HOW TO:

SET UP MAIL MERGE TEMPLATE

WHAT DO I NEED?

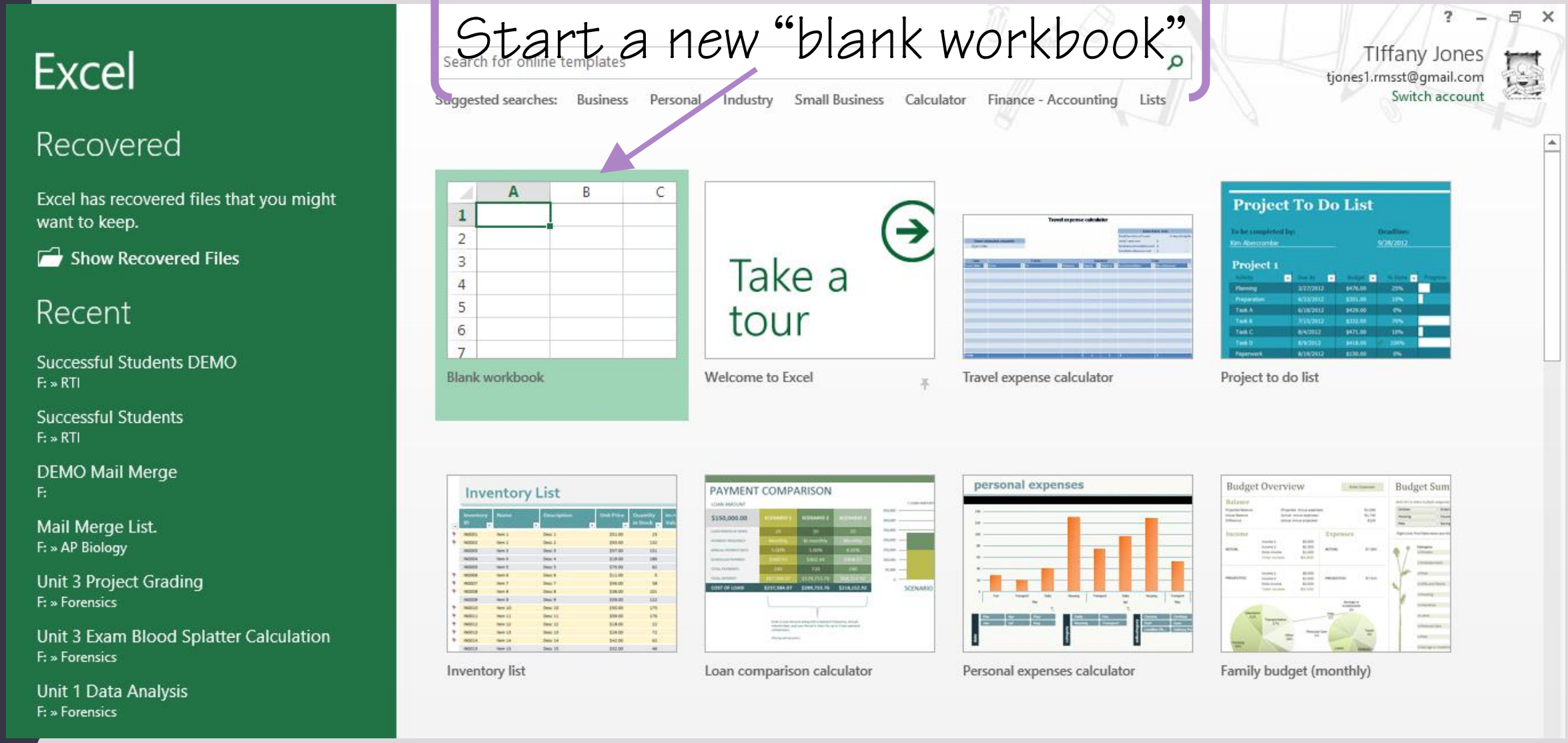
- Microsoft Office
  - Microsoft Excel
  - Microsoft Word
- Data/Information
  - Email addresses if electronically distributing

STEPS:

1. Set-Up Excel File
   - Columns with identifiable titles
   - Data into excel file
   - Save File
2. Set up Word File
   - Start Mail Merge
   - Link excel file
   - Type message & insert merge links
3. Merge the documents
   - Print or send your document

LET'S SET UP A TEMPLATE FOR YOU TO USE IN YOUR CLASSROOM!

