

E-Mail Merge

If you have a specific message you want to communicate to one or more contacts at a time, ACT! makes that process a snap. We've already seen how easy it is to perform a Mail Merge to Word. The process is nearly identical for e-mail merges.

You can send individually addressed e-mails to a single contact, a lookup, or a selected Group or Company. You can also choose to include attachments with your e-mail merges. You may also choose to send only one e-mail with all addresses in the current lookup placed in the bcc area of the e-mail. Let's look at both methods.

Creating the E-mail Template


To send e-mails that use rich-text formatting (such as different font types, styles and colors, different background color, bullets, numbering, alignment, hyperlinks, etc.), you must...


- ✓ Select Internet Mail or Microsoft Outlook as your e-mail system to use with ACT! (**Tools, Preferences, E-mail** tab). Outlook Express, Lotus Notes, and Eudora only send plain-text messages from ACT!.
- ✓ Set your Tools, Preferences..., E-mail tab, Composing Options... to **Send e-mails in:** HTML (instead of Plain Text). The HTML option allows you to send out the rich-text formatted templates from Outlook or Internet Mail.

Procedure: To create a template for an e-mail merge

1. **Write, Edit Template...**
2. Select a template and click **O**pen You might start with EmailBody.
3. Before starting changes, click **F**ile, **S**ave **A**s, enter a filename, **S**ave Give it a descriptive name.
4. Edit the template as desired, adding general text and mail merge fields. To create a document with rich-text formatting, review page 143.
5. Include your signature, as your default signature will not be used for merged templates.
6. Save your changes and close the template.

Mini-Exercise: Editing the EmailBody template

Step	What to do	How to do it/Comments
1.	Since templates will not use your default signature, let's add one to the EmailBody template so that it becomes good base for all your email templates.	Write, Edit Template... , select EmailBody and click Open .
2.	<p>Add a signature that others in your organization can also use.</p> <p>Change the default font for your name to Monotype Corsiva, 14 point, Blue.</p> <p>Insert your (My Record) Title if necessary and make it Arial Italic 10.</p> <p>Insert a marketing line at the bottom of the e-mail: Gifts for the discriminating clientele.</p> <p>Hyperlink the word "Gifts" to: www.chgourmetgifts.com.</p>	<div data-bbox="980 436 1398 716" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <pre><Salutation>, <MY:Contact> <Title> <MY:Company> <MY:Phone> Gifts for the discriminating clientele!</pre> </div> <p>Make the Font, Size, and Color changes. Enter the marketing line. Select the word Gifts and click Insert, Hyperlink..., in the Linked To: area, type www.chgourmetgifts.com, click OK.</p>
3.	If you like, try inserting a logo graphic.	<p>Use any graphic on your PC that you like.</p> <p> <i>Only graphics added using Character image will mail merge via e-mail if you are using the ACT! Word Processor.</i></p>
4.	Save and close the template.	
5.	Write, E-mail Message (from template) to see how it looks.	Test it before you start to use it in real life.

 *Now you have a good base for future templates. When you edit the EmailBody template to create an E-mail Merge template, just remember to save it with a new name.*

Merging the E-mail Template

Let's review the Mail Merge process as it relates to sending a personal e-mail to each contact in the lookup.

Procedure: *To send individually addressed e-mail to each contact in lookup*

1. Perform a lookup that displays the contacts you wish to receive your e-mail.
2. Choose **Write, Email Message (from template)** to send the template to a single contact,
or...
Choose **Write, Mail Merge....** to send to multiple contacts.

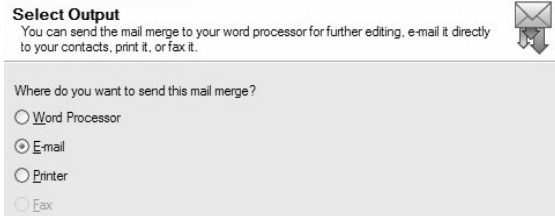
If you are sending to a single contact, you are finished.

If you select Mail Merge, the **Wizard** starts. The first window may appear as a Welcome page. Check the box **Check to hide in the future** and click **Next**.

3. In **Select Output...**

Click **E-mail** (*you must have e-mail setup to work with ACT! for this to work*).

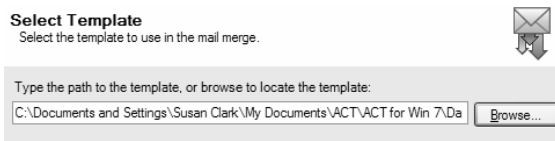
Click **Next>**.



4. In **Select Template...**


Click **Browse...** to locate the template to use in the E-Mail Merge. Select a template and click **Open**.

Click **Next>**.

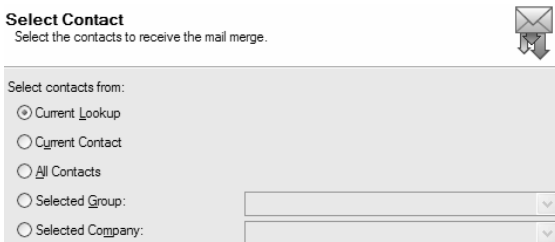


5. In **Select Contact...**

Select the contacts for the e-mail merge.

 *Use the **Current contact** if you are testing the template.*

Click **Next>**.



6. In **Set E-mail Options...**

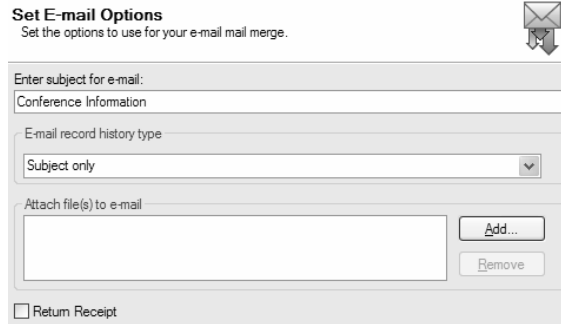
Enter a subject line for the e-mail.

Select how ACT! should record the history of the mail merge (None, Subject only, Subject + Message, or Attach to Contact(s)),


Add... Attachments as desired,

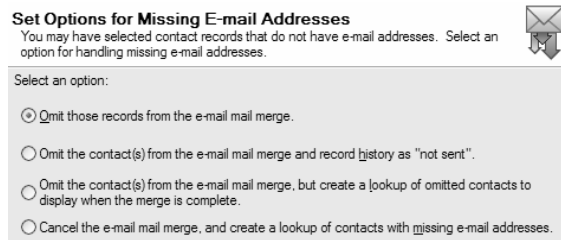
Check the **Return receipt** if desired.

Click **Next>**.




7. In **Set Options for Missing E-mail Addresses...**

 *The third option will send your e-mails and then create a new lookup of contacts without an e-mail address so that you can call to get an e-mail address for future mailings.*



8. Click **Next>** and click **Finish** to acknowledge the confirmation message and complete the wizard.

 *One e-mail for each contact in the lookup is placed in the Outbox, ready to send. You may need to click the Send/Receive button in your E-mail package to complete the send. Depending upon the Create History option you selected, a history is created for each contact in the lookup.*