.

A Blank Word Document will appear.

COMPOSE YOUR E-MAIL MESSAGE

You may begin typing your message and use the "Mail Merge" Toolbar to insert Merge Fields.

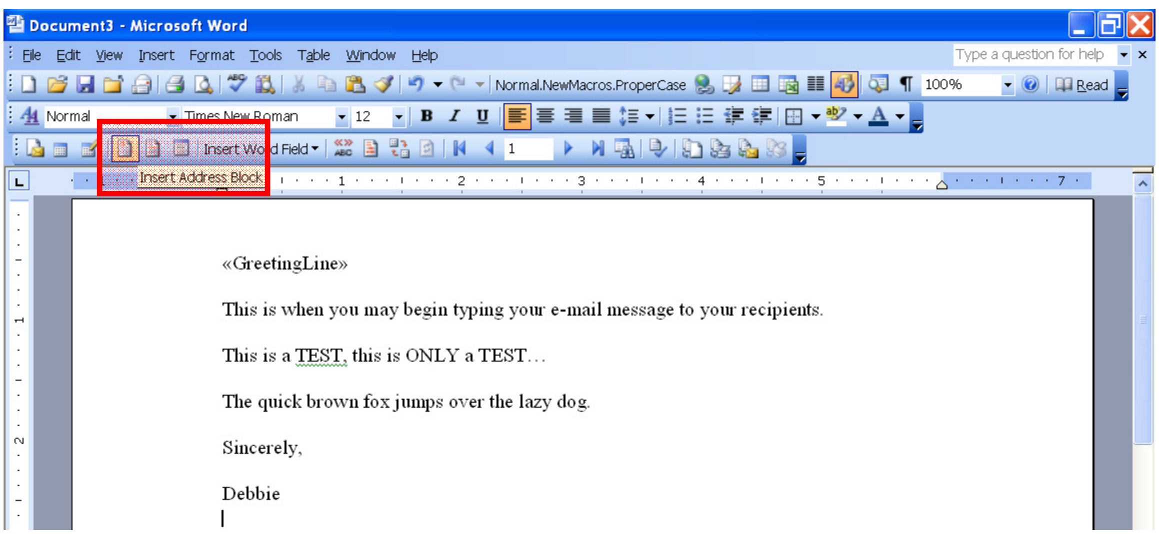
1) If you have not already done so, in the main document, type the text that you want to appear in every e-mail message.
2) Insert merge fields where you want to merge names and other information such as the greeting.

How?

a) In the main document, click where you want to insert the field.
b) Insert any of the following:

Address Block:

i) Click the **Insert Address block** button.

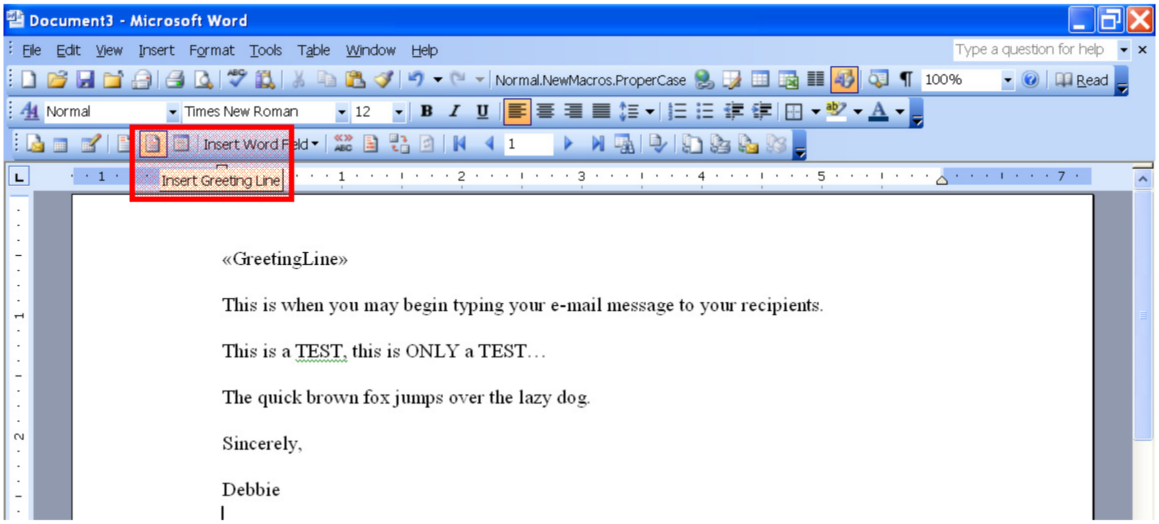


ii) In the **Insert Address Block** dialog box, select the address elements you want to include and the formats you want, and then click **OK**.

