

Word Email Merge

This tutorial will show you how to complete an Email Merge in Word.



1. Draft your email message in Word

(Leave a space if you place on inserting Recipient Specific Items into your email message)

Hello,

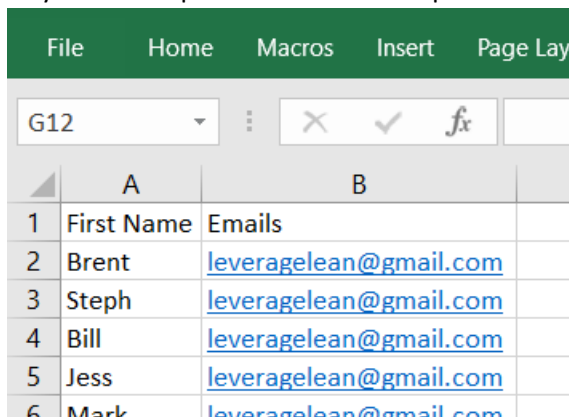
I wanted to reach out you about Leverage & Lean's new Tutorial Word Mail Merge.

If you have completed a Mail Merge in Word it is time to take things to the next level and create an Email Merge! An Email Merge is very similar to a Mail Merge but instead of Letters you are creating Outlook Emails. The Email Merge function helps you send a large number of emails to a list of recipients quickly out of Microsoft Word. The Email Merge feature is a collaboration across the big three applications Excel, Outlook, and of course Word!

If you are interested in learning more just visit the Word Email Merge Tutorial page [here!](#)

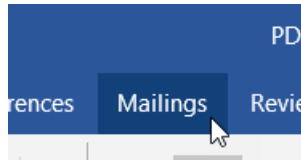
Stay Awesome,
Leverage & Lean

2. Prepare your Excel spreadsheet with Recipient information

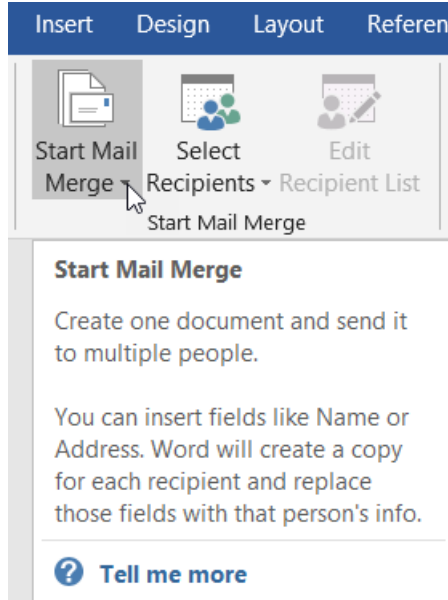
A screenshot of an Excel spreadsheet showing a table with two columns: 'First Name' and 'Emails'. The rows contain names and their corresponding email addresses.

	A	B
1	First Name	Emails
2	Brent	leveragelean@gmail.com
3	Steph	leveragelean@gmail.com
4	Bill	leveragelean@gmail.com
5	Jess	leveragelean@gmail.com
6	Mark	leveragelean@gmail.com

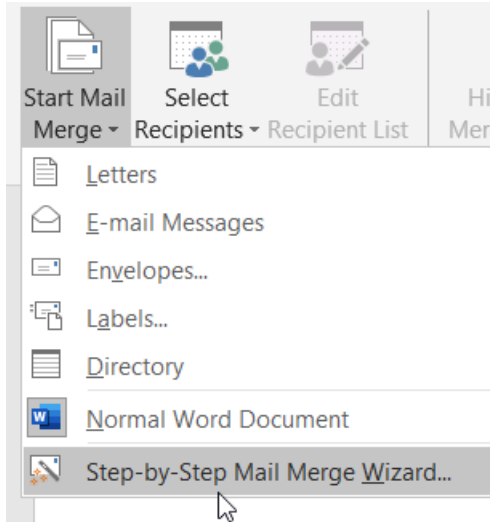
3. Click the Mailing Tab



4. Click the Start Mail Merge button



5. From the dropdown select Step by Step Mail Merge Wizard



6. Select E-mail Messages as the Document Type. Click Next: Starting Document

Mail Merge

Select document type

What type of document are you working on?

