
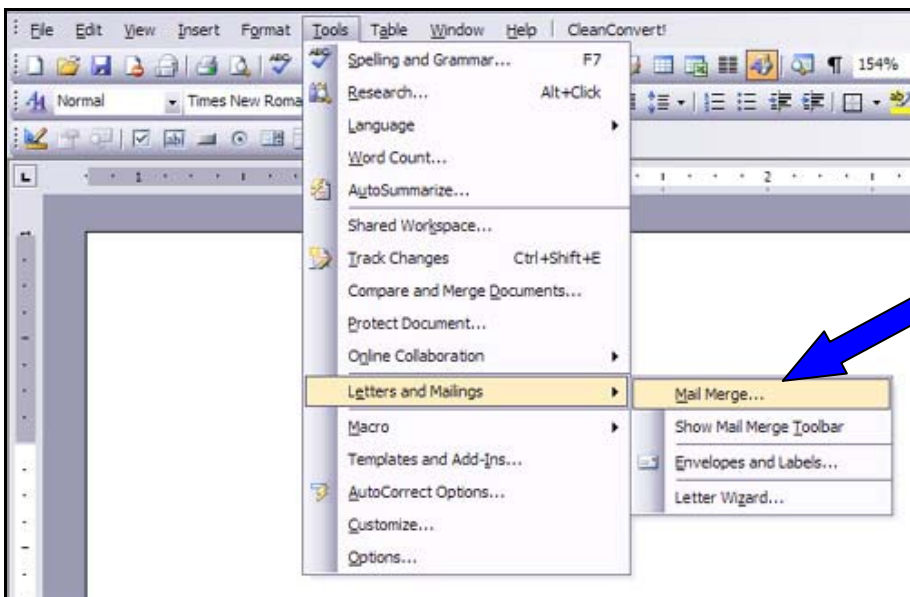
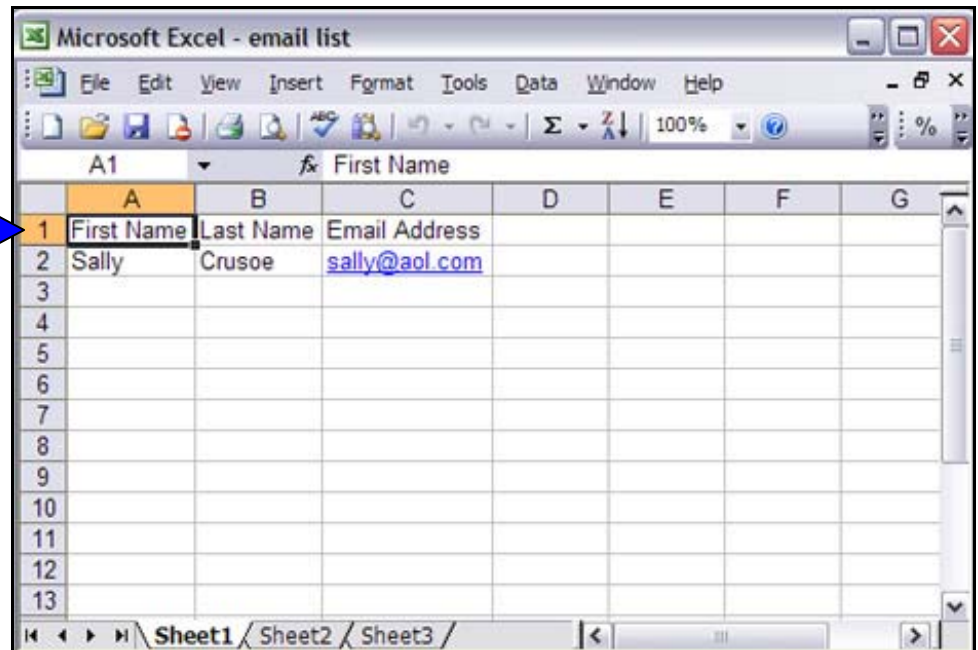


EMAIL MERGE TUTORIAL USING EXCEL, WORD, & OUTLOOK

1 Before starting an Email Merge, you must have an Excel File containing your names & email addresses. Be sure each column is clearly labeled in row #1. 

