

Improved email performance with the Microsoft Word Mail Merge feature

The Microsoft Mail Merge feature of the Microsoft Word editor is one of the great tools for people who often work with text, email ... In the following article, we will present some basic steps. to use and manage Word 2010's Mail Merge Wizard ...

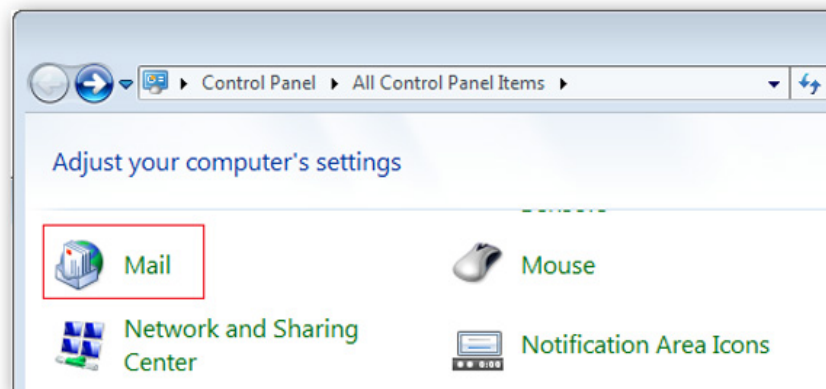
QuanTriMang - Microsoft Word's Mail Merge feature is one of the great tools for people who regularly work with text, email . In the following article, we will present some steps Basic to use and manage *Mail 2010* 's *Merge Wizard* . Here are some steps we need to proceed in order.

Create Distribution list:

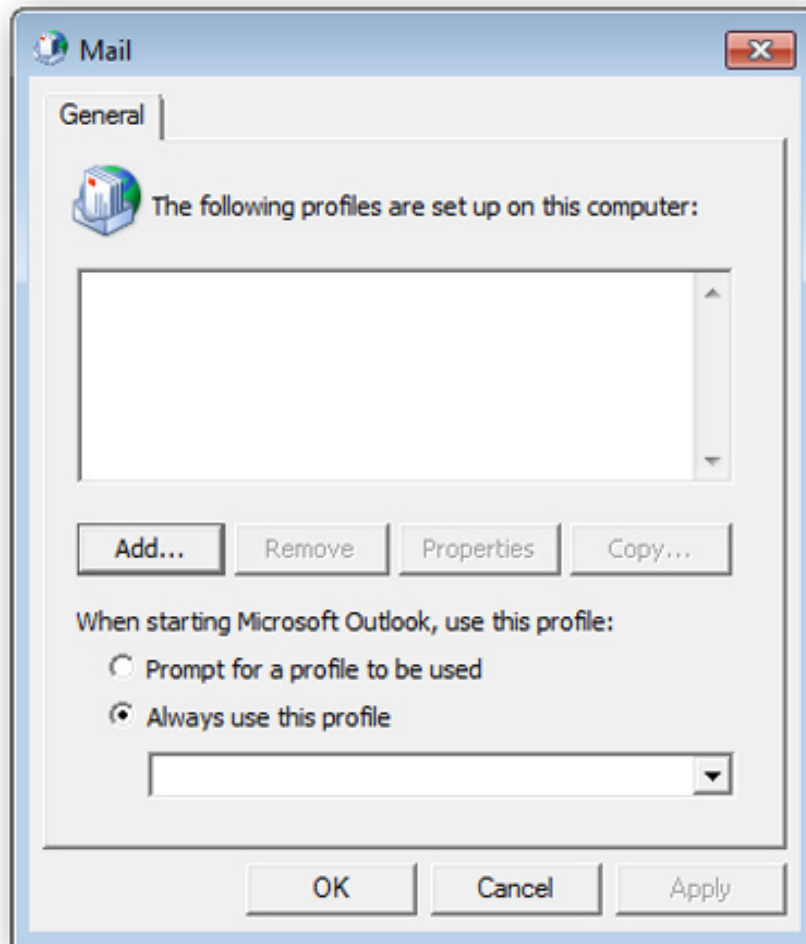
The Mail Merge function makes it easy for us to 'exit' from the tedious data entry process by directly entering email addresses from Outlook, Excel, Access or Word data. Among these options, Outlook is the most suitable and popular, and in the next step, we will go through the process of importing data lists directly from Outlook.

Set up Mail Profile:

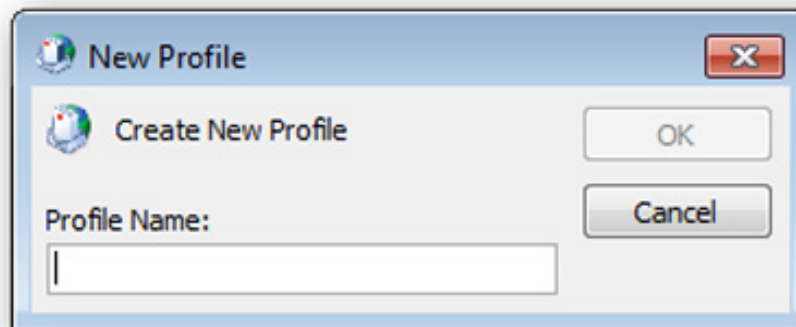
This setup process will begin by creating a *Mail Profile* to store relevant information such as addresses, passwords, specifications .:



For each account, users can create different individual profiles:



The name of the profile should be set to match and easy to remember with a fixed email account:



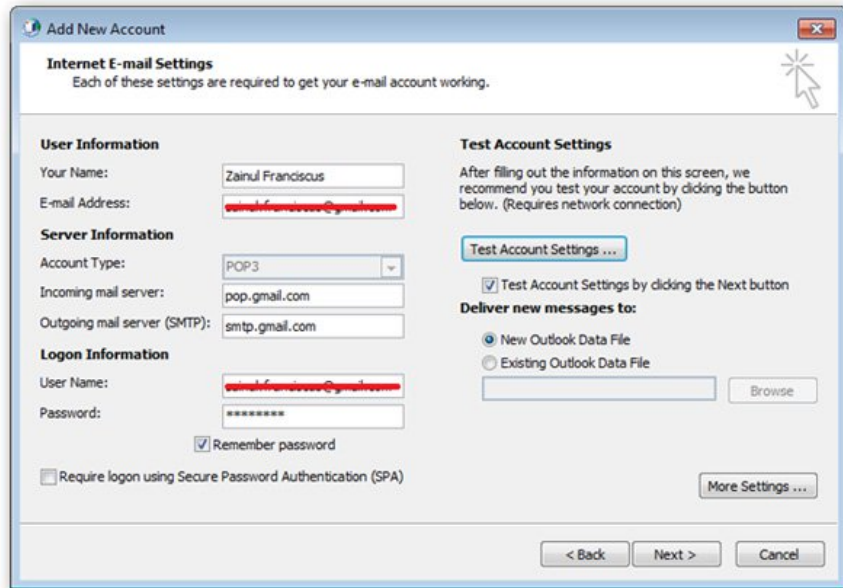
Suitable options for configuring email using the address you received from your service provider or your own account via the 3rd option:

The screenshot shows the 'Add New Account' dialog box with the 'Auto Account Setup' screen. The title bar reads 'Add New Account' and the subtitle is 'Auto Account Setup'. Below the subtitle, it says 'Click Next to connect to the mail server and automatically configure your account settings.' There are three radio button options: 'E-mail Account' (selected), 'Text Messaging (SMS)', and 'Manually configure server settings or additional server types'. The 'E-mail Account' section has four input fields: 'Your Name' (with example 'Ellen Adams'), 'E-mail Address' (with example 'ellen@contoso.com'), 'Password', and 'Retype Password' (with a note: 'Type the password your Internet service provider has given you.'). At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'.

