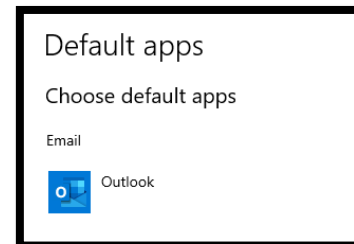


## Update Default Email App

If you have not already, you may need to update your default mailing app to Microsoft Outlook.

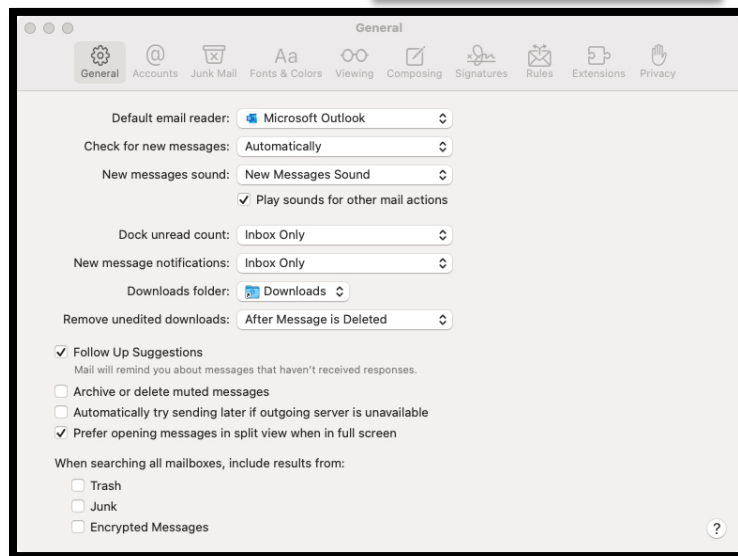
**Windows: (Please keep in mind if you are using window, you must be in classic Outlook)**

1. Go to **All Settings**
2. Search **Default apps**
3. Find **Email**
4. Click on the app currently set as the default
5. Change to **Outlook**



**Mac:**

1. Go to your Email application
2. Click Mail in the top left corner
3. Select Preferences...
4. Ensure you are in General
5. You should see Default email Reader
6. Select the default email
7. Add **Microsoft Outlook.app**



## Creating Your Recipient List in Excel

For a Mail Merge, you have the option to add recipients a few different ways. Here are the steps to create your recipient list using Microsoft Excel.

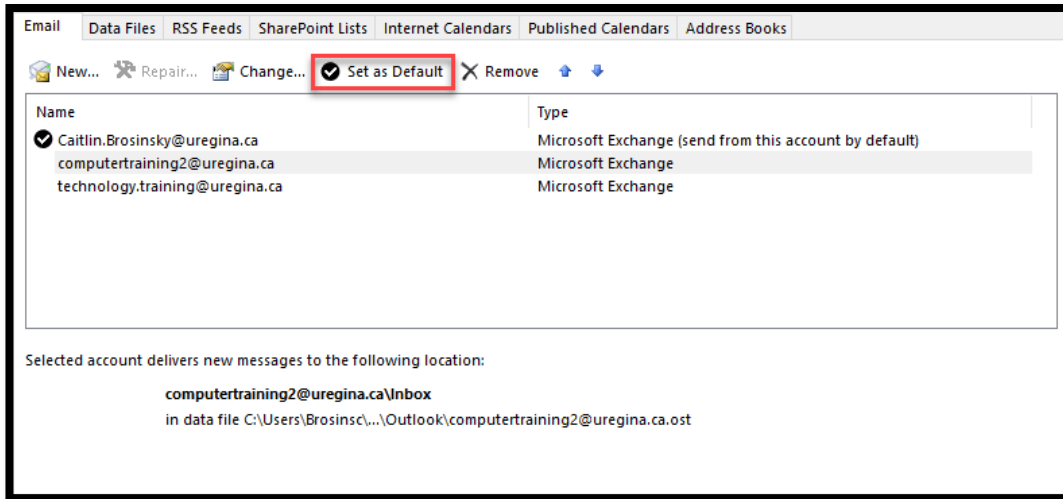
1. Open a **Microsoft Excel**
2. In **Row 1**, you will put your different titles that you need for the mail merge (First Name, Last Name, Email etc.)
3. In the following rows, you will put the data as seen in the image on the right
4. Save this document somewhere easily accessible

|   | A          | B         | C  | D               | E       |
|---|------------|-----------|--|-----------------|---------|
| 1 | First Name | Last Name | Email  | Project         | Field   |
| 2 | Caitlin    | Brosinsky | <a href="mailto:Caitlin.Brosinsky@uregina.ca">Caitlin.Brosinsky@uregina.ca</a> | Science Project | Science |
| 3 | Steph      | Wang      | <a href="mailto:Steph.Wang@uregina.ca">Steph.Wang@uregina.ca</a>               | Arts Project    | Arts    |
| 4 | Rob        | Knox      | <a href="mailto:Robert.Knox@uregina.ca">Robert.Knox@uregina.ca</a>             | Stats Project   | Stats   |
| 5 | Narges     | Rezaian   | <a href="mailto:Narges.Rezaian@uregina.ca">Narges.Rezaian@uregina.ca</a>       | Media Project   | Media   |
| 6 |            |           |  |                 |         |
| 7 |            |           |  |                 |         |
| 8 |            |           |  |                 |         |
| 9 |            |           |  |                 |         |

