**Mail Merge Instructions**

**Advantages**:

* Ability to send dozens of customized emails in seconds.

**Disadvantages**:

* Inability to CC emails
* Inability to attach files (must host shipping labels and provide link)

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**Preparation**

1. Create an offline Excel workbook. (Or use the sample here)
   1. Separate each week.
2. Add in columns for any value that must be added to the remote survey, follow-up, and 10-day follow-up emails. The additional information should include:
   1. Asset Tag
   2. RID
   3. Old PC Model
   4. \*Hyperlink to shipping label
3. Host your shipping labels using Dropbox or a similar content hosting site.
   1. Paste into the “Hyperlink to shipping label” column a link for each user. Ensure that each link is an active hyperlink. (Paste link, click after it, Enter)
4. Verify user email addresses using Active Directory.
5. Using the Word desktop app, create your weekly emails. (Or use the samples provided here)

**Execution**

1. Navigate to the Mailings tab and select “Select Recipients” > Use an existing list and select your offline refresh sheet.
2. Select “Edit Recipient List” and check the records you wish to include in this email.
3. [Insert each needed merge field](https://support.microsoft.com/en-us/office/insert-mail-merge-fields-9a1ab5e3-2d7a-420d-8d7e-7cc26f26acff). (May differ depending on column headers)
4. Enable “Preview Results to ensure that each field is correctly inserted.
   1. Under Preview Results, click the arrows to check through each record.
5. Select Finish & Merge > Send Email Messages
   1. Under To: Select the column containing the verified email addresses.
   2. Under Subject Line: Enter your appropriate subject line.
   3. Select OK and watch as dozens of emails are sent in seconds.

Please reach out if you have any questions or concerns with this process.

*-Hunter*