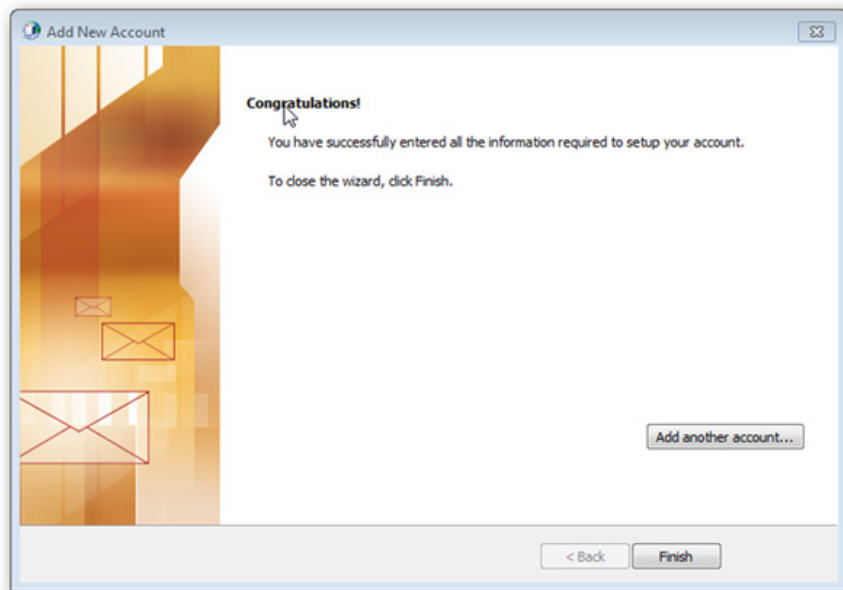
Select *Internet E-mail* if you want to use a support email address via *POP* protocol, such as Gmail:

The screenshot shows the 'Add New Account' dialog box with the 'Choose Service' screen. The title bar reads 'Add New Account' and the subtitle is 'Choose Service'. There are four radio button options: 'Internet E-mail' (selected), 'Microsoft Exchange or compatible service', 'Text Messaging (SMS)', and 'Other'. The 'Internet E-mail' option has a description: 'Connect to POP or IMAP server to send and receive e-mail messages.' The 'Microsoft Exchange or compatible service' option has a description: 'Connect and access e-mail messages, calendar, contacts, faxes and voice mail messages.' The 'Text Messaging (SMS)' option has a description: 'Connect to a mobile messaging service.' The 'Other' option has a description: 'Connect to a server type shown below.' Below the 'Other' option, there is a list box containing 'Fax Mail Transport' and 'Microsoft Outlook Hotmail Connector'. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'.

Each email service provider has a different POP configuration, so make sure you select and use these parameters correctly:

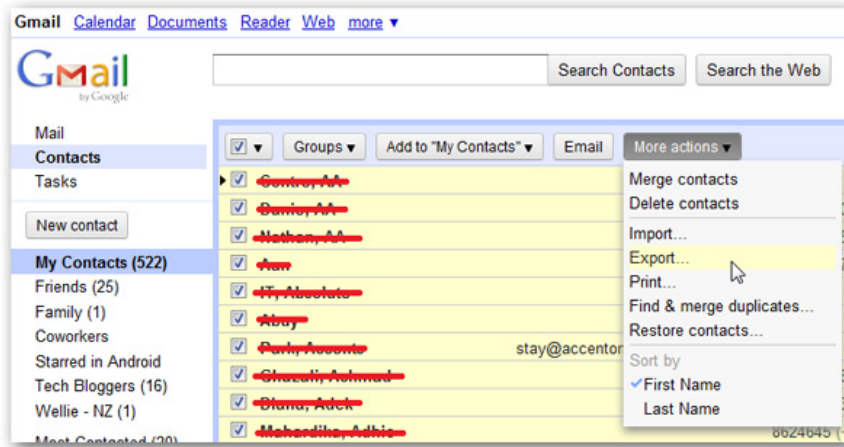


Once we have passed this basic setup and configuration step, we are ready to move on to the next step:

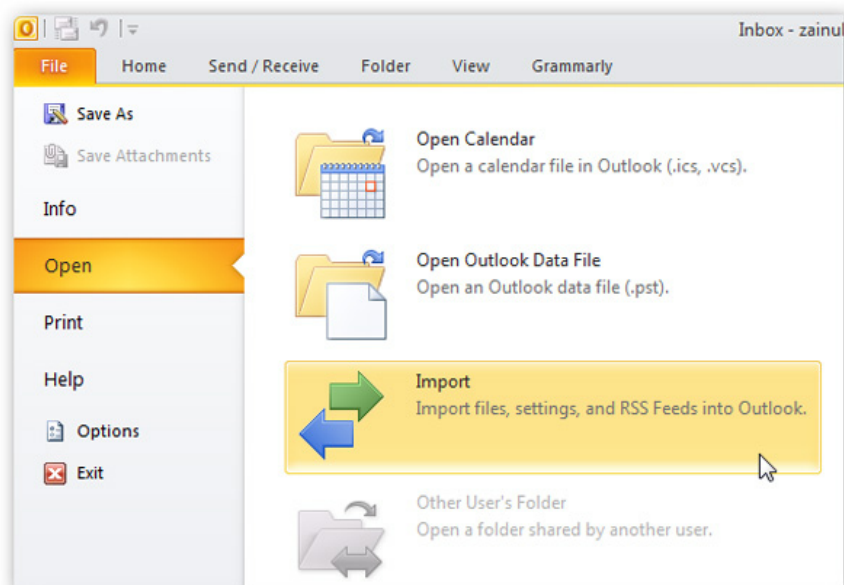


Specify directory to store contact list:

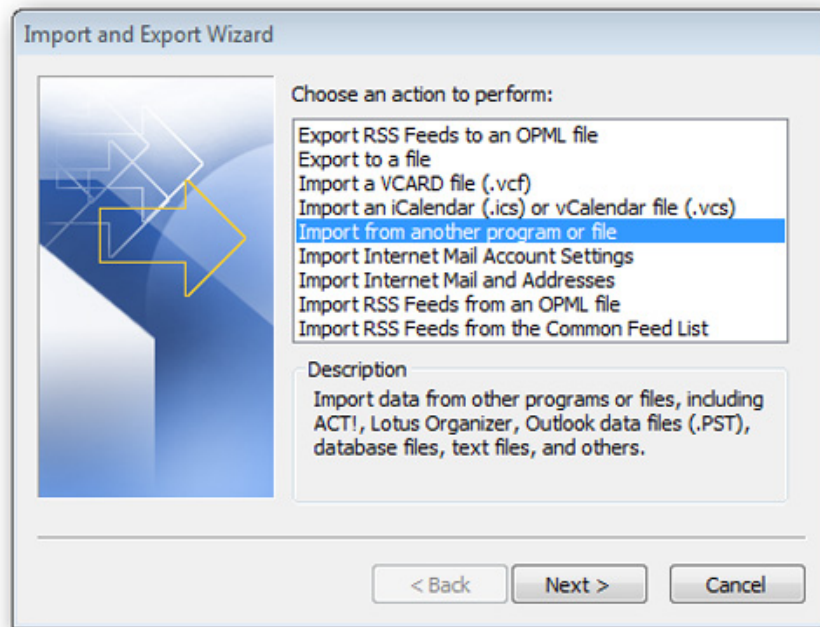
Users can manually import data lists into Outlook, or import directly from other supporting applications, such as *GMail*, *Yahoo*, or *Hotmail*. Most web-based email service providers often support the ability to export contacts to Outlook databases. For example, Gmail allows users to export data to a CSV file - compatible with Outlook:



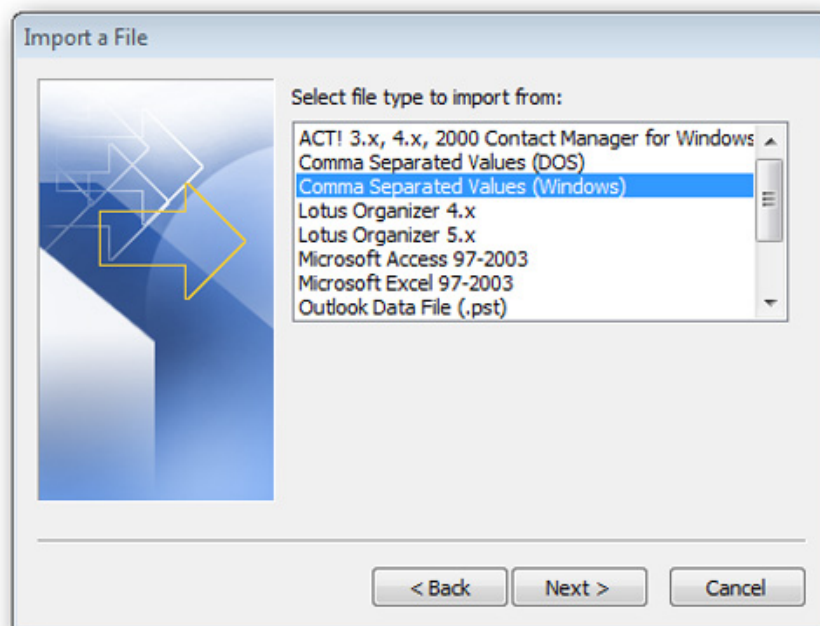
Outlook's import feature supports many popular formats like *csv*, *vcard*, *RSS*, *iCalendar* .:



