Microsoft Tools to Help Automate Messaging

Create an Email Message Template

(https://support.microsoft.com/en-us/office/create-an-email-message-template-43ec7142-4dd0-4351-8727-bd0977b6b2d1)
Outlook for Microsoft 365 Outlook 2021 Outlook 2019 Outlook 2016 Outlook 2013 Outlook 2010

Use email templates to send messages that include information that infrequently changes from message to message. Compose and save a message as a template, and then reuse it when you want it. New information can be added before the template is sent as an email message.

1. On the Home menu, click New E-mail.
   a. Keyboard shortcut: To create an email message, press CTRL+SHIFT+M.
2. In the message body, enter the content that you want.
3. In the Subject Line, enter the content that you want. Also, attach any documents or copy any email address you want to.
4. In the message window, click File > Save As.
5. In the Save As dialog box, in the Save as type list, click Outlook Template.
6. In the File name box, type a name for your template, and then click Save.

By default templates are saved in the following location:
c:\users\username\appdata\roaming\microsoft\templates. However, you can change that location.

Create Quick Parts in Outlook

(https://support.microsoft.com/en-us/office/quick-parts-4ffef7c5-7596-4e95-9faf-41c771847a7b)
Word for Microsoft 365 Outlook for Microsoft 365 Word 2021 Outlook 2021 Word 2019 Outlook 2019 Word 2016 Outlook 2016 Word 2013 Outlook 2013 Word 2010 Outlook 2010

With Quick Parts you can create and insert frequently used phrases or blocks of text, such as directions to an address or the answer to a frequently asked question. It allows you to speed up repetitive tasks in your documents and emails.

1. Pop out a reply or new email and click into the message area. The email must be popped out to see the Insert menu. Quick Parts only works in the message area of the email.
2. Click Insert > Quick Parts.
3. Select an existing Quick Part or one of the other options.

To create a new item for the Quick Part Gallery, select the portion of text from your document and click Insert > Quick Parts > Save Selection to Quick Part Gallery.

To remove an item from the Quick Part Gallery, right click in the Quick Part Gallery (Insert > Quick Parts). Select Organize and Delete. Click the Building Block you would like to delete, then click Delete.

# Use mail merge to send bulk email messages

Word for Microsoft 365 Word for Microsoft 365 for Mac Word 2021 Word 2021 for Mac Word 2019 Word 2019 for Mac Word 2016 Word 2016 for Mac Word 2013 Word 2010

Before you begin, open a blank document in Word and type the body of the email message you want to send.

To send an email, a MAPI-compatible email program like Outlook or Gmail needs to be installed.

Step 1: Prepare your main document
- Go to **Mailings** > **Start Mail Merge** > **E-mail Messages**.
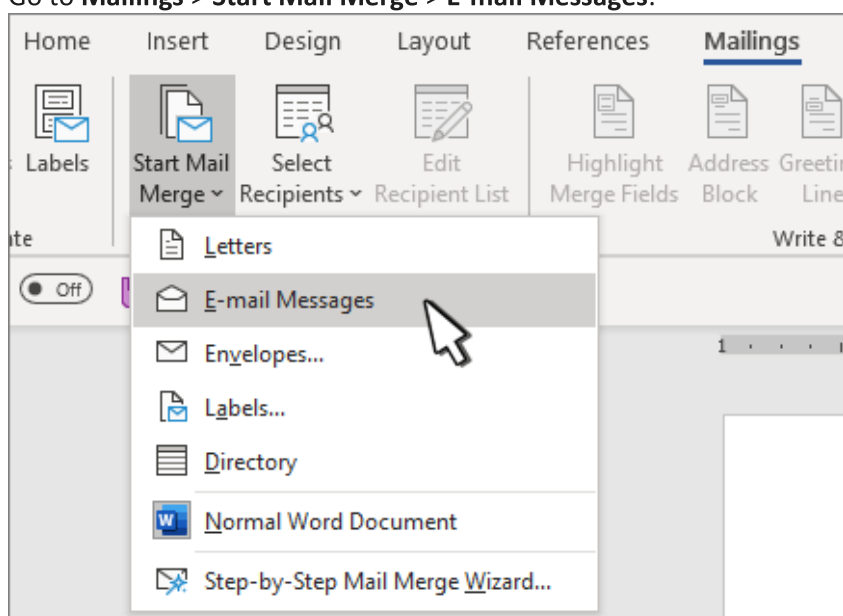
Step 2: Set up your mailing list
The mailing list is your data source. For more info, see Data sources you can use for a mail merge.
Tips
- If you don't have a mailing list, you can create one during mail merge.
- If you're using an Excel spreadsheet, format the ZIP Codes or postal codes column as text to preserve any zeros. For more info see Format mail merge numbers, dates, and other values in Excel.
- If you want to use your Outlook contacts, make sure Outlook is your default email program and the same versions as Word.

