

How to Mail Merge with the Service Day Website (Windows)

If you have any problems while going through this guide you can contact the ASWWU web team at aswwwu.webmaster@wallawalla.edu.

Setup

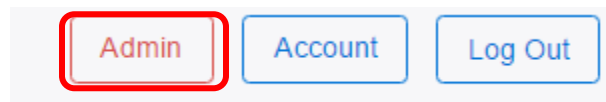
This guide uses the office suit's Mail Merge functionality. You must be logged into Outlook with the email you want to send the mass mail from. You must also have this email set as the default email in Outlook.

To choose the email account you want to be the default in Outlook:

1. Click *File* in Outlook.
2. Make sure the *Info* category is open.
3. Click *Account Settings* ▼ under *Account Settings*.
4. Select *Account Settings...* from the menu that has appeared.
5. Highlight the account you want to be the default.
6. Click *Set as Default*.
7. Click *Close*.

Log into the Service Day Website & Go to the Admin Panel

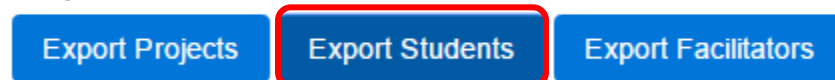
After logging in click *Admin* on the top right of your screen



Download Data

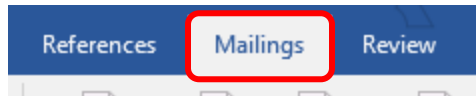
Click *Export students* to download the data.

Export Data to CSV

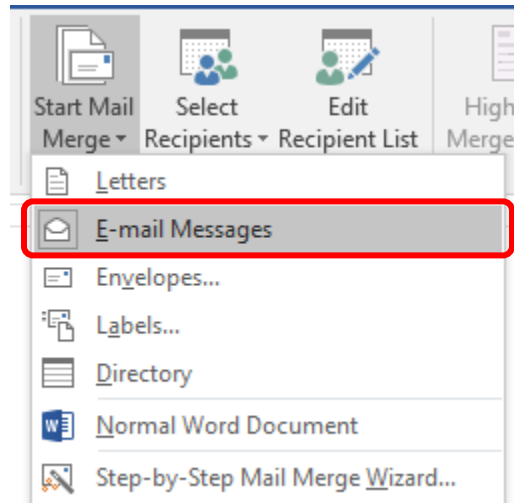


Start the Mail Merge

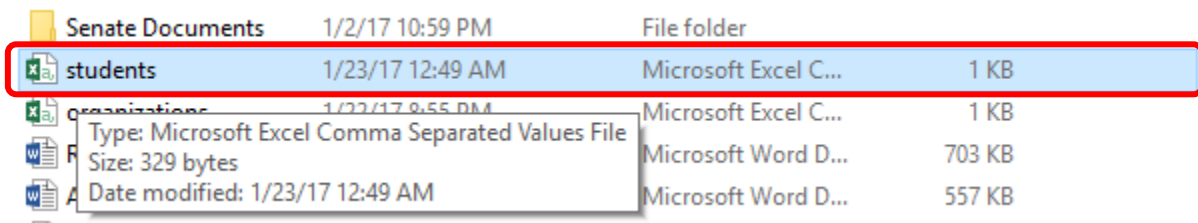
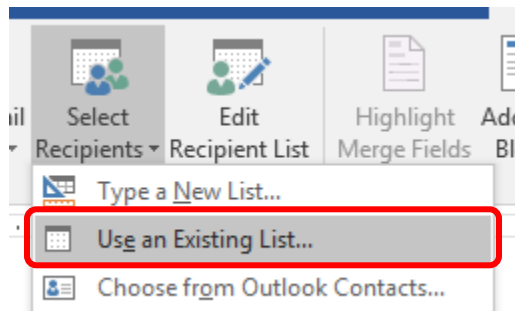
1. Open a blank document with Microsoft Word.
2. Click the *Mailings* tab.



3. Click *Start Mail Merge* and then *E-mail Messages*.



4. Add the recipient list.

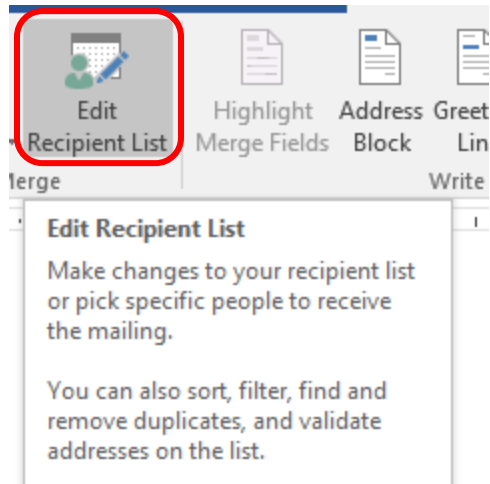


5. Click OK

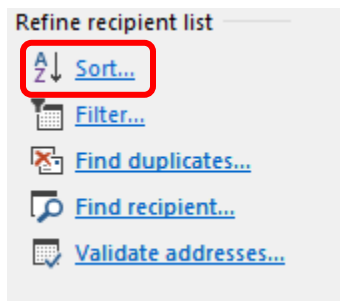
Sort through the data

You are most likely going to want to send an email to the people who have signed up for a project and the ones that are from the school you represent. To do this we are going to apply some rules to the list of students that we have.

