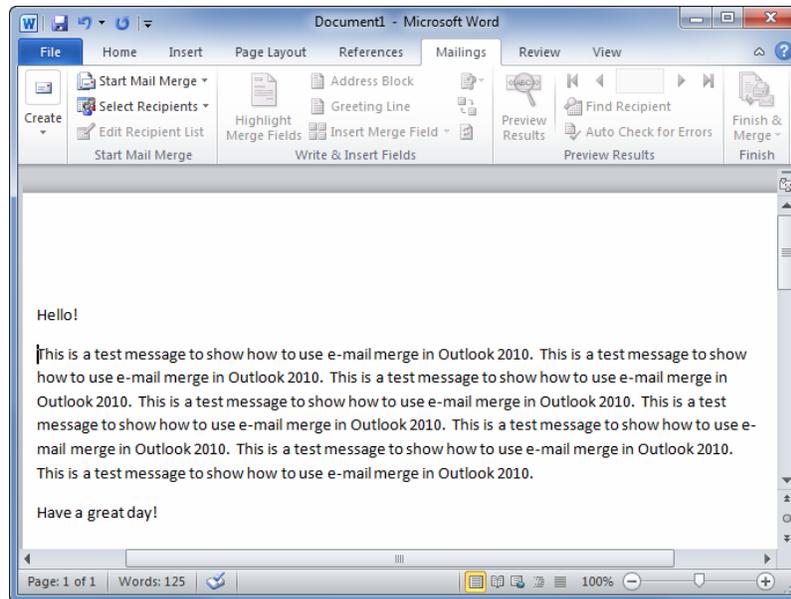


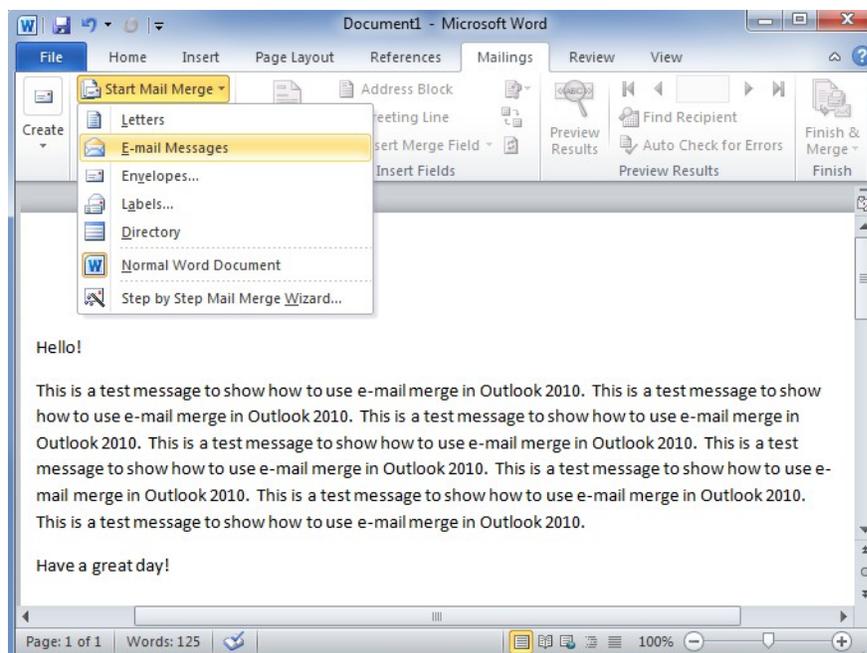
## How to create an E-mail Merge using Excel, Word and Microsoft Outlook 2010

*\*Note: Just like in Word 2007, Word is the only editor in Outlook 2010 (by default).*

