

Mail Merge Word 2003 Onwards

To perform a mail merge using the Evolution System and Microsoft Word 2003 onwards please follow the instructions below

PLEASE BE AWARE THAT YOU MUST BE USING MICROSOFT OUTLOOK 2003 ONWARDS TO PERFORM AN EMAIL MERGE.

Firstly, a list of projects or companies to be mailed needs to be produced within Evolution. This is done using the normal search area within Projects or Companies and People or using your saved profile. Once you have your list of projects / companies, tick only the projects / companies you wish to mail merge:

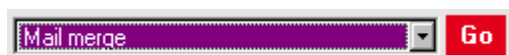
Projects Selection

<input type="checkbox"/>	★	1	CRM	Project
<input checked="" type="checkbox"/>	★	N	£	DURHAM GATE -376 HOUSES/RETAIL UNITS/HEALTH CENTRE/PUBLIC HOUSE/HOTEL
<input type="checkbox"/>	★	N		HOUSING - BRITISH SUGAR FACTORY SITE
<input checked="" type="checkbox"/>	★	N		GALAWHISTLE WIND FARM
<input checked="" type="checkbox"/>	★	N		360 HOUSES
<input checked="" type="checkbox"/>	★	N		SHOPS/ OFFICES/ HOTEL/ RESTAURANTS/ NON RESIDENTIAL INSTITUTIONS
<input type="checkbox"/>	★	N		84 FLATS/8 HOUSES/OFFICE - SOUTH NORWOOD GOODS YARD

Companies Selection

<input type="checkbox"/>	★	CRM	Projects	Company
<input checked="" type="checkbox"/>	★	£	1	2020 Liverpool Limited
<input type="checkbox"/>	★		1	3D Plans Limited
<input checked="" type="checkbox"/>	★		1	3ER Limited
<input checked="" type="checkbox"/>	★		1	A & G Architects Limited
<input checked="" type="checkbox"/>	★		1	A Close
<input type="checkbox"/>	★		1	A Hulme
<input checked="" type="checkbox"/>	★		1	A Hulstone
<input checked="" type="checkbox"/>	★		1	A Paiken-Baird

Select the MAIL MERGE option from within the Action Menu at the top of the list. Click on GO.



You will then see the following screen:

Please select the roles you wish to include

Exclude companies / project(s) mailed in: 7 Days

Exclude companies / project(s) telephoned in: 7 Days

Exclude On Hold / Withdrawn projects

Ignore Contacts with no confirmed name.

Role

Quantity surveyor (31)

Structural engineer (18)

Project Manager (10)

Agent (26)

Planner (3)

Surveyor (1)

Client (33)

Architect (80)

Contractor (1)

Mech. & Elec Engineer (22)

Consulting Engineer (2)

The upper section of this screen allows you to perform the following actions:

Exclude Companies / Projects already mailed or telephoned within a selected date range. This will come into action once you have performed your first mail merge (you will see further on in this document that we can automatically mark projects / companies as mailed at the end of the mail merge).

Exclude on Hold / Withdrawn Projects from your mail merge.

Ignore Contacts with no confirmed name. By default Evolution will input Sir/Madam within your letter / email if we don't have a confirmed contact name. If you only wish to contact people with a confirmed contact name make sure this box is ticked.

The lower section of the screen displays a list of roles within the companies. From this list, select the roles you wish to contact using the tick boxes to the left hand side. Alternatively, use the top tick box to select all the roles.

Click **Next** at the top right of your screen.

You will now see a screen with a list of your contacts. From the left hand side, you can untick the contacts you don't wish to mail/email.

You then have the following options:

Remove Duplicates : This will remove any duplicated contacts. If you have one contact working on several different projects, you may see them in this list a number of times. This would also be the case if the person appears more than once under separate roles. If you wish to contact this person just once you can use the **remove duplicates** option.

Single tick for companies : This will remove any duplicated companies. If you have one company working on several different projects with several different contacts, you can use this option to highlight just the first contact within the company to avoid multiple emails / letters going out to the same company.

