

# High Impact Email and ACT! Mail Merge

3 STEP HOW-TO GUIDE



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## HIGH IMPACT EMAIL TEMPLATES AND ACT! MAIL MERGE

You can use any High Impact eMail template with the ACT! Mail Merge feature to send personalized advertisements, newsletters or a variety of other email message types to ACT! groups and contacts.

ACT!'s mail merge feature is a more flexible and enhanced alternative to sending emails to groups of contacts. If you have been sending messages to groups by using the blind carbon copy (Bcc:) field of the email client, you will appreciate this new alternative. Using the Bcc: field has two main shortcomings: first, many ISPs will block email messages with large Bcc: lists and, second, messages sent out to the Bcc: field are not personalized for the individual recipient. Increase your response rate with personalized mail merge from ACT! and High Impact eMail.

Simply follow the following steps to create a personalized message that can be sent to dozens or hundreds of recipients in one activity.

1. Save a High Impact eMail template as a Gmt file to be used in ACT!
2. Prepare the saved template for Mail Merge – Add mail merge fields
3. Send personalized email messages to a group

# 1

## SAVE A HIGH IMPACT EMAIL TEMPLATE AS A GMT FILE TO BE USED IN ACT!

To save a template as a Graphical Mail Template (.gmt) that can be used by ACT!:

- n In High Impact eMail, select the template you want to save as ACT! GMT Template by clicking once.
- n Select the menu option Tools | Save as ACT! template to save the template as a .gmt file.

OR

- n Right mouse click on the template icon, and select Save as ACT! Template from the context menu. (See Fig. 1)

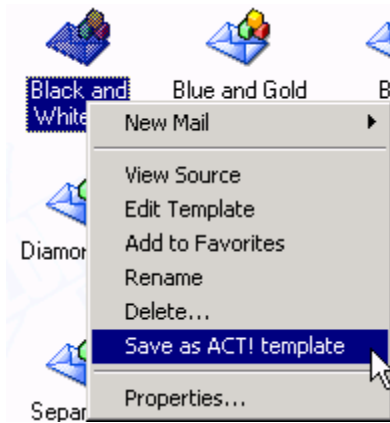


Fig. 1: Right click for context menu

- n Once the template has been successfully added as a Graphical Mail Template, a dialog box will appear as shown below.

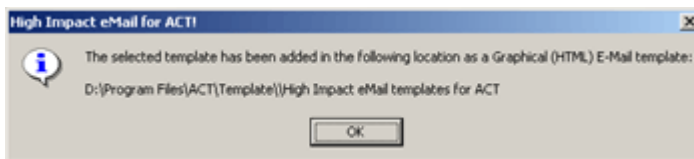


Fig. 2: Your template has been saved

- n Your High Impact eMail template is ready for use in ACT!

## 2 PREPARE THE SAVED TEMPLATE FOR MAIL MERGE – ADD MAIL MERGE FIELDS

The saved template can be accessed through the ACT! application and then used for Mail Merge.

- n To add Mail Merge fields in the template, select the Write | Edit Graphical (HTML) E-mail template... menu option in ACT!.

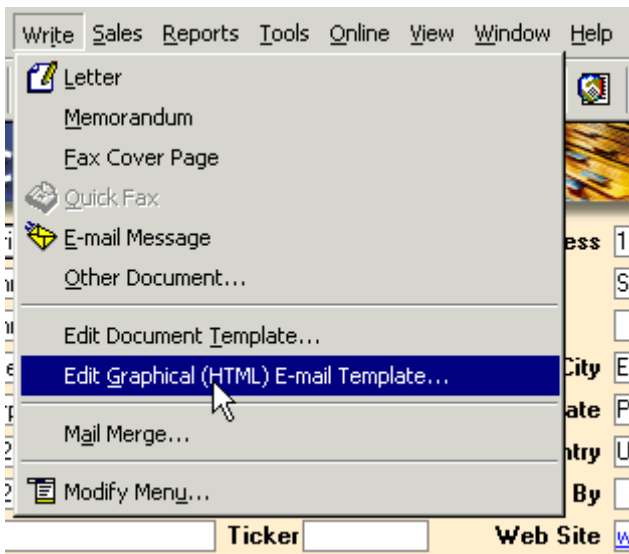


Fig. 3: Add Mail merge fields

- n Browse and select the template you wish to edit from the High Impact eMail templates for ACT folder.
- n The template opens in the ACT! Word Processor and displays the available Mail Merge Fields. Insert the desired Mail Merge fields as shown.