- Letters
- E-mail messages
- Envelopes
- Labels
- Directory

E-mail messages

Send e-mail messages to a group of people. You can personalize the e-mail message that each person receives.

Click Next to continue.

Step 1 of 6

→ [Next: Starting document](#)

7. Select Use the Current Document. Click Next: Select Recipients

Mail Merge

Select starting document

How do you want to set up your E-Mail messages?

- Use the current document
- Start from a template
- Start from existing document

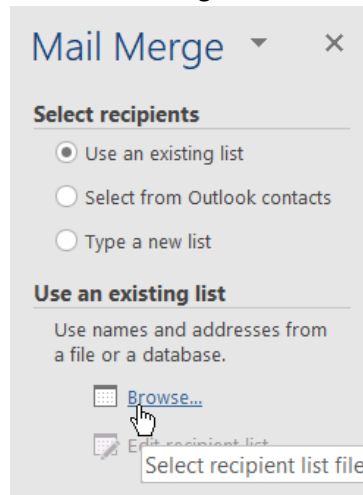
Use the current document

Start from the document shown here and use the Mail Merge wizard to add recipient information.

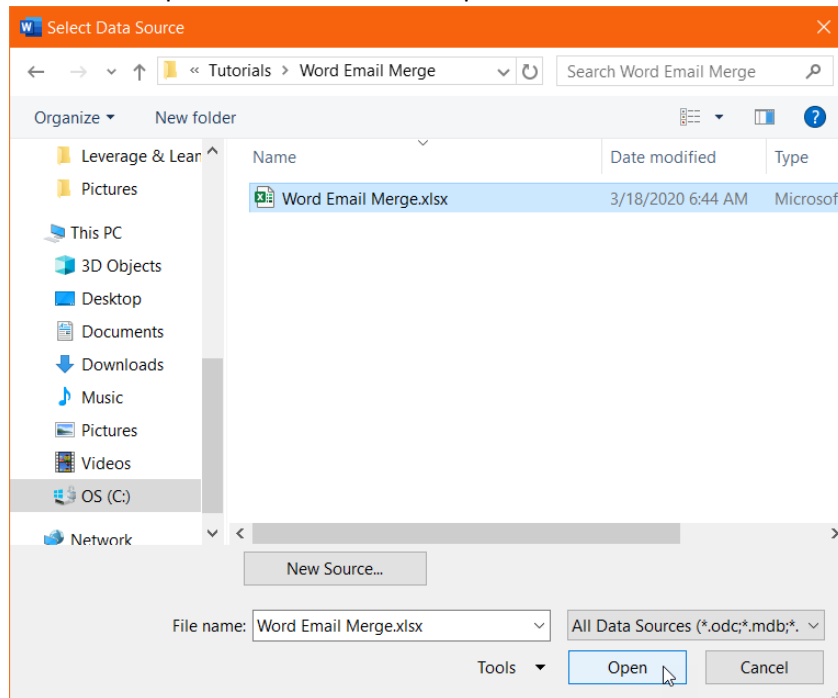
Step 2 of 6

→ [Next: Select recipients](#)

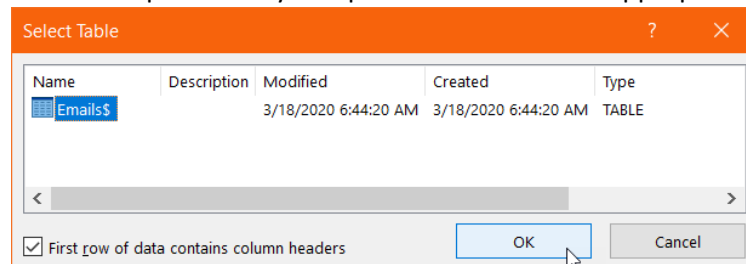
8. Select Use an Existing List. Click Browse



