

## Mail Merges in Word & Outlook 2013

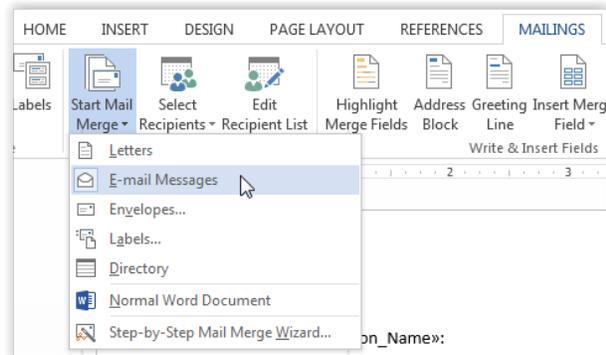
This document covers the process of mail merges in the new Office 365--using a Word 2013 document and CSV list of recipients, we'll create multiple Outlook 2013 e-mails and even show you how to set up a rule to delay sending these e-mails until you've had a chance to review them. This same process can be adapted to create physical letters, labels, and other types of documents.

To begin this tutorial, you'll want to have the text of your e-mail composed in a Word document and your list of e-mail recipients in a CSV or Excel spreadsheet.

### Selecting the type of output document

First, open your Word document and click on the **Mailings** tab, then click the **Start Mail Merge** icon and select the type of document you'll be creating—in this case, E-mail Messages.

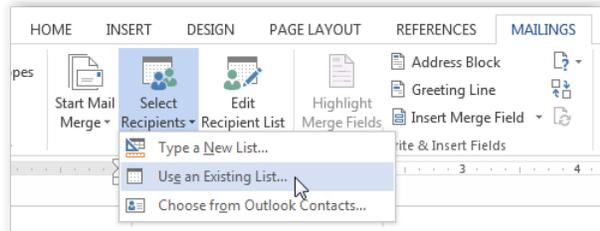
Note that you can also receive step-by-step instructions by choosing the **Step-by-Step Mail Merge Wizard** option at the bottom of this list.



### Selecting recipients and populating merge fields

On the **Mailings** tab, then click the **Select Recipients** icon and select **Use an Existing List**.

Browse to the location of your CSV / Excel file and double-click to select it and return to the Word document.

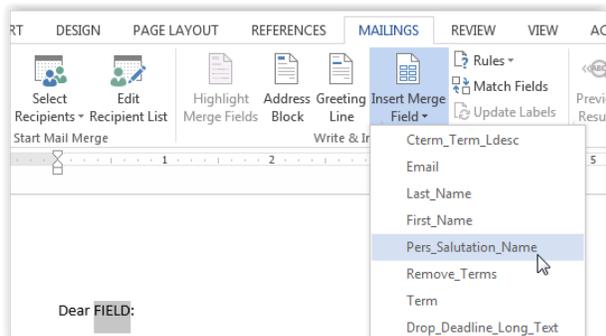


### Adding merge fields to your document

Place your cursor where you'd like to put your first merge field and click the bottom half of the **Insert Merge Field** icon:



The available fields from your CSV file are displayed, as shown to the right. Click your desired field to add it to your document.



## Previewing your mail merge documents

When you've finished adding your fields to your e-mail text, click the **Preview Results** icon to replace the field names with the data from each row of your CSV file.

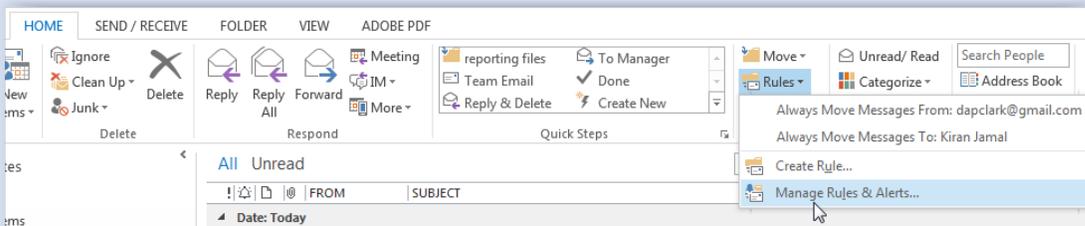
In preview mode, you can page through the output documents using the arrow icons to the right of the **Preview Results** button:



## Delayed sending in Outlook 2013

Former Thunderbird mail merge users may have been used to the “delayed” sending behavior, where e-mail merge messages are placed in your e-mail outbox and not immediately sent. You can create a rule to duplicate this functionality in Outlook with the following steps. If you want to send your messages immediately, skip this colored box and proceed with the instructions below.