*You must save your file in either **MY DOCUMENTS** or **DESKTOP** or another location you are familiar with if you want to be able to locate it later in this tutorial!!! For this exercise, I saved the Excel file to the **DESKTOP**.*

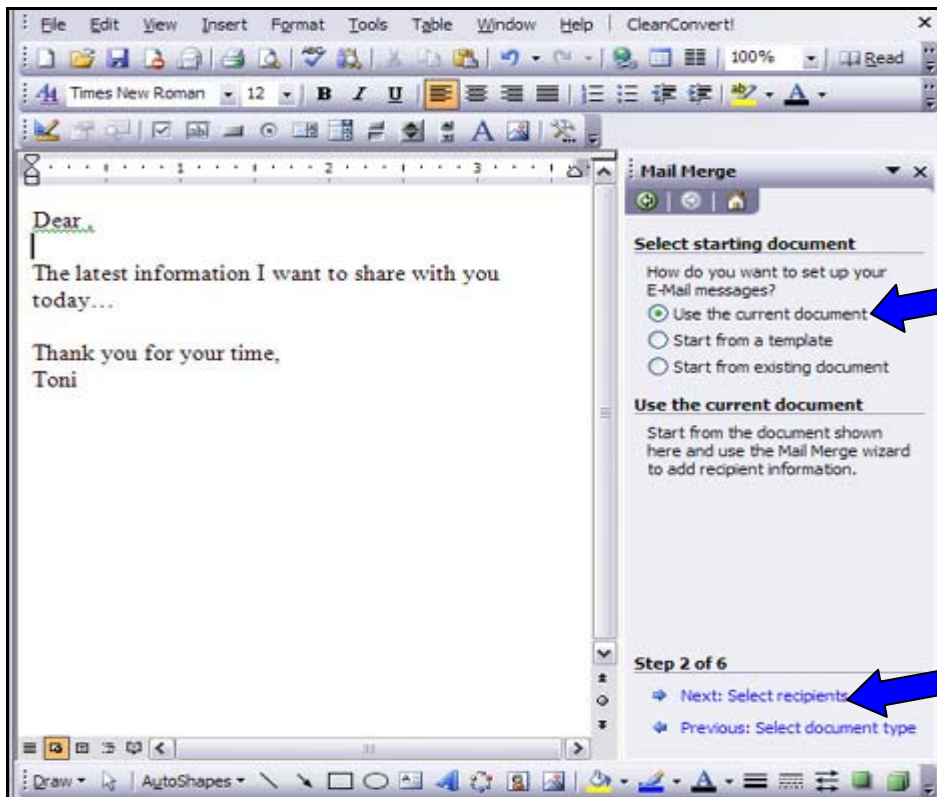


2 To Begin your email merge, open Word. From the top toolbar, click on **TOOLS**. From the menu that drops down, click on **LETTERS AND MAILINGS**. Then, select **MAIL MERGE**.

3 On the right side of your Word document, the 'Mail Merge' toolbar will appear. In this box, select **E-MAIL MESSAGES**.



4 Click **NEXT: STARTING DOCUMENT** to continue.



5 In the main body of the document, write out the message. Leave out personalized info (names), these will be added later.

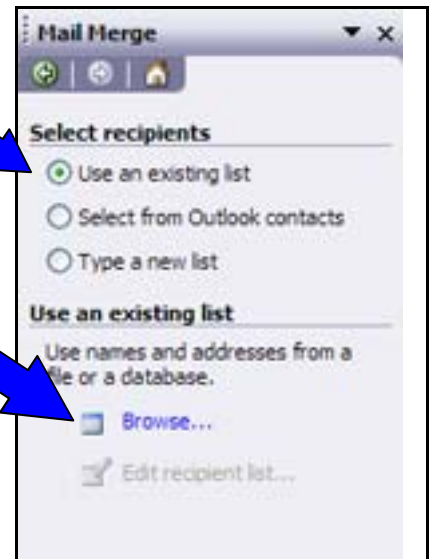
In the Mail Merge box, make sure it's set to **USE THE CURRENT DOCUMENT**.