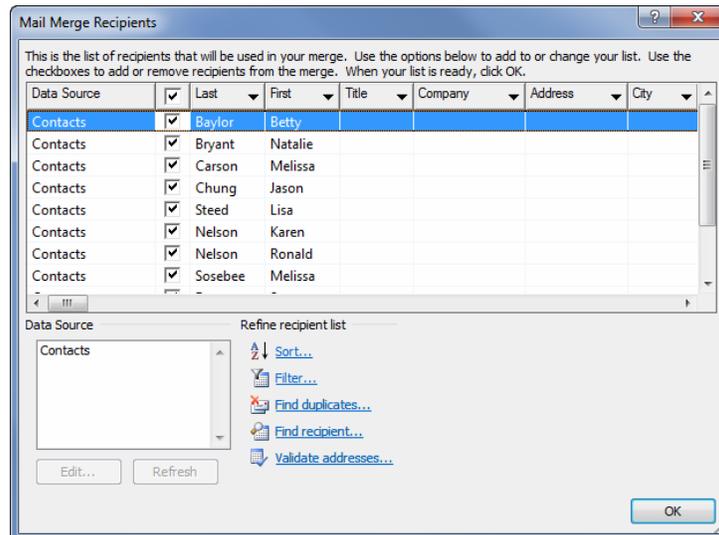
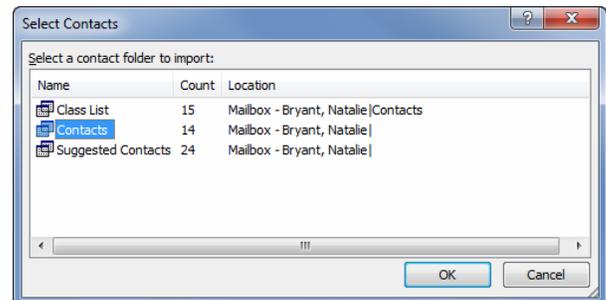
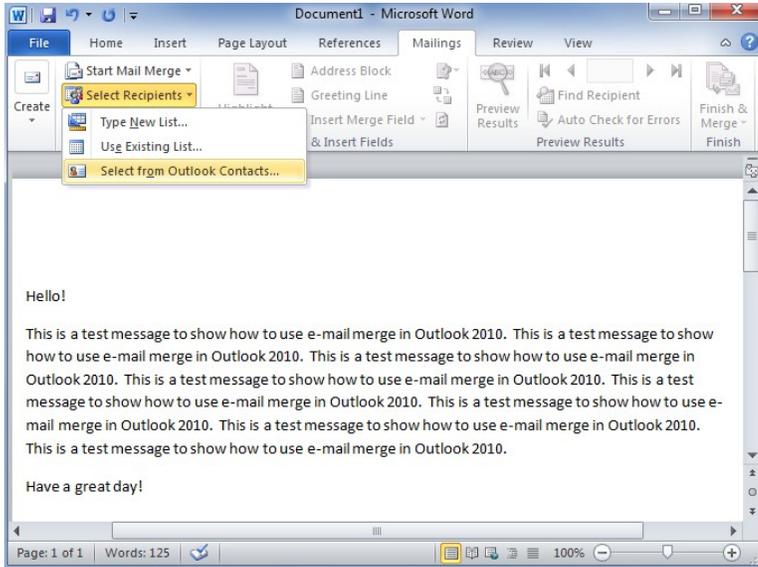
1. Open up Outlook for the email address from which you want to send this merge. Open up Word 2010. Create a new e-mail message in Word. Now you are ready to begin the merge by selecting the “Mailings” tab in the ribbon.



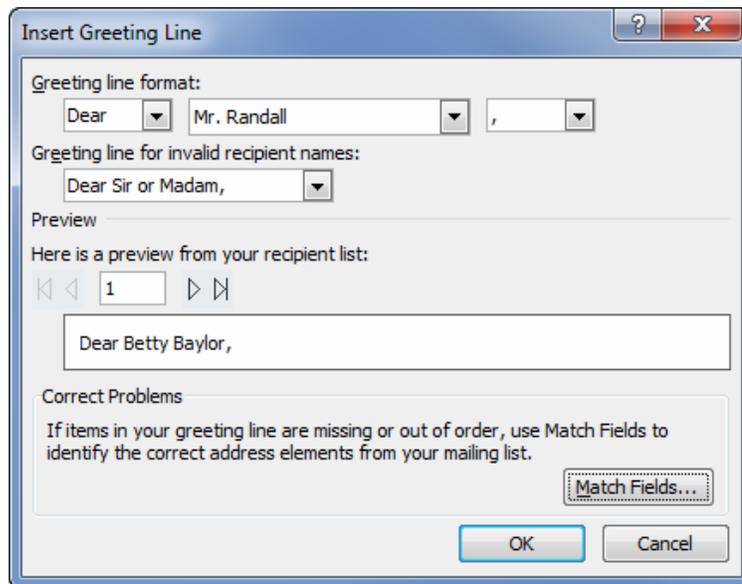
2. In the “Start Mail Merge” grouping, click on the “Start Mail Merge” button. It will show a list of mail merge options available. You can choose Letters, E-Mail Messages, Envelopes, Labels or Directory. In this case we want to send an email... click on “E-Mail Messages”. Type out the text of your message, or paste in the text of a previously drafted message.