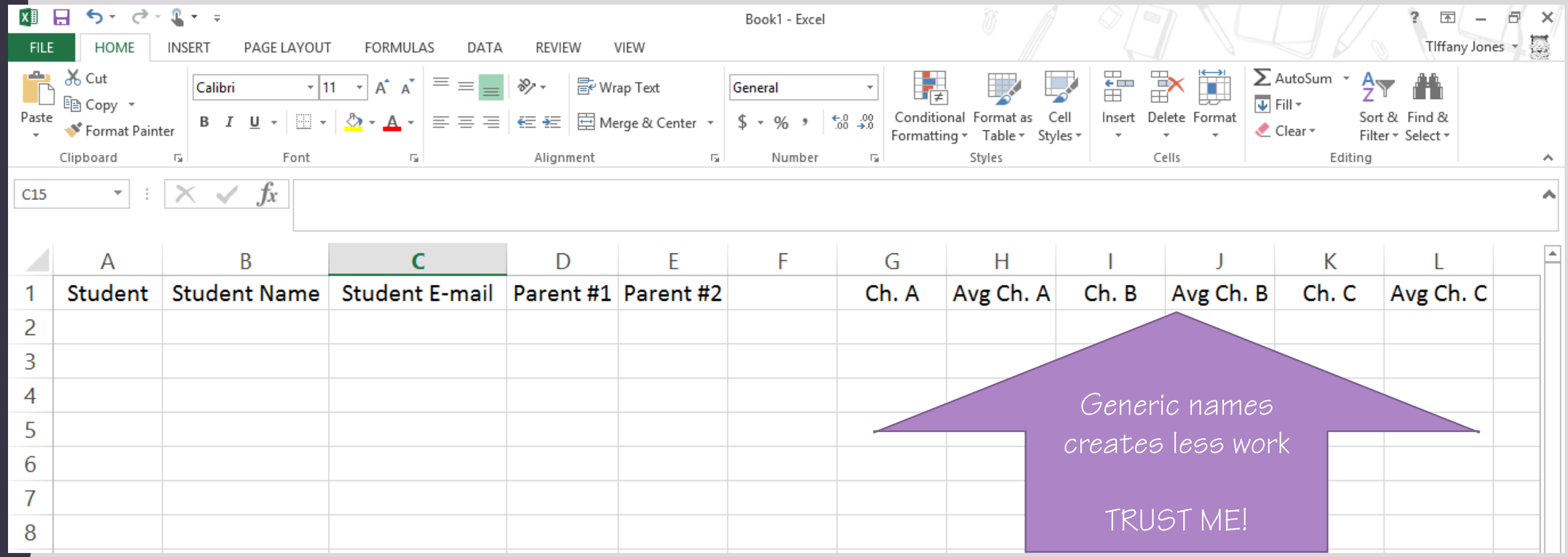
1. OPEN EXCEL


Start a new "blank workbook"
Excel
Recovered
Excel has recovered files that you might want to keep.
Show Recovered Files
Recent
Successful Students DEMO
F: » RTI
Successful Students
F: » RTI
DEMO Mail Merge
F:
Mail Merge List.
F: » AP Biology
Unit 3 Project Grading
F: » Forensics
Unit 3 Exam Blood Splatter Calculation
F: » Forensics
Unit 1 Data Analysis
F: » Forensics
Search for online templates
Suggested searches: Business Personal Industry Small Business Calculator Finance - Accounting Lists
TIffany Jones
tjones1.rmsst@gmail.com
Switch account
Blank workbook
Take a tour
Welcome to Excel
Travel expense calculator
Project To Do List
Project to do list
Inventory List
Inventory list
PAYMENT COMPARISON
Loan comparison calculator
personal expenses
Personal expenses calculator
Budget Overview
Family budget (monthly)

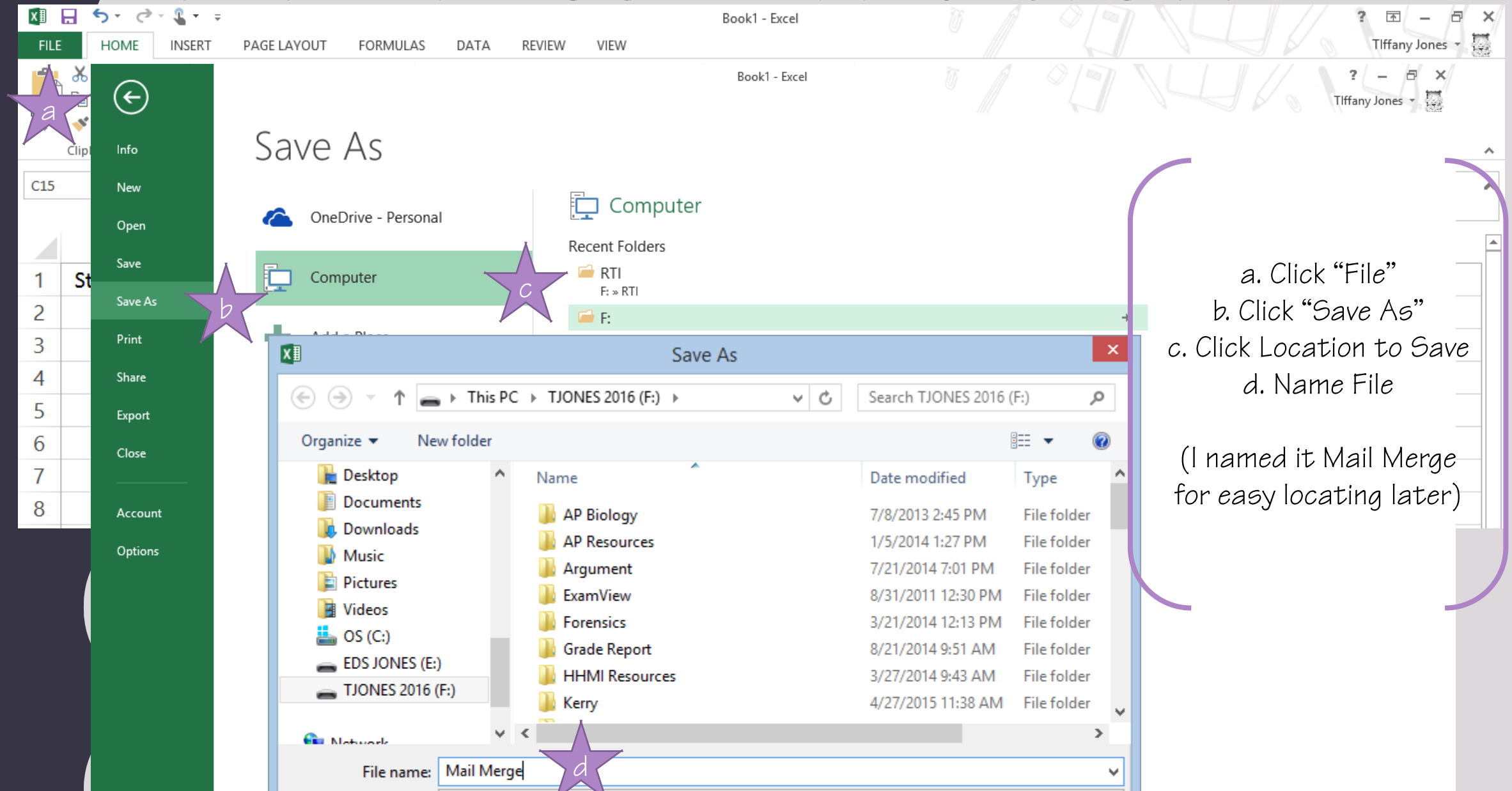
2. TITLE YOUR COLUMNS

Hints:

- Use Names You Understand
- Short hand
- If you want to re-use your file, use generic names



