Sending an e-mail message by using mail merge involves six major steps:

There is a tutorial of using MSWORD for Mail Merge at this site: You might read over it before using the steps later as found in MSWord Help.

Note: there is sometimes a problem when using an Excel file as the source for the addresses when the address includes a leading zero in the zip code. In Excel, to display the leading zero of a zip code click Format...click Cells...click Special...click Zip Code. You should be able to view the leading zero in Excel now and the leading zero should also print in your mail merge.

Click here: Microsoft Word Mail Merge

1. First, you set up the e-mail main document. The e-mail main document is the model on which each individual message is based.
2. Then, you connect the e-mail main document that you just set up to a data file that contains the e-mail addresses of the recipients. More about data files later.
3. Next, you write the e-mail message. This involves adding two kinds of information to the e-mail main document:
   - Information that is the same in every e-mail message. Usually, if you send a message to a group, most of the message is the same no matter who receives it. For example, in the message to customers, the sale information is the same in each message.
   - Placeholders (officially called **fields**) for information that is unique to a specific message. For example, in the message to customers, you might want to greet each customer by name and include a personal note about the customer's preferred coffee roast. To make that happen, you add placeholders for the name and the personal note to the e-mail main document.
4. Then, you preview the messages to make sure that information from the data file merged correctly.
5. Next, you send a test message. When the test message is sent and you're completely happy with the results, you complete the merge.
6. Finally, you send the entire set of messages.

Step 1: Set up the e-mail main document

The e-mail main document is the model message on which each individual message will be based. To set up this main document, you just click a few appropriate options in the **Mail Merge** task pane. Here's how to do it:

1. Start Word.
2. On the **Tools** menu, point to **Letters and Mailings**, and then click **Mail Merge** to open the **Mail Merge** task pane.
3. In the task pane, under **Select document type**, click **E-mail messages**. Under **Step 1 of 6** at the bottom of the task pane, click **Next: Starting document**.
4. Do one of the following:

- If you're creating the e-mail message from scratch, click **Use the current document**. When you started Word, a blank document opened by default. That open default document is a perfectly good place for you to compose your e-mail message.
- If you already have a document that contains the text that you want to include in the e-mail message, click **Start from existing document**. Under **Start from existing**, click **Open**. Locate the document, and then click **Open**.

5. Under **Step 2 of 6** at the bottom of the task pane, click **Next: Select recipients**.

Step 2: Connect to the data file

When you use mail merge to send e-mail messages, Word requires the e-mail addresses for the message recipients. You provide that information by connecting the e-mail main document to a data file that includes, at the very least, a category (column) that lists each recipient's e-mail address.

This data file can come from lots of different places. For example, you might:

- Have your recipient data, including e-mail addresses, stored in a Microsoft Access 2002 or Microsoft Office Access 2003 database, a Microsoft Excel 2002 or Microsoft Office Excel 2003 worksheet, or a table in Word.
- Keep your current recipient data in your Outlook Contacts list.
- Want to use the recipients listed in your Outlook or Outlook Express Address Book.
- Want to create a new data file that contains the e-mail addresses that you want to use. You can create a new data file in Word.

To learn about the different types of data files that Word can connect to and for additional information about data files and how to use them in a mail merge, click a link in the **See Also** section of this article.

Tip Include yourself in the data file as a recipient. Then, when it's time to send the merged messages, you can first send a test message to yourself to make sure that the message content looks exactly the way you want and that the messages are actually being sent.

If you want to use your Outlook Express Address Book as the data file

To use your Outlook Express Address Book as a mail-merge data file, you have to export the address book as a text file.

1. Start Outlook Express.
2. On the **File** menu, point to **Export**, and then click **Address Book**.
3. In the **Address Book Export Tool** dialog box, click **Text File (Comma Separated Values)**, and then click **Export**.

   Don't be afraid of this weird-sounding file type. It just means a text file where commas separate the columns from one another. It has a .csv extension, and you can open it in Excel.

4. In the **Save exported file as** box, type a file name for your exported contacts file, and then click **Browse**.

5. In the **Save As** dialog box, in the **Save in** box, choose where you want to save the file, and then click **Save**.

   Time-saving tip It's handy to save your data files in the **My Data Sources** folder in your **My Documents** folder. That's where Word searches first for data files when you browse for them during a merge.

6. Click **Next**. Select the check boxes next to the categories of information that you want to export, and then click **Finish**.

   Consider this When you're deciding which categories of information to export, think about the e-mail message that you're creating. For example, if you're sending e-mail messages to customers and you want to include customers' names in the messages, you'll need to export at least the name and e-mail address categories. You won't need to export nickname, personal Web site, or other categories of information that you don't need in the message.

