



MANAGE MAIL MERGE *for* **WINDOWS 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.





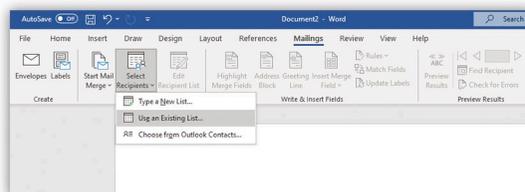
Here is an example of creating a letter to people to pay the Amount on the due date.

1. Gathering Your Data

- Create an Excel spreadsheet, create 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 of 'Text' for every Rs. Entry, and manually type the Rs. Sign otherwise. It will not show up in your letter.

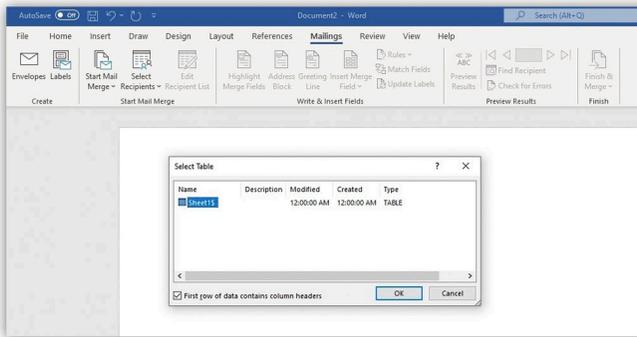
	A	B	C	D	E	F	G
1	Name	Email	Amount	Due Date	Plan		
2	All	All@gmail.com	Rs. 1000	1/1/2022	Starter		
3	Unair	Unair@gmail.com	Rs. 400	2/15/2022	Platinum		
4	Arsalan	Arsalan@yahoo.com	Rs. 2700	3/31/2022	Starter		
5	Zain	Zain@hotmail.com	Rs. 700	2/1/2022	Platinum		
6							
7							
8							
9							
10							
11							
12							

2. After the creation of the Excel File, Open MS-Word, and under Mailings Tab, Click on **Start Mail Merge -> Email Messages**; after that, Click on **Select Recipients -> Use an Existing List**



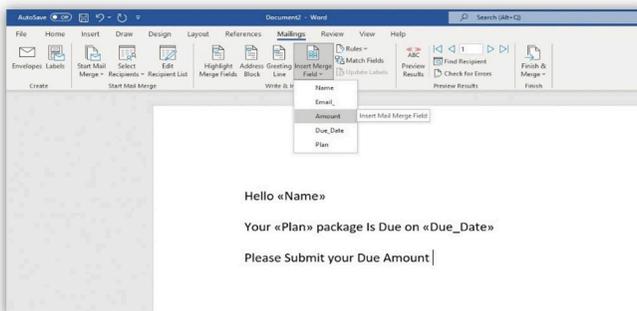


3. Choose Your Excel File that you have Created Earlier and Click **OK**



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

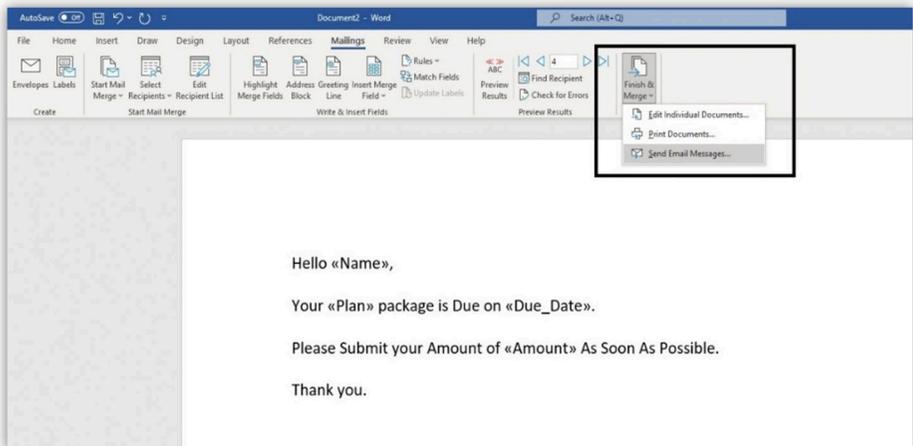
5. While creating the letter, click **Insert Merge Field** and choose that field where you want information from the mail merge to be placed, i.e., <<Amount>>, << name>>,<<Due Date>>.



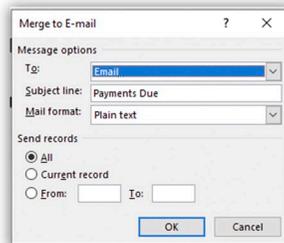


6. Once You Are Done, Click **Finish and Merge** Tab and Choose Your Required Method. In this example, we select **Send Email Message**.

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.



7. Select the **Email** Header in **To: Section** and Write Subject As your Requirement Set **Send Records**. In the **Mail format** box, choose **HTML** (the default setting) or **Plain text** to send the document as the body of the email message and click OK.



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



Important Note

Mail merge Emails are only sent from your set Default Email account.

These are the following steps to set an Email account as default in the Outlook Mail app.

- Open Microsoft Outlook
- Select File > Account Settings > Account Settings.
- Select the account you want to use as the default account from the list of accounts on the Email tab.
- Select Set as Default > Close.

For Outlook Web App

- If you open a mail merge document that you created with the Word desktop application, Word Web App will preserve all of the mail merge settings in it, but you can't perform a mail merge or edit any mail merge settings.
- If you have the Word desktop application, open the document there and perform a mail merge there.

For queries, please feel free to reach out:

helpdesk@lums.edu.pk

Ext: 4140

