Using mail merge to send e-mail messages to your applicants

Follow these steps to perform a mail merge to e-mail.

Getting started

*Microsoft Office Word 2007 and Microsoft Word 2010*

On the **Mailings** tab, click **Start Mail Merge**, and then click **Step by Step Mail Merge Wizard**.
The **Mail Merge** task pane appears.

**Step 1 of 6: Select document type**

1. Under **Select Document Type**, click **E-mail Messages**.
2. Click **Next: Starting Document**.

**Step 2 of 6: Select starting document**

1. Under **Select starting document** are three choices: **Use the current document**, **Start from a template**, and **Start from existing document**. When you click each option, additional information about the option appears in the task pane.
2. Click **Next: Select Recipients** to continue.

**Step 3 of 6: Select recipients**

1. Select **Use an existing list**, click **Browse** to locate and choose your file (the Excel file from your Applicant List Report that you already exported from PeopleAdmin). Click **Edit recipient list** to modify the address list after it is created. (You may choose to send different emails depending on the applicant status, ex: emails personalized to all applicants that were not selected/not interviewed versus all those who were interviewed.)
2. Click **Next: Write your e-mail message** to continue.

**Step 4 of 6: Write your e-mail message**

Write your message to applicants. At this point, you can also insert your merge fields. You can use a combination of items:

- **Address Block**: Use this item to insert fields that will insert a block of text, such as the name and address.
- **Greeting Line**: Use this item to choose the format that you want on your greeting line.
- **Electronic Postage**: Use this item if you have electronic postage software on your computer that is compatible with Word.
- **More Items**: Use this item to enter any other fields that are in your recipient list.

Click **Next: Preview your e-mail messages** to continue.

**NOTE**: Attachments are not an option in an email merge. All data must be within the body of the email message.
Step 5 of 6: Preview your e-mail message

You can preview just one message of your mail merge, or you can preview all of them. You also can click Edit recipient list to remove names or add to your recipient list.

After you preview your message, click Next: Complete the merge to continue.

Step 6 of 6: Complete the merge

1. Click Electronic Mail.
2. When the Merge to E-mail dialog box appears, select the field that you want to use for the To line, type the subject in the Subject line, and then select the mail format that you want to use.
3. Click OK to send your messages.

Example Screenshot: Start Mail Merge

Questions?
See Microsoft’s general online instructions or detailed online instructions. Or contact College of Charleston Helpdesk at Helpdesk@cofc.edu or (843) 953-3375.