Since we have chosen to send this message via e-mail, inserting the Address Block may make the document seem too formal. This is your option.

Greeting Line:

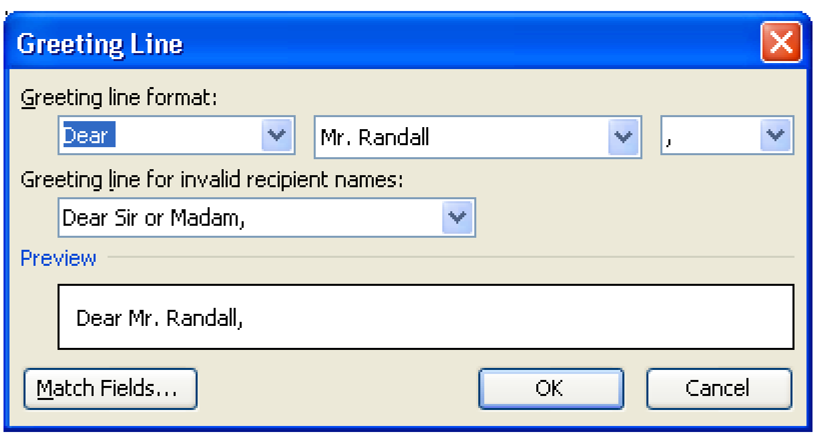
i) Click the **Insert Greeting line** button.



ii) Select the greeting line format, which includes the salutation, name format, and following punctuation.

iii) Select the text you want to appear in cases where Microsoft Word can't interpret the recipient's name, for example, when the data source contains no first or last name for a recipient, but only a company name.

iv) Click **OK**.



Other Fields of Information:

v) Click **More items**.

vi) Do one of the following:

(1) To select address fields that will automatically correspond to fields in your data source, even if the data source's fields don't have the same name as your fields, click **Address Fields**.

(2) To select fields that always take data directly from a column in a database, click **Database Fields**.

vii) In the **Fields** box, click the field you want.

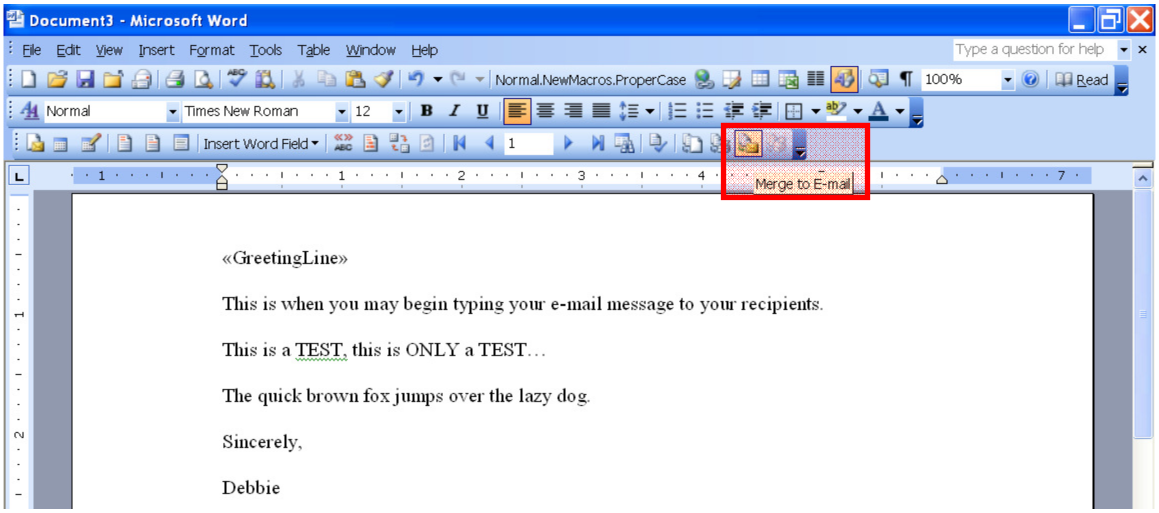
viii) Click **Insert**, and then click **Close**.

