Talent Management System (TMS)

How to Create a Mail Merge

Last Updated: 12/6/2019
Creating a Mail Merge from an Applicant Spreadsheet

The following training guide will show you how to create a ‘Mail Merge’ from an exported applicant spreadsheet. Mail Merge, offered in Office products, allows personalized mass emails that can be sent from a single Excel document. This function creates a seemingly personified email to be sent out using fixed text that will include a personal greeting using the applicant’s name. This feature is very useful when sending out multiple rejection emails to unsuccessful applicants who expect to be notified if they didn’t receive the job.
Creating an Applicant Spreadsheet

1. Select the Applicant Tracking module by clicking the three dots in the top-left corner of the screen.

2. Select Initiator from the User Group drop-down menu.
Creating an Applicant Spreadsheet

1. Navigate to the posting and click on the Applicants tab
Creating an Applicant Spreadsheet

Note: Unless you have a saved search set up, only applicants who are in an ‘active’ workflow state will appear in the list below when you first navigate to the Applicants tab.

1. Since you will be creating an applicant spreadsheet containing unsuccessful (‘Inactive’) applicant information, you will need to export the data for ‘Inactive’ applicants. To view inactive applicants and to add an email column, select the ‘More Search Options’ button.

Note: If there are applicants in an active ‘Hold’ workflow state that you wish to contact as well, you will need to export a list containing their information too.
Creating an Applicant Spreadsheet

1. From the expanded More Search Options menu, deselect Active and select Inactive from the Active/Inactive field, then click Search.
Creating an Applicant Spreadsheet

1. To add the email column, select Email from the Add Column drop-down menu then click search.

Note: After you click Search, only those in inactive workflow states will show up in the list below.
Creating an Applicant Spreadsheet

1. To export the applicant names and email addresses to an Excel spreadsheet, hover over the orange Actions button and select Export results from the drop-down menu.
Creating an Mail Merge from the Applicant Spreadsheet

Note: You now have an exported applicant spreadsheet with inactive applicant names and email addresses from which you will build your mail merge.

The following pages will demonstrate how to build an Outlook email template that utilizes this spreadsheet.
Editing the Spreadsheet for a Mail Merge

Note: Irrelevant columns will need to be deleted prior to creating the mail merge (Posting Number, Workflow State, and Application Date).

1. To delete entire columns, click on the corresponding letters for each column (i.e., C, D, E). Holding down the shift key will allow you select multiple columns at once.

2. Once the correct columns are highlighted, right click and select Delete from the drop-down menu.
Starting the Mail Merge in Word

1. Save the Excel document then open Word.
Starting the Mail Merge in Word

1. Navigate to the Mailings tab then hover over the Start Mail Merge button. From the drop-down menu, select E-mail Messages.
1. On the next page, you will need to connect the Excel spreadsheet to the Word mail merge. To do so, hover over the Select Recipients button and select Use an Existing List from the drop-down menu.

2. In the pop up window, locate your saved applicant spreadsheet then click ‘Open’.

3. In the next pop up window, select OK to finish connecting the spreadsheet.
Adding a Greeting Line to your email

1. Once the spreadsheet is connected to the mail merge, click on the Greeting Line button.

2. In the pop-up window, your desired greeting line from the Greeting line format drop-down menus.

   Note: Word will show you a preview of the greeting line here.

3. When you are ready, select OK.
Reviewing and Sending mail merge email

1. After selecting a greeting line, type out the email you wish to send. For sample regret letter language, please see the regret letter template.

Note: Word will insert your selected greeting line into the document.

Note: You may preview the emails by clicking on the Preview Results button. Use the arrow keys on the right to scroll through the different names. (For this to work, make sure your cursor is clicked away from the ‘<<GreetingLine>>’ area.)

2. When you are ready to send out the mass email, hover over the Finish & Merge button and select Send Email Messages… from the drop-down menu.

3. In the pop up window, type in your desired subject line for the email then click ‘Ok’.

Note: As soon as you click OK, the system will send out the emails. Be sure everything is ready to go before clicking the OK button.

Note: When you are previewing the emails, remember to click away from the ‘<<GreetingLine>>’ area before selecting the Preview Results button.

Thank you for your interest in the Academic Success Coordinator position at Colorado State University.

Your efforts in preparing and submitting your application are greatly appreciated. Unfortunately, your thoughtful consideration is no longer under consideration.

We value your interest in Colorado State University and wish you well in your future endeavors.

Sincerely,
Test User, Search Chair
Dear Gregory,

Thank you for your interest in the Academic Success Coordinator position in TMS Training office at Colorado State University.

Your efforts in preparing and submitting the application materials are sincerely appreciated. We were very pleased to have a very strong pool of candidates for this position. The Search Committee has thoughtfully considered all applications and narrowed the list to a smaller group. Unfortunately, your application was not forwarded for further consideration.

We value your interest in Colorado State University and wish you well in your future endeavors.

Sincerely,

Test User, Search Chair

Note: All applicants will receive a seemingly personalized email from you, addressed only to them.
Need further help?

Please visit the OEO website for more resources on the CSU Talent Management System (TMS) at:

www.oeo.colostate.edu/talent-management-system-tms

For additional help, contact the Office of Equal Opportunity at:

(970) 491-5836

or

Email at oeo@colostate.edu