Using Mail Merge for Advising Campaigns

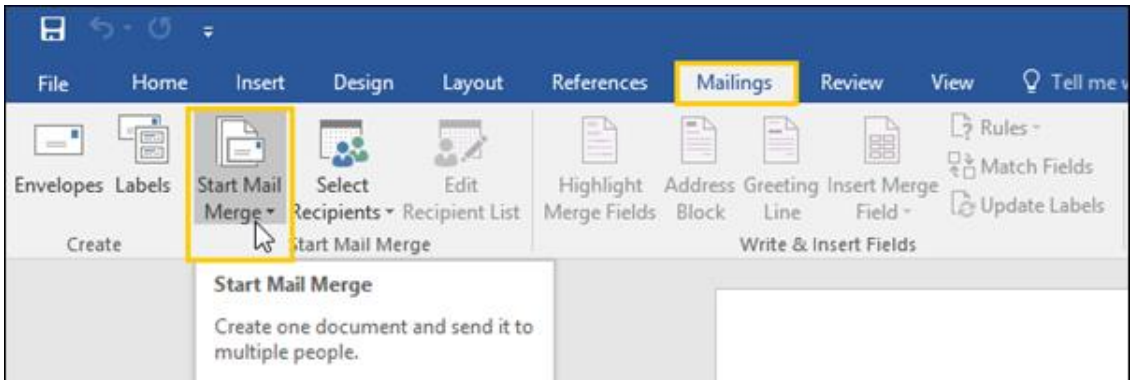
Mail Merge is a feature in Word that allows you to personalize mass emails from a list in Excel. Instead of starting a mass email with “Hello, All…” you can actually address individuals and use information specific to them in the email body without having to write a hundred of them.

This tutorial was taken from USC Dornsife, but the content is also presented below:

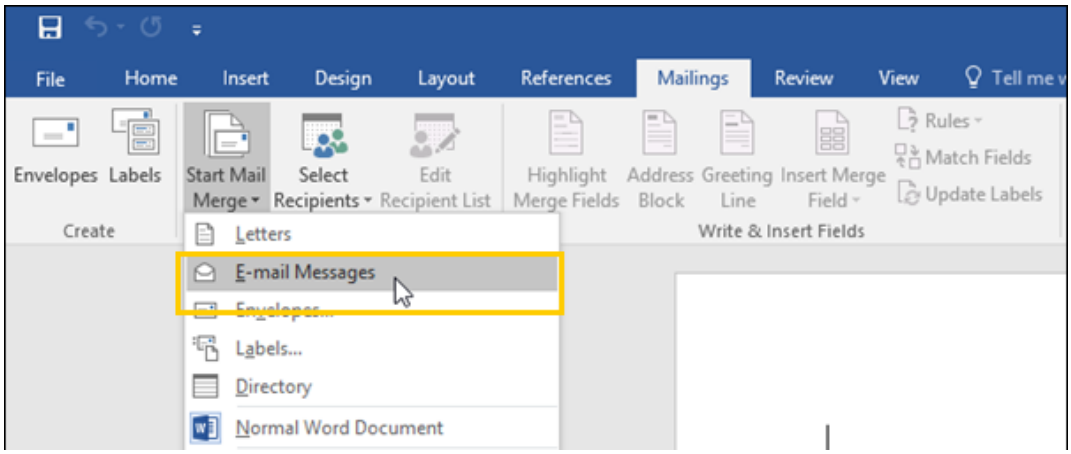
1) Create an Excel spreadsheet with the information you want to use. A quick way to do this is to run either an Argos or Navigate report with your caseload/students you want to contact. Be sure that your column headers are easy to understand. You’ll also want to be sure to include a column with the student’s email addresses. Once your information is how you like, save your file in an easy-to-find location and close.

2) Open a blank document in Microsoft Word.

