

How to send an email containing personalized information via Mail Merge

Mail Merge is a function implemented in Microsoft Word, which allows you to combine person-specific information from an Excel file with the text in a Word file and then send this via email to all the separate persons. This can be helpful when one wants to send for example grades to students, but not send all the grades to all the students or wants to send student-specific emails more efficiently.

For these instructions I have used 'Microsoft Word 2010', 'Microsoft Excel 2010' and 'Microsoft Outlook 2010'. In other versions of these programs it all works similarly.

What do you need?

To start, you will have an Excel file from which you want to send information. This sheet should be organized such that every line contains information about one person. So for example, a sheet that looks like this:

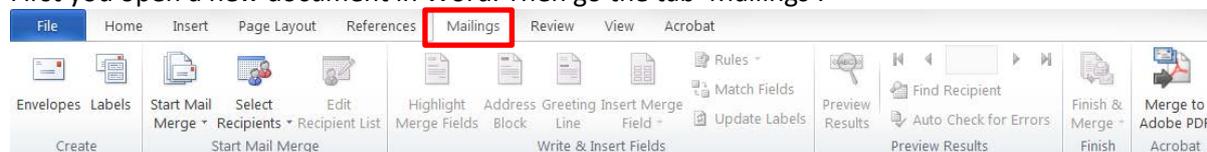
	A	B	C	D	E	F	G	H
1	Name	Email	Grade 1	Grade 2	Grade 3	Average	Passed the course?	
2	Student One	student.one@student.tue.nl	7,4	8	9,1	8,17	1	
3	Student Two	student.two@student.tue.nl	5,2	6,3	3,6	5,03	0	
4	Student Three	student.three@student.tue.nl	4,7	8,1	6,2	6,33	1	

Then you will also need a Word file with the text you want in your email. In this file you can add merge fields which puts information from your Excel file into your Word file.

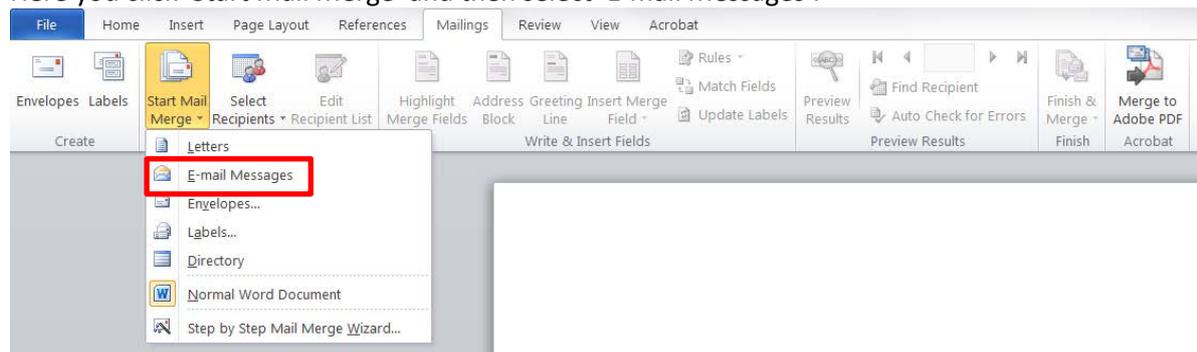
After you have done this you can send the merged text via Outlook.

Making the Word file

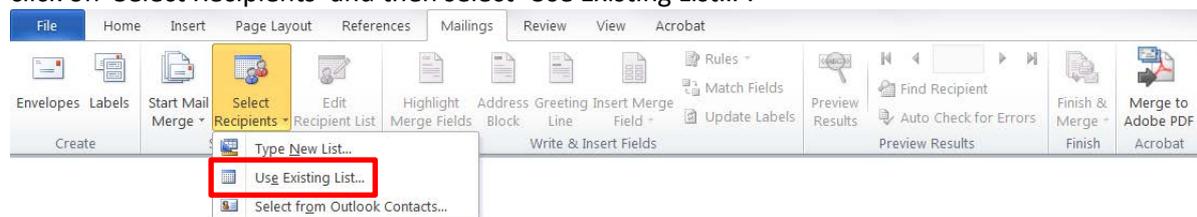
First you open a new document in Word. Then go the tab 'Mailings'.