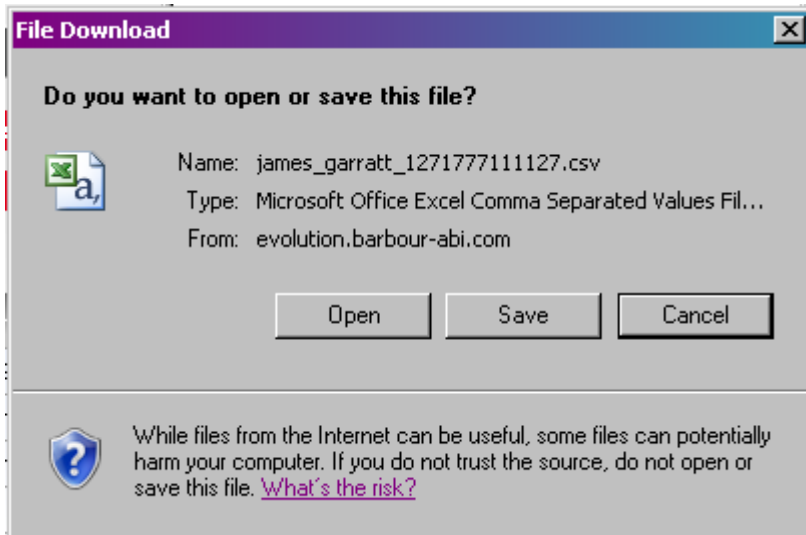
					Remove Duplicates	Single tick for companies	Next	Back
<input checked="" type="checkbox"/>	Contact Name	Company Name	Role	Project				
<input checked="" type="checkbox"/>	Anthony Buckley	ADG Design	Architect	Hotel				
<input checked="" type="checkbox"/>	Anthony Keith	Anthony Keith Associates	Architect	42 Flats				
<input checked="" type="checkbox"/>	Sir/Madam	Anthony M Gallagher	Architect	Nursing Home				
<input checked="" type="checkbox"/>	Ed Baverstock	BBLB Architects	Architect	Ramsgate Port - Operations Building				
<input checked="" type="checkbox"/>	Sir/Madam	BNP Paribas Real Estate (Head Office)	Architect	Offices - 19 Charterhouse Street				
<input checked="" type="checkbox"/>	Daniel Neville	Dalkin Scotton Partnership	Architect	Supermarket				
<input checked="" type="checkbox"/>	Ben Johnson	Fairview New Homes Limited	Architect	84 Flats/8 Houses/Office - South Norwood Goods Yard				
<input checked="" type="checkbox"/>	Leighton Cooksey	Faulkner Browns	Architect	Durham Gate -376 Houses/Retail Units/Health Centre/Public House/Hotel				

When complete click **Next**

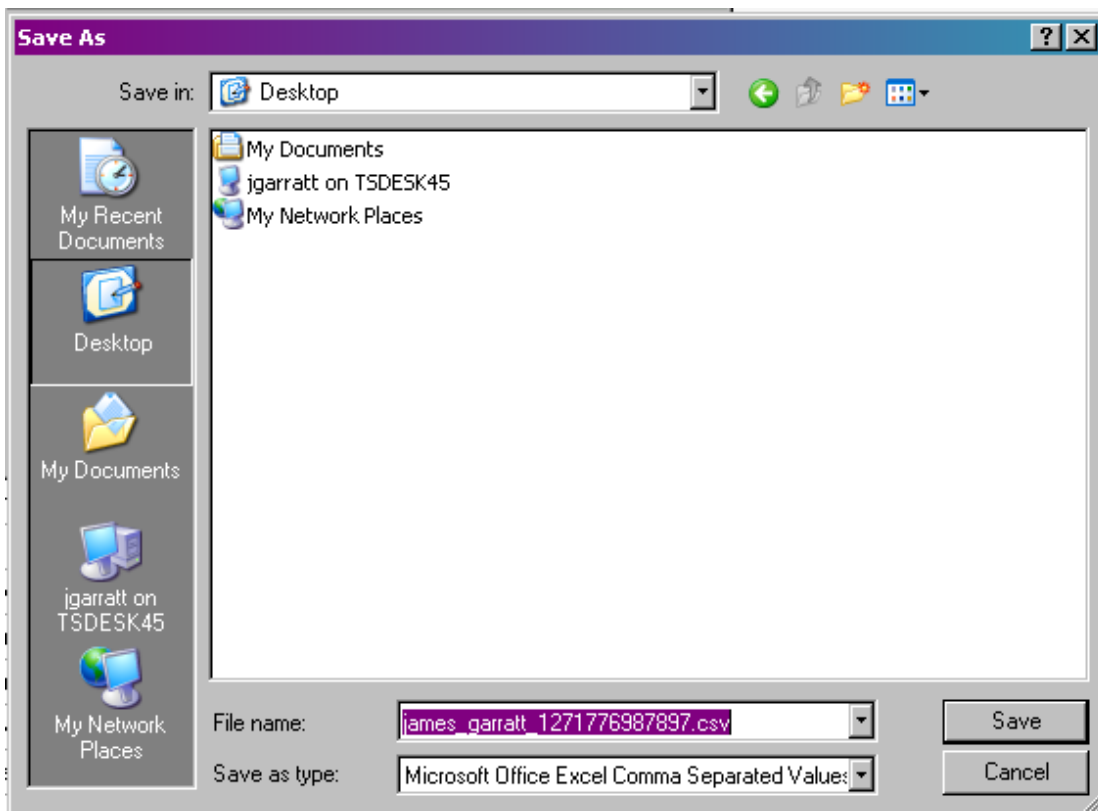
Next you will need to download this contact data from Evolution ready for the mail merge.