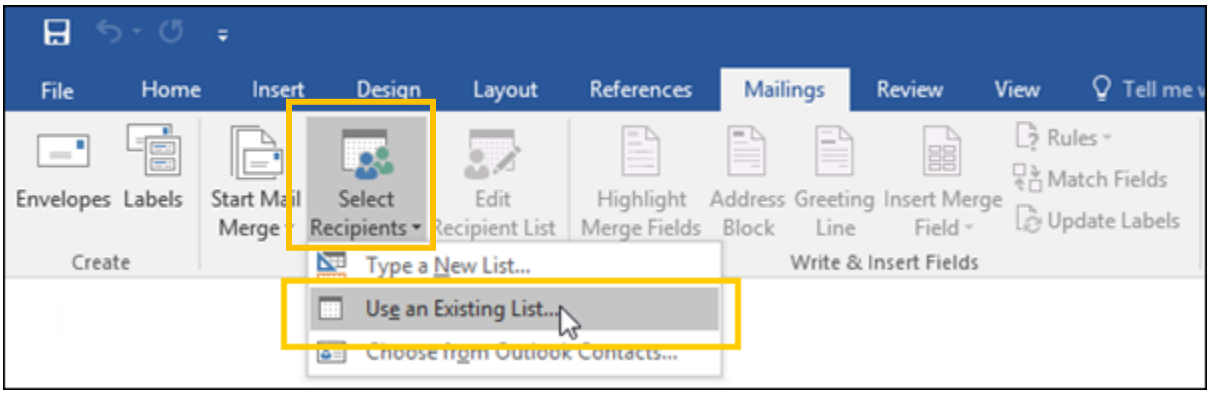
3) Select the Mailings tab at the top of the screen and select “Start Mail Merge:”



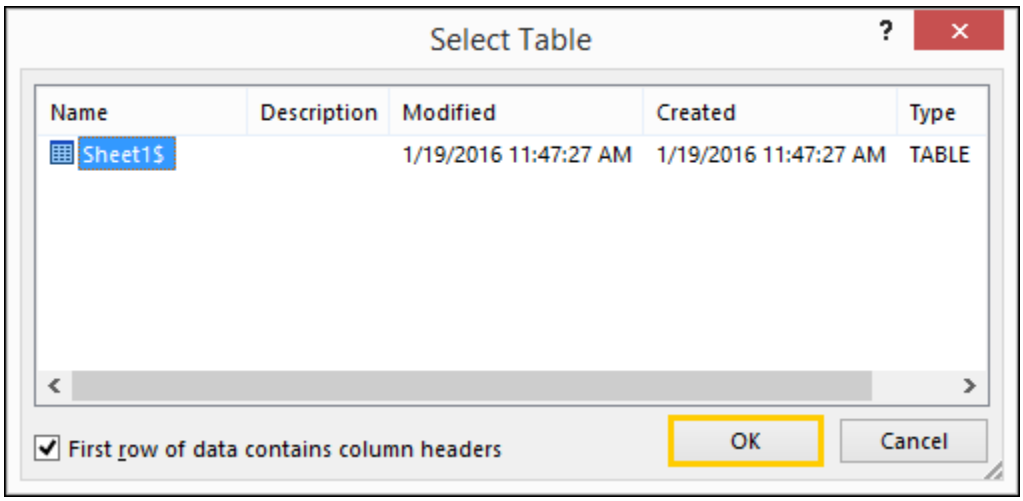
4) From the drop-down menu, select an option. Each option will be similar in process, but will contain individual steps that are specific to that process. For this example, select “E-mail Messages.”



5) Next, select the “Select Recipients” button and click “Use an Existing List:”