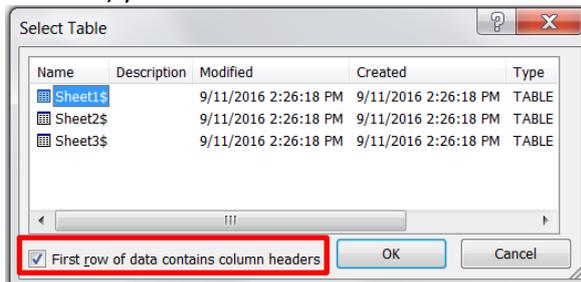
Here you click 'Start Mail Merge' and then select 'E-mail Messages'.



The document will then change from the regular 'Print Layout'-view to the 'Web Layout'-view. Now click on 'Select Recipients' and then select 'Use Existing List...'.



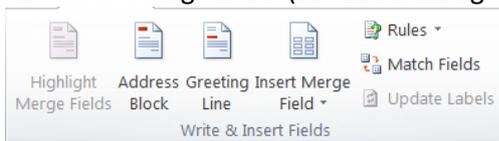
A pop-up will open where you have to select your Excel file from the documents on your computer. Select your file and then select the correct sheet. Also, if your Excel file has headers (the titles of columns) you have to check the box for 'First row of data contains column headers'.



This way some of the headers are recognized by Word, so for example a column with the header 'Email' will be recognized as a column with email addresses which will make it easier when sending your mails later on. Also if not checked this row of headers will be seen as regular input data, which is not the case.

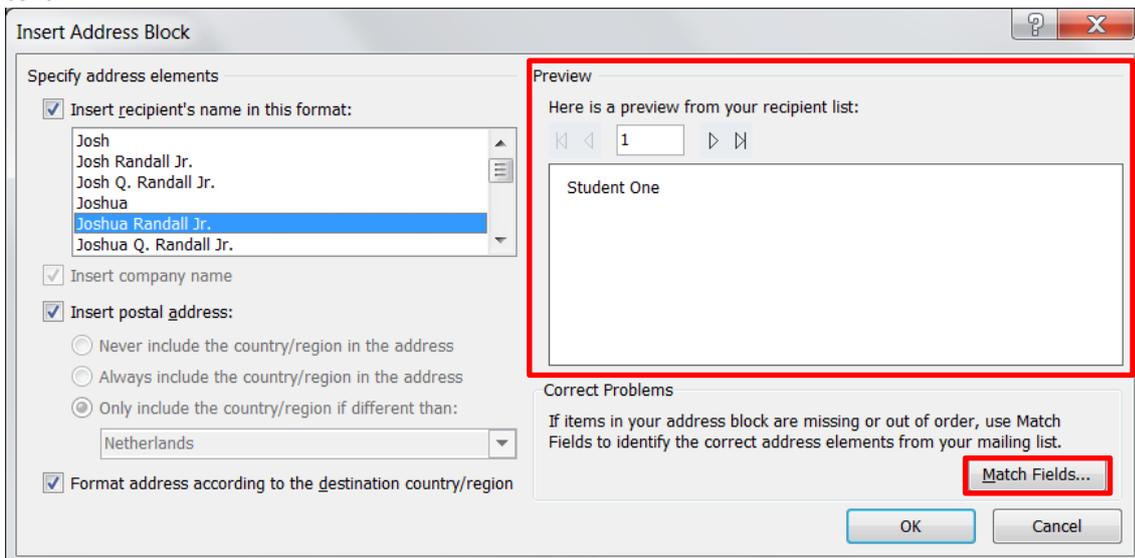
Writing the text

Now you can start typing your text. You can use the pre-specified fields like the 'Address Block' or 'Greeting Line' and follow the steps given in the menus that pop up; or you can type your own text and insert merge fields (via 'Insert Merge Field') to add in the person-specific data from Excel.

