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 personspecific 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:

	Α	В	C	D	E	F	G	H	
1	Name	Email	Grade 1	Grade 2	Grade 3	Average	Passed the	e 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'.

File Home	Insert Page Layout Refe	rences Mailings Review View Acrobat		
Envelopes Labels	Start Mail Merge * Recipients * Recipient Lis	Highlight Address Greeting Insert Merge Merge Fields Block Line Field 20 Update Labels	Preview Results Auto Check for Errors	Finish & Merge to Merge
Create	Letters	Write & Insert Fields	Preview Results	Finish Acrobat
		ard		

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...'.

File	Home	Insert	Page La	yout Refere	ences Mailin	ngs F	Review	View Ac	robat					
Envelopes	Labels	Start Mail	Select	Edit	Highlight Merge Fields	Address	Greeting	Insert Merge	Rules -	Preview	Find Reci	pient	Finish &	Merge to
Crea	te	Ivierge	Туре	New List	Werge Helus		Write & I	nsert Fields		Results	Preview Rest	ults	Finish	Acrobat
			Us <u>e</u>	Existing List										
			Seleo	ct fr <u>o</u> m Outlook	Contacts									

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'.

elect Table			وي	X							
Name	Description	Modified	Created	Туре							
III Sheet1\$		9/11/2016 2:26:18 PM	9/11/2016 2:26:18 PM	TABLE							
III Sheet2\$		9/11/2016 2:26:18 PM	9/11/2016 2:26:18 PM	TABLE							
III Sheet3\$		9/11/2016 2:26:18 PM	9/11/2016 2:26:18 PM	TABLE							
•		III		4							
First row of data contains column headers OK Cancel											

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 'Adress 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 'Adress Block'

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

Insert Address Block		2 ×
Specify address elements Insert recipient's name in this format: Josh Josh Randall Jr. Joshua Joshua Randall Jr. Joshua Q. Randall Jr. Insert company name Insert postal address: O Never include the country/region in the address	4 III >	Preview Here is a preview from your recipient list: I D D Student One Image: Student One Image: Student One
 Aways include the country/region in the address Only include the country/region if different than: Netherlands Format address according to the <u>d</u>estination country/region 	gion	Correct Problems If items in your address block are missing or out of order, use Match Fields to identify the correct address elements from your mailing list. Match Fields OK Cancel

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.

Match Fields	Match Fields										
In order to use special features, Mail Merge needs to know which fields in your recipient list match to the required fields. Use the drop-down list to select the appropriate recipient list field for each address field component											
Required for Address Block											
First Name	(not matched)										
Last Name	Name 💌 _										
Suffix	(not matched)										
Company	(not matched)										
Address 1	(not matched)										
Address 2	(not matched)										
City	(not matched)										
Postal Code	(not matched)										
Country or Region	(not matched)										
Optional information											
Unique Identifier	(not matched)										
Courtesy Title	(not matched)										
Use the drop-down lists to choose the field from your database that corresponds to the address information Mail Merge expects (listed on the left.)											
Remember this matching for this set of data sources on this computer											
OK Cancel											

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.

Insert Greeting Line	? ×
Greeting line format: Dear Joshua Randall Jr. , , Greeting line for invalid recipient names: Dear Sir or Madam,	
Preview	
Here is a preview from your recipient list:	
Dear Sir or Madam,	
Correct Problems	
If items in your greeting line are missing or out of order, use Match Fields to correct address elements from your mailing list.	identify the
Ma	tch Fields
ОК	Cancel

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>>'.

File	Home	Insert	Page Lay	out Refere	nces Ma	ilings	Review	View .	Acrobat					
Envelopes	Labels	Start Mail Merge *	Select Recipients +	Edit Recipient List	Highlight Merge Field	Addre s Bloc	ess Greeting	g Insert Mer Field *	Provide Provide	Preview Results	I ↓ 1 I	ipient eck for Errors	Finish & Merge *	Merge to Adobe PDF
Crea	te		Start Mail Me	erge			Write & I	Insert Fields			Preview Res	ults	Finish	Acrobat
_														

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.

File	Home	Insert	Page Layou	ut Refere	nces Mailir	igs	Review	View Ac	robat								
-				82					😰 Rules 🔹		K 2	∢ Find	1 Recipient	► t	M		
Envelopes	Labels	Merge * I	Select Recipients * R	ecipient List	Merge Fields	Block	s Greeting Line	Field *	Update Labels	Results	Þ	Auto	Check fo	or Erro	ors	Merge *	Adobe PDF
Crea	Create Start Mail Merge			ge			Write & I	nsert Fields			Pre	view	Results			Finish	Acrobat

Dear Student One

Dear «Name»

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.

File	Home	Insert	Page Lay	out Refere	nces Mailin	gs	Review	View Ac	obat					
=				3					Rules * Match Fields	(ABC)>	Find Recipien	► ₩ †		
Envelopes	Labels	Start Mail Merge *	Select Recipients *	Edit Recipient List	Highlight Merge Fields	Addres Block	s Greeting Line	Insert Merge Field *	Update Labels	Preview Results	Auto Check fo	or Errors	Finish & Merge *	Merge to Adobe PDF
Create Start Mail Merge				erge	Write & Insert Fields						Preview Results		Finish	Acrobat

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.



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...'.

File Hom	e Insert Page Lay	out Refere	nces Mailir	ngs F	Review	View Acr	obat						
Envelopes Labels	Start Mail Select Merge * Recipients *	Edit Recipient List	Highlight Merge Fields	Address Block	Greeting Line Write & In	Insert Merge Field * sert Fields	P	Ask Fill-in	 Image: A the second sec	1 Recipien Check fo Results	It or Errors	Finish & Merge *	Merge to Adobe PDF Acrobat
Dear «Name», You have recei	ved the following gr			Merge <u>R</u> ecord # Merge Seguence # <u>N</u> ext Record Next Record If				1					
Grade 1		rade 3	Set Bookmark										
«Grade_1»		Grade_3»		Ster Desend M									
This means tha	it your average for t		_	Skip Record II	ļ								

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	X							
IF Comparison: Compare to: Passed_the_course Equal to 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.								
ОК Са	ancel							

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'.

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Send/Recei	کې Upc اتعا Sen ive او Sen	late Folder d All d/Receive Groups *	Show	Cancel	Download	□₃ Mark to Download → ∴ Unmark to Download → ✓ Process Marked Headers →	Dial-Up	Download	Work
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You can send the merged document (to your outbox) by clicking 'Finish & Merge' and then 'Send E-mail Messages...' in your Word document.

File	Home	Insert	Page Layo	out Refere	nces Mail	ings	Review	View Ac	robat				
Envelopes	Labels	Start Mail Merge *	Select Recipients • 1	Edit Recipient List	Highlight Merge Fields	Addre Block	ss Greeting	Insert Merge Field *	Rules *	Preview Results	 I I	Finis Merc	h & Merge to Adobe PDF
Creat	te		Start Mail Me	rge			Write & I	nsert Fields			Preview Results	Ð	Edit Individual Documents
Deer «N												D ₂	Print Documents
Dear «N	ame»,												Send E-mail Messages
You have	e receiv	ed the fo	llowing gra	ades for thi	s course:								
ф.													
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 succesfully 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).

Merge to E-mai	l i	? <mark>×</mark>
Message options		
T <u>o</u> :	Email	•
Subject line:		
<u>M</u> ail format:	HTML	•
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