

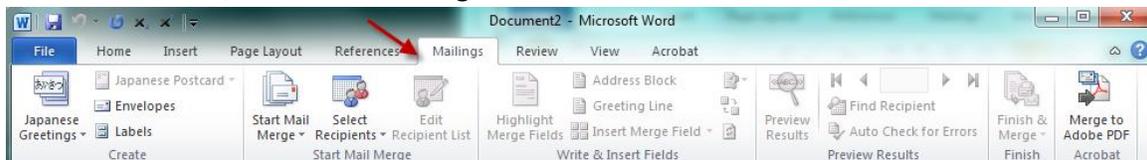
# Mail Merge with Groupwise

## Quick Reference Guide

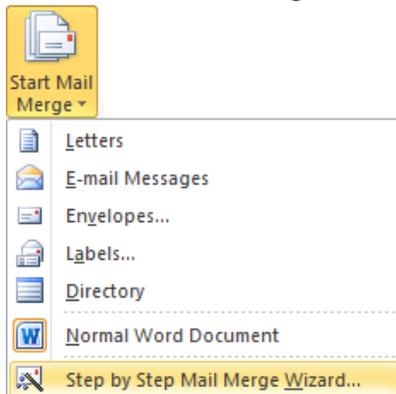
1. Create an Excel document with the required data (see example). This spreadsheet **MUST** contain column headings in Row 1.

	A	B	C	D	E
1	<b>First Name:</b>	<b>Last Name:</b>	<b>Student ID #:</b>	<b>Email Address:</b>	<b>Amount:</b>
2	Charles	Brown	2345678	<a href="mailto:charlie.brown@example.org">charlie.brown@example.org</a>	\$50.00
3	Sally	Brown	2345679	<a href="mailto:sally.brown@example.org">sally.brown@example.org</a>	\$150.00
4	Lucy	Van Pelt	2345680	<a href="mailto:lucy.vanpelt@example.org">lucy.vanpelt@example.org</a>	\$25.00
5	Linus	Van Pelt	2345681	<a href="mailto:linus.vanpelt@example.org">linus.vanpelt@example.org</a>	\$50.00
6	ReRun	Van Pelt	2345682	<a href="mailto:rerun.vanpelt@example.org">rerun.vanpelt@example.org</a>	\$25.00
7	Violet	Gray	2345683	<a href="mailto:violet.gray@example.org">violet.gray@example.org</a>	\$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

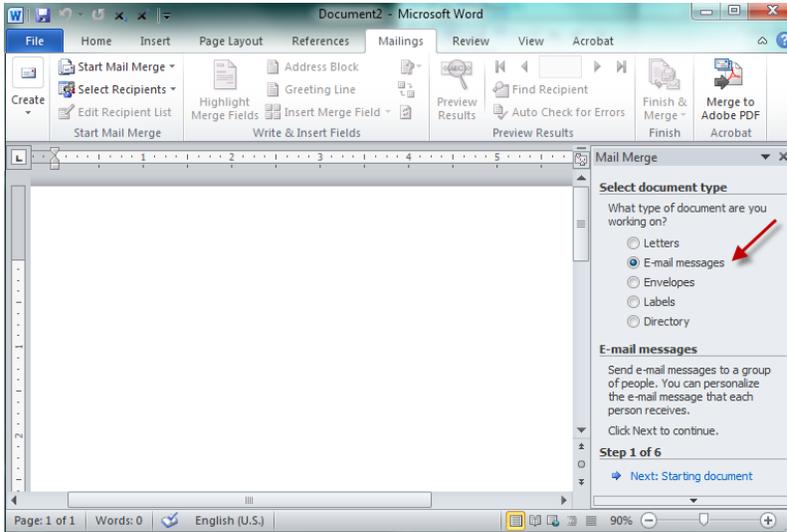


6. Click the **Start Mail Merge** button and select **Step by Step Mail Merge Wizard ...**



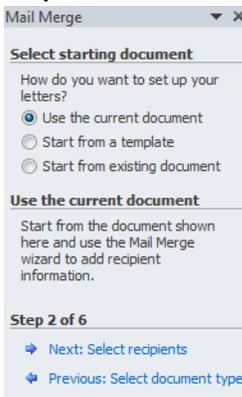
7. The pane on the right will take you through the mail merge steps:

**Step 1:** Select Document type = E-mail messages



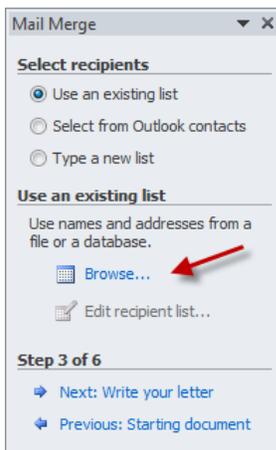
8. Click **Next: Select Starting Document**

