Mail Merge to email with Office 2010

- My first advice is to have your WORD Document be in Office 2007 format – and to have your Excel file in 2007 also.
- You must have enough ‘space’ in your mailbox to send the messages
  - You might want to turn OFF “save copy in my SENT items folder: File, Options, Mail (on left), under section labeled SAVE MESSAGES – uncheck “save copies of messages in the sent items folder”, OK, OK… REMEMBER to turn this back on after you are done with the merge.
  - If you currently have Outlook tracking the read receipt on messages you send, you should turn this OFF. File, Options, Mail, Tracking Section, UNCHECK Delivery receipt, Read Receipt.
  - Merge ‘may’ run faster if you reboot your computer right before sending – so you have fresh memory.
  - Close any unnecessary programs while doing a merge
  - Open any Outlook in the profile that the FROM message is to be sent from (if generic account…).
  - Send yourself a test message – check links and also check the size of the message. It should be less than 150KB – preferably 80KB or less.
  - If you are sending to more than 500 addresses, I suggest you break the list into multiple spreadsheets (groups of 500 or less/group).

1. Create a data file. This Excel file should contain fields for name, email address and whatever fields you want to merge. You WILL need to have a header row with field names like “Name” and “email”. It might be a good idea to put your (the senders) name and email address as the LAST record in the datafile – I’ll explain below.
   Data file example below

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Email address</th>
<th>Major</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carol</td>
<td>Schmitt</td>
<td><a href="mailto:cschmitt@usi.edu">cschmitt@usi.edu</a></td>
<td>NURS</td>
</tr>
<tr>
<td>John</td>
<td>Smith</td>
<td><a href="mailto:jsmith@mail.usi.edu">jsmith@mail.usi.edu</a></td>
<td>BIOL</td>
</tr>
</tbody>
</table>

2. Save the excel file (remember the location – documents, desktop…), close excel file.

3. Start Word with a new Blank document. Type or paste your entire email message into this document
4. Click MAILINGS in the toolbar/ribbon, Click Start Mail Merge
5. Choose “step by Step Mail Merge Wizard”
6. On the RIGHT choose “email message” – at bottom-right click “Next: Starting Document”
7. On the Right choose “Use the Current Document”, at bottom click “Next: Select Recipients”
8. On the right choose “Use an existing List”. Just below that, choose BROWSE
9. This is where you will need to know where your Excel file is – browse to your data file. IF prompted for Sheet1$, Sheet2$… choose Sheet1, Click OK
10. You should now see a simple version of your excel data. IF you wanted, you could Uncheck some records that you might not want to send to, otherwise click OK.
11. At bottom-right, click NEXT: Write your email Message
12. IF you want to PERSONALIZE your email – do the following. Click in the letter/email where you want the name to appear – then (on the right) click MORE ITEMS. Double click the NAME field from your data file. This should put <<NAME>> in the email message. If you have more fields to add- do the same steps. Remember to put spaces and commas where they are needed. When finished click CLOSE on the “insert Merge Field” window.

13. Click “Next: Preview you email message” (Lower right)

14. On the top right you can page through multiple records (this will only make a difference if you PERSONALIZED the message)

15. Click “Next: Complete the Merge” (Lower right)

16. Click ELECTRONIC MAIL

17. In the TO: field drop down, choose the field in your data file that contains the email address.
   FILL IN THE SUBJECT LINE *** IMPORTANT that the message has a subject *** PLEASE, PLEASE, PLEASE, start your subject with “USI”.

18. As far as the mail format – of the options given, I would pick HTML.

19. At this point you can again rule out sending to ALL recipients. You can send a sample mailing to yourself (pending you put your record as #1) to see a test of the message. To do this choose “FROM 1 to 1”

20. Click OK to send. If you sent a test (to yourself), check the test. The size of a mass email should be less than 150KB – preferably 80KB or less.

21. When the merge is running (to many recipients) you should see it flashing in the lower left area – I think it says “Saving” but I’m not sure why... Do not try to open any other applications while the merge is running. Do not try to open any of the non-delivery messages that you might be receiving – wait until merge is done running before you do ANYTHING else.

22. When you receive the message to yourself (last name/address in the spreadsheet), the merge is done. All messages are not necessarily RECEIVED yet, but they are on their way.

After merge is done – work on the non-delivery messages you received. If you get some non-delivery for improperly formatted addresses – fix these in your original data source (Banner or ?). Some messages will be returned because the receiving mailbox is full – there isn’t really anything you can do about these.

IF you turned off “Save in Sent items” – you might want to turn this back on.

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