

Word: Mail Merge 2

Emails and Formatting Switches



Word Mail Merge 2: Emails and Formatting Switches

1.0 Hour

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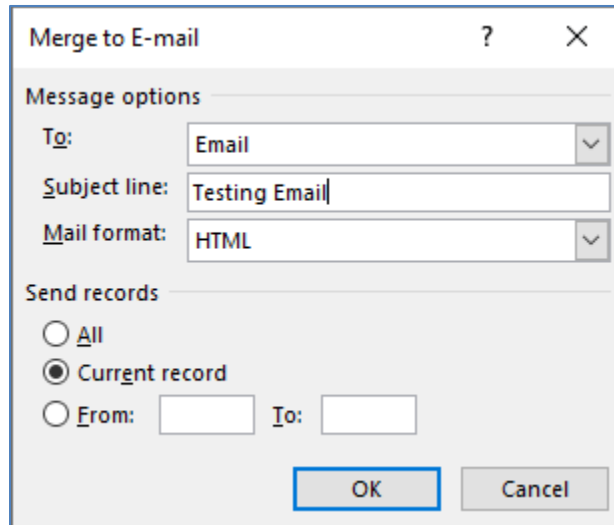
(352) 273-5051
prcowart@ufl.edu
<http://training.health.ufl.edu>

Class Evaluation: https://ufl.qualtrics.com/jfe/form/SV_1Ojkl6lRsKV3XT

Updated: 12/08/2020

Before You Email

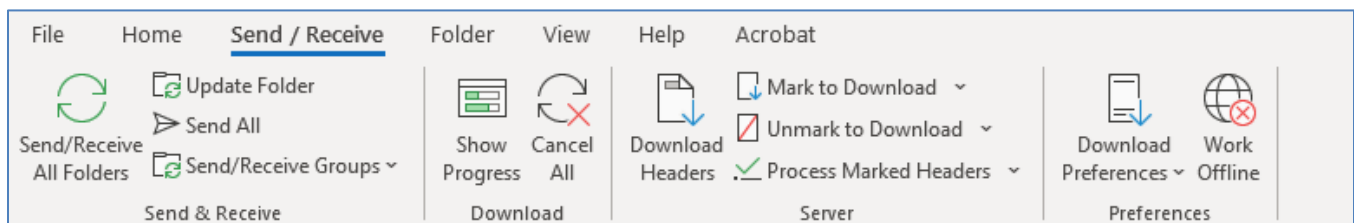
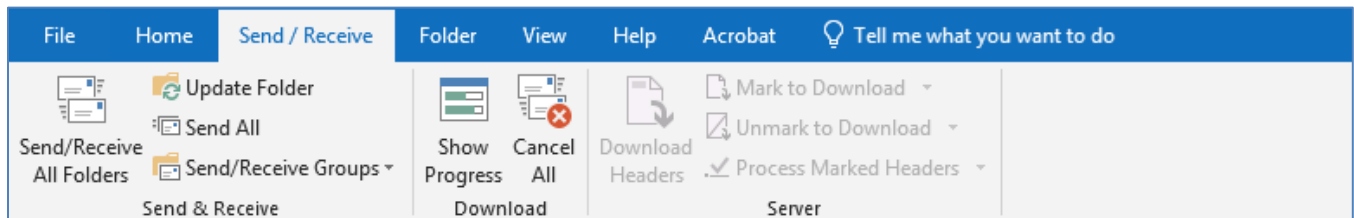
It's recommended you put yourself as the first recipient of the email. The Finish and Merge step has an option to merge only the **Current Record**. If you make your account the first one, you can merge just the first record to see how the result will appear before sending it to EVERYONE.



Work Offline

Depending on how your Outlook is controlled by your IT department, you may be able to set your Outlook account to Work Offline. Any messages you try to send while you are *Offline* will appear in your Outbox.

If you have the option, you will find it on the Send/Receive tab, near the end in a group called Preferences.



This prevents any incoming and outgoing messages, so be sure to eventually switch it back Online.

Data Source

Before you create your email, make sure your data source has a column (field) for that contains email addresses. There should only be the title, and addresses in the email column.

To BCC or not to BCC

There are three sending options with an email: To, CC, and BCC.