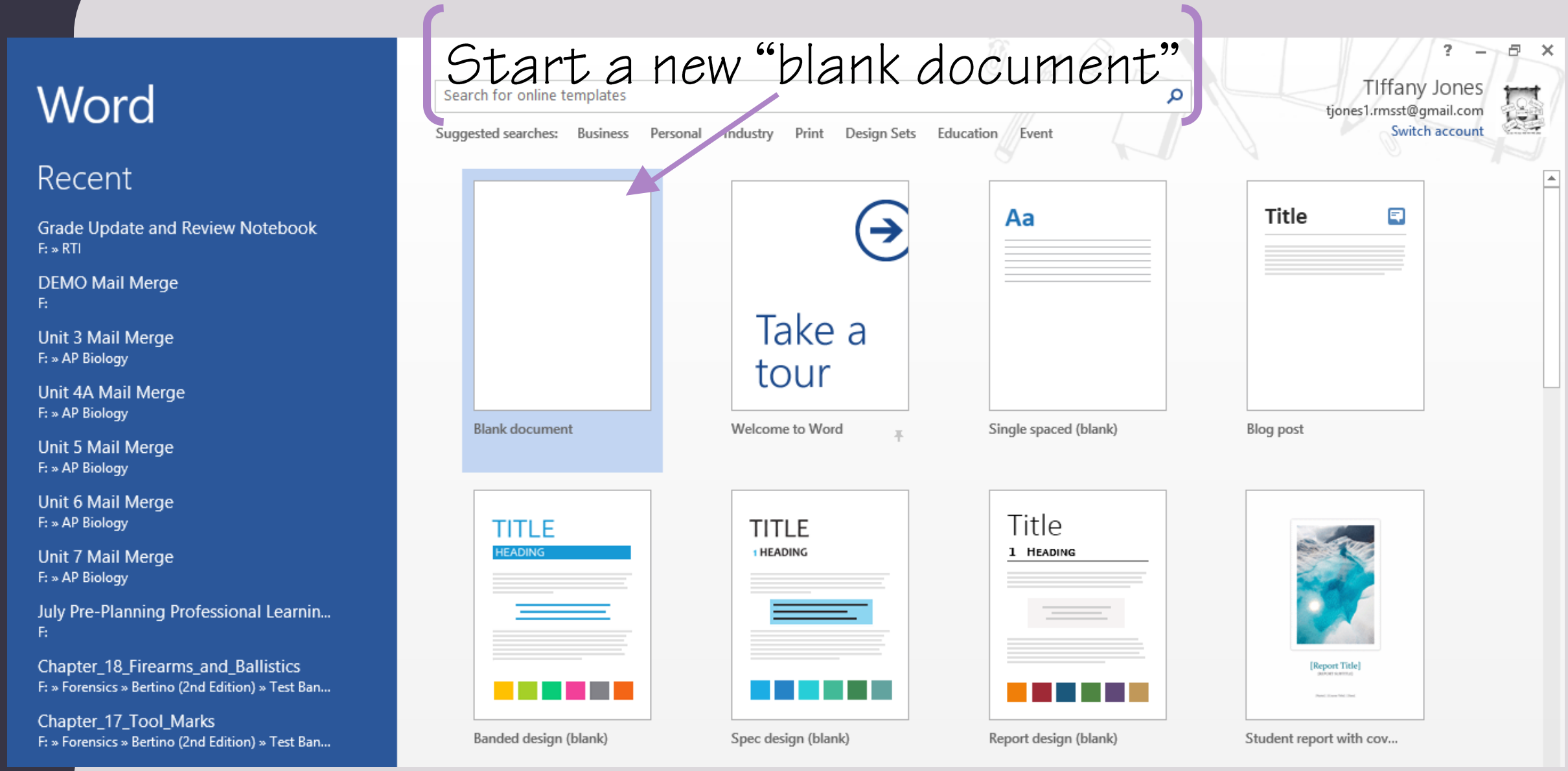
3. SAVE YOUR FILE & CLOSE



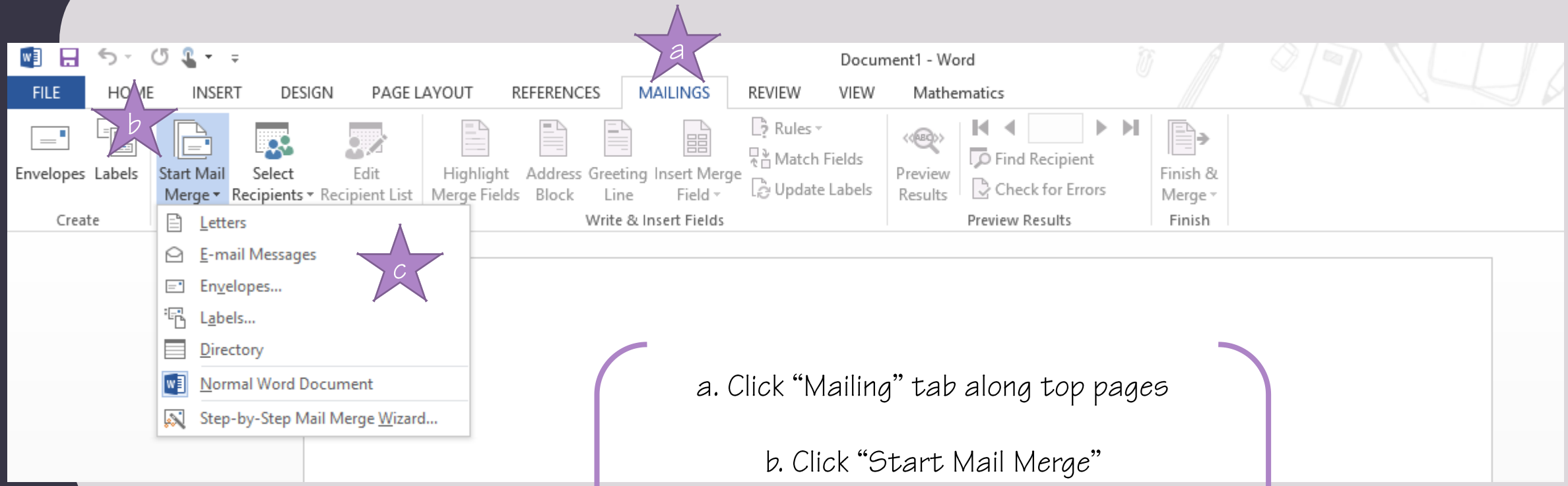
a. Click "File"
b. Click "Save As"
c. Click Location to Save
d. Name File

(I named it Mail Merge for easy locating later)