Click the **Download Mail Merge CSV Data File** button.

You will then be prompted to Open or Save the file.



Make sure you save this file to a location that you can find at a later stage. The file can also be renamed if required.



You can also download Evolution Sample Letters / Emails / Faxes using the buttons at the top of the screen. These can be used as a “template” letter if you do not have a letter already prepared, or you can use this to copy and paste the mail merge fields into your own document.



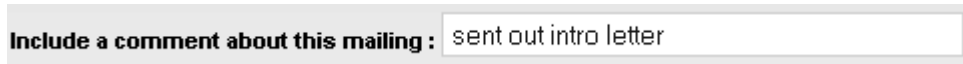
Once again make sure this is saved in a memorable location.

The rest of the process will now be completed within Microsoft Word.

You now have the option to mark all these companies as mailed, meaning the next time you perform a mail merge these companies can be excluded:

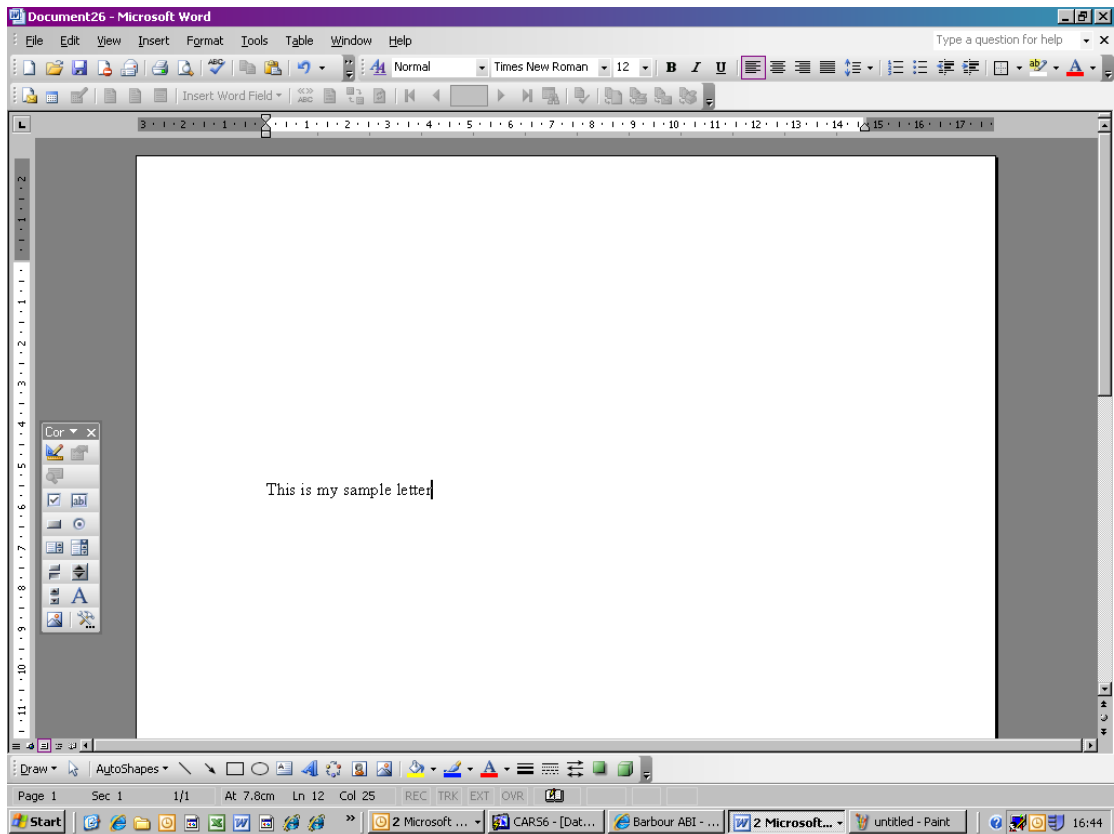


You also have the option to include a comment about this mail merge which will be shown when hovering over the mail icon in your list of mailed companies:

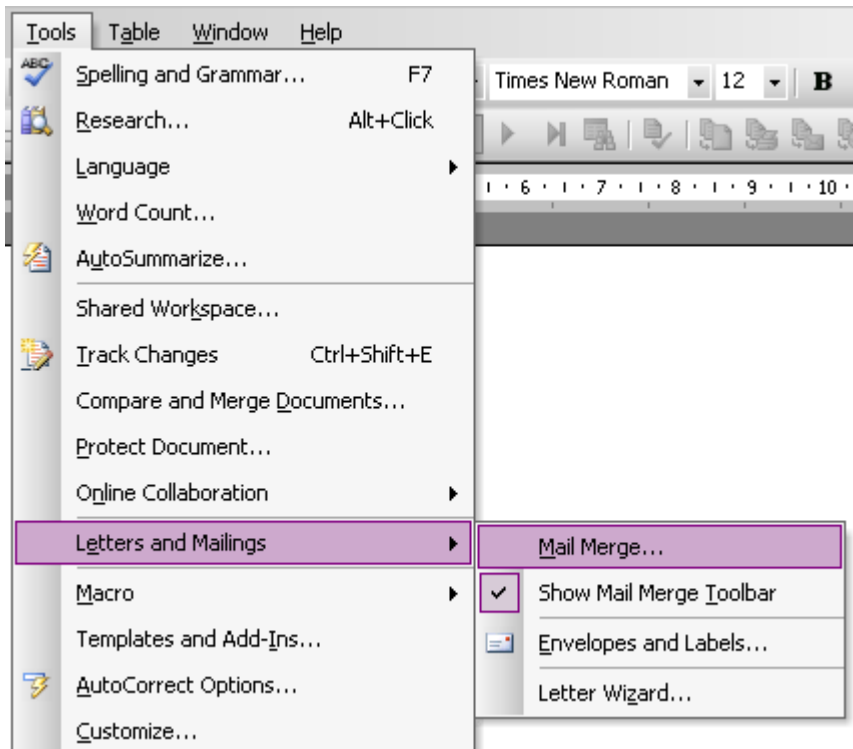


Once this has been done, click **Finish Mail Merge** and you will be taken back to your list of companies / projects.

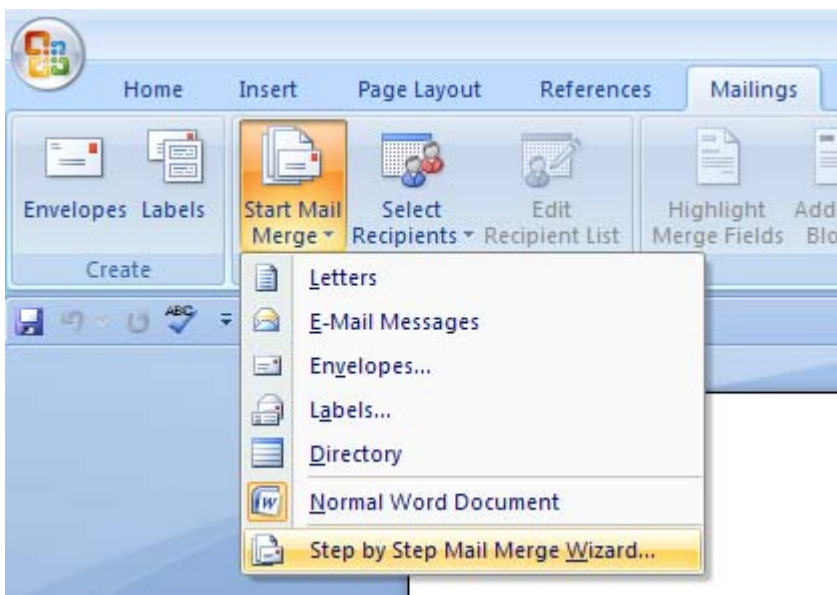
Minimize Evolution and open up your pre-prepared letter / email or create a blank document within Microsoft word.