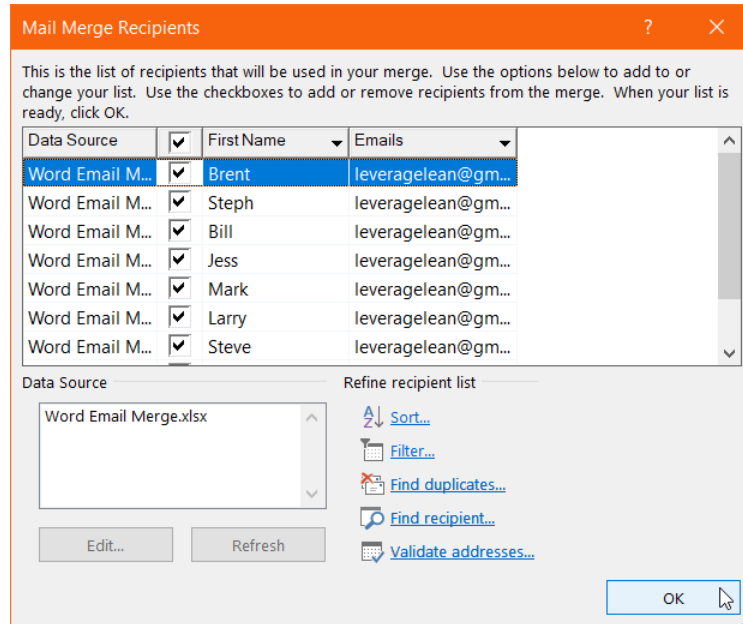
9. Navigate to the Excel spreadsheet with the Recipients information. Select and Click Open



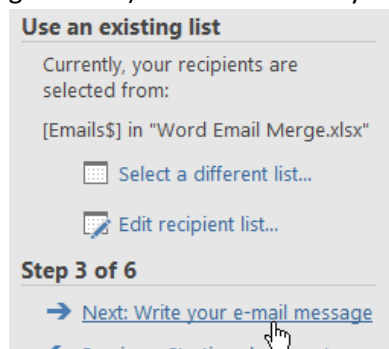
10. The Select Table popup will appear. Click Ok
(If there are multiple tabs in your spreadsheet make the appropriate select)



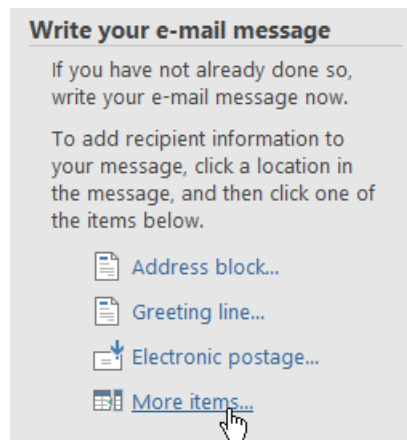
11. The Mail Merge Recipients popup will appear. Click Ok
(Uncheck any Recipients you want to exclude from the Email Merge)



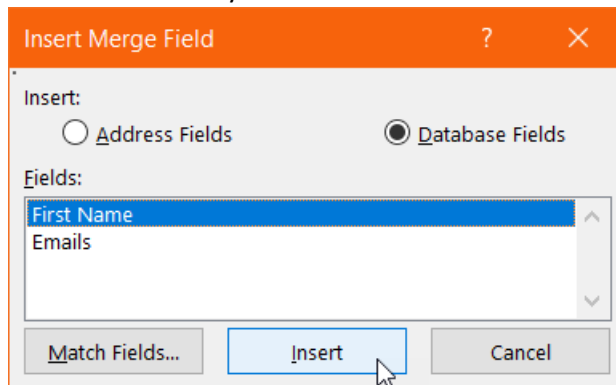
12. (On the Mail Merge Wizard) Click Next: Write your E-mail Messages



