



MANAGE MAIL MERGE *for* **MAC OS**

Mail merge is a handy feature that incorporates data from both Microsoft Word and Microsoft Excel and lets you create a batch of documents at once, saving you the time and effort of retyping the same letter or recipients over and over. For example, a form letter might be personalized to address each recipient by name. A data source, like a list, spreadsheet, or database, is associated with the document. Placeholders--called merge fields--tell Word where in the document to include information from the data source. Mail merge can be used for bulk email, letters, labels, and envelopes.





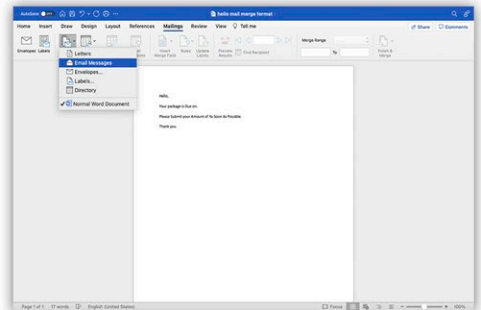
Here is an example of creating a letter to people to pay the Amount on the due date.

1. Gathering Your Data

- Create an Excel spreadsheet, creating a header for each field such as First Name, Email, Amount, Due Date, Plan, etc.
- The field headers, i.e. (first name, last name), are separately labelled. So that you can filter them alphabetically if you need to.
- You can also add additional headers, such as a donation amount. Be sure to label it something you'll remember if you use Rs. Amounts, change the number type under 'Number' at the top to 'Text' for every Rs. entry, and manually type the Rs. Sign otherwise. It will not show up in your letter.

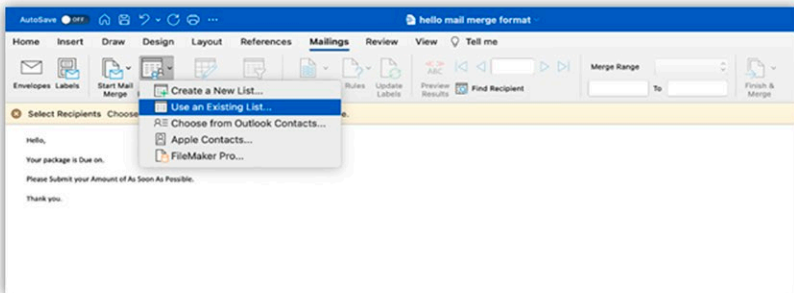
	A	B	C	D	E	F	G
1	Name	Email	Amount	Due Date	Plan		
2	Ali	Ali@gmail.com	Rs. 1000	1/1/2022	Starter		
3	Umair	Umair@gmail.com	Rs. 400	2/15/2022	Platinum		
4	Arcalan	Arcalan@yahoo.com	Rs. 2700	3/31/2022	Starter		
5	Zain	Zain@hotmail.com	Rs. 700	2/1/2022	Platinum		
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2. After the creation of the Excel File, Open **MS-Word**, and under Mailings Tab, Click on Start **Mail Merge -> Email Messages**;

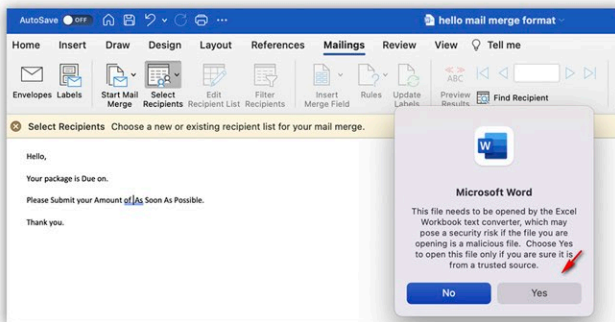




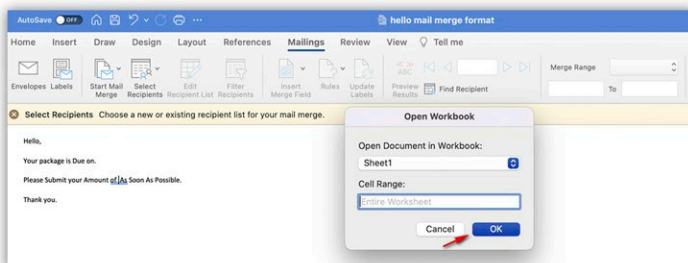
3. Click on **Select Recipients -> Use an Existing List**. Choose Your Excel File that you have Created Earlier and Click **OK**.



