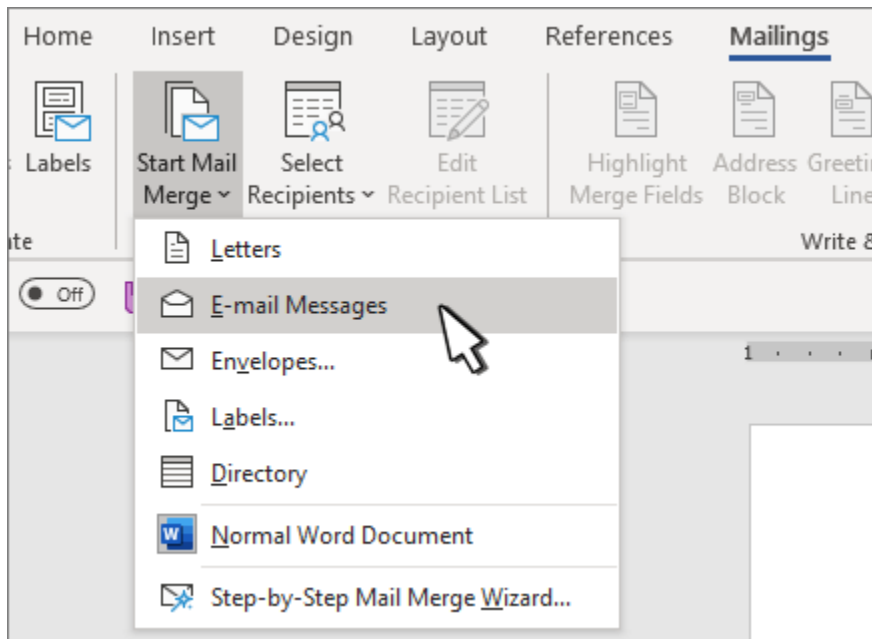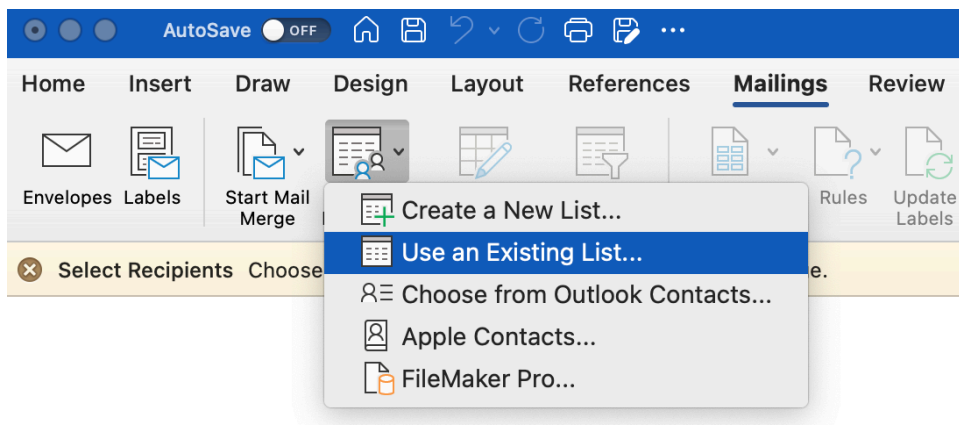# Steps to mail merge with Outlook

1. Download the list of recipients with surveys links from the surveys module
2. Prepare your main document

- Open Word
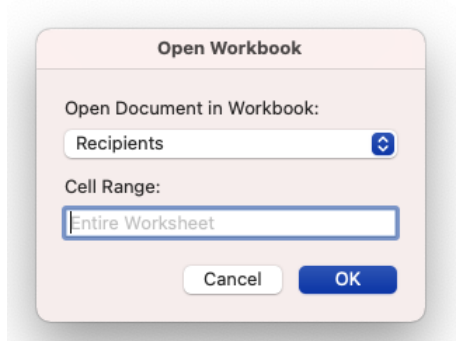- Go to Mailings > Start Mail Merge > E-mail Messages.

3. Select the recipients by clicking on > Select recipients > Use an existing list

4. Browse your files and select the the list of recipients with surveys links that you downloaded from the surveys module.

