

Mail Merge to email with Microsoft 365

- 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.
 - You cannot send an attachment with Mail Merge.
 - Close any unnecessary programs while doing a merge.
 - Send yourself an example 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).
 - Our cloud accounts are limited to 10,000 recipients/day.
 - If you decide to send ONE message vs. Mail merge - There is a 500 recipients/message limit. If you go this route vs. mail merge. Make sure you BCC all the recipients – so they cannot reply-to-all.
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 FIRST & LAST record in the data file – I’ll explain below.

Data file example below

2. Save the excel file (**remember the location/path where this is saved**), **CLOSE** the excel file.

First Name	Last Name	Email address	Major
Carol	Schmitt	cccdchmitt@usi.edu	NURS
John	Smith	jsmith@eagles.usi.edu	BIOL
Test	Schmitt	cccschmitt@eagles.usi.edu	CHEM

3. Open Outlook in the profile that you want to send FROM. Applicable if you want to send from a generic account. You will do the merge from WORD, but Outlook must be open.
4. Start Word with a new Blank document. Type or paste your entire email message into this document
5. Click MAILINGS tab, Click Start Mail Merge (ribbon), Choose “step by Step Mail Merge Wizard”
6. On the RIGHT choose “E-mail messages” – at bottom, 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/select 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 Word Document. 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 start your subject with "USI".
- Do not use any exclamation marks in the subject
18. Choose HTML as mail format.
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
21. When the merge is running it may appear that nothing is happening. You should have Outlook minimized – Hover over Outlook in the Task bar, and open outlook. Watch the **OUTBOX folder** – to see the progress of your merge.
22. **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. Do not close Word, Do not close Outlook.**
23. 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 the 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.