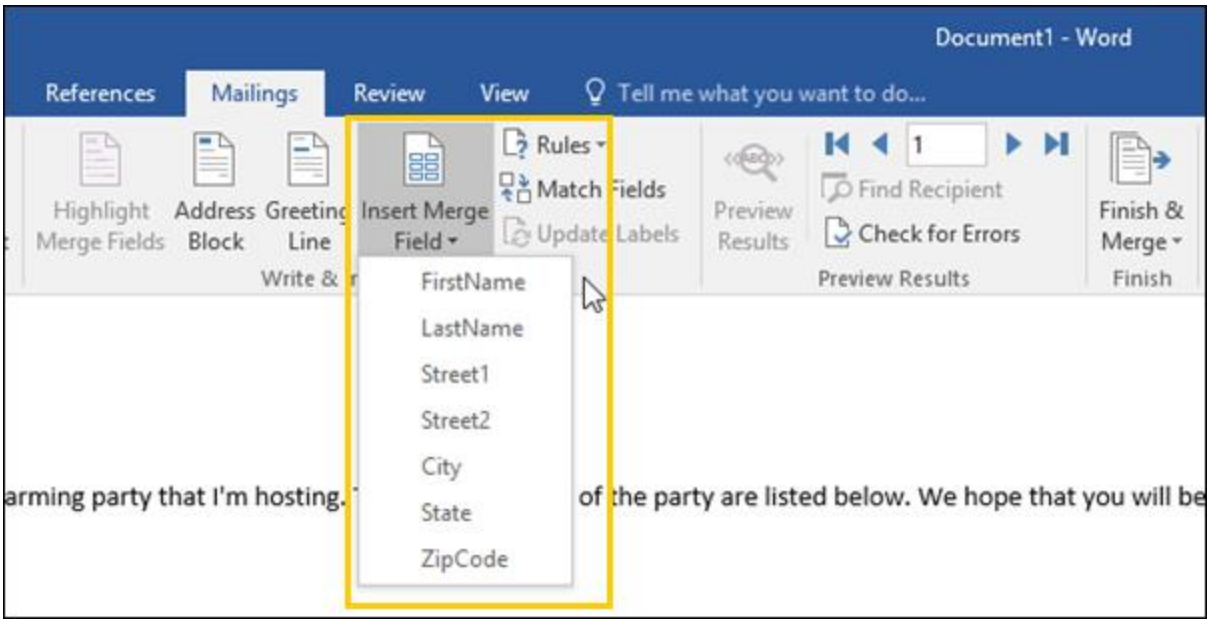
6) When prompted, find and select the Excel spreadsheet you saved. Then, click the "Open" button. The "Select Table" screen displays the tab name that contains data in the Excel spreadsheet you selected. Select the "First row of data contains column headers" checkbox to tell Excel to skip the first row of the spreadsheet because it contains column names, if applicable.



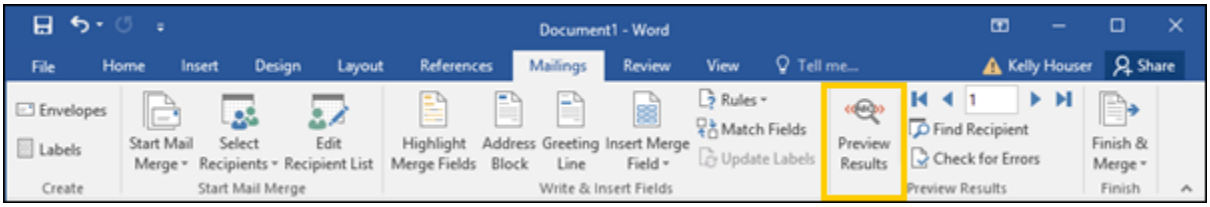
7) Select the OK button. The Select Table screen closes.

8) In the blank Word document that is displayed, type the email you want to send. If you have already composed it, you can copy and paste it here from the original source.

9) After you have composed the email, you will begin to insert the Mail Merge fields. This will map the data within your Excel spreadsheet to a specific location within your email. Place your cursor in the location that you want to insert the first Mail Merge field (for example, put your cursor at the top of the email if you'd like to insert their name). Under the Mailings tab in the Word toolbar, select the "Insert Merge Field" option. The Insert Merge Field drop-down menu displays the names of your Excel spread sheet column headings. Select the column name that you want to insert in the location where you previously placed your cursor in the Word document. The Mail Merge field is inserted. See screen shot on next page for example.



10) You are now ready to preview the Mail Merge. You do not have to preview the Mail Merge, but it is a good idea to make certain it has worked successfully. Select the "Preview Results" option in the Word toolbar.