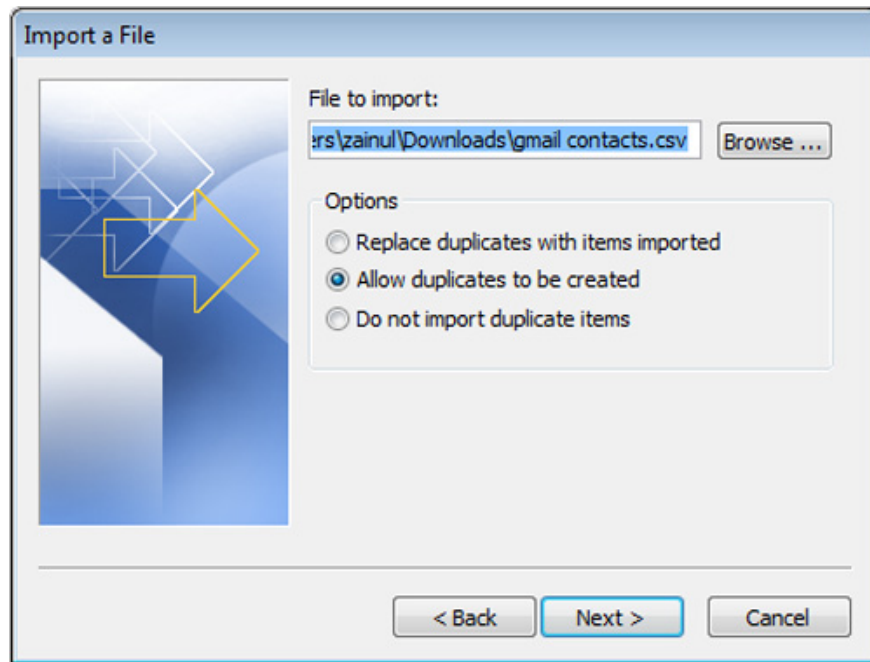
You just need to choose the right file type in the list:



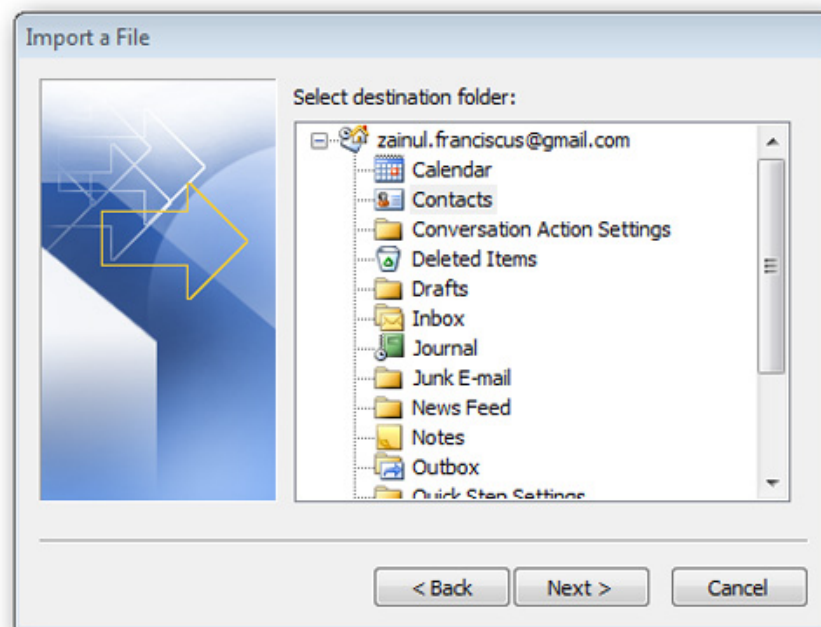
Common formats such as *ACT*, *DOS CSV*, *Lotus*, *Access 97-2003*, *PST* . are available, in this test we choose *Comma Separated Values* ??(Windows):



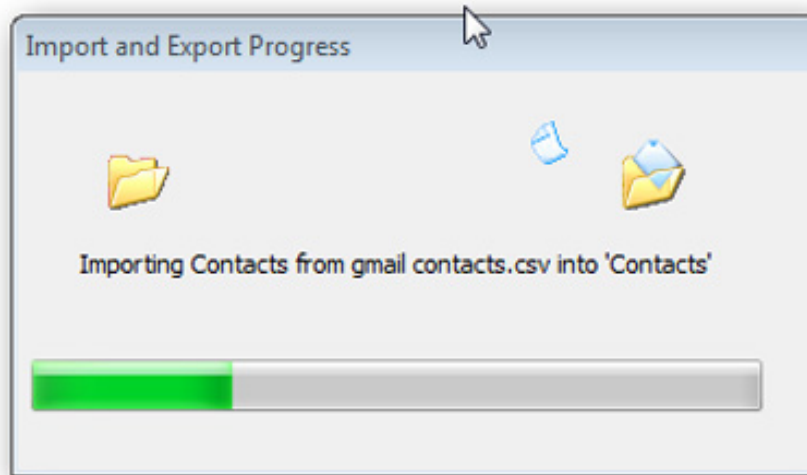
Next, point the link to the folder where the CSV file has been exported from Gmail:



Of all the directories listed here, select *Contacts* :

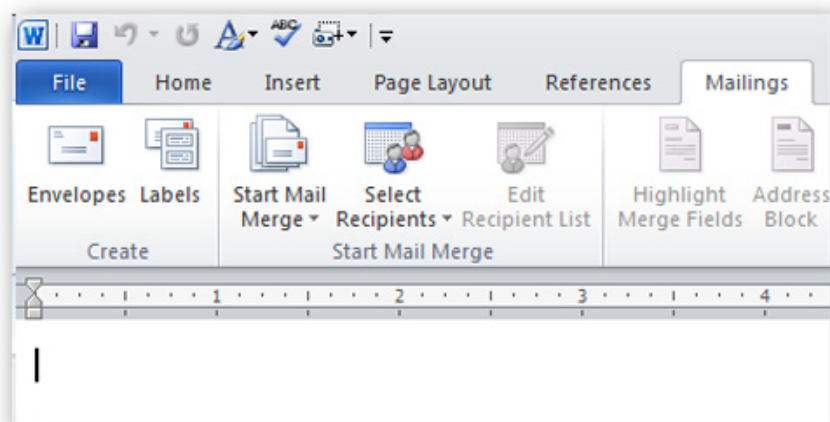


This import process will happen fast or slow depending on the amount of data backed up:

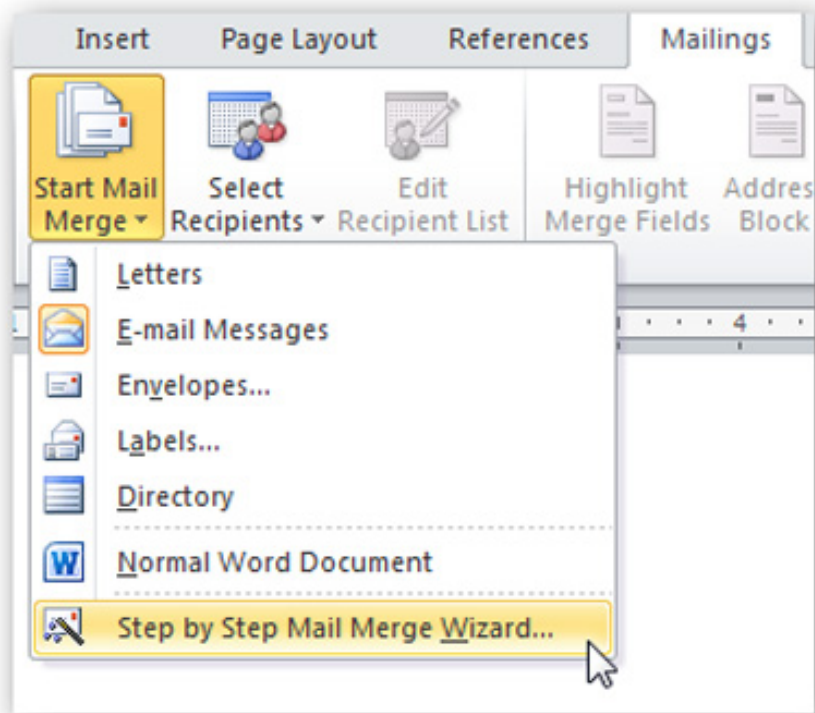


Use Mail Merge:

