What is mail merge to PDF?

Adobe Acrobat's **Mail merge to PDF** add-in for Word allows you to:

− Create individual PDF files from a Word mail merge.

− Automatically email each PDF as an attachment via Outlook desktop app (if your data source contains emails).

Before you start

Software requirements

− Microsoft Office 2016 or later

− Adobe Acrobat DC

If necessary, staff can install either or both of these onto network PCs or laptops via the Software Center.

> For help using the **Software Center**, please see:
> staffnet/working-here/software

Merge document and data source

The following instructions require you to have already set up a merge document and data source, as you would a normal mail merge in Word.

> If you are unfamiliar with mail merge, we recommend reading chapters on Mail Merge in our **Word 2016** workbook IT Services Training Office-2016

Using mail merge to PDF

Create individual PDF files from a Word mail merge

1. Open **Word**, then click the **File** tab.

2. Click **Open** to browse to your merge document.

   − This is the body of your PDF, such as a letter or certificate.

3. Click on the **Mailings** tab, then click **Select Recipients**.
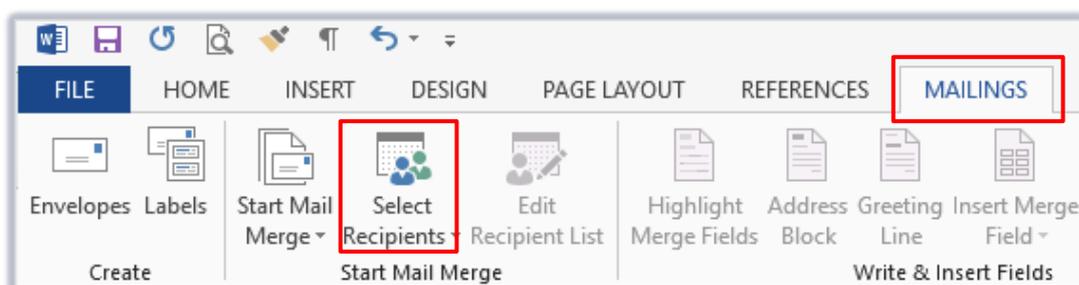
   − Click **Use an Existing List…** to browse to your data source file, often an Excel file.

This contains the mail merge data for each PDF, such as names and contact information.
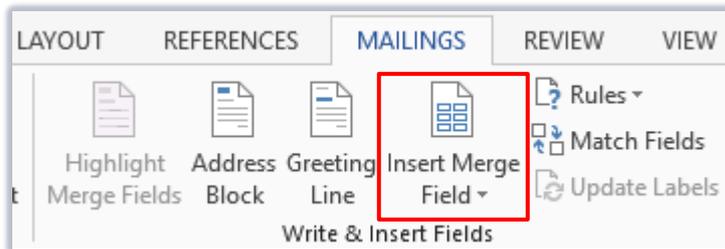
− Click **Open**.

> You can click **Edit Recipient List** to check that the correct recipients are ticked. If there is a recipient you do not wish to include in the merge, you can untick their row in the list.
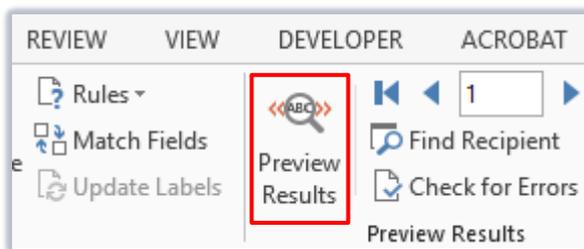
4. Check that your document includes the merge fields that you require.
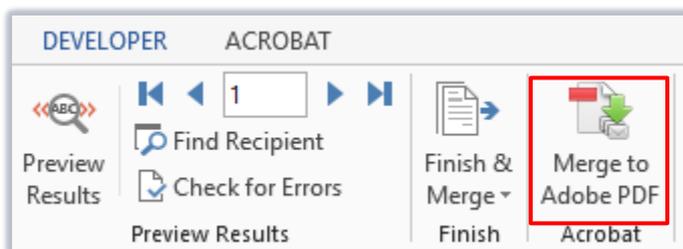
Dear «Firstname»

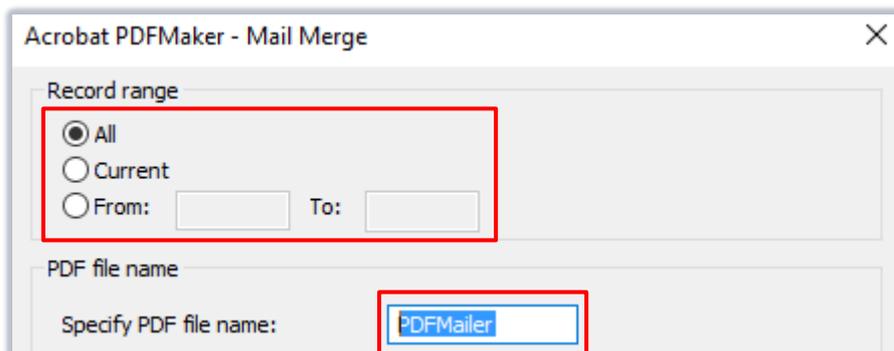− If not, insert them via the **Insert Merge Field** icon.

5. Click **Preview Results** to check that the merged documents look correct.

6. Click **Merge to Adobe PDF**.

− Select the record range you wish to merge.

− For **Specify PDF file name:** Type the name for the generated PDFs.

Automatically email each PDF as an attachment via Outlook - this step is optional

The next steps will only work if your data source contains email addresses.

7. If you would like to send automatic email messages with the merged PDFs included as attachments, tick **Automatically send Adobe PDF files by Email**.

   (If not, leave this box unticked and move to step 8).

   − For **To:** Check that Word has selected the field that contains recipient email addresses.

   − For **Subject line:** Type the email subject line (this will be the same for all recipients).

   − For **Message:** Type the email content (this will be the same for all recipients).

8. Click **OK**.

9. Browse to the folder where you would like to save the PDF files and click **OK**.

> If **Outlook** is not already open and you selected to send automatic emails, you will be prompted to select the email profile you wish to use to send emails. Select a profile and click **OK**.

> ⚠ We recommend sending out smaller batches of **250** emails at a time to ensure emails are sent and not sitting in your Outbox folder. You may find that Outlook may crash with larger quantities.

10. When the merge has finished, make sure you close **Word** before beginning any new mail merges.

Viewing merge to PDF results

How do I view the PDF files?

The merged PDF files are stored in the folder you selected in step 9 of the merge process.

How do I view the automatic emails with PDF attachments?

In **Outlook**, you can click **Sent Items** to view the automatic emails (if you ticked this option in step 7 of the merge process).

Additional options

Can I Cc/Bcc the automatic emails to someone else?

Unfortunately, it is not possible to customise the mail merge to PDF process any further. However you can select multiple emails in your **Outlook Sent Items** folder, then right-click on the selection and **Forward** the batch as required.

Can I search for keywords in the PDF files?

You can search for keywords in PDF files by using Acrobat's advanced search function:

1. Open **Adobe Acrobat DC**.
2. Click **Edit**, then click **Advanced Search**.
3. Select the radio button for **All PDF Documents in**.
4. Select **Browse for location…** from the drop-down menu.
5. Navigate to the folder where you saved the PDFs and click **OK**.
6. Type the word or phrase you would like to search for.
7. Click **Search**.
8. The results are listed in the search window where you can click on a file to open it.

Further information and help

Use MyIT to log calls with the IT Service Desk: myit.abdn.ac.uk