13. Click More Items



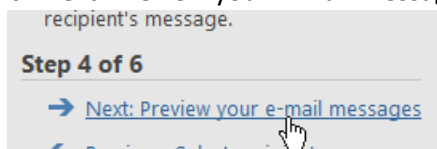
14. Select the Item you want to Insert. Click Insert



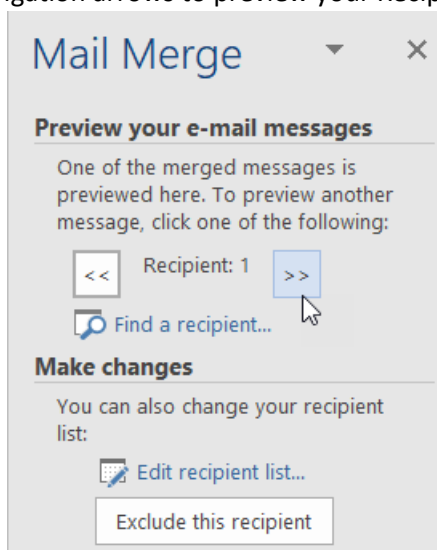
(Make search your Email Items are displaying where you want)

Hello «First_Name»,

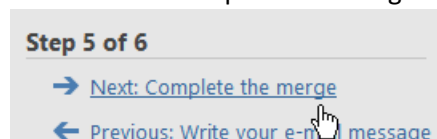
15. Click Next: Preview your E-Mail Messages



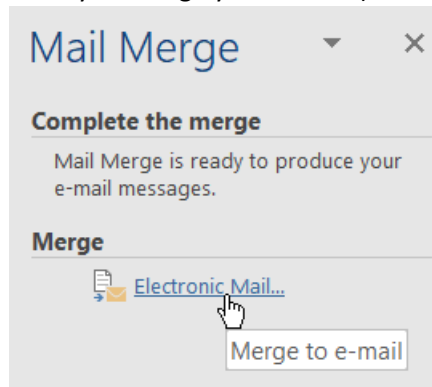
16. Use the navigation arrows to preview your Recipients Emails.



17. Click Next: Complete the Merge



18. (When you are ready to Merge your E-mails) Click Electronic Mail



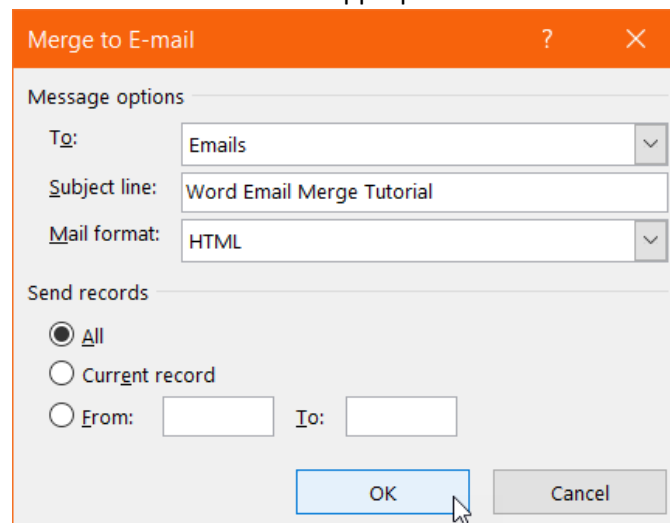
19. The Merge to E-mail popup will appear. The following fields are available to update.

To: select the column that contains your email addresses.

Subject: Enter a subject for the emails being created.

Mail Format: Determine the Mail Format (Rich Text, HTML, etc.)

Send Records: Select the appropriate records to send.



20. Click OK. Word will send every recipient an email.

(You can confirm in the Sent Folder of Outlook)