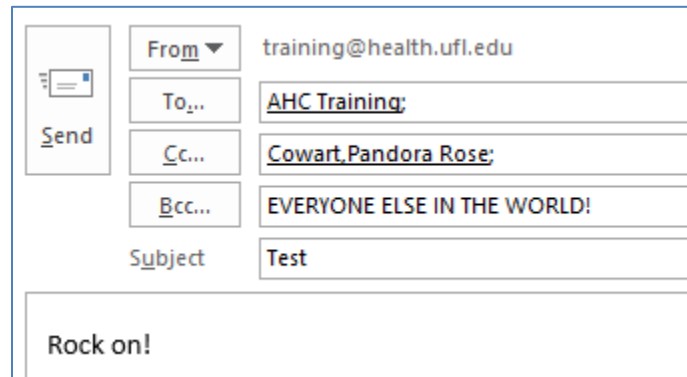
An email sent "To" you is directly for your attention.

An email sent "CC" to you is a courtesy copy, so you're aware.

An email sent "BCC" to you is a blind courtesy copy, so you're aware but no one else knows you got the email.

The BCC option is amazing for sending out mass emails.

When I send out announcements, the email looks like this:



The screenshot shows an email composition window with the following fields:

- From:** training@health.ufl.edu
- To:** AHC Training;
- Cc:** Cowart, Pandora Rose;
- Bcc:** EVERYONE ELSE IN THE WORLD!
- Subject:** Test

The body of the email contains the text: "Rock on!"

From my training account, to my training account, copying myself, and blind copying everyone else.

When someone receives this email they will only see the To and CC recipients, they will not see their address, nor anyone else from the BCC field.

When someone replies to this email it will go to the training account.

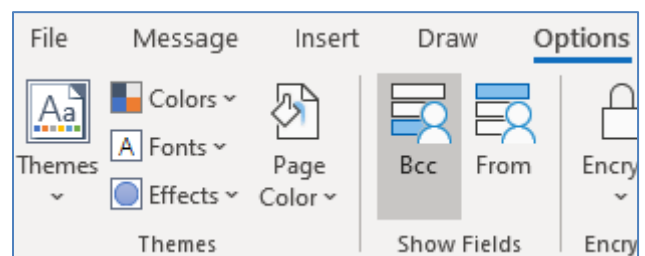
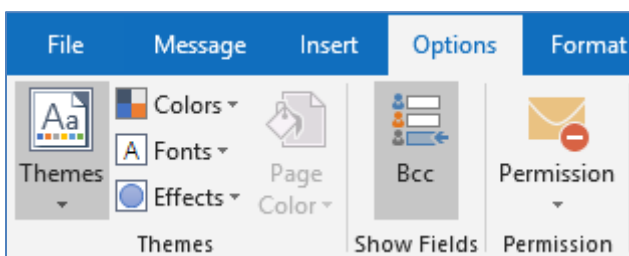
When someone replies ALL to this email it will go to the training account and to my account. There is no access to anyone that was in the BCC field.

With BCC – Everyone gets the same email and there's only one sent item in your mailbox

With Merge – Everyone gets a customized email, but you'll see every single one in your sent items.

To turn on the BCC field -

1. Open a new email message
2. Turn to the **Options** tab
3. Click the BCC button.

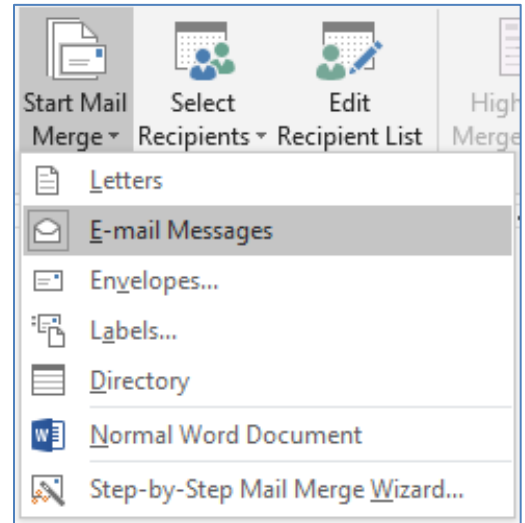
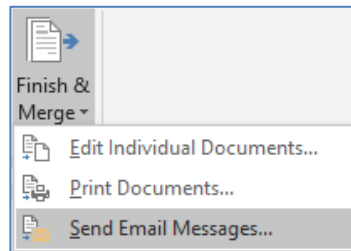


Merged Emails

When you're creating emails with Word's merge tools, you're making "form letters". All the steps that happen to create letters are the same for creating emails.

When you select **E-mail Messages** from the Start Mail Merge window, Word will put you into a **Web Layout View**. Any images or tables you have in your document may shift on the page.