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



10. Click **Next: Select recipients**

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



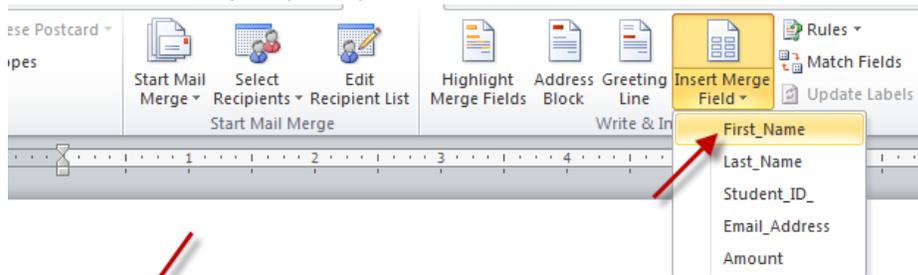
- Click **Browse**
- Navigate to and then select the spreadsheet you saved earlier and click **Open**
- Click on the correct table (usually named Sheet1 by default) and click **OK**
- You will be presented with the list of recipients. Skim the data to make sure it looks accurate and click **OK**

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)



Dear «First\_Name»,

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

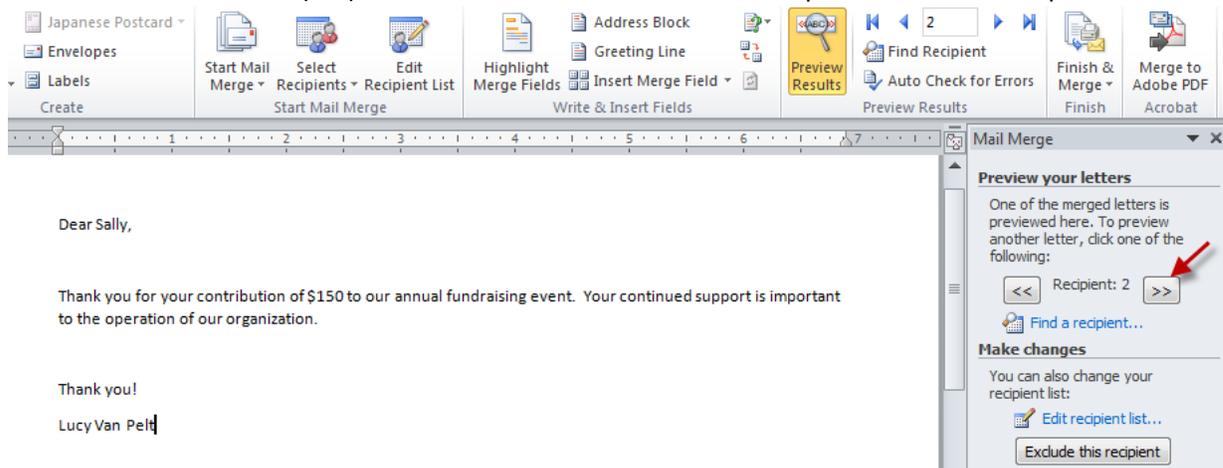
Thank you!

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 recipient.



Dear Sally,

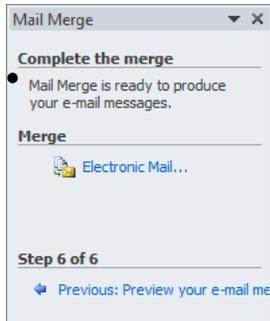
Thank you for your contribution of \$150 to our annual fundraising event. Your continued support is important to the operation of our organization.

Thank you!

Lucy Van Pelt

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

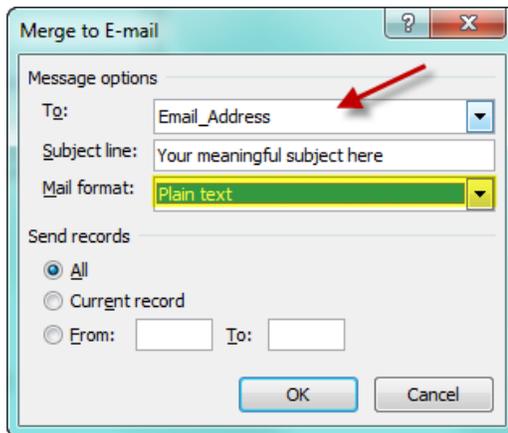
## 17. Step 6: Complete the merge



(figure 17.1)

- 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 meaningful subject  
**Mail Format:** Plain text (HTML does **NOT** work with Groupwise)

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



(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.