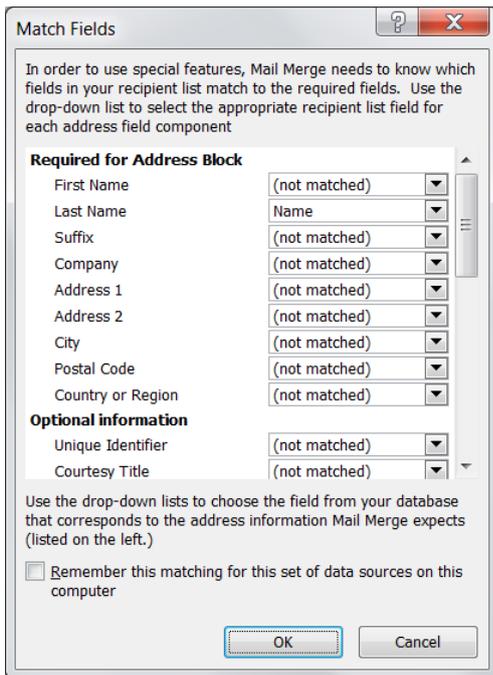


Use of 'Address Block'

If you click on the button 'Address Block', a menu will open. Here you can choose from different options to create the address block you want to use. You can see what it will look like in the preview window. Once you like the address block you have created, click 'OK' and it will be inserted into your text.

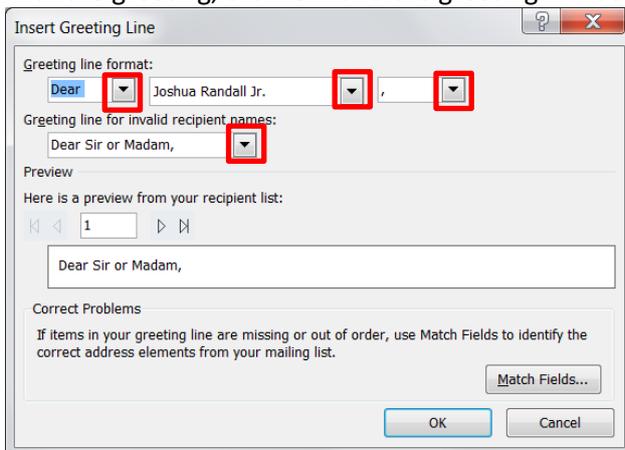


Sometimes you will find that the preview is not showing what you thought. The cause might be that the columns from your Excel file are automatically matched to the wrong fields here. You can check and match fields to different columns via the button 'Match Fields...'. If you click this button a menu will pop up which shows all possible fields.



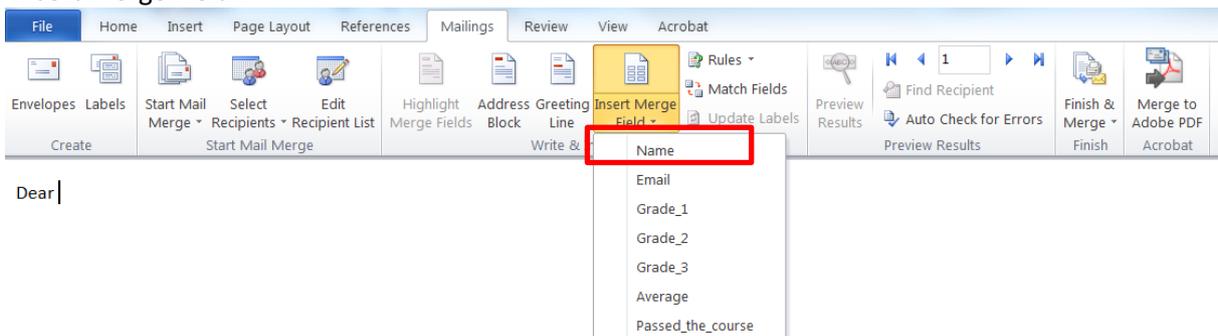
Use of 'Greeting Line'

When you click on the button 'Greeting Line', a menu will open. By clicking the arrows you can choose different options and thereby creating the greeting that you want to use. Once your happy with the greeting, click 'OK' and the greeting will be inserted into your text.