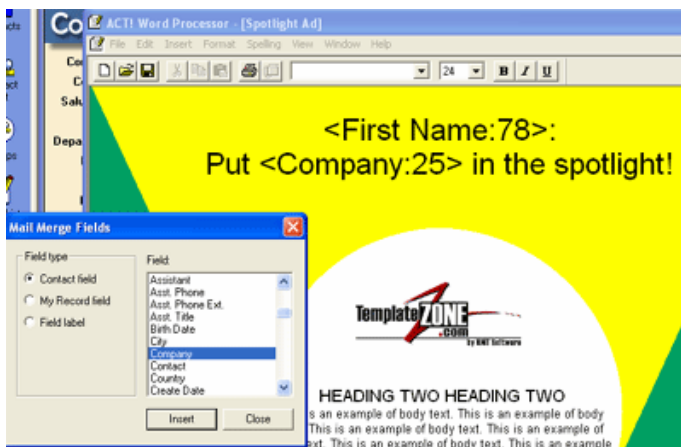


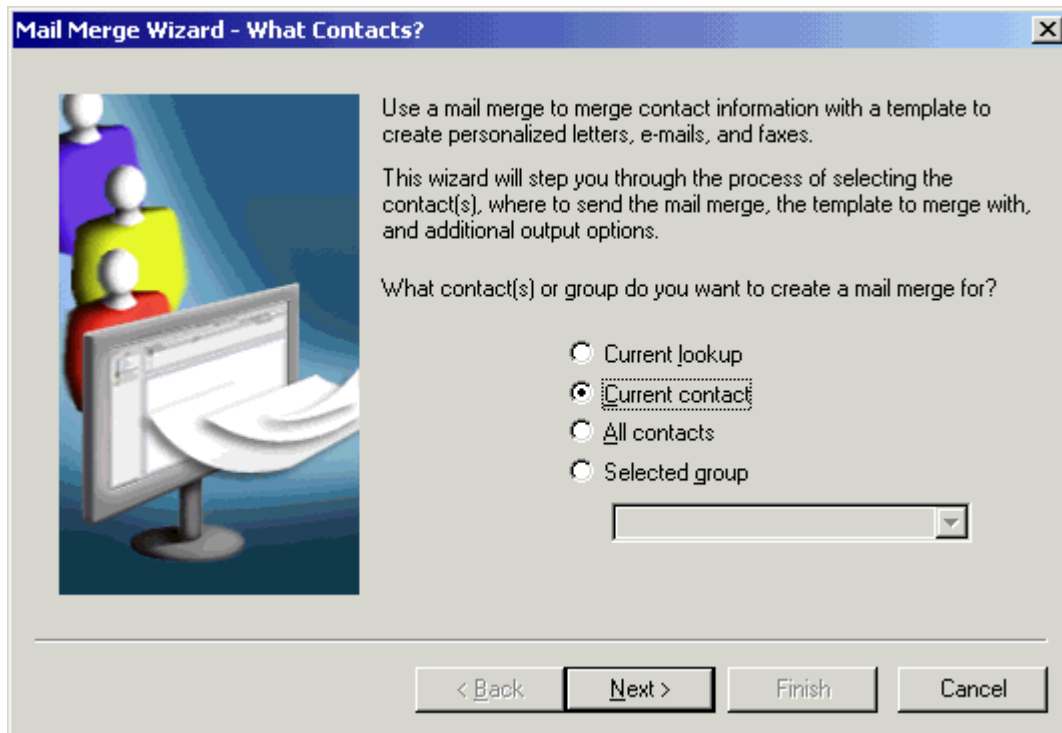
Fig. 4: Add Mail merge fields

Place the mail merge fields in the appropriate positions within the template. Then replace sample text and add fonts and other formatting as desired to the template. When you have the template set up exactly as you want your recipient to view it, save the changes you have made to the template.

- n Your template is now ready to send.

### 3 SEND PERSONALIZED EMAIL MESSAGES TO A GROUP:

- n To use the mail merge feature in ACT!, select the Write | Mail Merge option. This will start the Mail Merge Wizard.
- n Depending on your list requirement, select one of the options below and click next:



- n Current lookup: Select to send a personalized document to all of the contacts in the current lookup.
- n Current contact: Select to send a personalized document to the current contact.
- n All contacts: Select to send a personalized document to all of the contacts in the open database.
- n Selected group: Select to send a personalized document to all of the members of a specified group, and then select the group from the list.
- n If no further editing is required in your template, just select E-Mail and click next