To start your mail merge in Word 2003, click the **Tools** menu, navigate to **Letters and Mailings** and select **Mail Merge**.



In Word 2007 Onwards, select the **Mailings Menu**, click on **Start Mail Merge** and select **Step by Step Mail Merge Wizard**



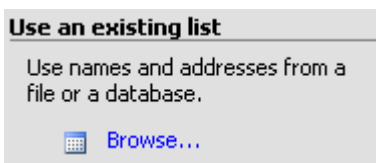
The Mail Merge window will appear to the right of your document.



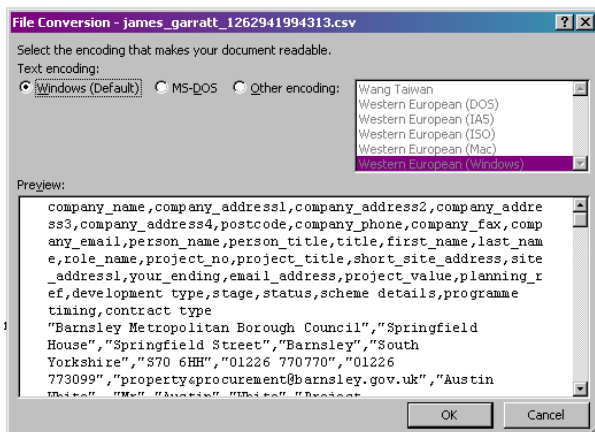
This example will create an email merge. You have the option to create a letter, envelopes, labels or a directory. Exactly the same process is followed for each.

Select **E-mail messages**, click on **Next: Starting Document** at the bottom of the screen

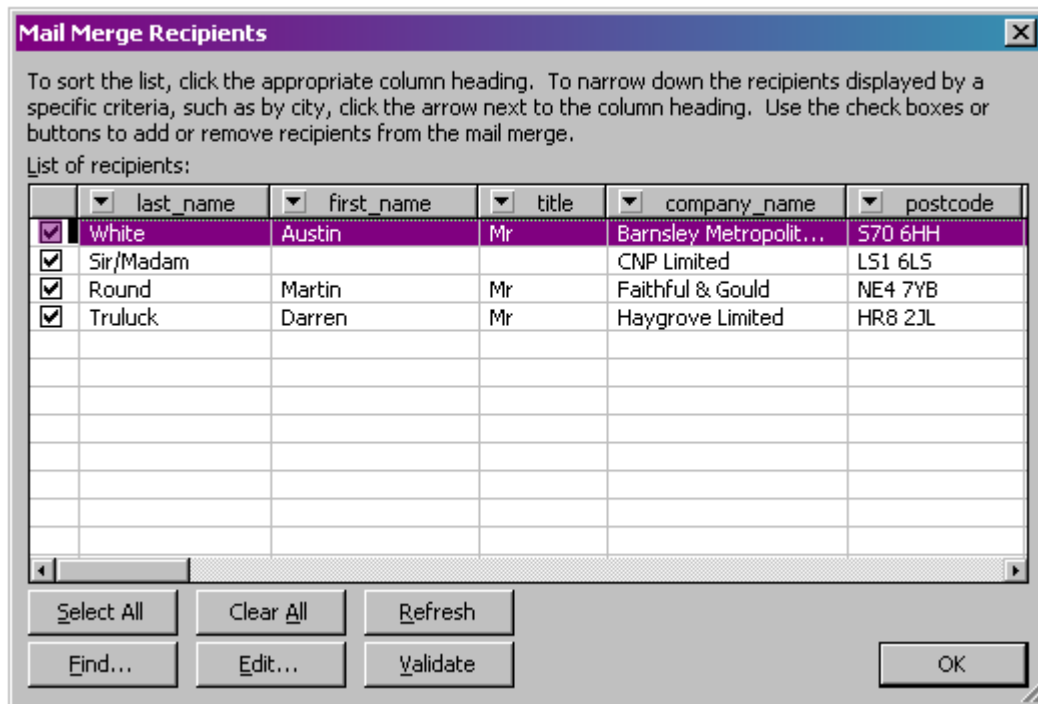
No action needs to be taken at Step 2 so advance to Step 3. Step 3 is asking you to select your recipients, so you need to find the contact list you downloaded from Evolution. Do this by clicking on Browse and pointing Microsoft Word to the relevant file:



You may then receive the following window. Nothing needs to be done here, just click OK.