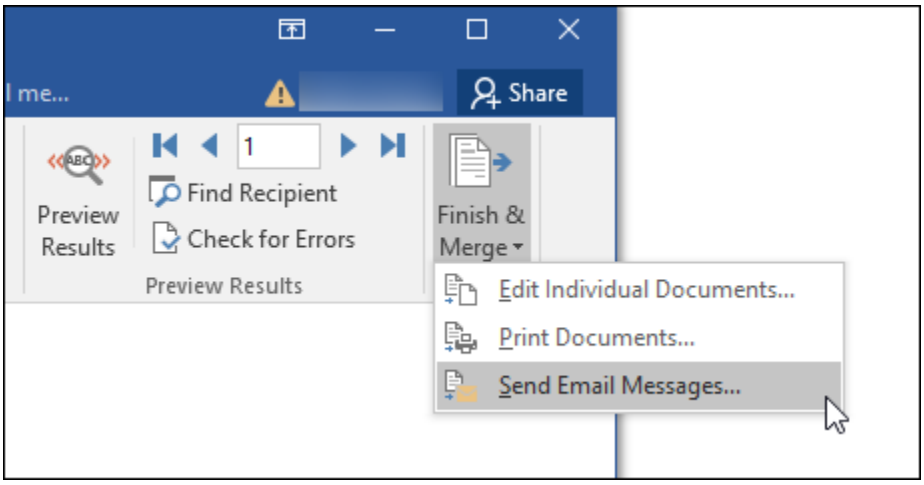


11) Word displays a preview of how the Mail Merged documents will appear. The Mail Merge fields have been converted into actual data.

12) If the Mail Merge preview look accurate, then you are now ready to send. Select the "Finish & Merge" option from the Word toolbar. A drop-down menu displays. From the drop-down menu, select the way in which you would like to send your messages. Here are the options:

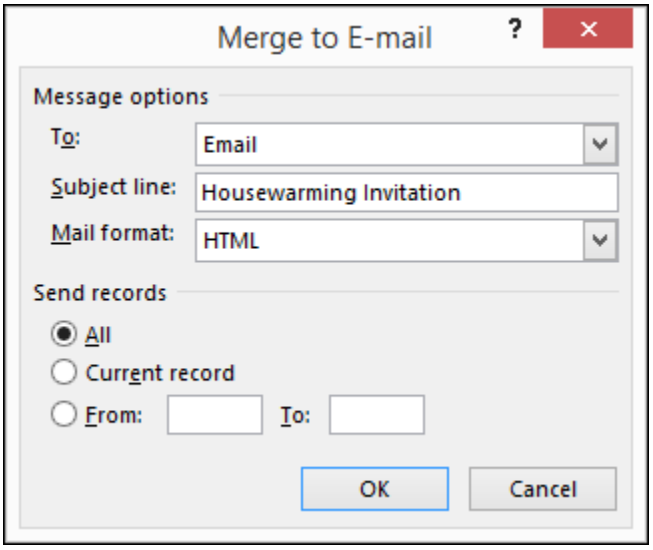
- **Edit Individual Documents**: Select this item to edit each individual letter.
- **Print Documents:** Select this item to send the Mail Merge documents to the printer.
- **Send Email Messages**…: Select this item to send via email.

For this example, "Send Email Messages…" will be selected. The Merge to E-mail screen displays. The Merge to E-mail screen provides the ability to designate to whom the emails will be sent. Your Excel spreadsheet should contain a column containing the email address of each recipient. In the example below, the To: field is set to Email, because that is the header name in the Excel spreadsheet. After selecting the appropriate Excel spreadsheet column name, enter a Subject line in the corresponding field. See screen shot on next page for example.



13) Select a Mail format. HTML is selected by default. You may leave that option as-is or you may select a new option from the corresponding drop-down menu.

14) The Send records section provides the ability to select which documents in your Mail Merge to send via email. You can select "All" to email all documents in the Mail Merge. You can select "Current record" which will send only the document currently displayed on your screen. You can select the "From: and To:" option to designate a page range to be emailed.



15) After selecting the options appropriate for your needs, select OK. The documents should be immediately emailed from Microsoft Outlook. The Mail Merge process is complete. Repeat these steps to create additional Mail Merges.