

E-MAIL MERGE – Excel 2003

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- TEST this procedure before sending an official communiqué. To test, build an Excel spreadsheet with two e-mail entries in it: your Title, FirstName, LastName, E-mail. Include your e-mail and a friend's e-mail address. Call your spreadsheet "Test E-mail Merge" and go through the steps below.
- Enter recipient e-mail addresses in an Excel spreadsheet. Always add YOUR name to the list so that you get a copy of every e-mail you have sent, plus you can see how it looks to other people when they receive it.
- Save your file with a memorable name in a memorable place (My Computer > *House G Drive* > My Documents > Mass Mailings).
- Open Outlook, and choose "New" from the top menu.
- **IMPORTANT: Place the cursor in the e-mail body, or you will not be able to proceed.**
- Tools > Letters > Mail Merge – a dialog box opens on the right.
- Select Document Type: E-mail messages
- Next: Start Document (at the bottom)
- Select Starting Document: Use current document
- Next: Select Recipients
- Choose "Use an existing list" – and then "browse"
- Choose a list from wherever you saved the list containing the e-mail addresses.
- A dialog box opens where you confirm the data source – choose OLE DB files
- OK ... OK ... OK
- Next: Write your e-mail message
- If you wish to personalize your e-mail message to each recipient, include a Greeting Line
- You may also wish to "Match Fields."
- On the "Mr. Randall" drop-down menu, click on the arrow to the right, and choose to add the first and last name option (Mr. Josh Randall, Jr. will do).
- Next: Preview your e-mail message.
- Now you type your message in the body of the e-mail.
- Next: Complete the merge.
- Now click on the blue "Electronic Mail"
- **VERY IMPORTANT: Fill in your subject line at this point > choose applicable options > click OK.**
- **MOST IMPORTANT: Your e-mail messages send quickly and without further notification to you. DO NOT think nothing has been done and click "Electronic Mail" again, or you will send two identical messages to each of your recipients.**
- Close your e-mail window.
- If you send and receive successfully and so does your friend, you have done excellent work and may proceed with courage. ☺