*Alternatively, you can click on **START FROM EXISTING DOCUMENT**, which brings up a 'browse' function to open the Word document you want to use.*

Click **NEXT** to continue.

6

In this step, you tell Word where your Excel file is. In the Mail Merge box, ensure it has **USE AN EXISTING LIST** selected.



7

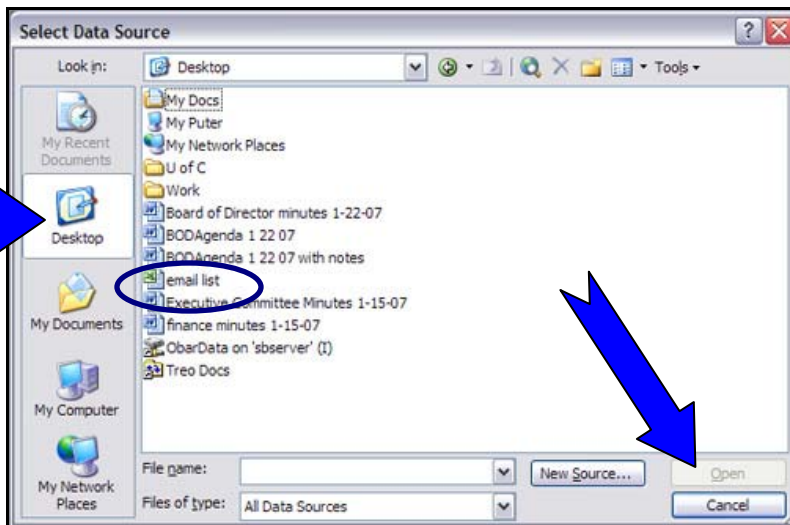
Click on **BROWSE**.

8

In the popup box that appears, locate your Excel file of email addresses. As my Excel file is on the **DESKTOP**, I can click the **DESKTOP** icon on the left side to quickly locate it.

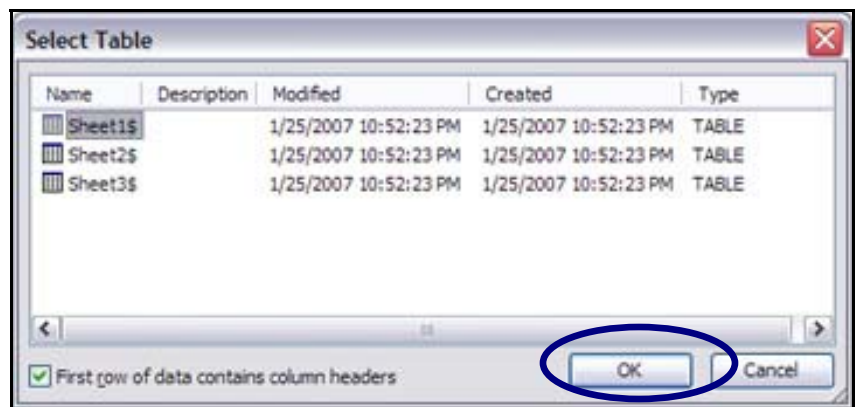
If it is in MY DOCUMENTS, click on that icon. If it is somewhere else, use the LOOK IN: function to locate the Excel file.

When you locate your file, click on it and then click **OPEN**.



9

After clicking OPEN in Step #8, you may see this box. If you do, just click **OK** without making any changes.