4. OPEN NEW WORD DOCUMENT



5. START MAIL MERGE

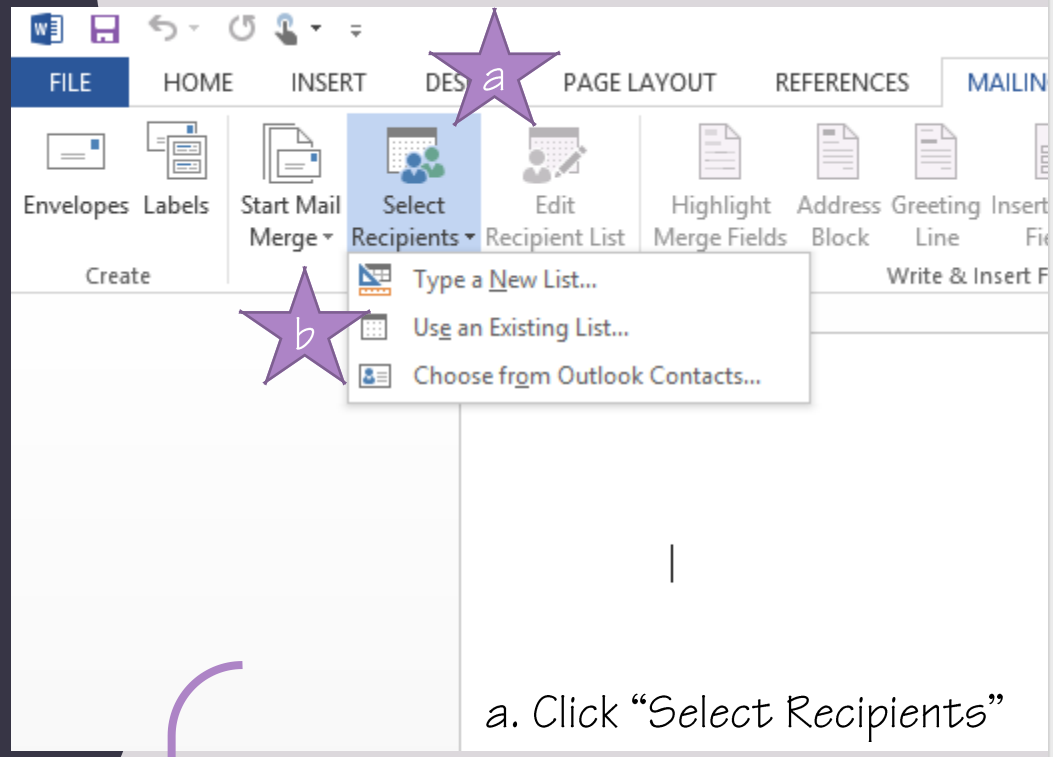


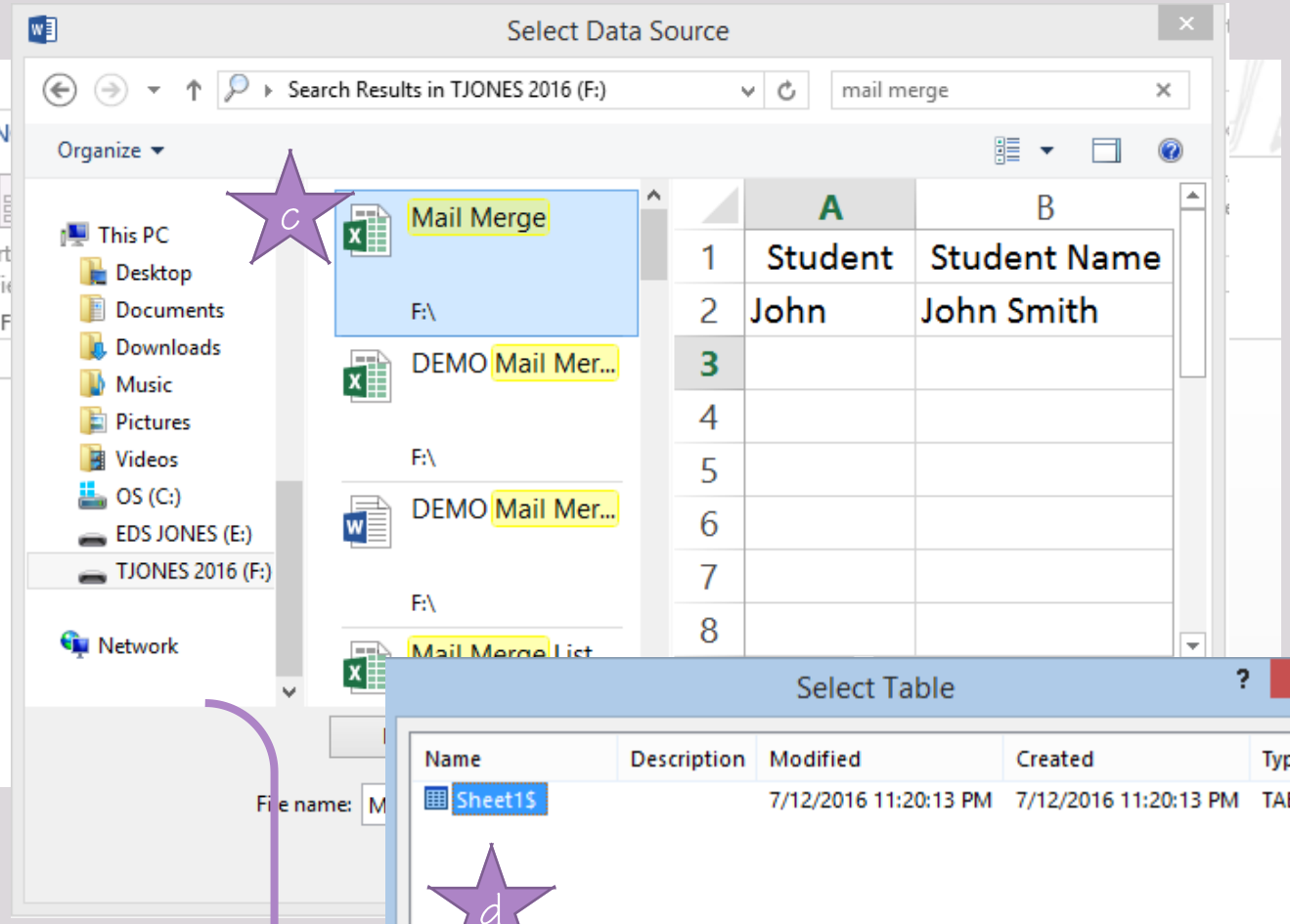
a. Click "Mailing" tab along top pages

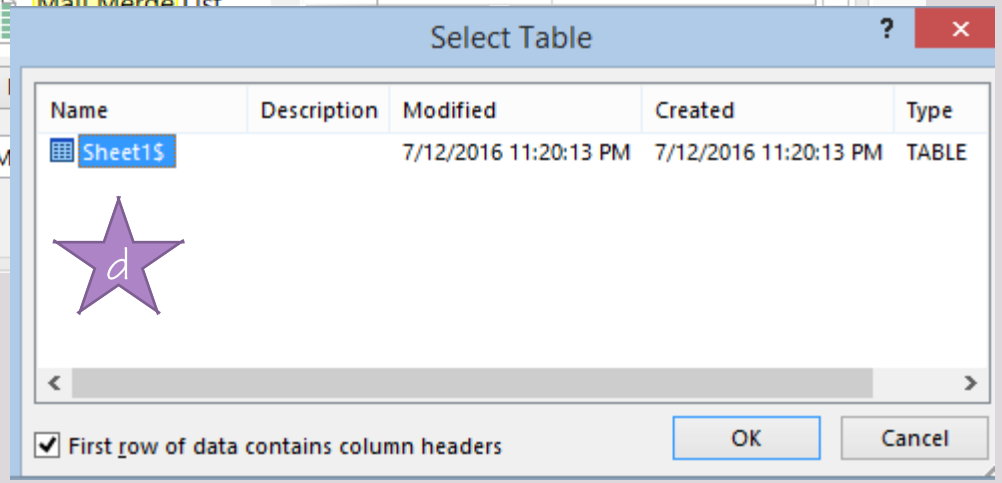
b. Click "Start Mail Merge"