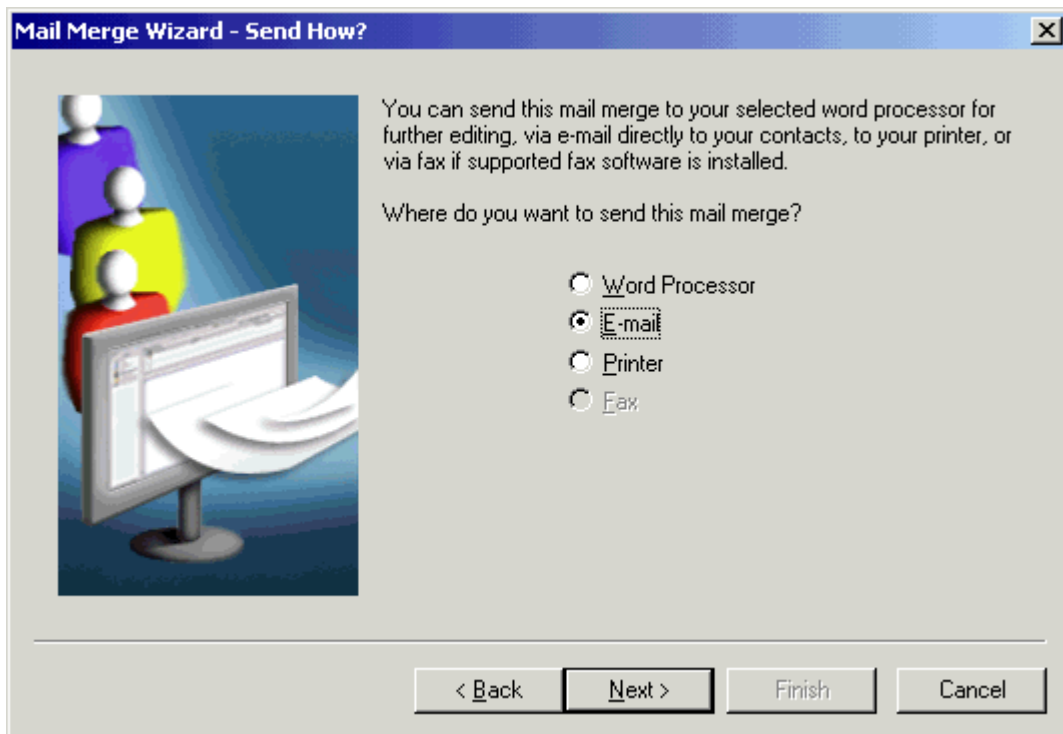


Fig. 5: Send document to 'E-mail'

- n In the next dialog box, browse to select the template you modified and saved. Click Finish to complete the wizard.

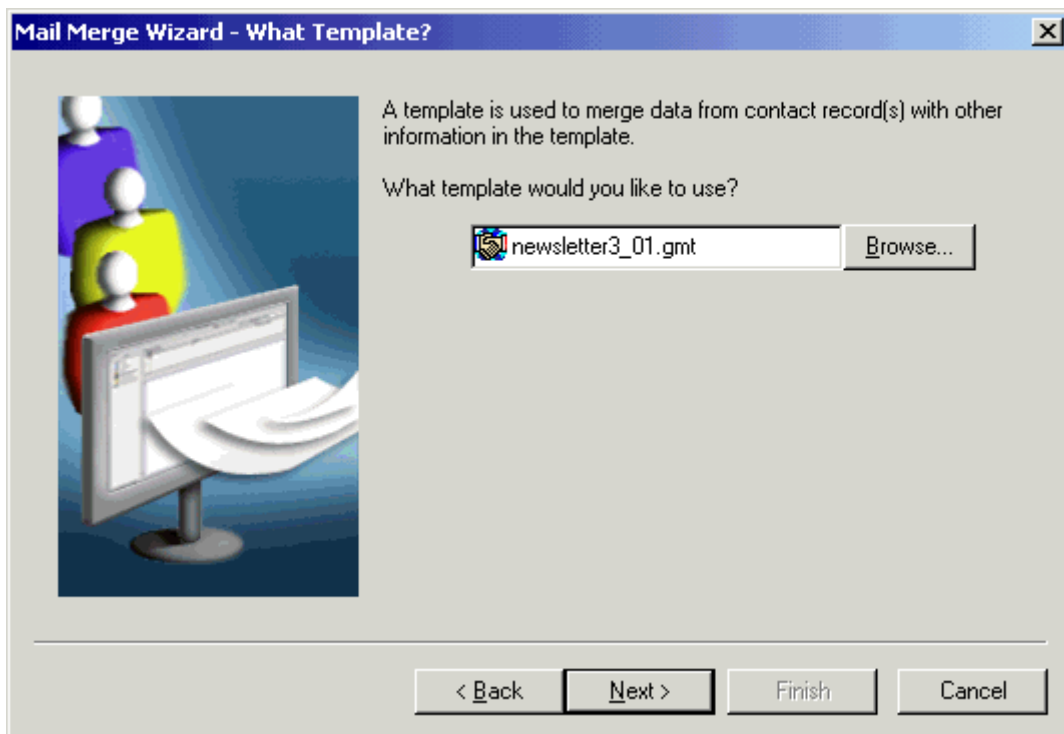


Fig. 6: Select your document

Shown below is the finished template launched in ACT! email with the Mail Merge fields.



Fig. 7: Select your document

\*\* For Advanced Users: \*\*

## SETTING YOUR DEFAULT STATIONERY TO MAIL MERGE IN ACT!

- n Set a High Impact eMail template as Default Stationery (This is important)
- n After setting your default stationery, go to Write | Edit Graphical (HTML) E-mail Template... Choose emailbody.
- n Insert your mail merge fields using the mail merge tool.
- n Save the template. Make sure it is saved as emailbody
- n Your default stationery will now mail merge every time you hit Write Email or when you click on an email address in the ACT! database. You can revert to the default ACT! stationery by going to Tools | Revert to ACT! default in High Impact eMail.

Note: If the above steps are not followed correctly, you may lose the Default Stationery feature in ACT!.