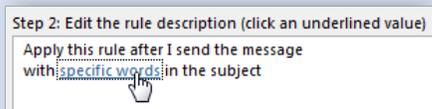
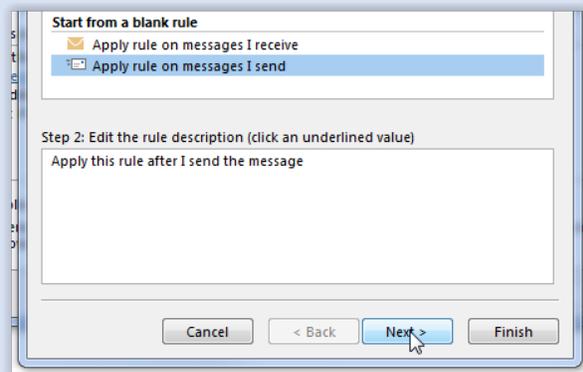
Open Outlook 2013, and on the **Home** tab, click **Rules** and select **Manage Rules and Alerts**:



In the upper left corner of the window that appears, click the **New Rule** button to bring up the Rules Wizard pop-up window.

Toward the bottom of the list, select the **Apply rule on messages I send** option, then click next.

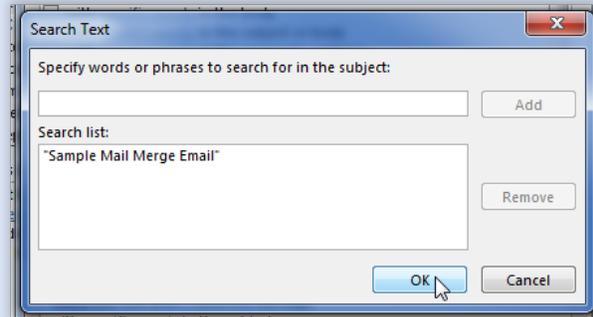
Check the **with specific words in the subject** check box, and click the **specific words** link at the bottom of the window to define the subject of the e-mail you'd like to filter:



In the popup window that appears, enter the subject you'll be using for your e-mail messages and click the **Add** button. You can add multiple subjects here if you'll be sending different types of mail merged e-mails.

When you're done adding subjects, click **OK** and note that your subject is added to the bottom of the window:

Apply this rule after I send the message with Sample Mail Merge Email in the subject



Click the **Next** button and check the **defer delivery by a number of minutes** checkbox, then click the **a number of** link to define how long you'd like to hold e-mails – anywhere from 1 – 120 minutes.

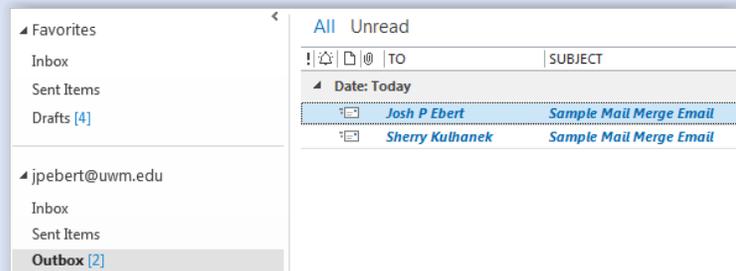
Enter your desired time and click **OK** to return to the Rules Wizard and update the rule text at the bottom of the window as shown to the right. Click the **Next** button.

Apply this rule after I send the message with Sample Mail Merge Email in the subject defer delivery by 60 minutes

Select any necessary exceptions to this rule, and click the **Next** button again. Give your name a rule and ensure that the **Turn on this rule** checkbox is selected, then click the **Finish** button. You'll be informed that this rule will only work in the Outlook desktop client; click the **OK** button to confirm.

Click the **OK** button again to save your changes and close the Rules and Alerts window.

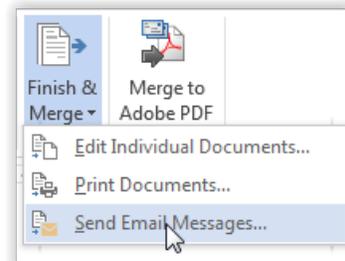
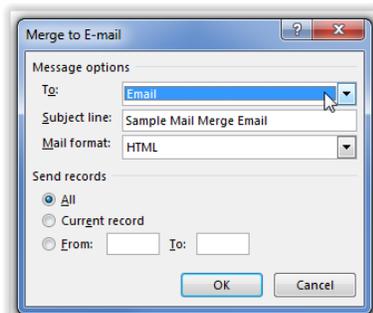
The next time you send e-mails with this subject, they'll be held in your Outlook Outbox for the specified duration of time.



To edit or preview a message in your Outbox, just double-click it. Please note that when you preview a message, you'll need to click the **Send** button again to queue it up in your Outbox.

## Sending merged e-mail messages

When you've finished reviewing your mail merge documents, click the Finish & Merge icon in the **Mailings** tab of Word 2013 and select the output type—in this case, **Send Email Messages**—to bring up the message options pop-up window:



Set the **To:** dropdown to the column in your CSV file which contains the e-mail addresses of your recipients. Type the subject line for your e-mail—if you set up the delayed sending rule, make sure this field matches the subject line you provided in Outlook. Keep the mail format as HTML, and select if you'd like to send all of merged e-mails or to a subset of the recipients.

When you click **OK**, your messages will be sent right away (and can be found in your Outlook Sent folder) or will be sent to your Outbox for the duration you specified.

### Questions or Problems?

If you encounter any problems with the instructions above or have questions beyond the scope of this documentation, please submit an [L&S IT Support Request](#) with as much information as possible.