Step 3: Link your mailing list to your email message
Make sure your data source has a column for email addresses and that there's an email address for everyone you're sending email to.
1. Go to **Mailings** > **Select Recipients**.
2. Choose a data source. For more info, see Data sources you can use for a mail merge.
3. Choose **File** > **Save**.

Step 4: Add personalized content to the email message

1. Go to **Mailings** > **Greeting Line**.
2. Choose the format you want to use.
3. Choose **OK** to insert the merge field.
4. Choose **File** > **Save**.
5. You can add other fields from your data source to your email message. For more information, see Insert mail merge fields.
6. **Note:** You'll need to format your email manually after inserting fields.
7. If any part of your address or other fields are missing, see Mail merge: Match Fields to fix.
8. To change the font, size, or spacing of the merged content, select the merge field name and make the changes you want.

Step 5: Preview and finish

1. Choose **Preview Results**, and then choose **Next** ▶ or **Previous** ◀ to see the names and addresses in the body of your letter.
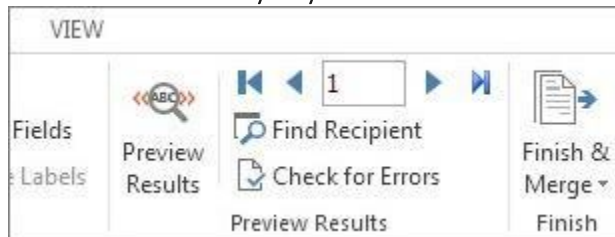
2. Choose **Finish & Merge** > **Send E-mail Messages**.
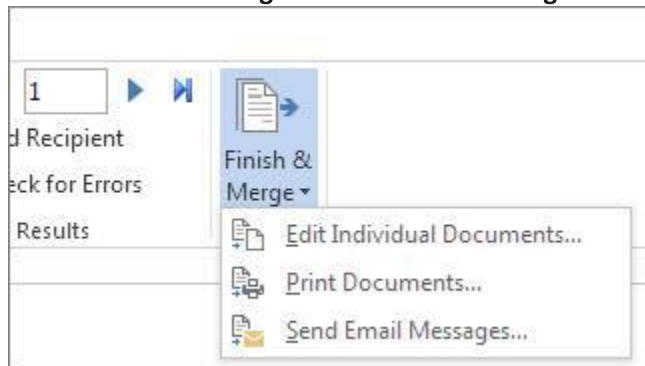
3. In the **To** box, choose the email address column or field from your mailing list.

   Note: Word sends an individual message to each email address. You can't Cc or Bcc other recipients. You can include links, but you can't add attachments to the email.

4. In the **Subject line** box, type a *subject line* for the message.
5. In the **Mail format** box, choose **HTML** (the default setting) or **Plain text** to send the document as the body of the email message.
6. Under **Send records**, use one of the following:
   - **All** records (default).
   - **Current record** only the record viewable on your screen is sent the message.
   - **From** and **To** send only a range of *records*.
7. Choose **OK** to run mail merge.

I don't typically save the Word document after the email is sent. Saving it will maintain connection to this specific Excel file. I prefer opening the Word document and connecting the new Excel file each time I am sending an email merge.

Insert mail merge fields

(https://support.microsoft.com/en-us/office/insert-mail-merge-fields-9a1ab5e3-2d7a-420d-8d7e-7cc26f26acff)
Word for Microsoft 365 Word for Microsoft 365 for Mac Word 2021 Word 2021 for Mac Word 2019 Word 2019 for Mac Word 2016 Word 2016 for Mac Word 2013 Word 2010 Word 2007

Once you have a data source connected to your document, adding merge fields is a way to personalize a document with information from the data source. The merge fields come from the column headings in the data source.

Here's an example of how the Address Block and Greeting Line collections of merge fields might pull data from an Excel spreadsheet into a form letter.

The Address Block and Greeting Line fields are collections of merge fields.

Note: If the merge field commands appears dimmed, click **Select Recipients** and choose the kind of mailing list you're using. If you don't have a mailing list yet, click **Type New List** to create your list in Word.

Add an Address Block
1. Click or tap where you want to add the address block in your document.
2. On the **Mailings** tab, choose **Address Block**
   1. Word gives you options for choosing the formality of the name in the address.

Add a Greeting Line
1. Click or tap where you want to add the greeting in your document.

2. Choose **Greeting Line**.
3. Choose the name style that you want to use, and set other options.

Add individual merge fields

To include data like phone numbers or email addresses, you insert those merge fields specifically. Also, a merge field like First Name doesn't have to be part of an Address Block or Greeting Line. If you want to personalize a document by including your recipients' first names, insert the **First_Name** merge field on its own.

1. Click or tap where you want the merge field.
2. Choose the down-arrow under **Insert Merge Field**, and select a field.

3. If you don't see your field name in the list, choose **Insert Merge Field**.
4. Choose **Database Fields** to see the list of fields that are in your data source.
5. Choose **Insert**.

Note: If some of the numbers, currencies, or dates aren't formatted right, see Prepare your Excel data source for a Word mail merge.