4. Click on **Yes** upon prompt.



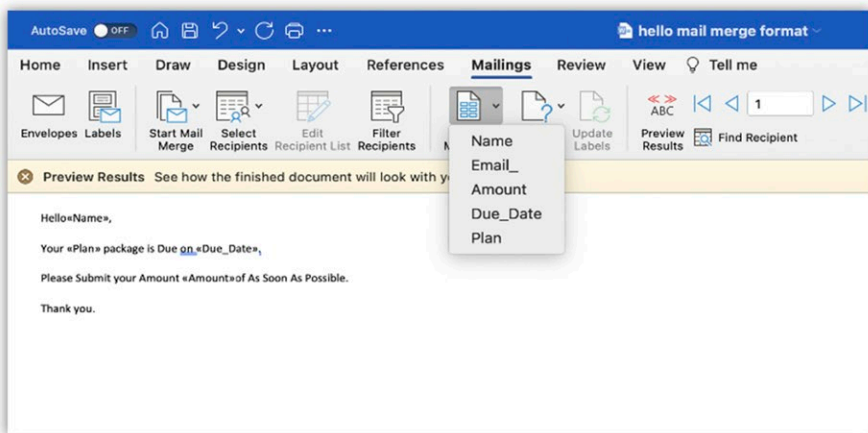
5. Click **OK** when prompt Open Workbook windows.





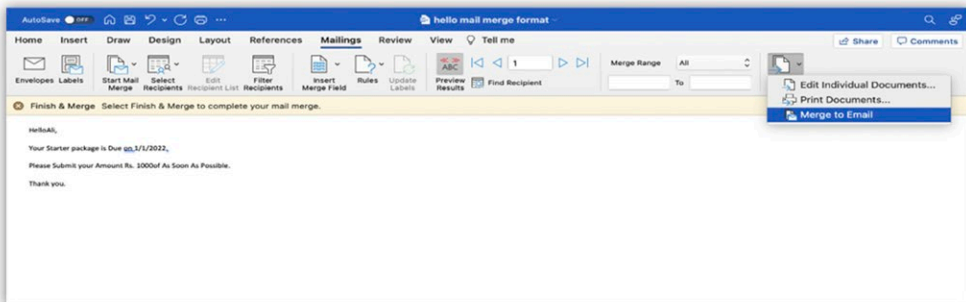
6. Prepare your letter in **Microsoft Word**.

7. While creating the letter, click insert Merge Field and choose that field where you want information from the Mail merge to be placed, i.e., <<Amount>>, << name>>,<<Due Date>>.



8. Once you are done, Click Finish and Merge tab and choose your required method. In this example, we select Merge To Email.

Note: Word sends an individual message to each email address. You can't Cc or Bcc other recipients. You can include links, but you can't add attachments to the email.



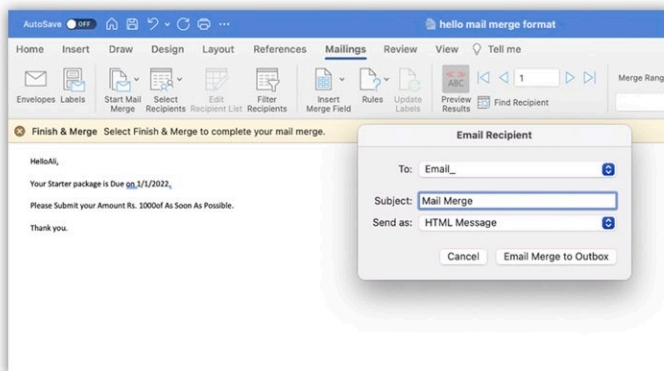


9. Select the Email header in To: Section and write Subject as per your requirement. In the Send as: choose HTML Message (the default setting) or Text to send the document as the body of the email message and click Email Merge to Outbox.

Text: your messages will deliver as plain text, meaning formatting styles such as bold and italics are removed.

Attachment: your messages will deliver as a Word document attached to the email. Only the Subject will display in the message itself.

HTML Message: your messages will deliver as a regular email message, honouring any formatting styles set in Word.





Once you click on Email Merge to Outbox, an email/letter will be sent out to all records/recipients available in the excel sheet.

Important Note

Mail merge Emails are only sent using your set as a Default Email account. Mac OS uses its default mail app for emails, but you can change the default mail app to Microsoft Outlook.

1. Open Finder > Applications.
2. Select Mail.
3. Select Mail> Preferences.
4. On the General tab, in a Default email reader, select Microsoft Outlook.

For queries, please feel free to reach out:

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Ext: 4140