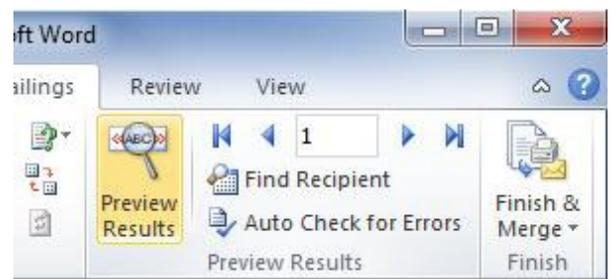
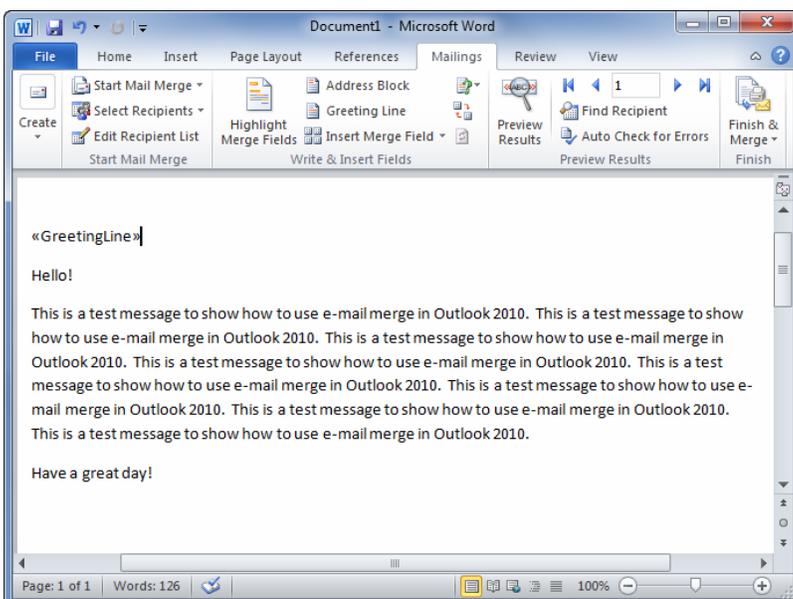
3. Next you need to select the recipients of your email merge. These names could come from any number of sources... maybe an Excel 2010 spreadsheet or your Outlook 2010 Contacts. To do that, click on the "Select Recipients" box in the "Start Mail Merge" group. Either find your data source, your outlook contacts, or create a new list. If you want to edit any of the recipients in the list, now is the time to click on "Edit Recipient List" in the "Start Mail Merge" group.



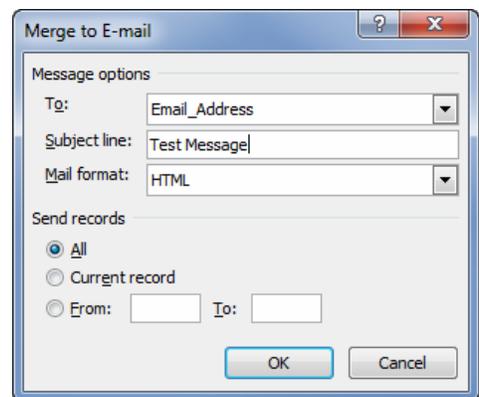
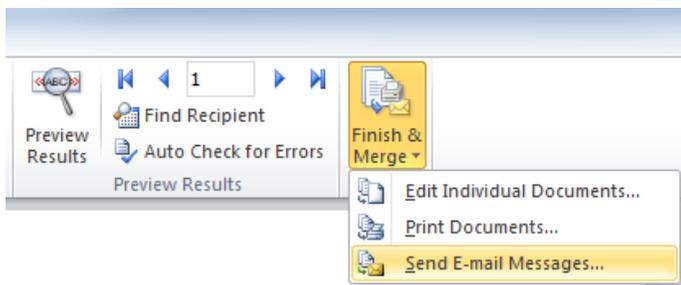
4. The next step is to add the appropriate fields to personalize the greeting, the recipient's name, or to add any other piece of data you might have on the contact anywhere throughout your recipient List. (For example, if this is a fundraising appeal, you might include a specific "ask" amount for each potential donor.) You can find the appropriate fields in the "Write & Insert Fields" group (still on the "Mailings" tab). One option would be to place the cursor where you want the field to appear, and use the "Insert Merge Field" button. In most instances you will want to add at least a greeting line (Dear Bill... or something like that). To do that, place the cursor in the appropriate location within the document, and then click on the "Greeting Line" button in the "Write & Insert Fields" group. The following dialog box appears:



5. If you are using the "Insert Merge Field" group, once you are happy with the format of your merge field, click "Insert". If you are using the "Greeting Line", once you are happy with your greeting line format, click "OK". Word 2010 will now drop the field into your document wherever you have placed the cursor. Now you can preview your results to ensure that everyone's name and other information is coming up correctly. Click the "Preview Results" button in the "Preview Results" group... then use the forward and back arrows beside it to run through your recipient list.



6. If you are happy with the preview, now is the time to finish things off and complete the merge. In the “Finish” group on the “Mailings tab” you will see a button called “Finish & Merge”. Click on it. (If you want to do one last check on the documents, choose “Edit Individual Documents”, then choose “All”. The text for each merge document will appear. Review them to see if you need to go back to make any last minute changes.) When you are ready to send out the emails, click on “Send E-mail messages”. Fill in the “To:” using the name of the field which contains the email address data. Fill in the appropriate “Subject” line you want to use for all of these emails. Fill in the format you want to use: “HTML”. You now need to decide if you want to send “All” of the emails at once, or specific emails from your list. It is recommended that you only send out 20 emails at a time when using a CUNY email, to prevent the GC computer system from thinking this is SPAM. Assuming you are doing this, choose the specific records you want to send, for example “From: 1 to: 20” or “From: 21 to: 40”, then click “OK” to send these email messages. Repeat this step for the remaining emails you want to send until you are finished with your list.



7. Now Word 2007 automatically generates all the individual emails, and sends them to your Outlook 2010 outbox (or your default email client). Your email merges will be recorded in your sent items folder. You may want to save an electronic copy of these merged documents for your records for a specific period of time.

**NOTE: Attachments are not an option in an email merge. All data must be within the body of the email message.**