7. When you see the message that the export procedure is completed, click **OK**.
8. Close the **Address Book Export Tool** dialog box by clicking **Close**, and then exit Outlook Express.

In the step where you connect to a data file, click **Use an existing list**, and browse to locate the .csv file that you just exported. If Word asks you to choose what separator character will separate one column from another in your address list, click **Comma**. Then click **OK**.

If you want to send merged e-mail messages to recipients in your Outlook Global Address Book

To send merged e-mail messages to recipients in your Outlook Global Address Book, you have to export those recipients to an Outlook Contacts folder. Here's how to do that:

1. Open Outlook.
2. On the **Tools** menu, click **Address Book**.
3. In the **Address Book** dialog box, on the **Tools** menu, click **Options**.
4. Under **Keep personal addresses in**, select the Contacts folder that you want to export the recipients to, and then click **OK**.

   Note If this is a different Contacts folder from the one that you typically use, be sure to change this setting back after you finish adding entries.

5. In the **Type Name or Select from List** box, type the name of the recipient whom you want to import into your Contacts folder.
6. In the list below, right-click the name, and then click **Add to Contacts**.
7. The **Contact** form for the recipient opens. Update any information that you want to change, and then click **Save and Close**.

   Note You might have to click the **Close** button to close the **Contact** form.

8. Click the **Close** button to close the **Address Book** dialog box.

If you open the Contacts folder, you can see the recipient whom you just added.

If you intend to include personalized information, such as a name or a personal note, in individual messages

For each personalized item that you want to include in the merged e-mail messages, you must have a corresponding category (column) in your data file.

For example, if you want to address each customer by name and include a personal note, your data file must contain columns for name and personal note. The data file might look like this.

Name	Last Name	E-mail address	Personal note
Nancy	Anderson	nancy@example.com	Nancy, I just roasted a new batch of Sumatra and it's on sale.
Ann	Beebe	ann@example.com	Ann, your favorite Indonesian beans are included in the sale offer.

In the section about writing the e-mail message and adding placeholders, we'll talk about how to indicate where you want each piece of information to appear in the message.

If you want to filter the data file by type of recipient or another category

If you want to send e-mail messages to subsets of the recipients in your data file, make sure that you can filter on each subset.

For example, if you want to send e-mail messages only to customers who prefer a specific coffee roast, your data file must contain a category (column) for preferred roast. Or, if you want to send the original message to customers and a slightly revised version to coffee company managers, your data file must contain a category (column) for recipient type.

You'll learn more later about how to filter a data file during the mail-merge process.

To establish a connection between your e-mail main document and your data file

In the **Mail Merge** task pane, under **Select recipients**, you have three options:

- **Use an existing list** Click this option if you already have a data file, such as an Excel worksheet, an Access database table, or a Word table, that contains your recipients' names and addresses.

  Note Remember, if you want to use your Outlook Express Address Book as a source for the message recipients, you can't connect to that address book directly. You must export the address book to a text file first and then use this option to connect to the text file.

- **Select from Outlook Contacts** Click this option if you want to use names and addresses from your Outlook Contacts list.
- **Type a new list** Click this option if you don't have a data file that contains recipients' names and addresses.

Click one of the following options to find out what to do next.

Use an existing list

1. Under **Use an existing list**, click **Browse** to locate your mailing list data file.
2. In the **Select Data Source** dialog box, locate the file, select it, and then click **Open**.
3. If you see the **Select Table** dialog box, click the table or worksheet that contains your recipient names and addresses.
4. The **Mail Merge Recipients** dialog box opens.

Select from Outlook Contacts

1. Under **Select from Outlook contacts**, click **Choose Contacts Folder**.

   If you see the **Choose Profile** dialog box, choose the profile that includes the Contacts list that you want to use, and then click **OK**.

2. In the **Select Contact List Folder** dialog box, click the Contacts folder that contains your recipient names and addresses, and then click **OK**.
3. The **Mail Merge Recipients** dialog box opens.

Note If you run into problems connecting to your Contacts folder, you can get problem-solving help by clicking an Answer Box link in the **See Also** section of this article.

Type a new list

1. Under **Type a new list**, click **Create**.

   The **New Address List** dialog box opens. Under **Enter Address information**, you see a list of categories, such as **First Name**, **Last Name**, and **Address Line 1**. You need to modify this list so that it matches the categories of information that you want to record about your recipients. For example, although the list in the dialog box includes items such as Title, Home Phone, and mailing address information, you might want your list to include only First Name, Last Name, E-mail Address, and Personal Note.