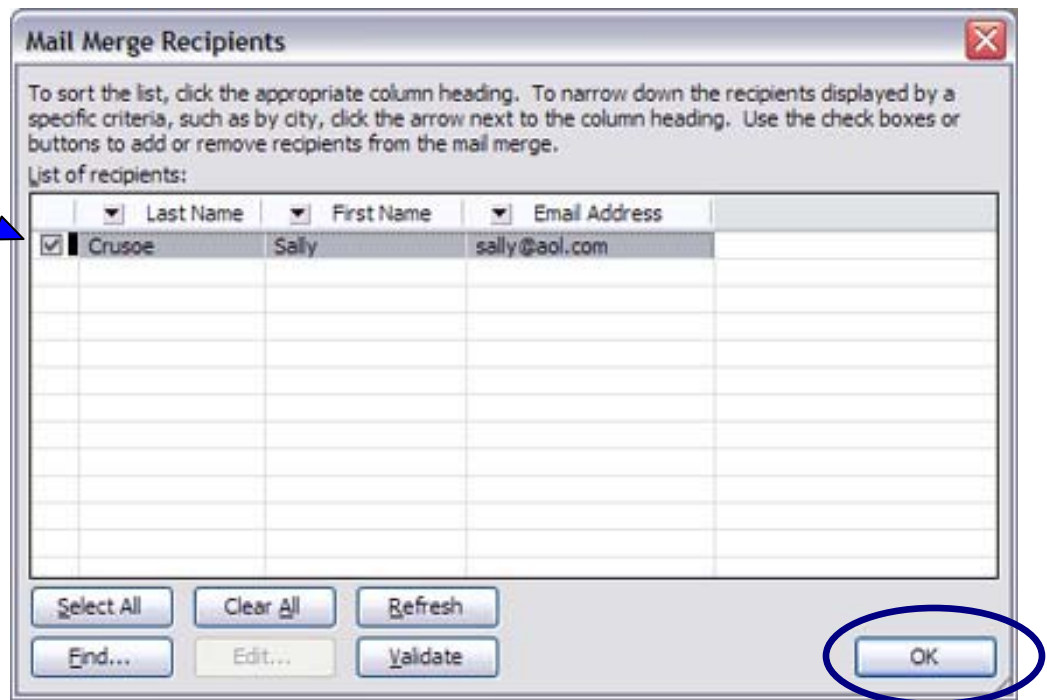


10

Next, you will see this box appear. If you wish to exclude any recipients, uncheck the box next to their information.

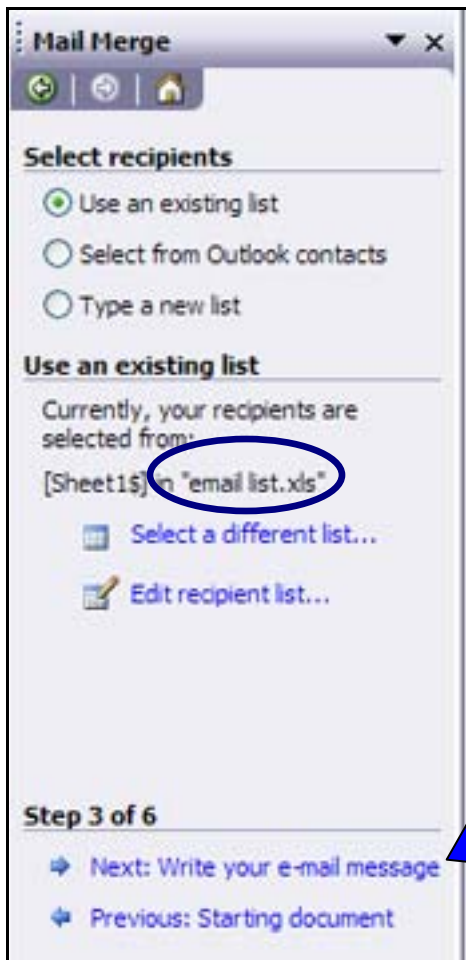
If there are more fields here than you wish to use, don't worry... choosing the info you want to use comes later!

After you unchecking any boxes or if you want to keep all of them, click **OK**.

