



E-Mail Mail Merge

This tipsheet will explain how to send out bulk emails by using Mail Merge that is built into Word and Outlook. This will allow you to send an email to a very large list of people without having to have every email address in the To: field. You will be able to personalize each email and because you will not be sending one email to a large number of people, anti-junk mail filters will not block your email. Simply put, instead of sending one email to 500 people, this will send 500 emails – one to each person.

You will need:

Microsoft Word XP or later

Microsoft Outlook XP or later configured to send mail

A list of your recipients (in Excel preferably)

Please note one limitation: You cannot send attachments using this method. But this is easily dealt with by placing your “attachment” on your website and linking to it in the email.

(The screen shots are from Office XP, but the same procedures can be used in any version of Office.)

Step 1: Prepare the list of recipients

You can use Excel, Access, or any commonly used database program to create the list. Excel is the easiest to use, and is installed on most computers.

The screenshot shows a Microsoft Excel spreadsheet titled "email mail merge.xls". The spreadsheet has the following data:

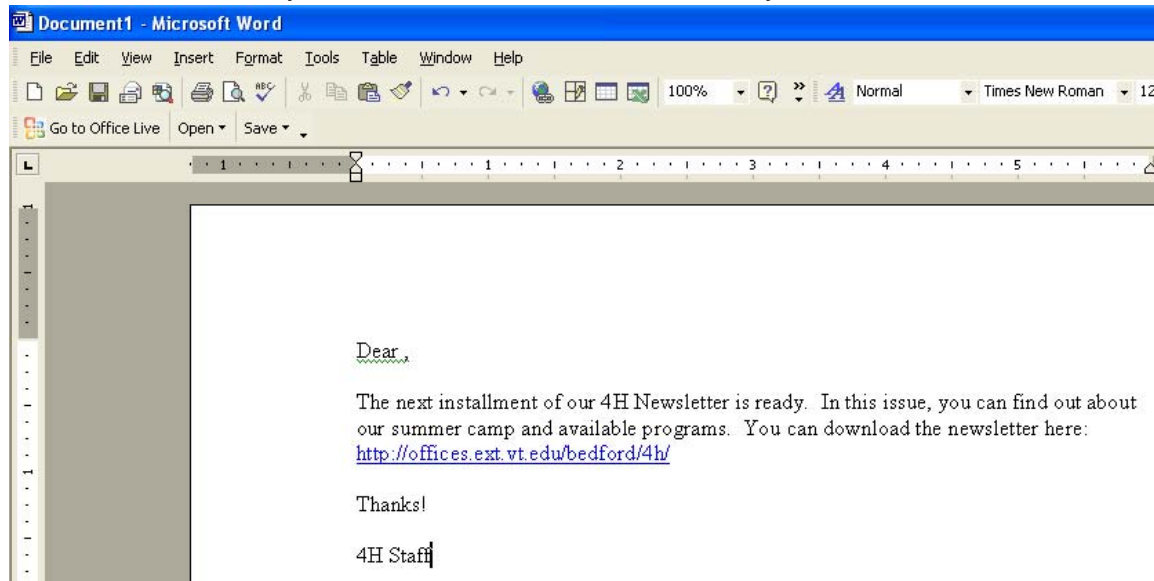
	A	B	C	D	E	F	G	H
1	Firstname	Lastname	email	address1	address2	city	state	zip
2	John	Doe	johndoe@vt.edu	123 Main St.		Blacksburg	VA	24061
3	Jane	Doe	janedoe@vt.edu	321 Main St.		Blacksburg	VA	24061
4	Jack	Smith	jsmith@gmail.com	435 Druid Ln.		Swoope	VA	24256
5								
6								

Create you list as shown in the screen shot. *(Using the column headers shown will make it easier for Mail Merge to recognize the fields.)* The only requirement is the email field. The rest are there to help personalize the email. Also, if any of the email addresses are incorrect, it will be easy to mark so that you could send a letter through the Post Office. Save your file making note of the name and location.



Step 2: Write the email

Instead of Outlook, you will use Word to write the body of the email.



