



# Mail Merge

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# Mail Merge

Starting with a WORD document, create a mass mailing (letters or email) where each document is customized for its recipient



# Mail Merge

- Customization is typically done using data from:
  - An EXCEL spreadsheet
  - OUTLOOK contacts
  - An ACCESS table or query
- Typical customizations include the Address Block and the Greeting Line.
- Can also create Envelopes and Labels



# Mail Merge Step by Step

- Create the prototype WORD document, decide what customization is required and insert “placeholders”
- Create the EXCEL spreadsheet
  - One row for each recipient
  - One column for each item of customization data. Use column headings with standard names when possible
  - One column for the email address to be used for email output
- Alternatively, recipients and customization data can be selected from your OUTLOOK contacts list



# Mail Merge Step by Step (Con't)

- Link EXCEL columns or OUTLOOK fields to the “placeholders” in the WORD document
- Preview
- Initiate the Merge



# Email Output Considerations

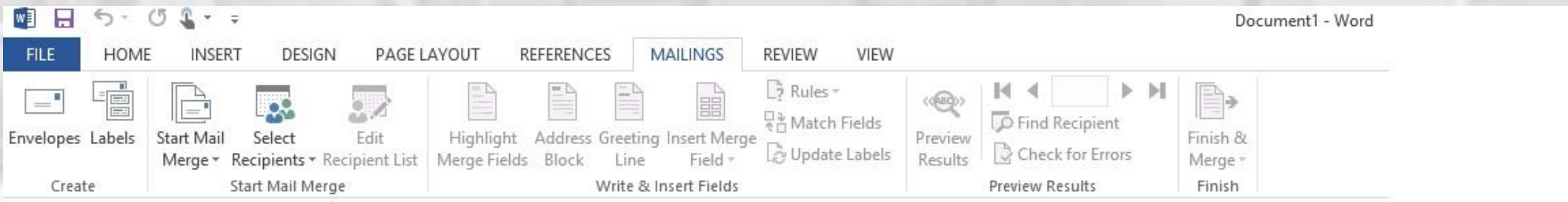
- You must have a desktop Email client (Outlook, Windows 10 Mail App, Windows Live Mail, AOL, Thunderbird, etc.)
- Web-based Email clients will not work (Outlook, Yahoo, Gmail\*, etc.)
- To send HTML messages, Mail Merge requires OUTLOOK. For Plain Text messages, it will use your default Email application.
- Can not use Contact Groups
- Can not have files attached to the emails

\* Gmail has its own Mail Merge Add-Ons



# Mail Merge Demo

- Letters
  - Print
  - Multi-page document
- E-Mail
  - Using Outlook to send
  - Using other email to send
  - Using Outlook contacts





# Mail Merge with Gmail

- Mail Merge uses Google Sheets and Gmail
- At least two Mail Merge Add-ons for Google Sheets are available
  - Free, with a Premium version available
- Create your email template as a draft in Gmail
- Create your recipient list as a spreadsheet in Sheets
- Initiate the Mail Merge from Sheets
- Some additional features:
  - Scheduling, attachments