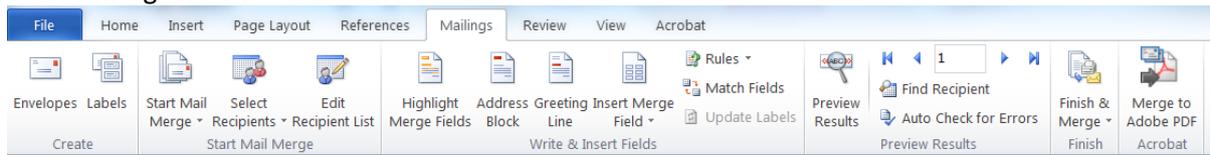


Use of 'Insert Merge Field'

Instead of using 'Greeting Line' you could also write a greeting yourself by first typing something like 'Dear ' and then clicking 'Name' (this is the header of the column with names in the Excel file) under 'Insert Merge Field'.

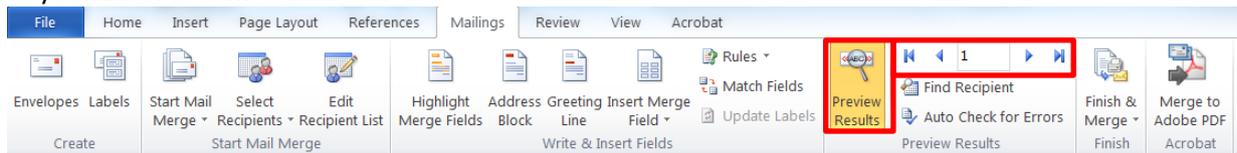


Then a merge field will be inserted which looks like '<<Name>>'.



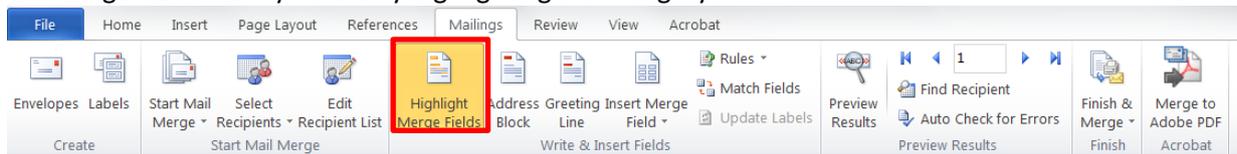
Dear «Name»

Now, by clicking 'Preview Results' you can see a preview of what your text looks like with the information from Excel inserted in it. By using the arrows you can browse through the different rows of your Excel document.



Dear Student One

In the same way as the greeting you can write the rest of your text by inserting merge fields. To keep track of where you have used the merge fields, you can click 'Highlight Merge Fields' which will make the merge fields clearly visible by highlighting them in grey.



Dear «Name»,

You have received the following grades for this course:

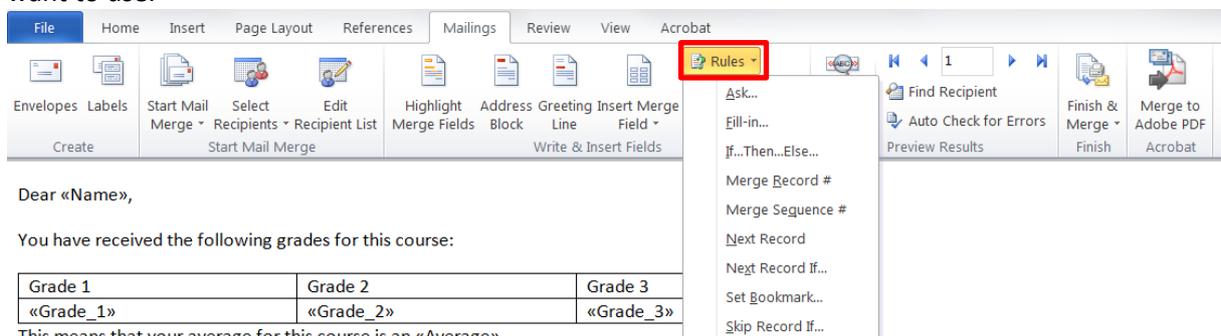
Grade 1	Grade 2	Grade 3
«Grade_1»	«Grade_2»	«Grade_3»

This means that your average for this course is an «Average».