If you're going to send this document as an attachment, or if you're uncomfortable using the wider window, leave the start option as **Letters** and when you finish and merge, choose the **Send Email Messages** option.



Layout

One of the benefits of the **Web Layout View** is it removes the boundaries of the page, and your text will wrap within the window size. Have you ever opened an email in its own maximized window? Normal typed emails will wrap within the boundaries of the window.

"**How now brown cow**" is a phrase used in elocution teaching to demonstrate rounded vowel sounds. Each "ow" sound in the phrase represents the diphthong /au/. Although spelled "ow" in these four words, this same diphthong is also spelled "ou". Some examples of these homophonic /au/s are the English words "house", "blouse", "noun", and "cloud". The use of the phrase "how now brown cow" in teaching elocution can be dated back to at least 1926.

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If you want to force your text to stay within your own boundaries, use **Tables**. This will help hold images and text within the space you choose. Gridlines can be set with no color, so the boundaries will be invisible.

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Spacing Characters

Non-Breaking Space

- Ctrl-Space
- ties two words together no matter the line wrapping, if both words can't fit, they move to the next line.
- Also useful as a placeholder on empty rows. If the "blank" row keeps collapsing once the email is "merged" into Outlook, put a Non-Breaking Space inside and it will stay.

Line Break

- Shift-Enter
- ties two lines together into the same paragraph formatting (bullets, spacing...)

Message Options

When you're ready to send the emails, choose **Send Email Messages...** from the **Finish & Merge** option at the end of the mailings tab.

1. Match the To: field with the fieldname containing the recipient's email address.
2. Type in the Subject Line that will appear for every email.
3. Choose the Mail Format.
 - Attachment – Attach this Word file to each email. There will be nothing in the body of the message.
 - Plain Text – Removes all formatting, table structures, and images. Keeps the email as simple as possible.
 - HTML – Most common option. Sends all formatting. If someone's inbox is set to only see plain text messages the email will look strange. If you're concerned about it send the email to different accounts to test it before you send it everyone.
4. Send Records to All of the recipients? Only the recipient currently previewed? Or a set of maybe the first 50 records (From 1 To 50)

Merge to E-mail

Message options

To: Email

Subject line: Testing Email

Mail format: HTML

Send records

All

Current record

From: To:

OK Cancel

Custom Formats in Merge Fields

Regardless of the type of merge and the original data format, our resulting mailing can appear off.

Data

| | A | B | C | D | E | F |
|---|---------|-------------------------------|--------------------------|------------|------------|------------|
| 1 | Name | Description | Email | Due Date | Management | Percentage |
| 2 | apollo | god of prophesy, music and h | itctr-apollo@ad.ufl.edu | 2/22/2021 | x | 8% |
| 3 | ares | god of warlike frenzy | itctr-ares@ad.ufl.edu | 12/26/2020 | x | 48% |
| 4 | artemis | goddess of the hunt | itctr-artemis@ad.ufl.edu | 1/8/2021 | x | 13% |
| 5 | athena | goddess of crafts and the dor | itctr-athena@ad.ufl.edu | 11/7/2020 | x | 29% |
| 6 | circe | sorceress renowned for your | itctr-circe@ad.ufl.edu | 11/26/2020 | | 2% |

Main Primary Document

Hi «Name»,

As the «Description», I know your time is valuable.

This email is a remind of your project due date: «Due_Date»

Your project is «Percentage» of our quarterly report.

We hope to hear from you soon,

-Pandora

Preview Result

Hi apollo,

As the god of prophesy, music and healing, I know your time is valuable.

This email is a remind of your project due date: 2/22/2021

Your project is 7.883333333333339E-2 of our quarterly report.

We hope to hear from you soon,

-Pandora

Desired Result

Hi Apollo,

As the god of prophesy, music and healing, I know your time is valuable.

This email is a remind of your project due date: February 22, 2021

Your project is 8% of our quarterly report.

We hope to hear from you soon,

-Pandora

Formatting Merge Fields - Switches

There are several formats you can enforce on your merge fields to have them display the way you want them to. In order to do this, you need to add a "switch" to the field.