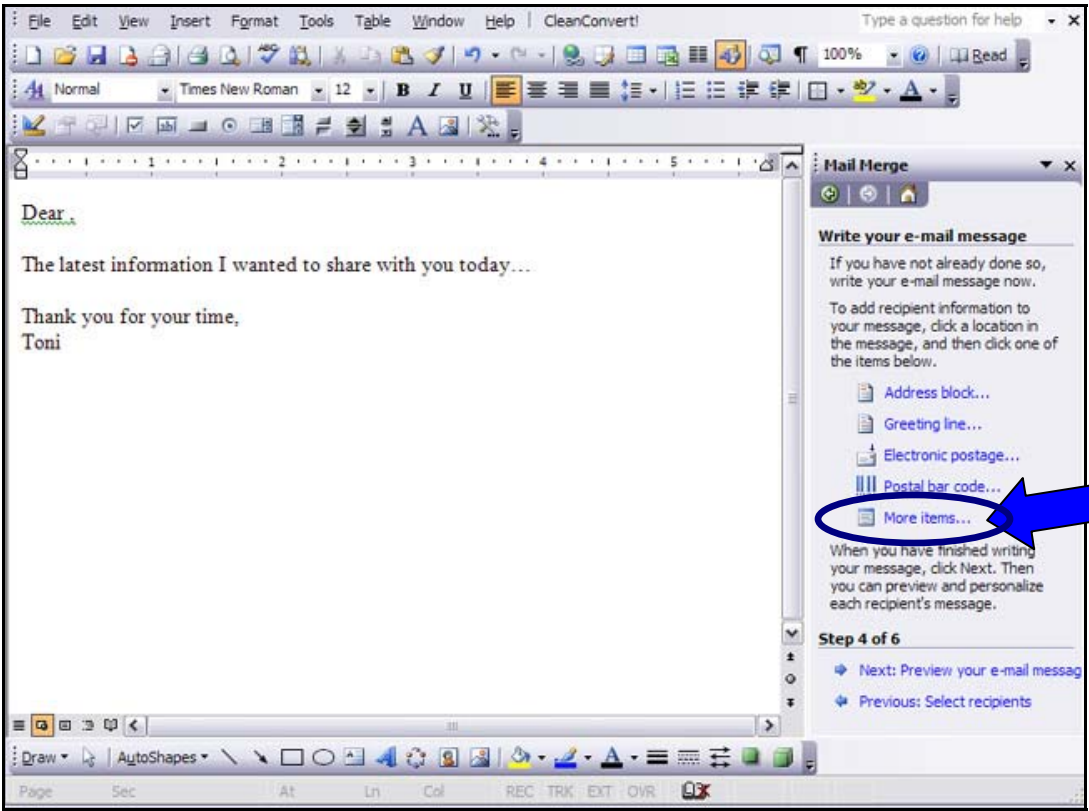


11

If all previous steps have been followed correctly, your Mail Merge box will now look like this. The name of your Excel file should be displayed...it may or may not have the [Sheet1\$] in front of it. This does not matter.



Click NEXT to continue.

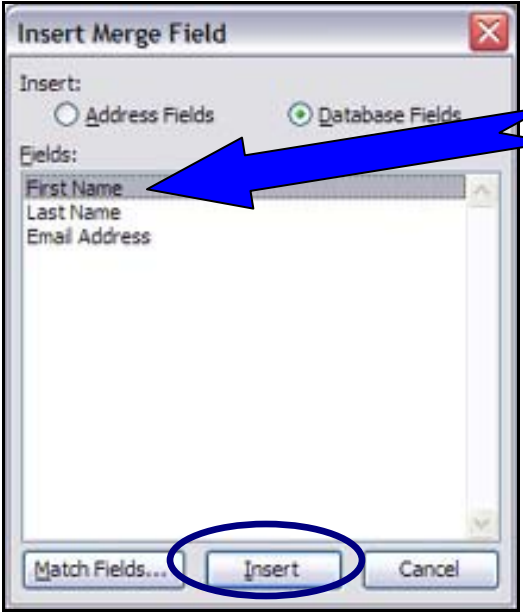


12 If you have not yet typed out your message in the main area, do so now.

Position your mouse cursor where you want to add the information (e.g. first name, last name). In this example, it would be right after the “Dear”. In the first line.

Click **MORE ITEMS**.