# Shared Mailbox Mail Merge Process

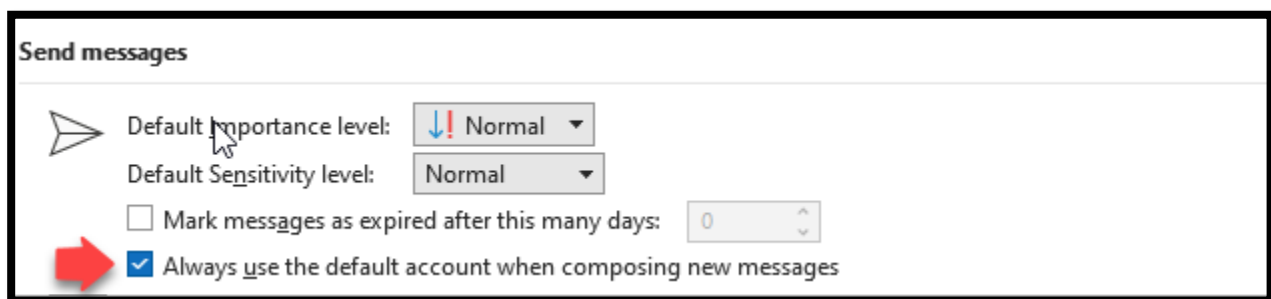
If you are wanting to use a shared mailbox for you mail merge, you will need to take a few extra steps.

1. Ensure you have added your shared mailbox by following these steps: [add-account-to-outlook.pdf \(uregina.ca\)](#)
2. Once you have verified that, click **File**
3. Then Click **Account Settings**
4. Then Click **Account Settings**
5. Then Select the shared mailbox that you would like to use.
6. Click **Set as Default**
7. Then Click **Close**



8. Select **File** again
9. Select **Options**
10. Click **Mail**
11. Under **Send messages**, Check **Always use the default account when composing new messages**

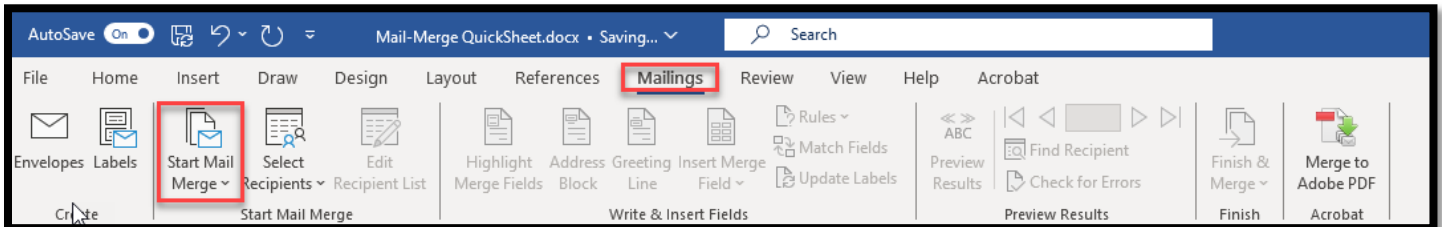
(Keep in mind, when you are done, you will want to revert these settings back)



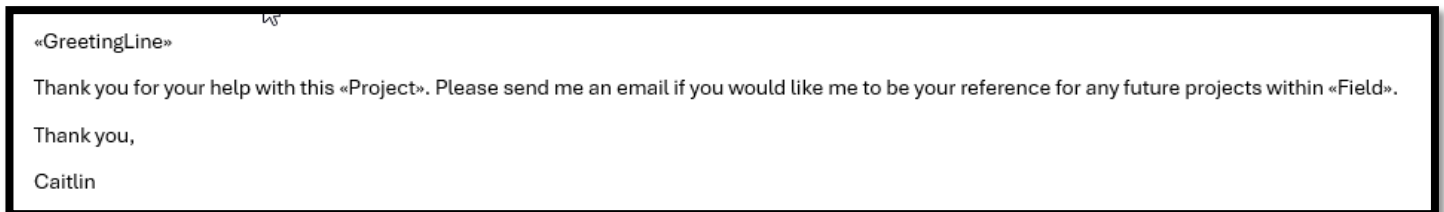
# Mail Merge in Word

If you are using Windows, please keep in mind that this only works in classic Outlook.

1. Open **Microsoft Word**
2. Prior to beginning the mail-merge process, you can draft your email in Microsoft Word. Additionally, if you prefer, you can draft your email throughout the mail-merge process.
3. In the top navigation bar, select **Mailing**
4. Select the drop-down menu for **Start Mail Merge**



5. Here, you can choose between using the Step-By-Step Mail Merge Wizard or your preferred Mail Merge type (e.g. Letters, Email Messages, Envelopes, etc.). The Step-By-Step Mail Merge Wizard will give you a little extra guidance while processing your mail merge. **For this Quick Sheet, we will be using Email Messages**
6. Next, you will choose **Select Recipient** which is where you will add your Excel file created above
7. Select **Use an existing list**
8. Find your Excel file, then click **Open**
9. Select the proper sheet if you are using multiple sheets
10. Click Ok
11. Next, you can customize your fields  
**Address Block:** You can choose how you want to address the person you are sending to  
**Greeting Line:** You can choose to add greetings within your address  
**Insert Merge Field:** You can insert other fields that you have added to your excel (e.g. dates, project, etc.)
12. Once customized, it will look have the generic merge fields within the message



13. Then you can select **Preview Results**
14. Once you have ensure that everything is prepared for your mail merge, you can select **Finish & Merge**
15. Select Send Email Messages...
16. Under **To:** ensure it selects the **email** field within you excel
17. Under **Subject:** Type in the subject you would like for the email.
18. Under **Mail Format:** you can set it as **HTML**
19. Select Ok