For example, imagine this is an inserted merge field: «Name»

Right click on the field and choose **Toggle Field Codes** (or press Shift-F9)

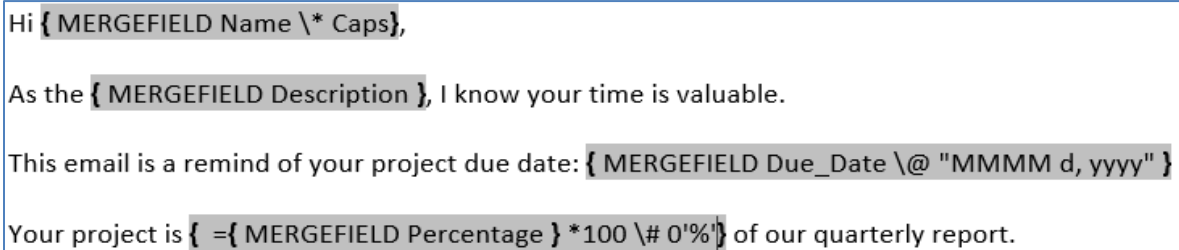
The field will now display as { MERGEFIELD Name }

The *switch* should be placed after "Name" but before the closing bracket }.

For example: { MERGEFIELD Name * Caps } This will make the first letter of the name appear as a capitol letter, no matter how it exists in the original data source.

The syntax is MERGEFIELD, FieldName, Slash (\), Switch (*,#,@), Space, Format.

To get the "desired result" listed on the previous page, we would make these changes:



Hi { MERGEFIELD Name * Caps },
As the { MERGEFIELD Description }, I know your time is valuable.
This email is a remind of your project due date: { MERGEFIELD Due_Date \@ "MMMM d, yyyy" }
Your project is { = { MERGEFIELD Percentage } * 100 \# 0% } of our quarterly report.

Notice the Extra set of brackets around the percentage so we can do math with the value. That is probably easier to do in Excel, but I wanted to show you an example of creating it in Word.

Typically, we modify one field at a time, using Shift-F9 or right-click Toggle Field Codes. Once you make the change you can turn the preview off and on and it will update the field so you can see the result.

However, if you want to modify several, you might find the Alt-F9 to toggle all field codes at once. You have to press Alt-F9 again to preview the results.

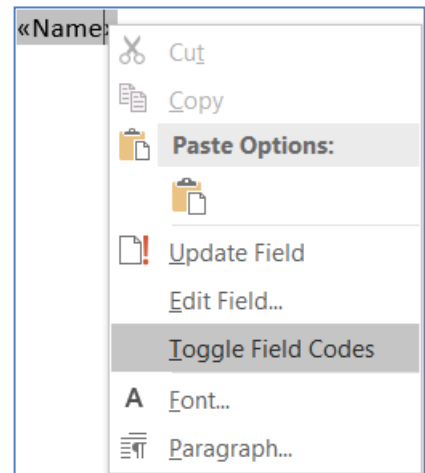
Helpful Field Shortcuts

F9 Update Fields

Shift-F9 Toggle Field Codes

Alt-F9 Toggle all Field Codes in the whole document

Ctrl-F9 Adds Brackets to create a formula with the field



*** Text Formats**

Specifies number formats, capitalization, and character formatting; prevents changes to the format of the field results when a field is updated.

*** Caps** – First letter of each word appear as a capitol letter
Example: the rain in Spain => The Rain In Spain

*** FirstCap** – The first letter of only the first word appears as a capitol letter
Example: the rain in Spain => The rain in spain

*** Upper** – All the letters are capitalized
Example: the rain in Spain => THE RAIN IN SPAIN

*** Lower** – All the letters are lower cased
Example: the rain in Spain => the rain in spain

*** alphabetic** – Shows letters instead of numbers
Example: 12345 => abcde

If you type the code in all caps (ALPHABETIC) the results will be in capital letters instead.
Example: 12345 => ABCDE

*** Arabic** – Shows numbers in the cardinal format (1, 2, 3).
Example: ii => 2

*** CardText** –Shows the cardinal text, formatted in lowercase letters unless you add a format switch to specify a different capitalization.
Example: 342 => three hundred forty two

*** DollarText** – Shows the cardinal text, inserts "and" at the decimal place and displays the first two decimals (rounded) as Arabic numerators over 100. The result is formatted in lowercase letters unless you add a format switch to specify a different capitalization.
Example: 345.22 => three hundred forty five and 22/100

*** Hex** – Shows the hexadecimal numbers. For example,
Example: 458 => 1CA

*** OrdText** – Shows the ordinal text, the result is formatted in lowercase letters unless you add a format switch to specify a different capitalization.
Example: 21st => twenty-first

*** Ordinal** – Shows the ordinal Arabic text.
Example: 21 => 21st

*** roman** – Shows the roman numerals, the result has the same case as the word "roman" in the field code.
Examples: (roman) 16 => xvi
(ROMAN) 16 => XVI

\# Numeric Formats

Specifies the display of a numeric result, including the number of decimal places and the use of currency symbols. This switch is called a "picture" switch because you use symbols to represent the format of the field result.

