Email Mail Merge

Overview: This document outlines how to perform a mail merge using email as the means of communication. The steps provide can also be used for other types of mail merges simply by selecting a different type of merge. You can create merges for Letters, E-mail messages, Envelopes, Labels, Directory. Before accessing the "Mail" tab either create or select the document you wish to use. In this demonstration, we will choose E-mail Messages as the document type and we will use a letter already created and stored.

Feel free to use colored fonts, font styles (bold, italics, etc) or other effects to make the message more appealing. However, e-mail merges to external audiences outside the CCAC Exchange Community should avoid special formatting, tables, text boxes, auto-shapes or pictures. Also, the hyperlink should be explicitly stated. (i.e http://www.ccac.edu) so that external audience members without an HTML mail editor may copy the address and paste it into their web browser.

This Job Aide provides the necessary steps to complete and send an email merge. Upon completion of the following procedure you will be able to:

- Construct and send a email mail merge

First open Word. Select the “Mailings” on the ribbon. Next, click on "Start Mail Merge".

You now may choose either to follow the ribbon by selecting "E-mail Messages" or “Step by Step Mail Merge Wizard”. In this document, we will be utilizing the commands on the ribbon.

1. Select a Document Type
Click on “Start Mail Merge” Next select “E-Mail Messages"
2. Select Recipients
Next step is to select your target audience.
Click on "Select Recipients"
You have the ability to "Type New List", "Use Existing List" or "Select from Outlook Contacts".
For our purpose will be selecting "Use Existing List"
An existing list, can be an Access Database an Excel Spreadsheet, or even an Excel Spreadsheet which was downloaded from a Colleague query.

Navigate to where you stored your list.
When you look up a list that is an Excel Spreadsheet, you may get the following dialogue box. This box is just asking you which sheet in the workbook you wish to use. Just choose the first entry (if your workbook has only one sheet) or the correct sheet.

When you choose an existing list (this Mail Merge Recipients list uses the spreadsheet shown on the Mailing List page), you will be able to:
- Check or un-check the boxes to select or de-select any of the recipients
- Click on the header arrows to filter or sort your list
3. **Insert Merge Fields**

You may select one of the following to insert an “**Address Block**, "**Greeting Line**, or "**Insert Merge Field**". **Address blocks** are usually used for labels, **Greeting Line** is generally used for Letters and **Insert Merge field** are for general purposes. For our purpose we will be using "**Insert Fields**".

Before Insert the merge fields you first have to “**Match Fields**”

![Match Fields](image)

Match each field from your recipient list the required fields.
Use the drop-down list to select the appropriate field for each on the components

*Note if you select “**Insert Greeting Line, or Address Block**” you will need to make sure that you click “**Match Fields**”*
4. Preview your Letters
The "Preview Results" section allows you to click on the forward and back arrows to view how the merged letters will look. Notice that there is still only 1 page to this document; you can preview easily BEFORE a merged document is created. You can make changes by editing the recipient list, or excluding any recipient.

Dear Cyrano Beurecat

The Information Technology Services (ITS) staff has been informed that you have been hired by the College, and been provided with an Employee Network Account. The ITS staff welcomes you to the College.

We would like to inform you of the services we offer to employees, as well as to make you aware of the policies and procedures that influence your use of computer resources at CCAC.

Please take the time to review and bookmark the following information online:

1. **ITS SERVICES**: For a concise overview of the services provided by the ITS department, review our online welcome brochure.

2. **TECHNOLOGY TOOLKIT**: As an employee, you have a wealth of resources available to you through ITS and other technology-related areas of the College. Review online to understand all the technology tools available from your desktop. These resources will enhance your job effectiveness.

3. **ONLINE ORIENTATION TO TECHNOLOGY**: We have developed an online tutorial for new employees. Call the Helpdesk to enroll in the Online
5. Finish & Merge
You can now click on "Finish & Merge" and then select "Send E-Mail Message" to complete the merge.

The Merge to E-Mail window will be displayed. In this window, enter the Subject Line and choose Mail Format. If you are sending to an external audience, you may want to select Plain Text as the Mail Format. Next, click OK to complete the merge. The email will now be sent to the email address specified within your data source.

To a demo of using mail merge click [http://webdev.ccac.edu/talkin/Techtorials/default.htm](http://webdev.ccac.edu/talkin/Techtorials/default.htm)