c. Select type Mail Merge
(I use <u>letters</u> for all my Mail Merges)

6. SELECT EXCEL FILE FOR MERGE







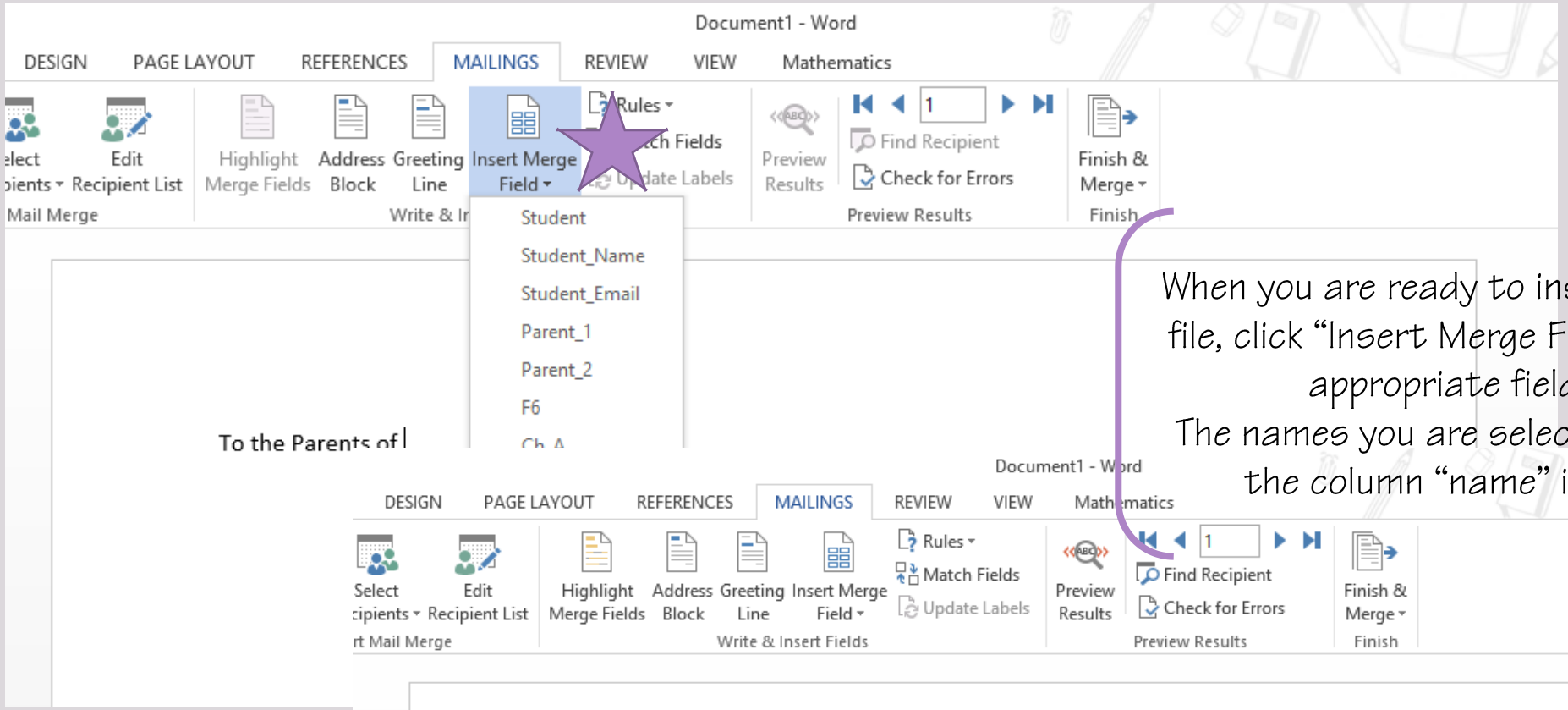
a. Click "Select Recipients"

b. Click "Use and Existing List"