5. Confirm that is not a malicious file, by cliking YES
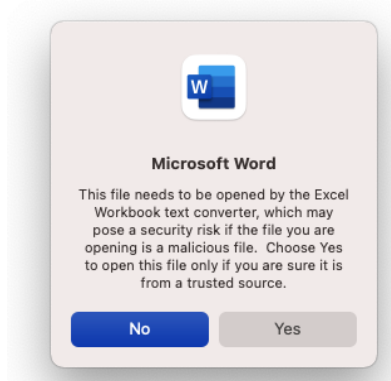
6. Confirm all the range by clicking on OK

7. Create the content of your email. You can use the template below, but you will need to insert the merge fields by selecting them in the menu
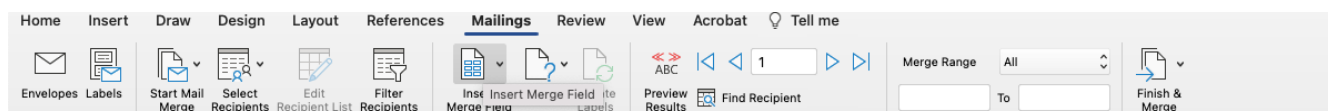
Dear < insert title optiona mergel field> <insert Name merge field> <insert SurnameOptional merge field>,

My company *is currently in the process of identifying areas that could represent risks and opportunities for the company now and/or in the future, based on insights captured by Datamaran. These insights are informed by an objective analysis on regulatory developments, industry best practice, peer activity, and public opinions on financial, environmental, social, and corporate governance issues. We recognize you as an important stakeholder and we would greatly appreciate the chance to gain your perspective via this short survey.*

Thank you for taking the time to contribute to our assessment, the results of which will inform the identification of issues that have a relevant impact on us as a company as well as on our stakeholders.

Click on the link below to begin the survey:

<insert Survey_link field>

For the optimal user experience, please use the latest version of Firefox, Chrome, Safari or Edge. You will not be able access the survey using Internet Explorer - in case other browsers are unavailable, please consider responding via your mobile device.
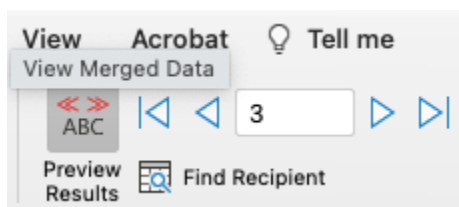
Sincerely,

Sender name

My company

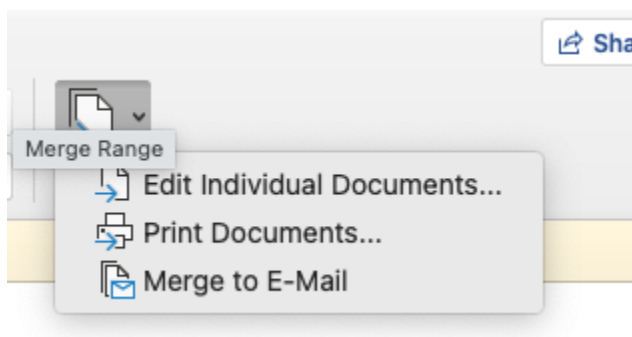*Click on the link below if you don't want to receive more notifications.*

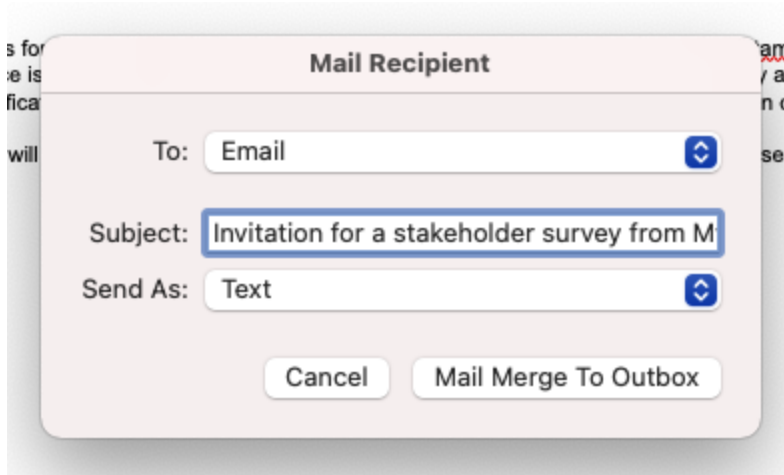*<insert Reject Survey Link field>*

8. You can see a preview of the email by clicking on preview results

9. Once your recipients list and you email text is ready you can finish >Finish & Merge > Merge to E-Mail.

10. In the pop up, select email for the first box and the subject of your email

11. When you click in mail merge to outbox you will send the email with the survey links to all
    the recipients.
    To **TEST** the survey
    - Connect to your outlook account
    - Create a new email.
    - You can use the template
    - Add the email addresses of the testers
    - The survey link for these recipients can be the survey preview link obtained from the
      platform. If you don't have it, simply use the first recipient in the sheet and replace
      survey/ with survey/preview/<Survey_ID> where <Survey_ID is the unique ID of
      this survey

References:

1) Use mail merge to send bulk email messages
   https://support.microsoft.com/en-us/office/use-mail-merge-to-send-bulk-email-messages-0f123521-20ce-4aa8-8b62-ac211dedefa4