1. Click edit recipient list



2. Click Sort...



3. Here is an example query that selects only the WWU students signed up for a project.

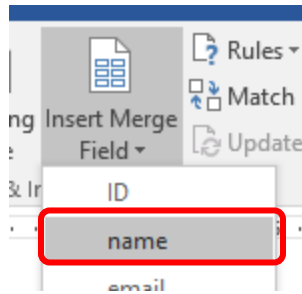
| Filter Records | | Sort Records | |
|----------------|-----------|--------------|-----------------|
| | Field: | Comparison: | Compare to: |
| | projectID | is not blank | |
| And | projectID | Not equal to | PROJECT REMOVED |
| And | school | Equal to | WWU |

4. Click OK and then OK again to apply your filters.

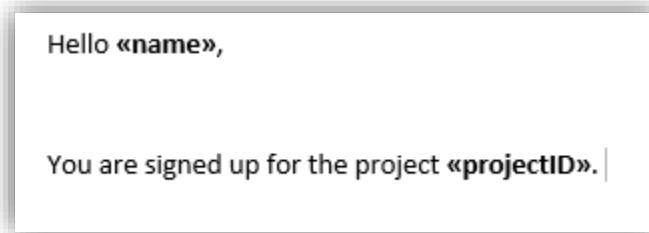
Composing the email

With mail merge you can tailor the email to the individual that receives it. For example you can make the email say "Hello <<Name>>" and it will fill in the appropriate information.

To do this click *Insert Merge Field* and then *name*.

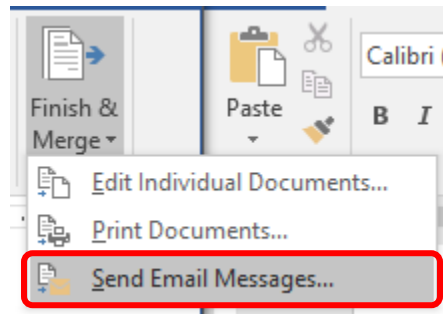


You can now finish composing your email.

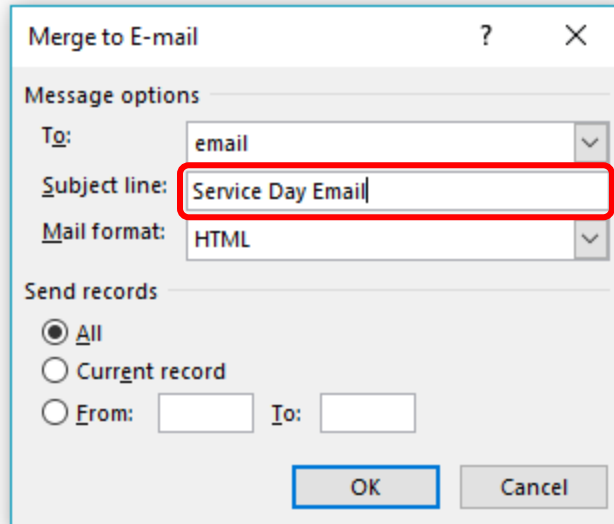


Sending the emails

1. Click *Finish & Merge* then *Send Email Messages...*



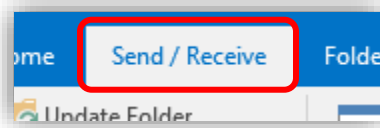
2. You can now set the title of the subject line.



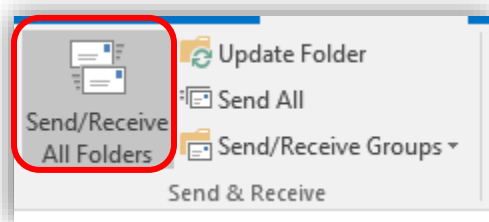
Note: The *To* attribute should have email selected as its attribute.

Verifying the messages sent

1. Open Outlook
2. Click the *Send / Receive* tab



3. Click *Send / Receive All folders* to ensure the emails are sent.



4. Check your *Sent Items Folder* to make sure the Items have been received by Outlook

Saving the Word Mail Merge

If you wish you can save the mail merge document and use it again for next year. Just save the document like you would a normal word document.