✍ ***NOTE:*** *If you insert a field from the Database Fields list and then later switch to a data source that doesn't have a column with the same name, Word won't be able to insert that field information into the merged document.*

b) Repeat steps 1 and 2 for all the fields you want to insert.

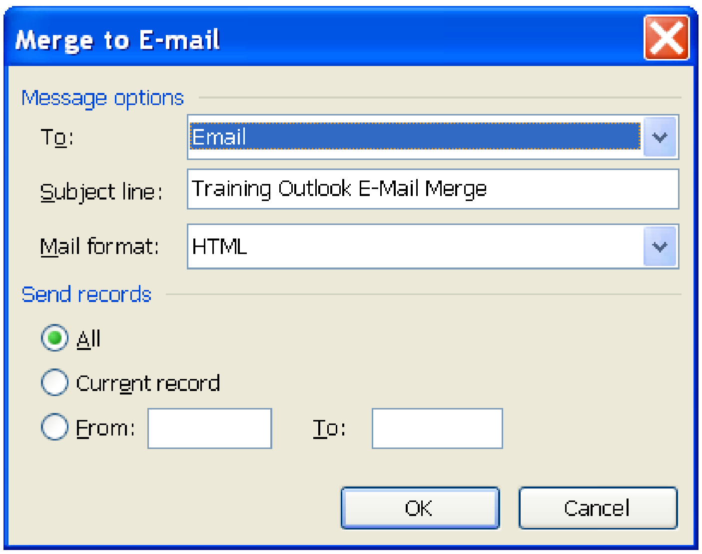
Type the rest of your message as you wish.

Once you are ready to send your message, simply click on the "**Merge to E-mail**" button.



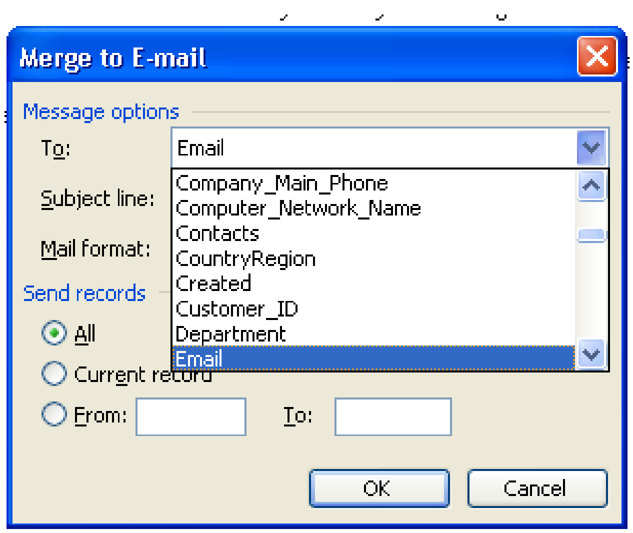
FINALIZE DISTRIBUTION SETTINGS AND SEND THE MESSAGES

After clicking on the “Merge to E-mail” button, the following window will appear, giving you one last time to change your Subject Line, choose the Mail Format, and choose how the “To” field will appear in your e-mail.



Notice that you have the option of choosing from any of the Contact fields in the Contact Database.

If you would like the e-Mail to show each Contact’s First Name, then choose “First Name” from the Drop-down.



TIP: **If you chose the specific contacts you would like to e-mail, you will want to choose to send to "All" records. Depending on server requirements, you may want to choose to send a batch of say, 50 records at a time.**

IMPORTANT! IMPORTANT!

NOTE: *Once you click "**OK**", the e-mail message will be sent. There will not be an Outlook Dialog Window that will appear for you to have a final chance of clicking "Send"!*

So, if you have completed everything within your e-Mail Merge document, click on the "**OK**" button to send the e-mail.

TIP: **If you are not using a Distribution List with your name in the list, it is a good idea to add yourself to the list of recipients.**

E-MAIL MERGE DOCUMENT SAMPLE:

Notice that the e-mail is personalized. You no longer need to use the “BCC” option within Outlook. Also note that the message within the e-mail will be personalized.