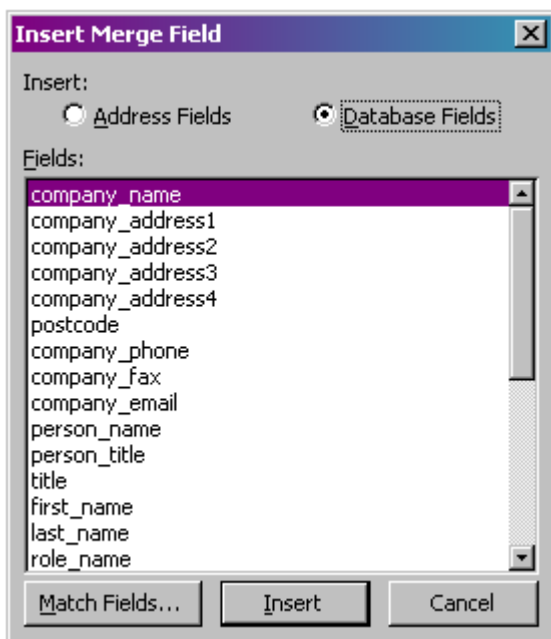
A window containing all of your contacts should now be displayed. At this stage you can untick contacts on the left hand side if you decide you do not want to email them. Once you are happy with this, click OK.



Now click on **Next – Write Your Email Message** at the bottom right of the screen.

Step 4. At this stage you will need to insert your merge fields into the document. Address, reference to a project etc.

To do this, click on  within the window on the right hand side of your screen. You will see the following window showing the list of fields / data that you can bring across from Evolution into your document:




From this window, select the fields you wish to add to your document and click on Insert after you have selected each one. You will see the fields appear in a continuous line after your cursor, as shown below. Don't worry about this, you will be able to change the layout of this afterwards.

«company_name»«company_address1»«company_address2»«company_address3»«company_address4»«po
stcode»«title»«last_name»

You will now need to change the layout so that it appears correctly in your document. You can do this by placing the cursor between the >> and the << characters and tab or enter the fields into the correct positions as shown below:

«company_name»
«company_address1»
«company_address2»
«company_address3»
«company_address4»
«postcode»


Dear «title» «last_name»

Once you are happy with the layout you can click .


This will take you to **Step 5** where you will see your merge data has now been brought into your document as shown below:

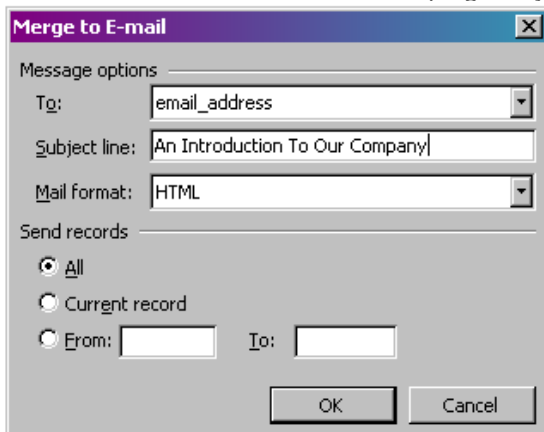
Smith Test Company
Albany Court, Monarch Road
Newcastle Business Park
Newcastle-upon-Tyne
Tyne And Wear
NE4 7YB

Dear Mr Smith


You have the option at this point to preview all of your emails by clicking the  buttons at the top right of your screen. Once these have been checked, you are ready to send out your email.



Click on  to take you to **Step 6**.

Click on  at the top right of your screen and the following window will appear:



A **Subject Line** need to be added at this point for all your emails being sent out. Once this has been entered, click on OK and your email will automatically be sent out through Microsoft Outlook. This can be verified by checking your **Outbox** and **Sent Items** folder within Outlook.

If you have chosen not to create an email merge you will not get the  **Electronic Mail...** option at the end of

the process, you will get the  **Print...**  **Edit individual letters...** options, allowing you to print your letters / brochures / labels, or edit them individually, producing an separate document for each one allowing you to edit them at a later stage.