This step is completely optional, but if you have the names in your Excel file, it can make each email look like it was written personally

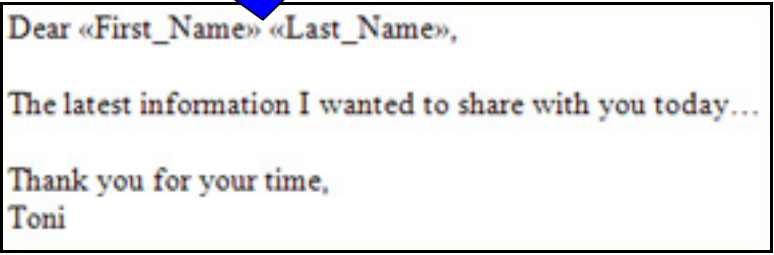


13 The ‘Insert Merge Field’ box will pop up on top of your work. Click on each field(s) you want to insert into your email (e.g. First Name). Then, click INSERT. When you do, notice that it places a <<FIELD NAME>> into your work right where you placed your mouse cursor.

Do NOT insert the Email Address field! That comes later...

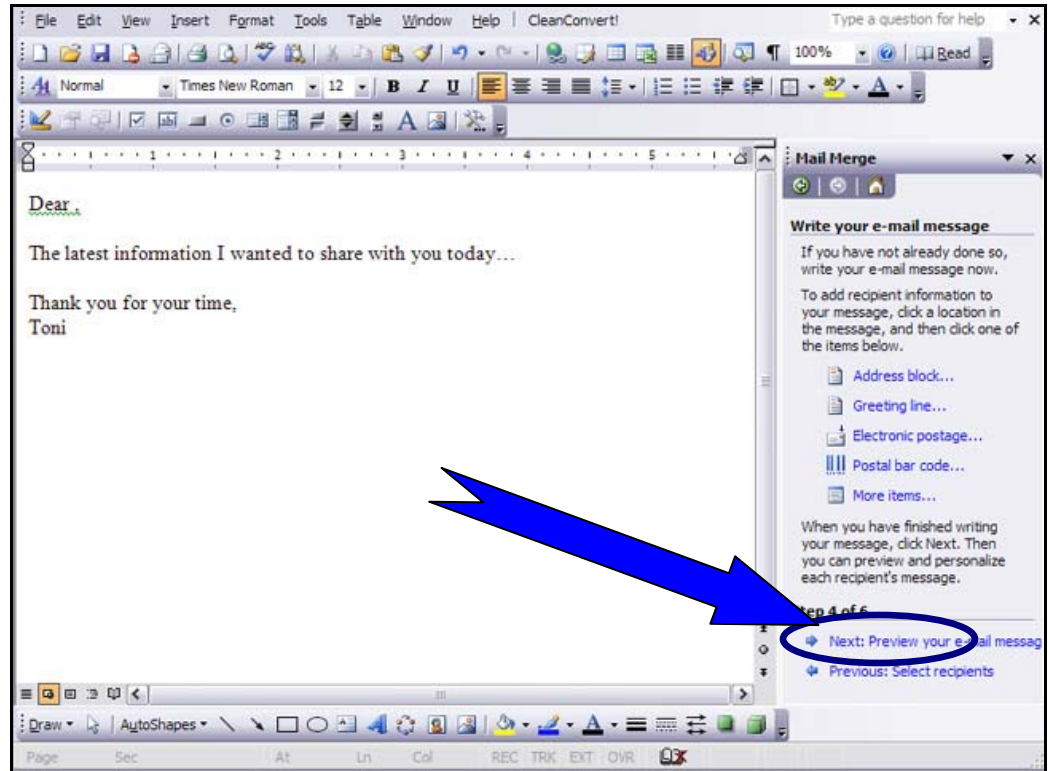
You can insert multiple fields and then click on the X in the upper left corner of this box to close it, or insert just one field and close it, reposition your cursor, and click MORE ITEMS to open it again.

Now look at your message. Make sure you have spaces between your new merged fields if needed...for example if you put in both the first and last names at once, you may need to click between them and hit the spacebar once to ensure they are properly spaced.