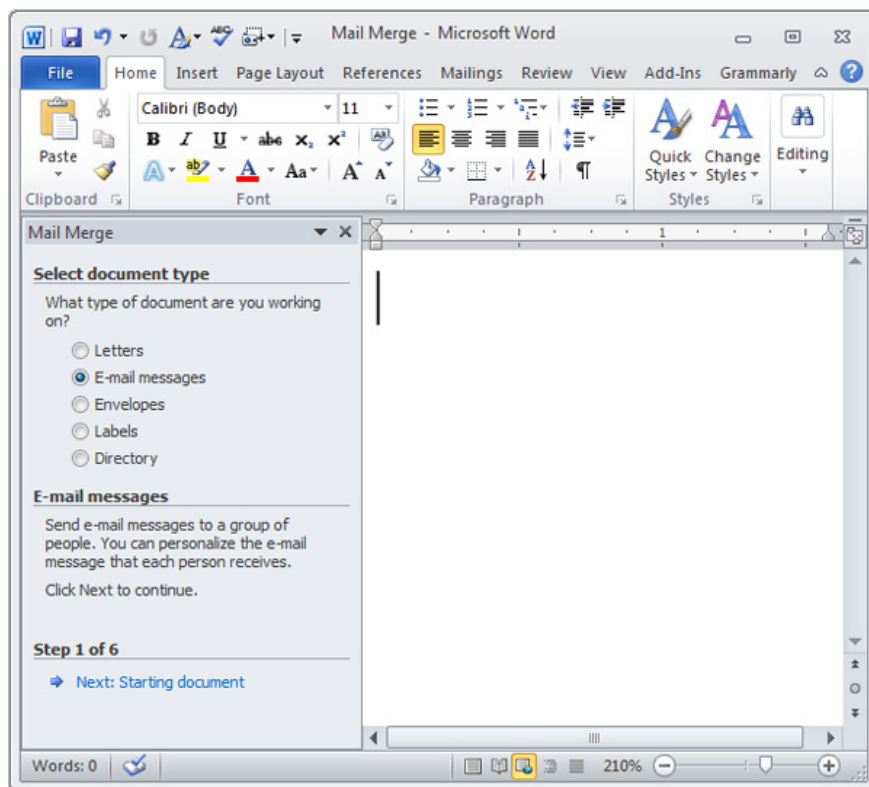
Let's start with a new text, select *Mail* :



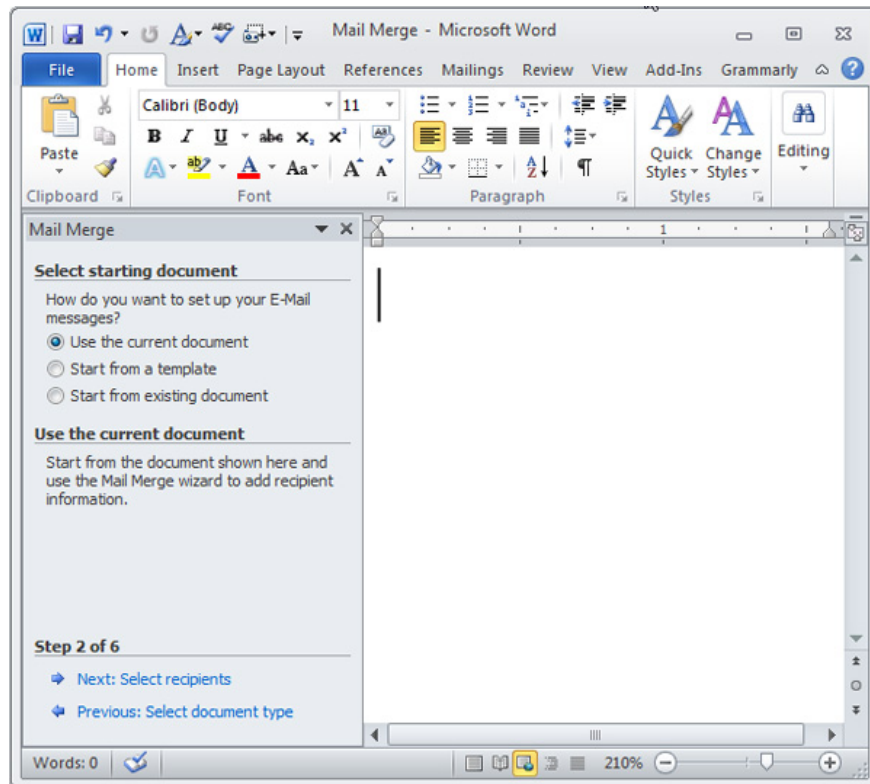
To get used, it's best to select the *Step by Step* :



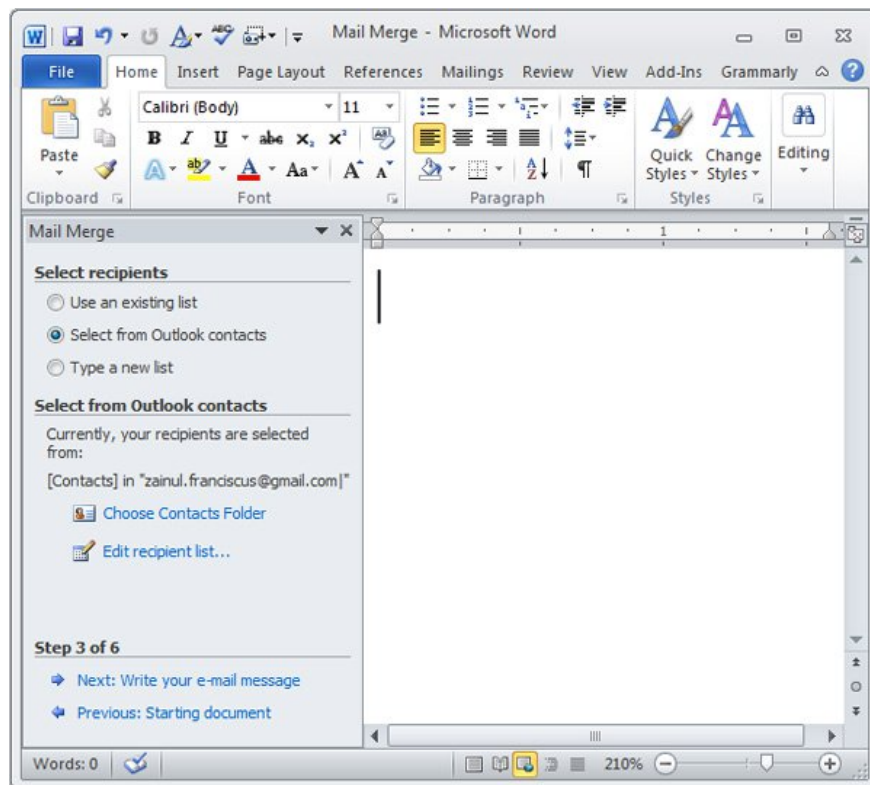
The program will ask us to choose between the corresponding templates, our example here is *E-mail messages*:



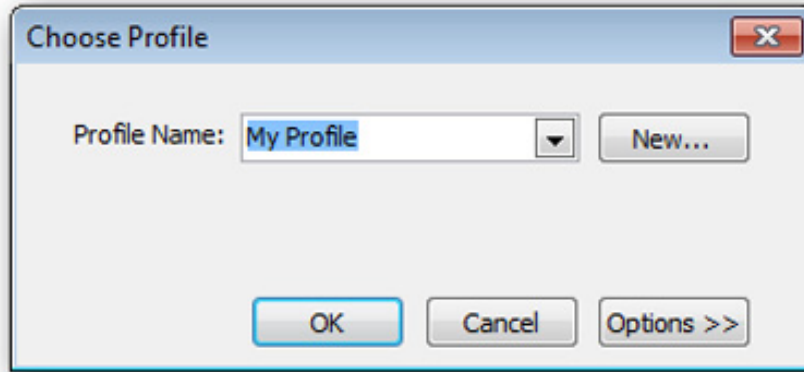
And start writing emails from blank text, templates or available documents:



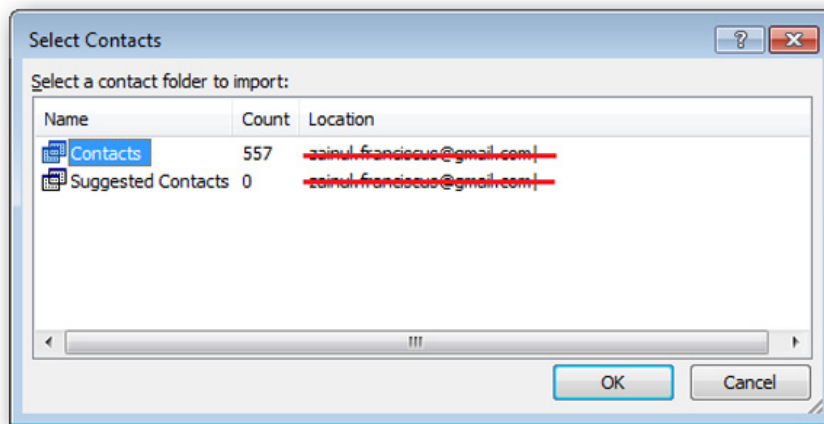
Select Next *Select from Outlook contacts* :



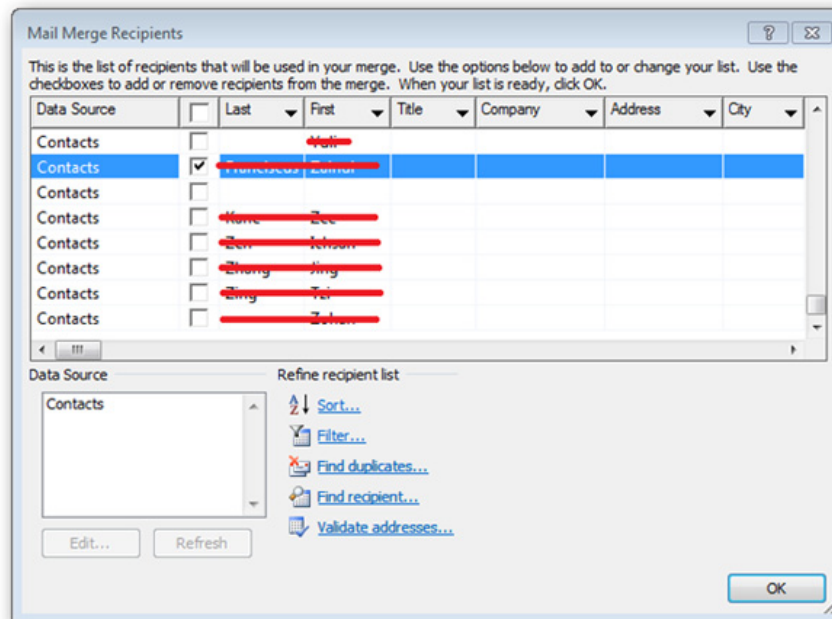
And use *Mail Profile* in the list we have set up earlier:



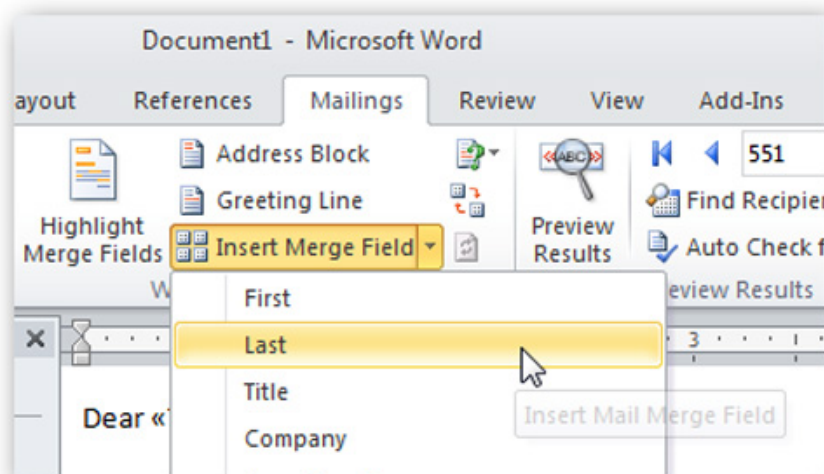
The correct list must have a Count greater than 0:



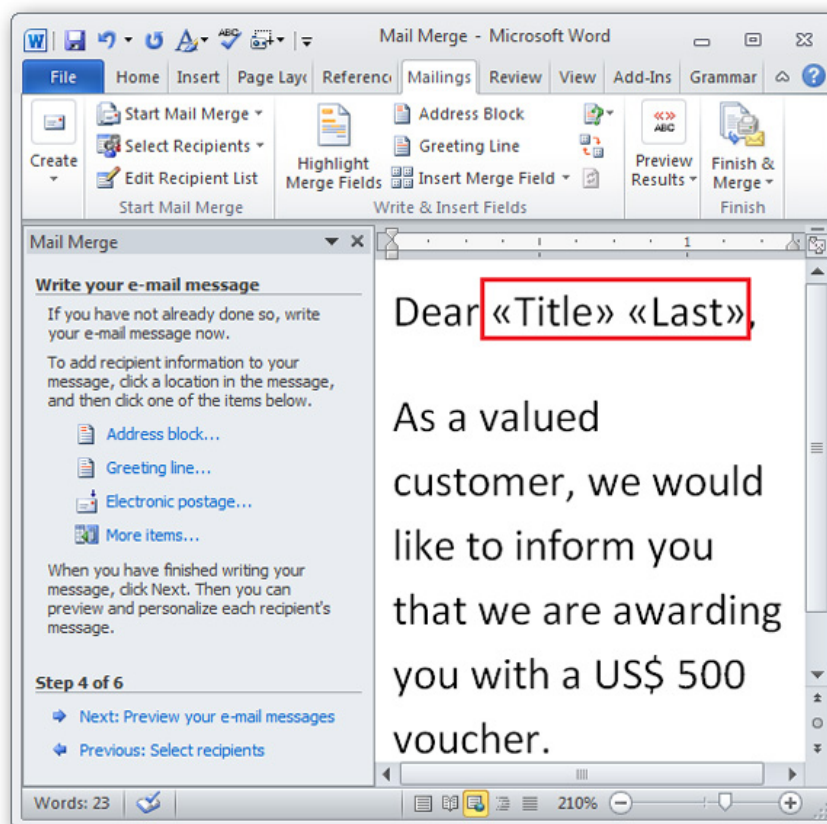
Select the account you want to keep in the email section by checking:



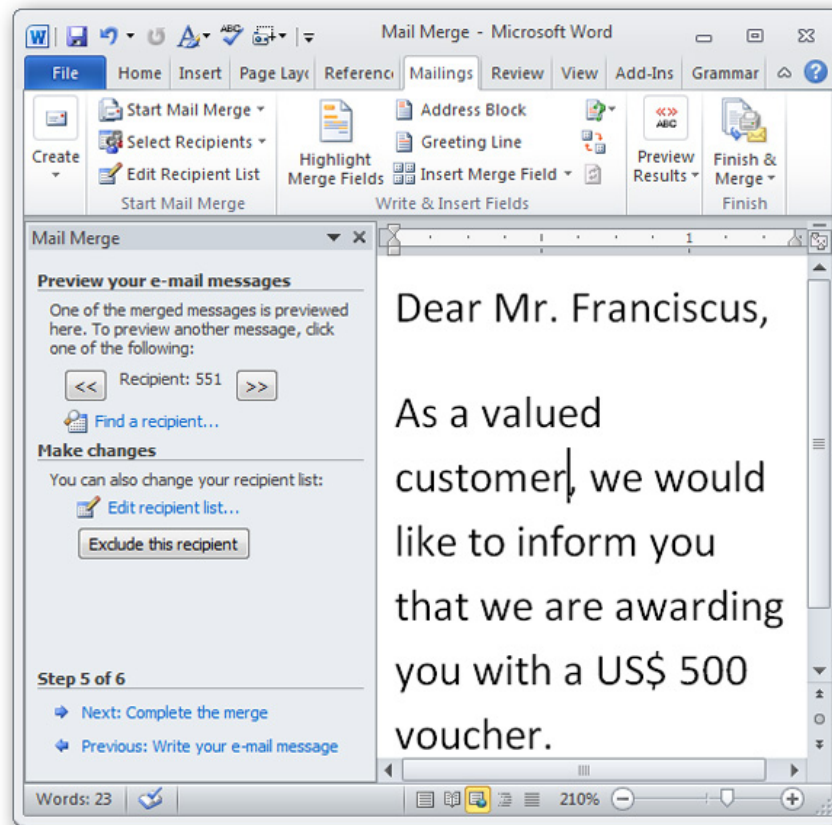
After that, you can edit the email as usual, and insert the appropriate data fields into the relevant sections such as headlines, signatures, posts .:



Each merged data field is enclosed by >> , and the information will be fully displayed when you finish this process:



See *Preview* mode to check if Word handles data fields correctly after merge, with the path **Next: Preview your e-mail messages** :

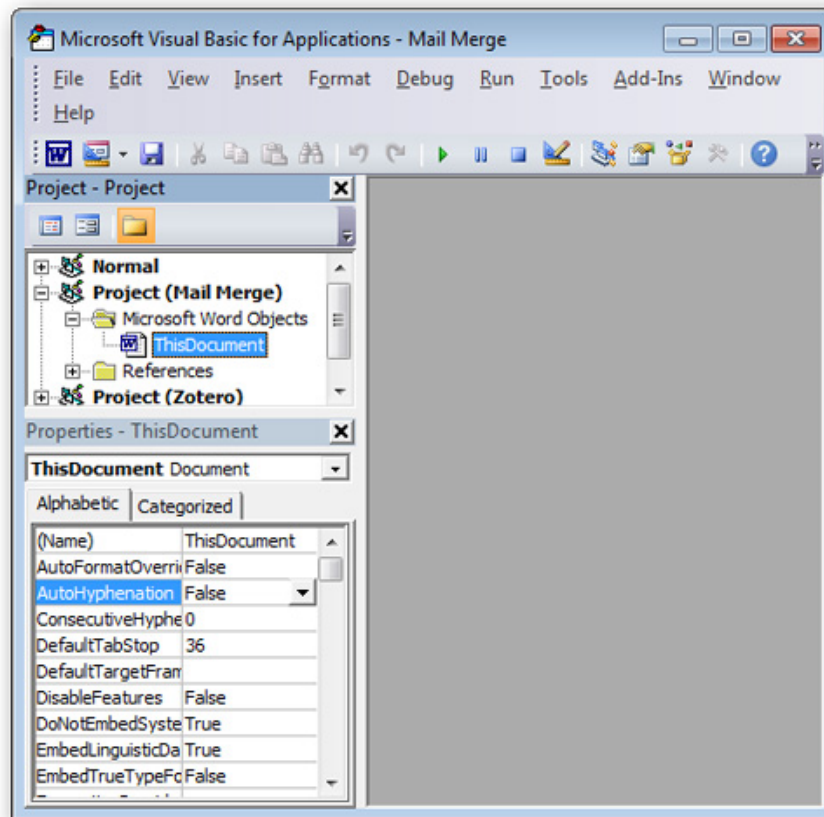


If you are satisfied with the result above, select **Next: complete the merge** and Word will automatically send the email template to all recipients in the list.

Personalize the letter header:

The whole process can be divided into specific segments as follows: select the appropriate text sample, create a list, insert data and view Preview, and finally send to the list of recipients prepared. At this point, we can easily recognize two other components that are not supported, namely writing titles with personal information and setting up different attachments. In fact, we must use macros to apply in the mail merge, before completing the entire process.

In the message template that is currently open, press *Alt + F11* and double-click *thisDocument* to open the Macro:



Then, use the following code snippet - written by macro programmer hutchinsfairy:

```
Dim WithEvents wdapp As Application
```

```
Dim EMAIL_SUBJECT As String
```

```
Dim FIRST_RECORD As Boolean
```

```
Private Sub Document_Open ()
```

```
Set wdapp = Application
```

```
ThisDocument.MailMerge.ShowWizard 1
```

```
End Sub
```

```
Private Sub Document_Close ()
```

```
Set wdapp = Nothing
```

```
End Sub
```

```
Private Sub wdapp_MailMergeBeforeRecordMerge (ByVal Doc As Document, Cancel As Boolean)
```

```
Dim i As Integer
```

With ActiveDocument.MailMerge

If FIRST_RECORD = True Then

EMAIL_SUBJECT = .MailSubject

FIRST_RECORD = False

Else .MailSubject = EMAIL_SUBJECT

End If

i = .DataSource.DataFields.Count

Do While i > 0

.MailSubject = Replace (.MailSubject, "" & .DataSource.DataFields (i) .Name & ">", .DataSource.DataFields (i) .Value,, , vbTextCompare)

i = i - 1

Loop

End With

End Sub

Private Sub wdapp_MailMergeBeforeMerge (ByVal Doc As Document, ByVal StartRecord As Long, ByVal EndRecord As Long, Cancel As Boolean)

FIRST_RECORD = True

End Sub

Private Sub wdapp_MailMergeAfterMerge (ByVal Doc As Document, ByVal DocResult As Document)

ActiveDocument.MailMerge.MailSubject = EMAIL_SUBJECT

End Sub

Save the changes, go back to the edit page and select **Next: complete the merge:**

Preview your e-mail messages

One of the merged messages is previewed here. To preview another message, click one of the following:



 [Find a recipient...](#)

Make changes

You can also change your recipient list:

 [Edit recipient list...](#)

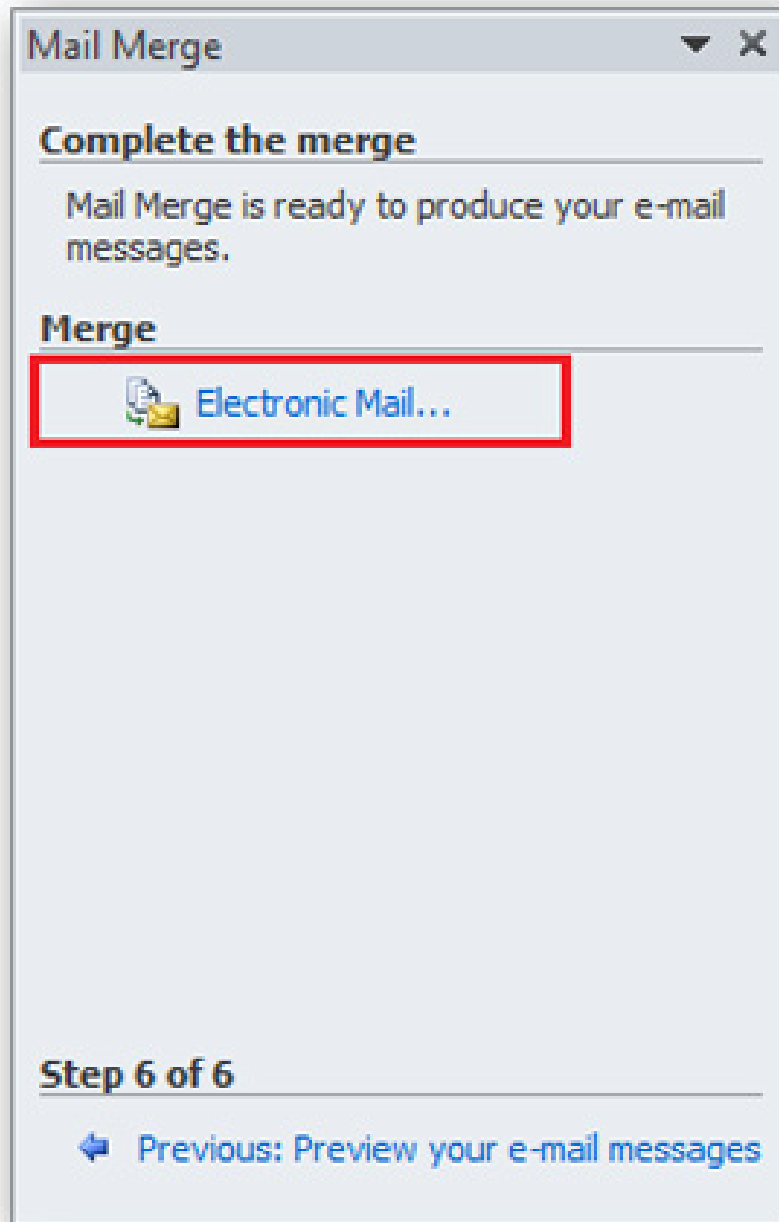
[Exclude this recipient](#)