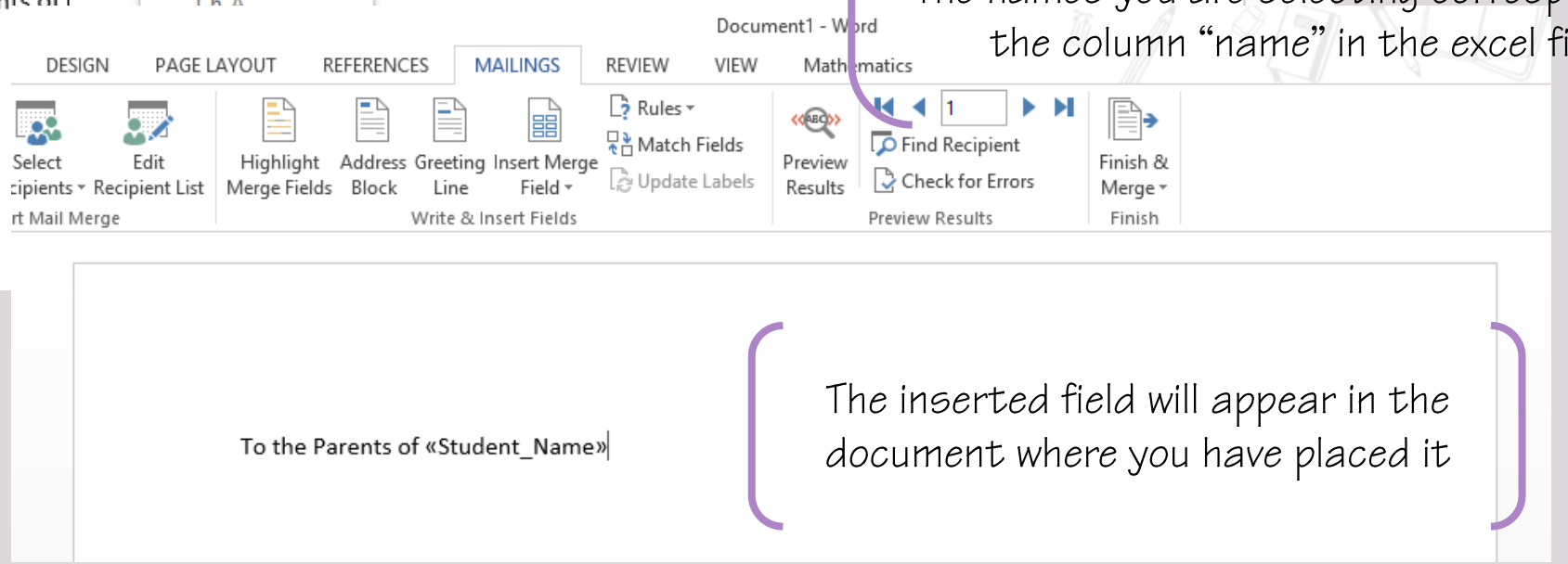
c. Open your Mail Merge document

d. Select the sheet from the Excel file you want to use

7. TYPE YOUR DOCUMENT

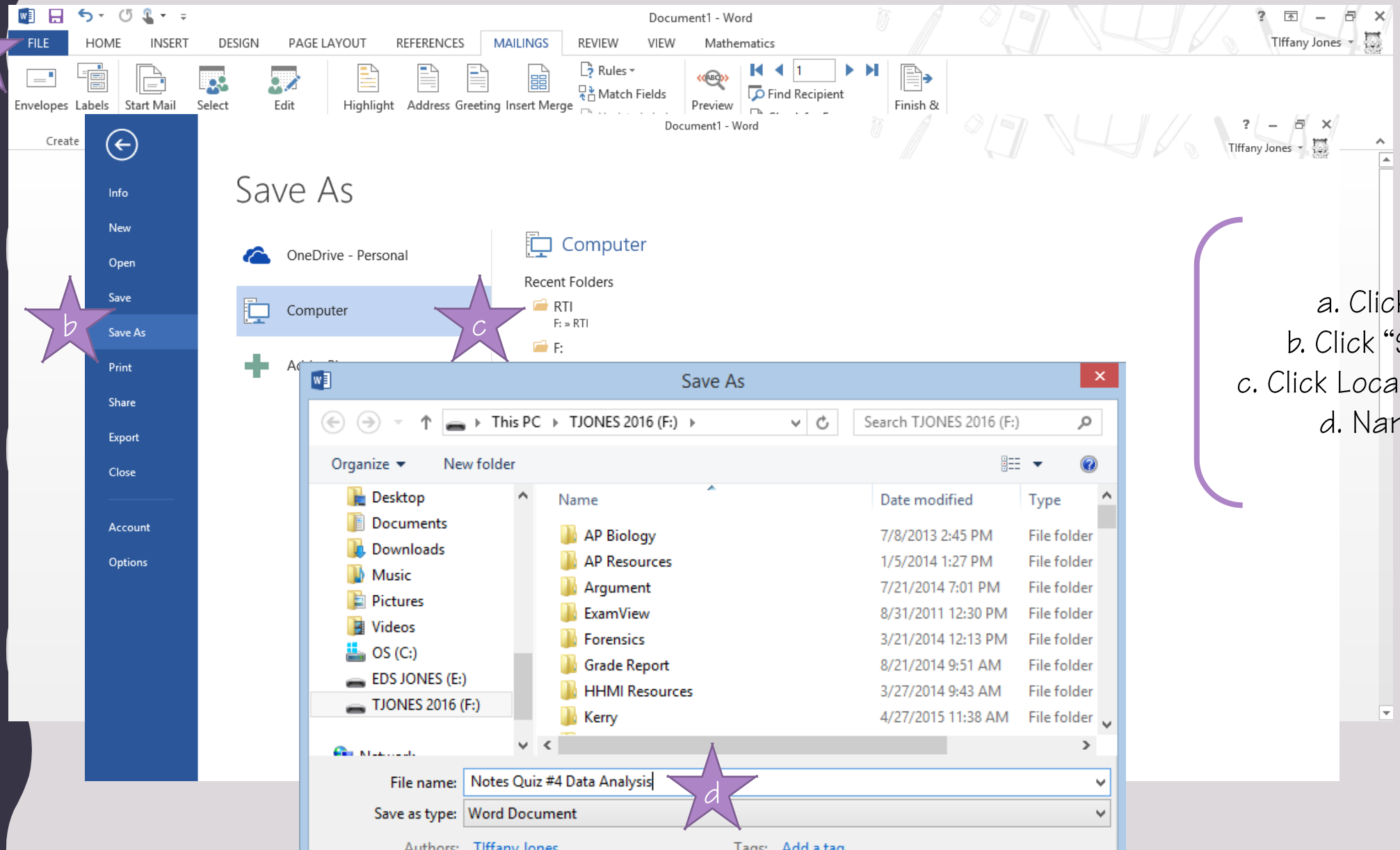


When you are ready to insert from your excel file, click "Insert Merge Field" and select the appropriate field to insert.
The names you are selecting correspond to the column "name" in the excel file.