0 – (zero) Specifies the requisite numeric places to display in the result. If the result does not include a digit in that place, Word displays a 0 (zero).

Examples: \# 0.00

0 => 0.00 12 => 12.00 1.2567 => 1.26

– Specifies the number of spaces to display.

Examples: \# \$###

0 => \$ 0 12 => \$ 12 125.67 => \$125.67

x – This will drop the digit to the left of the place holder. If the place holder is to the right of the decimal point. Word will round the results to that place.

Examples: \# x##

123456 => 456 4983 => 983
\# 0.00x
1.23456 => 1.23 .4983 => 0.50

. – (decimal point) Determines the decimal point position.

Example: \# \$###.00

0 => \$.00 12 => \$ 12.00 1.2567 => \$ 1.26

, – (comma, digit grouping symbol) This shows word where to separates a series of three digits.

Example: \# #,###,###

1000 => 1,000 1234567 => 1,234,567 1234.5 => 1,234

-- (minus sign) Adds a minus sign to a negative result, or adds a space if the result is positive or 0 (zero).

Example: \# -\$##.00

0 => \$ 0.00 -12 => -\$12.00 -1.2567 => -\$ 1.26

+ – (plus sign) Adds a plus sign to a positive result, a minus sign to a negative result, or a space if the result is 0 (zero).

Example: \# +\$##.00

0 => \$ 0.00 -12 => -\$12.00 1.2567 => +\$ 1.26

\$, *, and so on – Includes the specified character in the result.

Example: \# "###%"

0 => 0% .12 => 12% 1.2567 => 126%

"positive; negative" – Specifies different number formats for positive and negative results.

Example: \# "\$#.00;-\$#.00"

10 => \$10.00 -12 => -\$12.00 1.2567 => \$ 1.27

"positive; negative; zero" – Specifies different number formats for positive, negative and zero results.

Example: \# "\$#.00;(\$#.00);\$0"

0 => \$0 -12 => -\$12.00 1.2567 => \$ 1.27

\@ Date-Time Formats

Sets the format for fields that have a date or time result.

| Friday, February 1, 2020, 1:05 PM | | | | | |
|-----------------------------------|--------|--------|----------|--------|------|
| Day | | Month | | Year | |
| d | 1 | M | 2 | y | 20 |
| dd | 01 | MM | 02 | yy | 20 |
| ddd | Fri | MMM | Feb | yyy | 2020 |
| dddd | Friday | MMMM | February | yyyy | 2020 |
| Hour | | Minute | | Second | |
| h | 1 | m | 5 | s | 0 |
| hh | 13 | mm | 05 | ss | 00 |

| Date Examples: | 2/1/02 | 8/30/02 |
|-----------------------|---------------|----------------|
| \@ "ddd, MMM dd" | Fri, Feb 01 | Fri, Aug 30 |
| \@ "MMMM d" | February 1 | August 30 |
| \@ "dddd" | Friday | Friday |
| \@ "MMM" | Feb | Aug |
| \@ "M/d/yy" | 2/1/20 | 8/30/20 |
| \@ "MM/dd/yy" | 02/01/20 | 08/30/20 |

| Time Examples: | 1:05 PM | 11:12 am |
|-----------------------|----------------|-----------------|
| \@ "h AM/PM" => | 1 PM | 11 AM |
| \@ "h am/pm" => | 1 pm | 11am |
| \@ "h A/P" => | 1 P | 11A |
| \@ "h a/p" => | 1 p | 11a |
| \@ "hh:mm" => | 13:05 | 11:12 |

| Other Examples: | 2/1/02, 1:05pm | 8/30/02, 11:12am |
|------------------------|-----------------------|-------------------------|
| \@ "M/d h:mm" | 2/1 1:05 | 8/30 11:12 |
| \@ "h:mm am/pm, dddd" | 1:05 pm, Friday | 11:12 am, Friday |
| \@ "dd-MMM 'payday'" | 01-Feb payday | 30-Aug payday |
| \@ "MMM d" * Ordinal | Feb 1st | Aug 30th |

Other values

You can type something like a % sign outside of merge field, but if you want to include it in the format, put the text in single quotes

'text' – Adds text to the result. Enclose the text in single quotation marks.

Example: \@ "\$###.00 'tax' "

0 => \$ 0.00 tax

12 => \$12.00 tax

1.2567 => 1.26 tax