14 After you have inserted your merge fields to personalize the emails, give the message itself one last once-over.

When you are ready, click **NEXT** to continue.

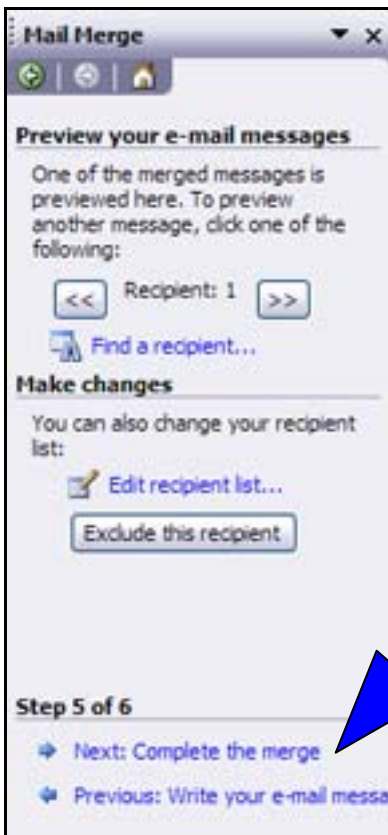


15

At this screen, you get to see what the email will look like. This screen shows you one of the merged emails, using the first row of data from your Excel file.

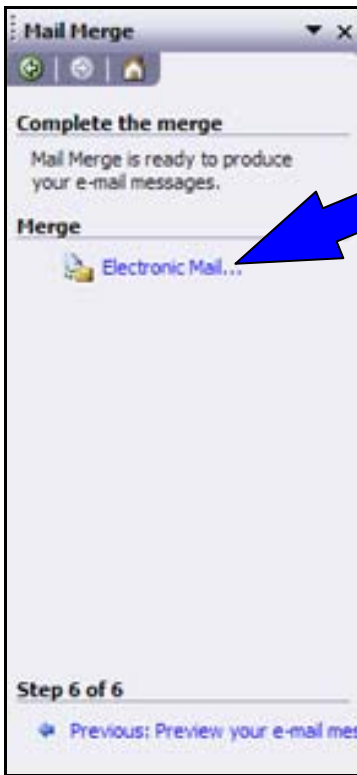
*If you want to change something in your email, click **PREVIOUS** at the bottom of the Mail Merge box. **DO NOT** try to change it on this screen!*

Otherwise, click **NEXT** to continue. Almost done...



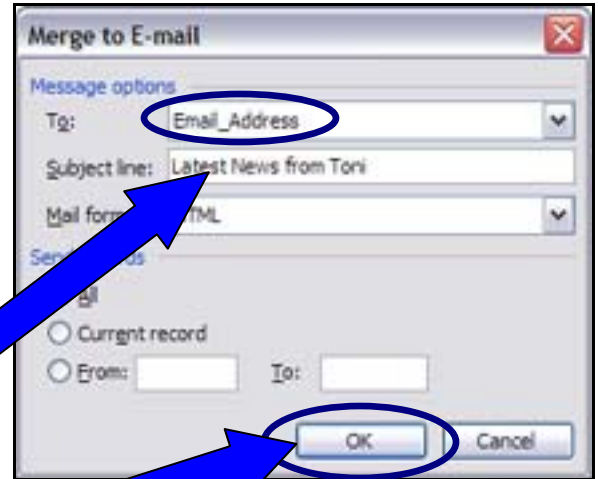
16

In this step, we complete the actual merge. Click on **ELECTRONIC MAIL**.



The 'Merge to E-mail' box pops up. If you used the word, 'email' in your Excel file to label the field used for email addresses, it will automatically put that in the TO: line. If it identified the wrong field, click the down Arrow and select the correct field from the choices offered.

Type out a **SUBJECT LINE** for your emails.



Finally, click **OK** to run your Merge.

17

Last Step!!!

Open your **OUTLOOK** email program. If all steps were completed correctly, you should be able to click on your **OUTBOX** folder, and see all the new emails you created waiting there.

Now click **SEND/RECEIVE** to send them out!