Step 5 of 6

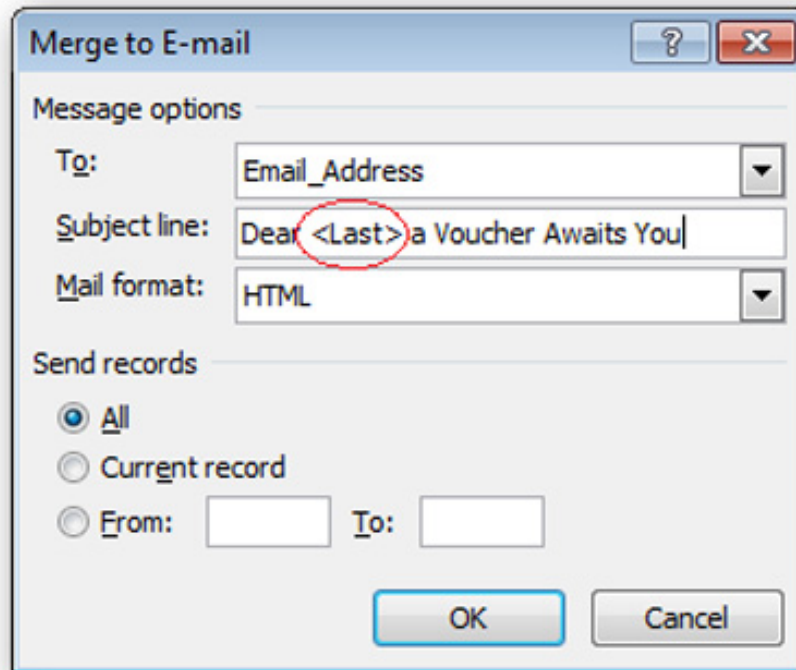
 [Next: Complete the merge](#)

 [Previous: Write your e-mail message](#)

Click the *Electronic Mail link* . to send the message:



Replace the matching merge data field, inside the > mark in the subject line:

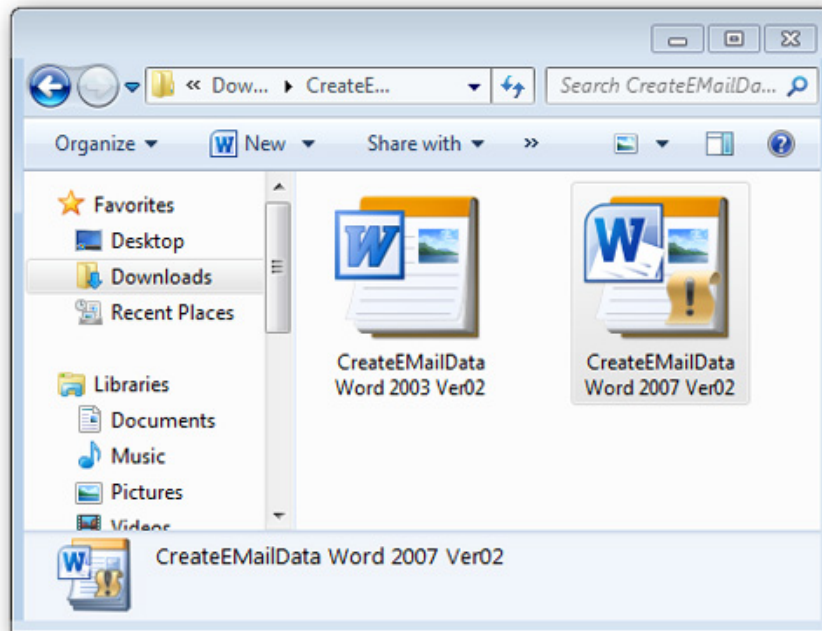


The macro will automatically analyze and replace it with the *Last Name* section of the recipient when Word sends this text via email.

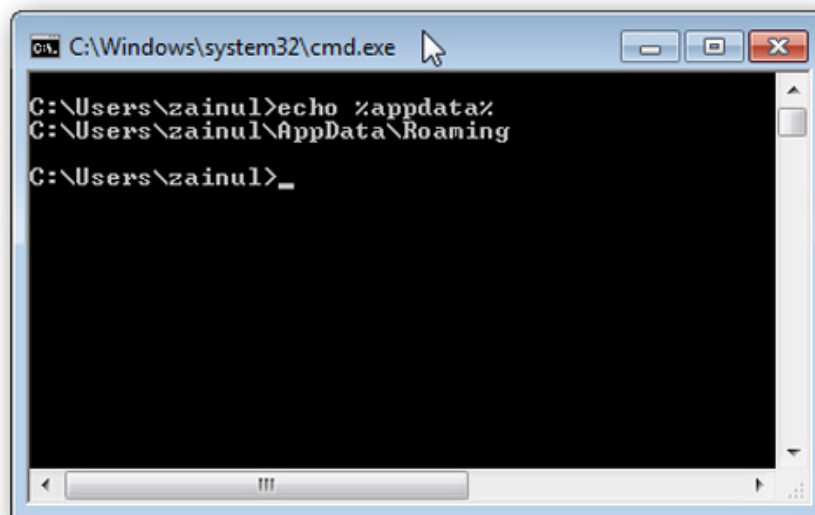
Attach different file types:

In the next section, we will use a support add - in that allows users to attach various files in an email.

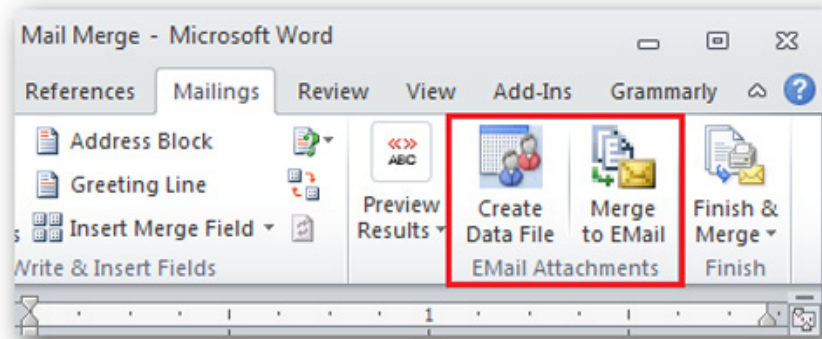
If you visit here, download and extract the add-in, there will be a number of Word Document templates. If you are using *Microsoft word 2007 or 2010* , select **CreateEMailData Word 2007 Ver02** , but with *Word 2003* , use **CreateEMailData Word 2003 Ver02** :



