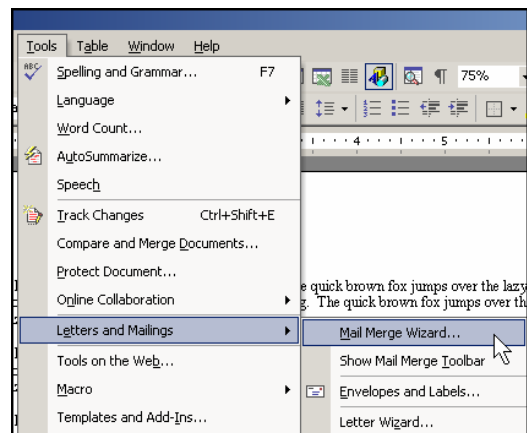


## Word XP: Learning to E-Mail Merge

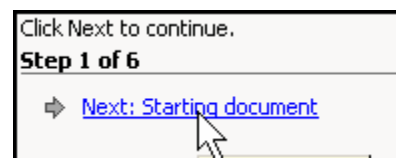
With the slow, but steady progression of offices migrating to a paperless environment, there has been a new demand for streamlining the document sharing process. *Microsoft Word* has migrated its mail merge technology into the realm of e-mail. With this program, users can use a standard letter that was created in *Word* and email it to selected users in a format that simulates a digital letter. This new streamlined technique not only save users time but will also save them money.

1. Open the *Word* document that you want to send as an e-mail.
2. Click **TOOLS > LETTERS AND MAILINGS > MAIL MERGE WIZARD** located on the standard toolbar.



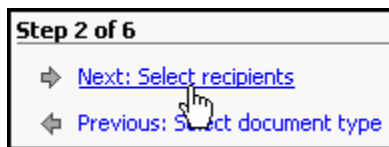
3. In the **Taskpane**, click the radio button that corresponds with the listing **E-MAIL MESSAGES**.

4. At the bottom of the **Taskpane**, click the hyperlink named **NEXT: STARTING DOCUMENT** to proceed to Step 2 of 6.



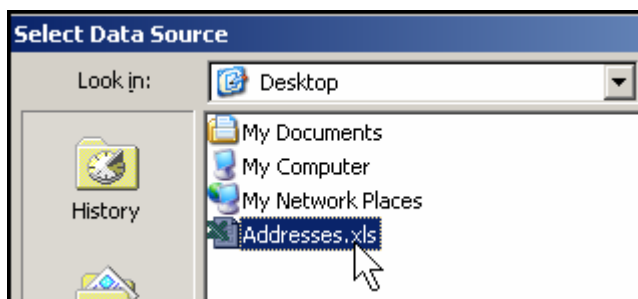
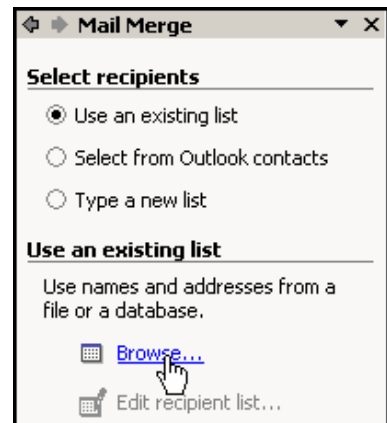
- On Step 2, make sure that the radio button next to **USE THE CURRENT DOCUMENT** is selected.

**Note:** Users can select the other document options if you wanted to create a document from a template or from an existing document that is not already opened. In this case, the document is already opened by the user.