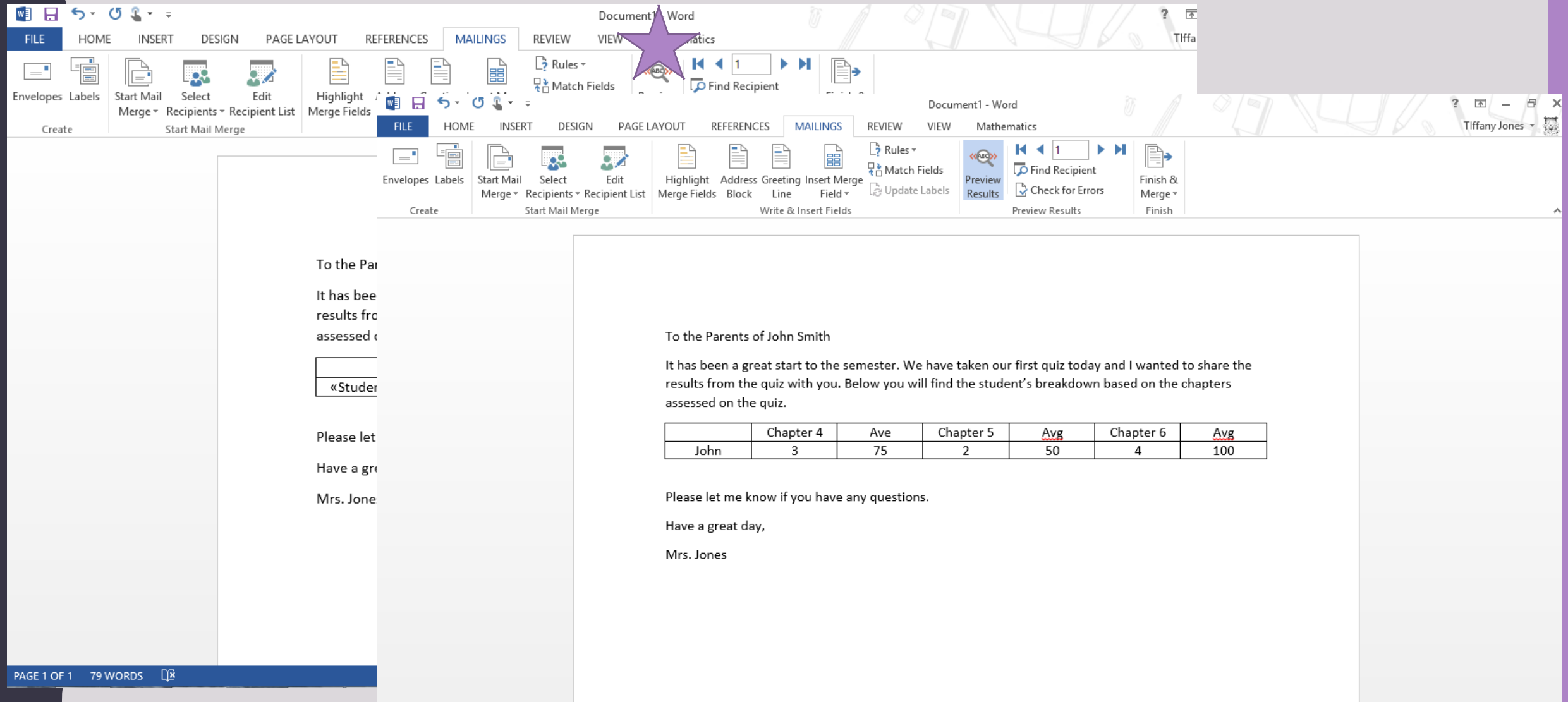
The inserted field will appear in the document where you have placed it