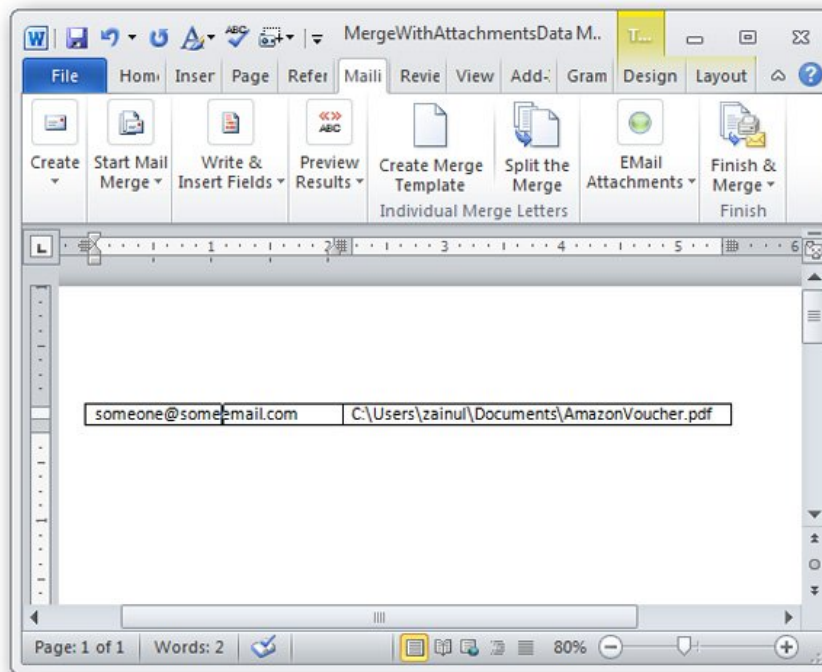
Copy this sample document to the % **appdata%** **MicrosoftWordSTARTUP** folder, with % **appdata%** being the folder containing Microsoft startup files. In this case, *C: UserszainulAppDataRoaming* :



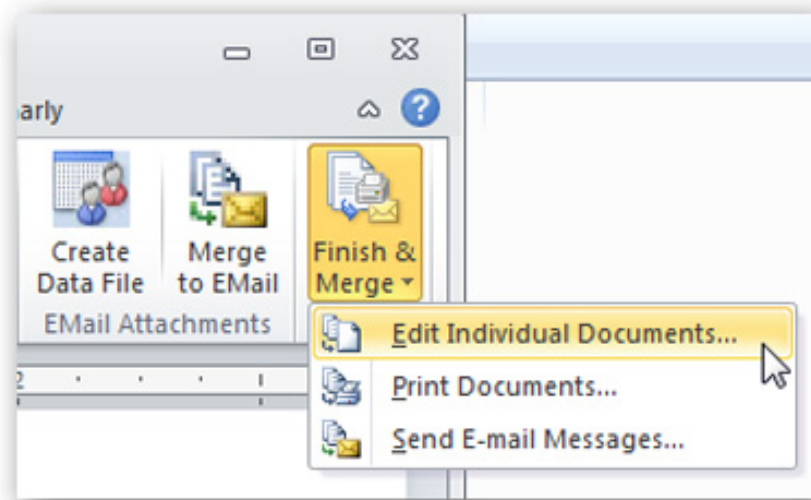
Restarting Word, you'll see two new add - ins: *Create Data File* and *Merge to Email* below the Mailing menu:



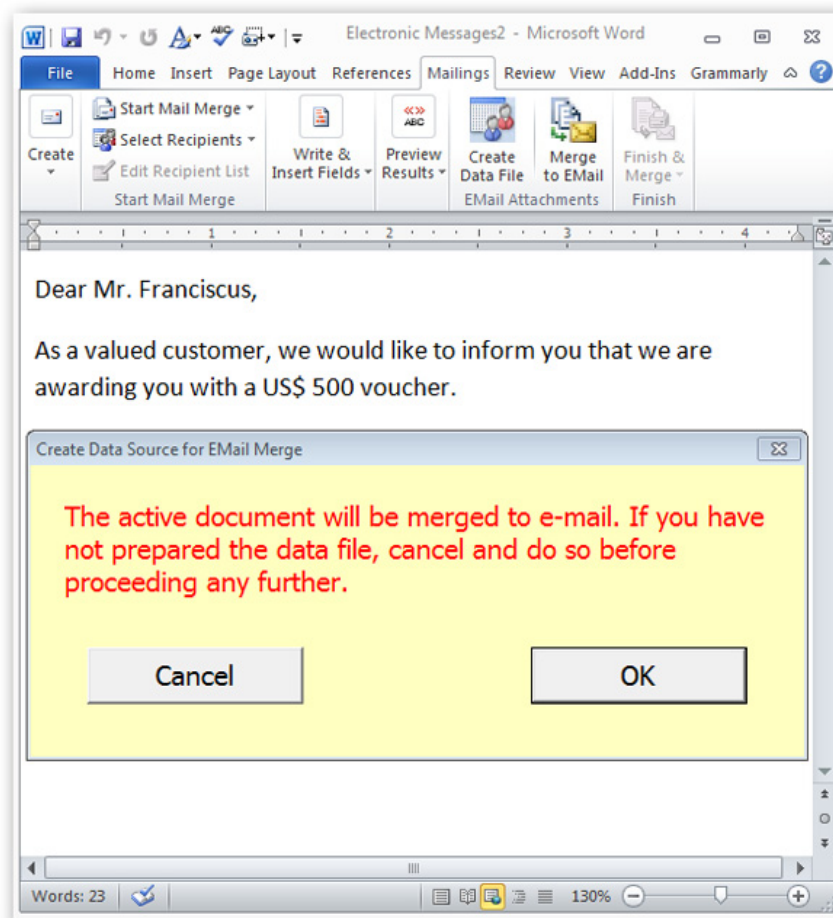
Next, prepare the data table for example with a table with 2 columns, on the left is the recipient's email address, on the right is the full path to the corresponding attachments, then save in the same folder with the merge email store with the name: **MergeAttachmentsData** . This is a required step, because if you save the file to any other name, the add - in will not work:



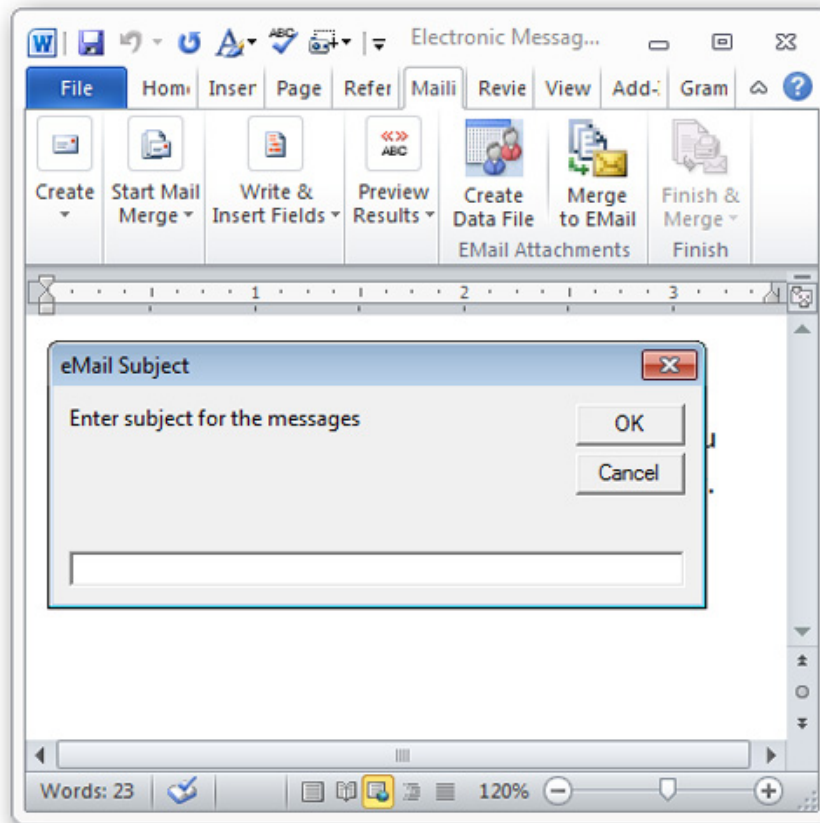
Return to the text and divide it into 2 separate files:



A new text window will appear, press the *Merge to Email* button, and OK:



Set the appropriate title for the email, click OK and Outlook will send your email with the attachments specified in the data file:



These are some of the basic steps to exploit, use and manage the Mail Merge feature of the Microsoft Word editing program, along with the add - in external support. Good luck!

You finished reading the article "**Improved email performance with the Microsoft Word Mail Merge feature**" edited by the [TipsMake](#) team. We hope this article has provided you with many useful tech tips and tricks. You can search for similar articles on tips and guides. Thank you for reading and for following us regularly.