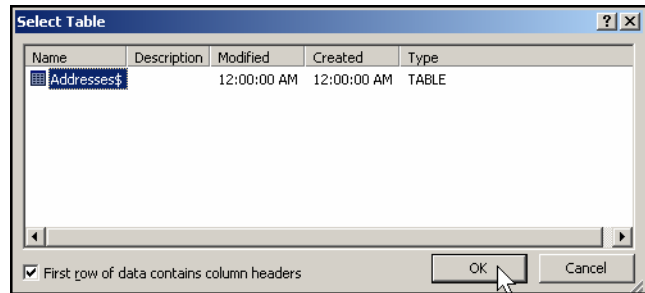
- At the bottom of the **Taskpane**, click the hyperlink named **NEXT: SELECT RECIPIENTS** to proceed to Step 3 of 6.

- On **Step 3**, select the radio button that corresponds with the listing **USE AN EXISTING LIST**. For this example, our list is a *Microsoft Excel* spreadsheet. However, you could use other data sources such as a *Microsoft Access* database.
- Since we are using an existing list, click the **BROWSE** hyperlink to point to the **data source**.



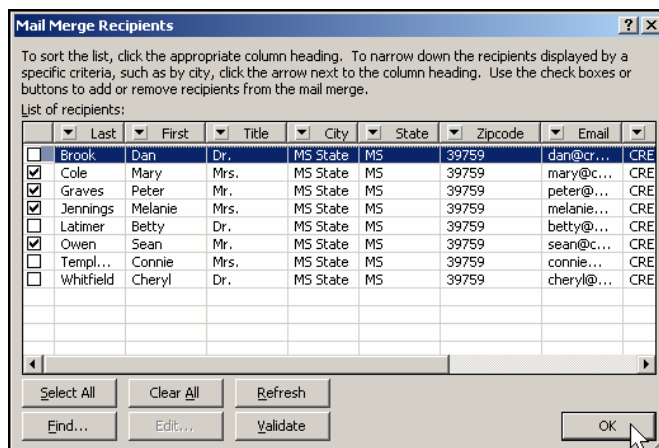
- Locate your data source on the hard drive or other storage medium.
- Once you locate the file, double-click the file to select the data source.

11. Select the table in your data source that you want to use for the e-mail merge. If the data source is an Excel file and the first row contains the column headers, make sure the checkbox that states **FIRST ROW OF DATA CONTAINS COLUMN HEADERS**.



**Hint:** All columns in the spreadsheet must have headers.

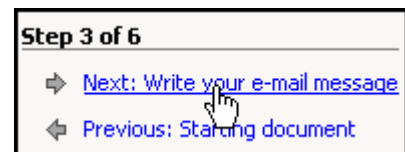
12. Click the **OK button** to proceed.



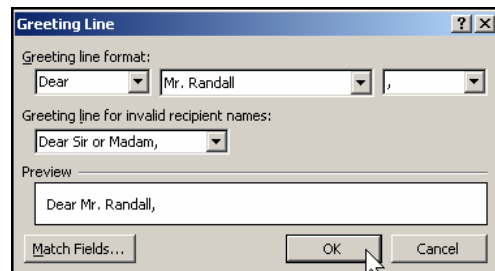
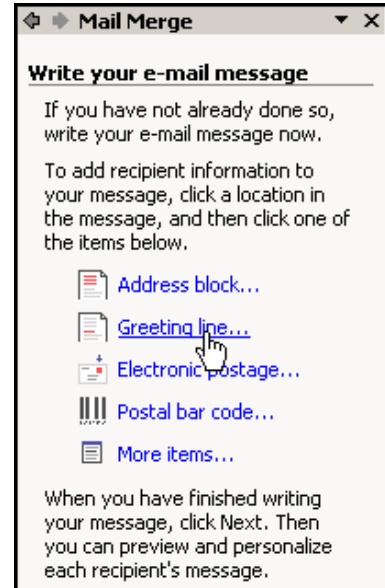
13. At this point, users can select the recipients that you want to send the document. **UNCHECK** the recipients that you do not wish to send the document.

14. Click the **OK button** to proceed.

15. At the bottom of the **Taskpane**, click the hyperlink named **NEXT: WRITE YOUR E-MAIL MESSAGE** to proceed to Step 4 of 6.