8. SAVE DOCUMENT FOR FUTURE

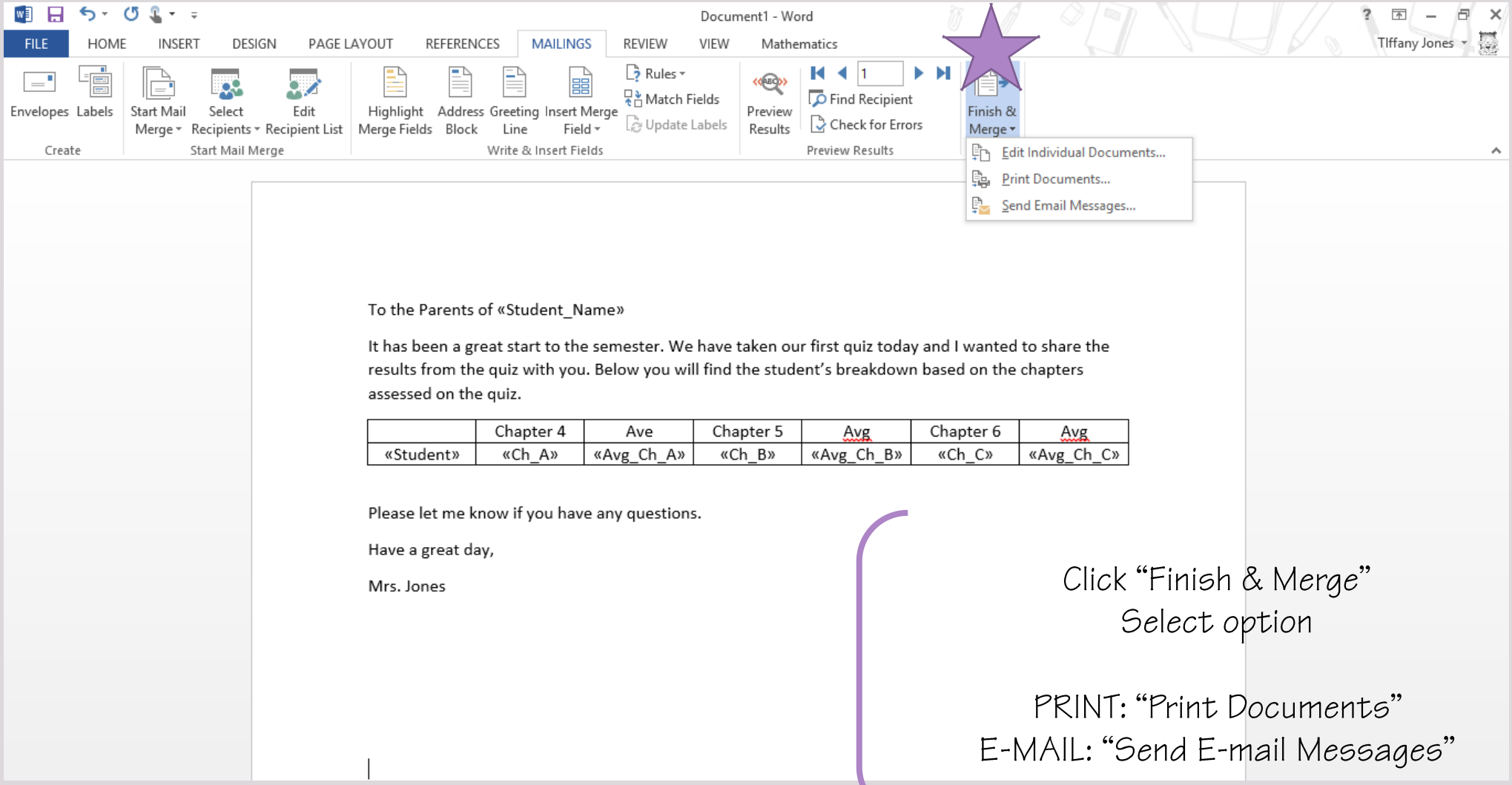


a. Click "File"
b. Click "Save As"
c. Click Location to Save
d. Name File

9. PREVIEW DOCUMENT TO CHECK FOR ERRORS



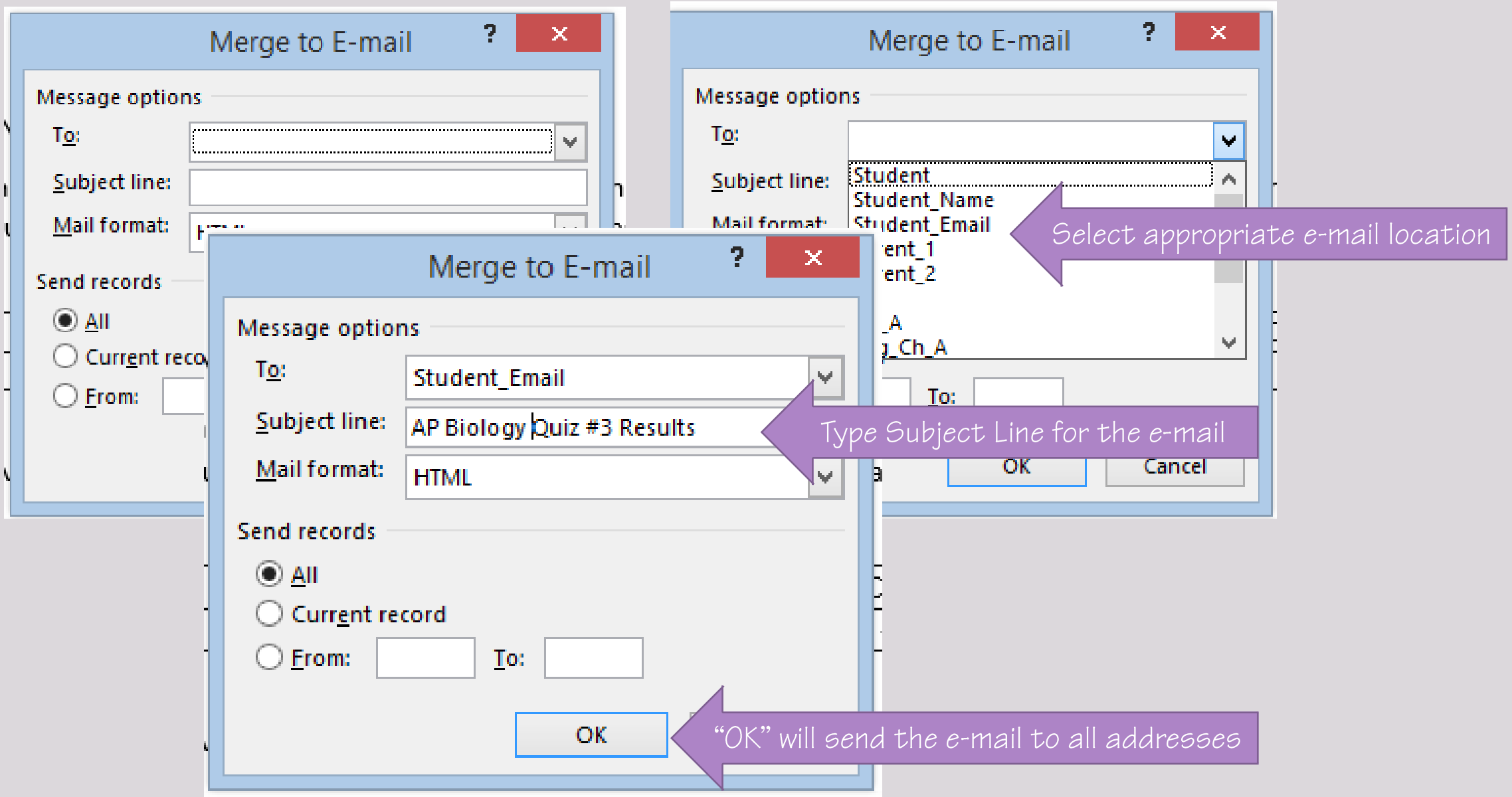
10. E-MAIL OR PRINT DOCUMENT



Click "Finish & Merge"
Select option

PRINT: "Print Documents"
E-MAIL: "Send E-mail Messages"

10. E-MAIL OR PRINT DOCUMENT



EXAMPLE OF THE E-MAIL SENT

Reply Reply All Forward

Tue 7/12/2016 11:50 PM

Tiffany Jones - Magnet School

AP Biology Quiz #3 Results

To 'parent1john@gmail.com'

To the Parents of John Smith

It has been a great start to the semester. We have taken our first quiz today and I wanted to share the results from the quiz with you. Below you will find the student's breakdown based on the chapters assessed on the quiz.

	Chapter 4	Ave	Chapter 5	Avg	Chapter 6	Avg
John	3	75	2	50	4	100

Please let me know if you have any questions.

Have a great day,

Mrs. Jones

Unable to log in to: SharePoint.