2. To edit the list of categories, click **Customize**.
3. In the **Customize Address List** dialog box, use the buttons to add, delete, or change the order of the categories. When the list looks the way that you want, click **OK**.
4. Type the information for the first entry in the **New Address List** dialog box.
5. Click **New Entry**, type the information for the second entry, and so on.
6. After you type entries for all the recipients, click **Close**.
7. In the **Save Address List** dialog box, type a name for the file, and then click **Save**.

8. The **Mail Merge Recipients** dialog box opens.

By default, if you don't change the location, the data file that you just created is saved to the My Data Sources folder in your My Documents folder. This is a convenient location. If, in the future, you want to send a new set of e-mail messages by using the same data file, Word automatically searches first for the file in the My Data Sources folder.

Tip If you want to add to or change the data file that you just created, you have a couple of options. You can open the file in Access and modify it there. Or you can make changes to the file in Word during a mail-merge process:

- Go through the steps in the **Mail Merge** task pane until you come to **Select recipients**.
- Click **Use an existing list**, and then click **Browse**.
- Open the mailing list data file that you created. In the **Mail Merge Recipients** dialog box, click **Edit**.
- The **Customize Address List** dialog box opens, and you can change categories, add new entries, and more.

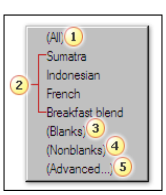
Filtering and sorting

The **Mail Merge Recipients** dialog box gives you the opportunity to filter or sort the entries in the data file. For example, your data file might include all of your customers, but you might want to send the sale announcement only to those whose preferred roasts match the roasts that are on sale. Or your data file might include both customers, who are the intended recipients, and managers of the coffee franchise to whom you want to send copies.

If you want to send messages to all the recipients in your data file and you don't need to do any sorting or filtering, just click **OK** to move on.

If you don't want to send messages to all the recipients in your data file, you can do some or all of the following things before you click **OK**:

- To eliminate one recipient, click the check box at the beginning of the recipient's row to clear it.
- To sort the rows according to the ascending or descending order of information in a particular column, click the column heading. For example, if you wanted to sort your customer list by preferred roast so that all of the Sumatra lovers are grouped together, you can click the preferred roast column heading.
- To filter the list according to specific criteria (for example, customers' preferred roasts), click the arrow next to a column heading. When you click the arrow, you see a list that looks similar to this.



Click **(All)** if you previously filtered the list and now want to include all the entries again.

Click the value by which you want to filter the list. In this example, the values are coffee roasts. By clicking one roast, such as Sumatra, you can restrict the list of recipients to those customers whose preferred roast is Sumatra.

Click **(Blanks)** to filter the list to only those entries in this column that are blank.

Click **(Nonblanks)** to filter the list to only those entries in this column that have content.

Click **(Advanced)** to open the **Filter and Sort** dialog box, where you can narrow the list according to more complex criteria. For example, you can narrow the list to two or more different values.

Note Any filtering and sorting changes that you make in the **Mail Merge Recipients** dialog box don't affect the original data file.

After you close the **Mail Merge Recipients** dialog box, you're ready to move to the next step. Under **Step 3 of 6** at the bottom of the task pane, click **Next: Write your e-mail message**.

Step 3: Write the e-mail message and add placeholders

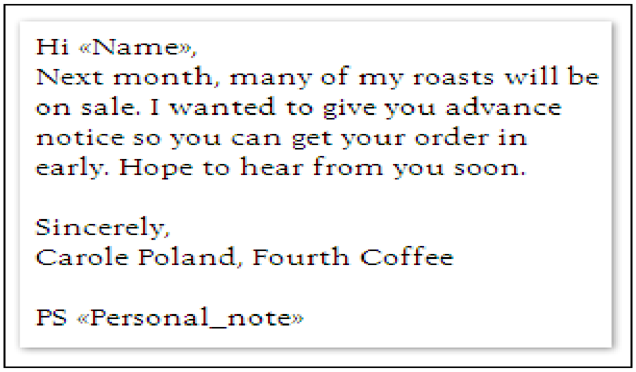
Now you add content to the e-mail main document. This content includes:

- **Information that is the same in each message** For example, in the case of the e-mail message to customers, the description of the sale is the same in every message. You can just type or paste this information right into the e-mail main document.

  Note This is where, instead of adding an attachment to your message, you can add the contents of a document to the body of the e-mail main document. On the **Insert** menu, click **File**. Locate and select the document with the content that you want to include, and then click **Insert**. The dialog box closes and the document's content appears in the e-mail main document.

