# Mail Merge with Groupwise



# **Quick Reference Guide**

1. Create an Excel document with the required data (see example). This spreadsheet **MUST** contain column headings in Row 1.

	А	В	С	D	E
1	First Name:	Last Name:	Student ID #:	Email Address:	Amount:
2	Charles	Brown	2345678	charlie.brown@example.org	\$50.00
3	Sally	Brown	2345679	sally.brown@example.org	\$150.00
4	Lucy	Van Pelt	2345680	lucy.vanpelt@example.org	\$25.00
5	Linus	Van Pelt	2345681	linus.vanpelt@example.org	\$50.00
6	ReRun	Van Pelt	2345682	rerun.vanpelt@example.org	\$25.00
7	Violet	Gray	2345683	violet.gray@example.org	\$25.00

- 2. Save your Excel document to your Desktop with a meaningful file name
- 3. Launch Novell Groupwise
- 4. Launch Microsoft Word
- 5. In Microsoft Word, click on the Mailings tab

W 🔒 🤊	- <mark>()</mark> ×, ×    <del>-</del>	× 1	Document2 - Microsoft Word		
File	Home Insert P	Page Layout References Mailings	Review View Acrobat		۵ 🕜
Japanese Greetings *	Japanese Postcard - Envelopes Labels	Start Mail Select Edit Merge * Recipients * Recipient List	Highlight Merge Fields	Preview Results Auto Check for Errors	Finish & Merge to Adobe PDF
	Create	Start Mail Merge	Write & Insert Fields	Preview Results	Finish Acrobat

6. Click the Start Mail Merge button and select Step by Step Mail Merge Wizard ...



The pane on the right will take you through the mail merge steps:
 Step 1: Select Document type = E-mail messages



8. Click Next: Select Starting Document

9. Step 2: Select Starting Document = Use the current document



# **10.** Click Next: Select recipients

11. Step 3: Select recipients = Use an existing list



- Click Browse
- Navigate to and then select the spreadsheet you saved earlier and click **Open**
- Click on the correct table (usually named Sheet1 by default) and click OK
- You will be presented with the list of recipients. Skim the data to make sure it looks accurate and click **OK**

### 12. Click Next: Write your letter

#### 13. Step 4: Write your letter

In the document area on the left, create your document, including any merge fields you would like to include.

To insert a field from your spreadsheet, place your cursor where you would like to merge field to appear in the document and then click on the **Insert Merge Field** button and select the correct field (corresponds to the column headings in your spreadsheet)

ese Postcard 👻	Start Mail Merge *	Select Recipients *	Edit Recipient List	Highlight Merge Fields	Address Block	Greeting Line	Insert Merge Field <del>•</del>	Rules *	<b>ields</b> Labels
Dear «F	irst Name:	· · · · · · · · · · · · · · · · · · ·	<u>2 · · · 1 · · ·</u>	. 3 1 .	· · 4 ·	· · · · ·	First_ Last_N Stude Email_ Amou	Name Name nt_ID_ _Address nt	<u>.</u>

Thank you for your contribution of «Amount» to our annual fundraising event. Your continued support is important to the operation of our organization.

Thank you!
Lucy Van Pelt

#### 14. Click Next: Preview your letters

#### 15. Step 5: Preview your letters

This step allows you to see a preview of each letter to verify the data from the merge field(s) is correct. You can click the arrows (« ») to view the customized letter for the previous or next recipeint.

Japanese Postcard ~ Envelopes Labels Create	Start Mail Select Edit Merge * Recipients * Recipient List Start Mail Merge	Address Block Greeting Line Highlight Merge Fields Insert Merge Field Write & Insert Fields	Preview Results Preview Results Preview Results	ecipie heck sults	ent for Errors	Finish & Merge * Finish	Merge to Adobe PDF Acrobat
· · · · X · · · · · · · · · · · · · · ·		4			Mail Merg	e vour lottor	<b>▼</b> X
Dear Sally, Thank you for your	contribution of \$150 to our annual fu	ndraising event. Your continued support is i	mportant		One of the previewer another following	ne merged le d here. To p etter, dick o : Recipient:	s etters is preview one of the 2 >>
to the operation of	<sup>'</sup> our organization.				en Fil Make cha	nd a recipien I <b>nges</b>	t
Thank you!					You can recipient	also change list:	your
Lucy Van Pelt					Ex	Edit recipient	: list .ipient

16. Once you have verified your documents look correct, click Next: Complete the merge

## 17. Step 6: Complete the merge

•

.





Click on the Electronic Mail ... link (figure 17.1)

You will be presented with a Merge to E-mail window (figure 17.2)
To: Select the column header from your spreadsheet that contains the email address information
Subject: Type a meaninful subject

Mail Format: Plain text (HTML does NOT work with Groupwise)

Click **OK**. Your message will **immediately** begin to send

Message options
To: Email_Address
Subject line: Your meaningful subject here
Mail format: Plain text
Send records
All
○ Current record
© <u>F</u> rom: <u>T</u> o:
OK Cancel

(figure 17.2)



**Tip**: You may want to send a test message to yourself using the merge process before sending to the final recipients. This will help you identify any email formatting issues that need to be corrected.