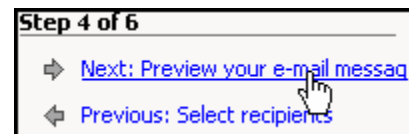
16. At this stage, users can customize the components of the e-mail message. Typically, for this situation, users would probably only add a greeting line to the document.
17. Click the **GREETING LINE** hyperlink to customize a greeting for your document.



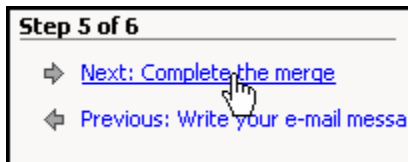
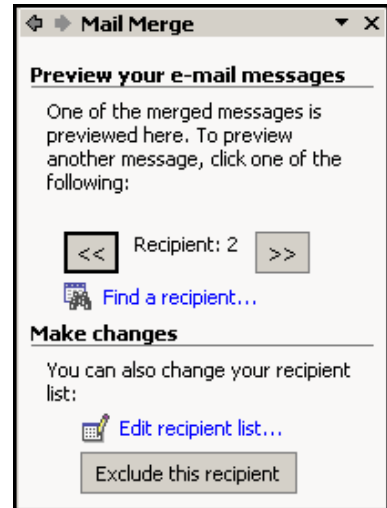
18. For this handout, **Dear Mr. Randall** was selected for the greeting of the document.

19. Click the **OK button** to return to the wizard.

20. At the bottom of the **Taskpane**, click the hyperlink named **NEXT: PREVIEW YOUR E-MAIL MESSAGE** to proceed to Step 5 of 6.



21. At this stage of the **MAIL MERGE WIZARD**, users can preview the e-mail messages that are generated from the list.
22. If there are users that need to be excluded that have been included, click the **EXCLUDE THIS RECIPIENT** button to remove the entry from the merge.

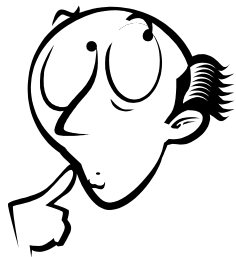
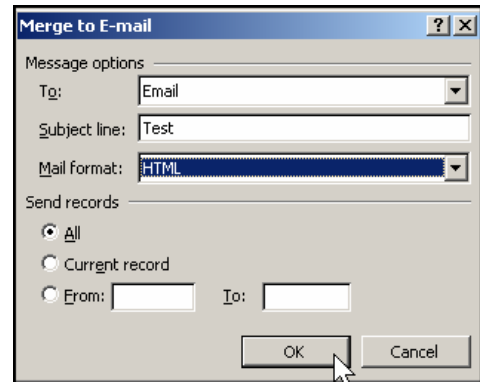


23. At the bottom of the **Taskpane**, click the hyperlink named **NEXT: COMPLETE THE MERGE** to proceed to Step 6 of 6.

24. In the final step, users will complete the E-Mail merge. Click the **ELECTRONIC MAIL** hyperlink to complete the wizard.



25. A window will appear asking a few questions to complete the process.
26. Select the field that contains the e-mail addresses of the recipients for the **TO: listing**.
27. Type an appropriate word(s) in the **SUBJECT LINE** for the e-mail.
28. Choose the **Mail format of the e-mail**, i.e. Plain Text, Rich Text or HTML.
29. Click the **OK button** to complete the process.



## Things to Consider

- ❖ Since *Microsoft* likes to provide the most interoperability within its own suite of products, this process works the best with *Microsoft Outlook* as the e-mail program.
- ❖ However, *Word XP* is supposed to be able to merge to any MAPI-compatible e-mail program.
- ❖ **MAPI:** The Microsoft interface specification that allows different messaging and workgroup applications (including e-mail, voice mail, and fax) to work through a single client, such as the Exchange client included with Windows 95 and Windows NT.

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