- **Information that is unique to each message, such as the recipient's name** You can't type information that is unique to each message into one e-mail main document. Instead, you add placeholders, or fields, to the main document. These fields correspond to categories (columns) in your data file. When you complete the mail merge in the next step, information from each row in the data file replaces the fields to create a set of unique e-mail messages.

Here's how an e-mail main document might look with fields in it. You can identify the fields because they are always surrounded by chevrons (« »).



Hi «Name»,
Next month, many of my roasts will be on sale. I wanted to give you advance notice so you can get your order in early. Hope to hear from you soon.

Sincerely,
Carole Poland, Fourth Coffee

PS «Personal_note»

Now take a few seconds to look at the **Mail Merge** task pane. Notice the list of links under **Write your e-mail message** (such as **Address block**, **Greeting line**, or **More items**). As the following procedure shows, you click these links to add fields to your e-mail main document.

To add placeholder fields

1. Make sure that the insertion point is in the e-mail main document at the position where you want to add a field, such as a name or personal note field. In the **Mail Merge** task pane, click **More items**.
2. In the **Insert Merge Field** dialog box, click **Database Fields**. Under **Fields**, you can see a list of the categories (columns) from your data file.
3. Click the field that you want to insert (for example, Name or Personal Note), and then click **Insert**.

   A field surrounded by chevrons (« ») appears in your document.

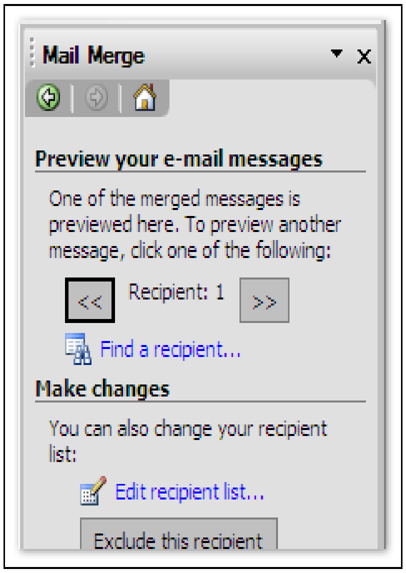
   Note If you don't see all the fields that you want to insert, you may be trying to insert custom fields that you added to a view in an Outlook Contacts folder. For information about how to do this, click an Answer Box link in the **See Also** section of this article.

4. Click **Close**.
5. Repeat steps 1 through 4 until you have added all the fields that you want to add.

Now, you're ready to preview your personalized messages.

Step 4: Preview the merged messages

When you click **Next: Preview your e-mail messages** at the bottom of the **Mail Merge** task pane, information from the data file replaces the placeholder fields in the messages. You can click the double-arrow buttons in the task pane to page through the messages, or you can click **Find a recipient** to locate a specific message.



Some things that might need fixing

- **Unintended recipients** If messages were created for recipients whom you don't want to include in this mailing, click **Edit recipient list** in the **Mail Merge** task pane to open the **Mail Merge Recipients** dialog box, and then filter the list of recipients. Or, just clear the check box to the left of each name that you want to omit.
- **Missing recipients** If only a subset of the records (rows) in your data file was merged into the messages, click **Edit recipient list** in the **Mail Merge** task pane to open the **Mail Merge Recipients** dialog box. Make sure that you haven't inadvertently filtered the list of recipients. Click the arrow in the column heading for each category that you don't want to filter, and then click **(All)** in the list.

  If you haven't filtered the list of recipients in any way, check your data file to be sure that it is organized correctly.

Step 5: Prepare and send a test message and complete the merge

As I mentioned earlier, it's a good idea to send one test message before you send the entire set of messages. A test message gives you the opportunity to to see if the messages will actually be sent and to verify that the message says exactly what you want. If you didn't add yourself to the data file, you can still send a test message if you can recruit a volunteer from among the recipients.

Prepare to send a test message

Use the double-arrow buttons in the task pane to display the message to yourself or to the person who has volunteered to receive the test message. By displaying this message on the screen, you'll be able to choose it quickly in the next step.

Send the test message

When you're satisfied with the way your messages look and the appropriate message is displayed on the screen, click **Next: Complete the merge** at the bottom of the **Mail Merge** task pane. Then, do this:

1. In the **Mail Merge** task pane, under **Merge**, click **Electronic Mail**.
2. In the **Merge to E-mail** dialog box, make sure the **To** box contains the name of the column from your data file that lists e-mail addresses. If it doesn't, click the arrow and then click the column name.
3. In the **Subject line** box, type the subject that you want to send with the messages.
4. In the **Mail format** box, click **HTML**.
5. Under **Send records**, click **Current record**, and then click **OK**.

The test message should appear in your Inbox or the Inbox of the volunteer recipient.

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