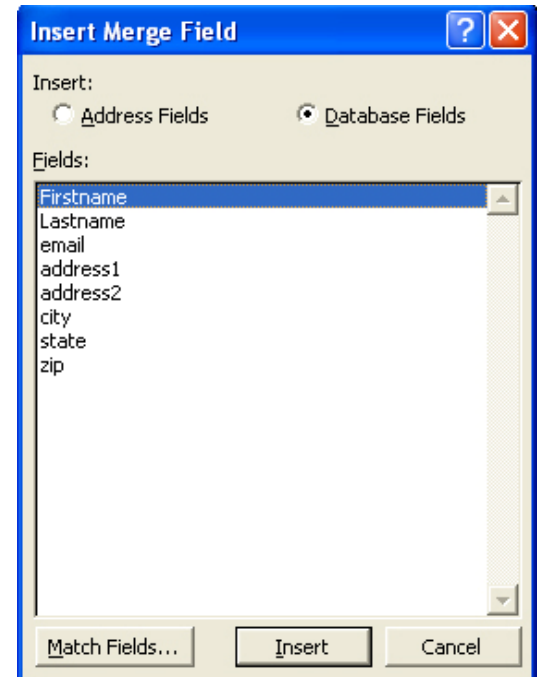
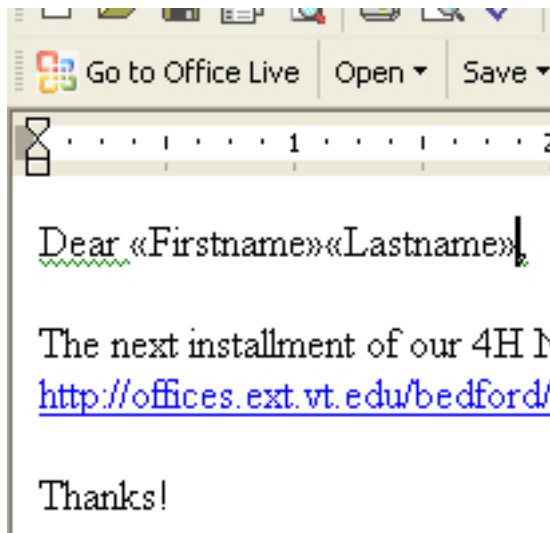
In this very simple message, a space was put in after “Dear” to leave room for a name. Also, a link to an office website was inserted. You can include as much or as little as you like. For newsletters, you may want to include some of the content of the newsletter to get the reader interested in reading the rest of it. For other messages, you may want to just write out the information that you want to share. You can save the document if you want, but it is not necessary.

Step 3: Mail Merge

This is where we put the two documents together and send the email.

1. While in Word, Go to Tools -> Letters and Mailings -> Mail Merge Wizard
(Note: for Office 2007, go to the Mailings tab)
2. Select: E-mail messages then click **Next: Starting document**
3. Select: Use the current document then click **Next: Select recipients**
4. Select: Use an existing list
 - a. Click on Browse...
 - b. Select the Excel document that you want to use
 - c. Select the sheet with your data stored on it (Sheet1 for most people)
 - d. You will see a list of the recipients. If you used the same labels for the columns as in the example, Word will automatically know what each of the data fields are. You can now select or deselect any of the recipients. Any one you uncheck will be skipped. Click **OK** then click **Next: Write your e-mail message**
5. Make any final edits to the email message, and this is where you can personalize the message. Put your cursor where you would like to insert data (like the person’s name) then click on the **More Items...** link.

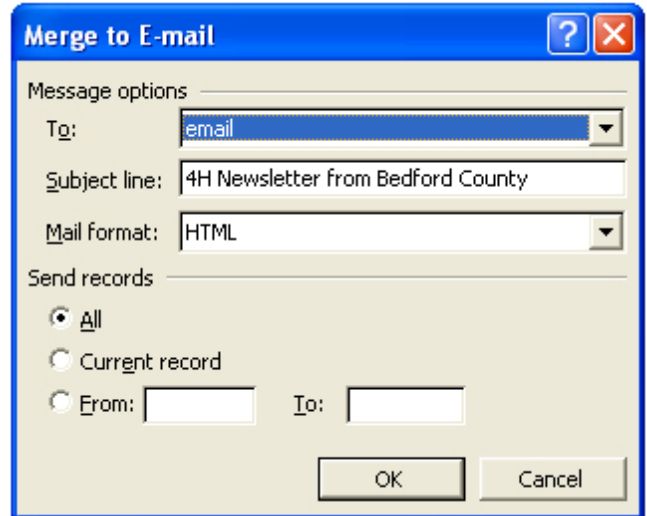
6. Choose the data field that you want to insert. For example: After Dear, you would want to put the person's first and last names. Select the Firstname field and click **Insert**, then click the Lastname field and click **Insert**.
7. You will see that <<Firstname>> and <<Lastname>> have been inserted into the document. These placeholders will be replaced with the data from the Excel document.



8. Notice that there is not a space between the two field placeholders. We will need to add that so that their names don't run together. Click on the **Cancel** button to remove the Insert Merge Field window. Then put your cursor between the placeholders and put in a space.
9. You can add as many fields as you want or none at all. When you are finished with the document click **Next: Preview your e-mail message**
10. You can now preview the document before it is sent. Use the arrows to cycle through your list. If it looks correct, then click **Next: Complete the Merge**.



11. Click on **Electronic Mail...**
12. Type in an appropriate subject for the email in the **Subject line:** field
13. Make sure that the **To:** field is set to email. *(Note: The item listed should be the name of the column that you used for the email data in Excel.)*
14. Click **OK** to send the emails.



You are finished. Emails will be sent to everyone on the list that you made in Excel. The emails that you sent will show up in your Sent Items in Outlook.

If you are not comfortable with the process and wish to test it, then create an Excel document with your name and email and one or two others in your office. Complete the merge with your test file and verify that everyone received the email.

Also, be prepared to get some bounced back emails or email errors. The longer your email list the more likely that there is a typo or that some provided the wrong or out of date email address. Any email addresses that just bounced back should be removed from your data file.