Kind regards,
Your teacher

Use of 'Rules'

It is also possible to adjust the text to the specific person based on certain verifiable rule on the input from Excel. If you click 'Rules' a menu will show where you can choose the kind of rule you want to use.



Dear «Name»,

You have received the following grades for this course:

Grade 1	Grade 2	Grade 3
«Grade_1»	«Grade_2»	«Grade_3»

This means that your average for this course is an «Average».

Kind regards,
Your teacher

In the Excel file used in this example there is a column 'Passed the course?' where a row has a '1' if the student has passed the course and a '0' if the student does not. So here you could add a line

which tells a student if he has either passed or failed the course. To do this you click on 'Rules' and then on 'If...Then...Else...'

Dear «Name»,

You have received the following grades for this course:

Grade 1	Grade 2	Grade 3
«Grade_1»	«Grade_2»	«Grade_3»

This means that your average for this course is an «Average».

Kind regards,
Your teacher

Then a pop-up menu will open where you can choose a column ('Field name') you want to define a rule on; a comparison like 'Equal to' or 'Greater than'; and a value to compare it to ('Compare to'). If the rule is satisfied for a person, the first text will be used and when the rule is not, the second text is used.

Insert Word Field: IF

IF

Field name: Passed_the_course Comparison: Equal to Compare to: 1

Insert this text:
Thus I can inform you that you have succesfully passed this course.

Otherwise insert this text:
Thus I can inform you that you have failed this course.

OK Cancel

Mailing your merged document

Before you mail your document, I suggest that you put your Outlook in offline-modus. That way you can check if the e-mails are what you wanted in your outbox before sending them out. Also if you want to attach files to the emails you can do this here as well. You can put Outlook in this modus by going to the tab 'Send/Receive' and clicking 'Work Offline'.

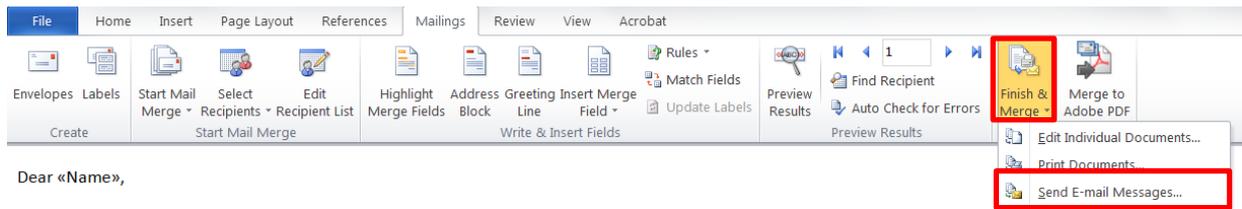
File Home Send / Receive Folder View Adobe PDF

Update Folder Mark to Download Dial-Up Download Work Offline

Send/Receive All Folders Send All Show Progress Cancel All Download Headers Process Marked Headers Connection Preferences

Send & Receive Download Server Preferences

You can send the merged document (to your outbox) by clicking 'Finish & Merge' and then 'Send E-mail Messages...' in your Word document.



Dear «Name»,

You have received the following grades for this course:

Grade 1	Grade 2	Grade 3
«Grade_1»	«Grade_2»	«Grade_3»

This means that your average for this course is an «Average». Thus I can inform you that you have successfully passed this course.

Kind regards,
Your teacher

Then a menu will open where you have to select the column containing the recipients' email addresses after 'To:' and can write the subject of the emails after 'Subject line:'. Then you click 'OK' and the messages will go to your outbox in Outlook (or send right away if you are not working offline).

