

Using Mail Merge to Send Email with Microsoft Word in Office 2003/XP

1. On the Pearl Navigator click the **Letters** radio button.
2. **Select** the merge letter from the list displayed, click the **Design** button. Pearl opens the document template in Microsoft Word.
3. Temporarily delete any Pearl hidden text commands (otherwise recipients with email set to 'plain text' format will see them). Look for commands like [Pearl Set DNO=Date()] or [Pearl Chronicle YES] with dotted lines underneath. **Delete the text from bracket to bracket.**
`[Pearl.Set.Dno=Date()]` DO NOT SAVE. (Skip this step if you have no such commands.)

4. Word should already have the **Mail Merge Toolbar** showing (outlined in red below):



(If **Mail Merge Toolbar** is not showing, on the **View** menu select **Toolbars**, then **Mail Merge**.)

5. Preview what your merged emails will look like before you send them. Click on the **View Merged Data** command (circled icon with ABC and red chevrons), then use the **record selector** to scroll through the emails for each record in the query.

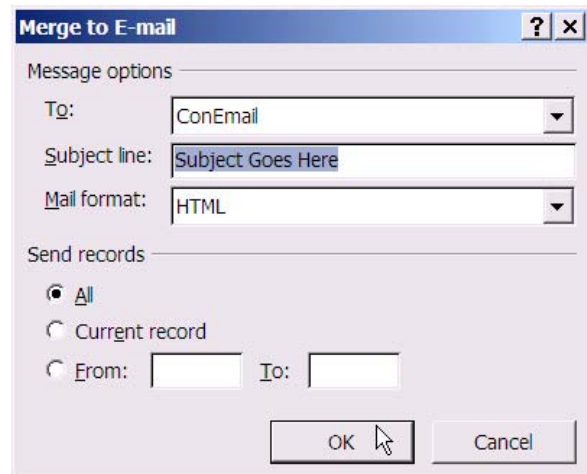


6. On the Mail Merge Toolbar, click the **Merge to E-mail** command (circled below):



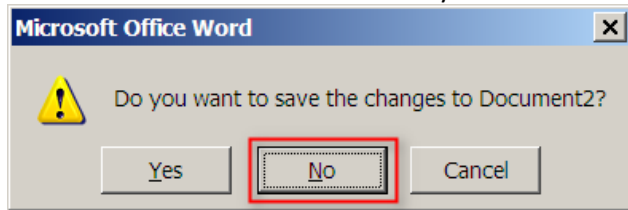
7. In the **Merge to E-mail** window:

- Make sure the **To** field has the correct field name for the e-mail address from the table or query (e.g. ConEmail)
- Type text in the **Subject** line, which will be the same for all of the emails
- Select the **Mail format**
- Under Send records, specify whether you want to send email to **All** records, the **Current record** or a **range** of records.
- Click the **OK** button. **Important Note:** Clicking the OK button will immediately send your email to the recipients without an opportunity to review or edit.



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8. Close the letter and click **NO** to "Do you want to save the changes to [document name]?".



9. To execute the Pearl hidden commands (e.g. update the Sent date or put a copy of the letter in Chronicle) select the letter and click **Preview** from the Pearl Navigator.

Tips & Tricks:

- Letterhead logos and header and footer text must be placed in the body of the document to show when sent as email (will not show if placed in the Word header or footer section).
- If you need additional information on using Merge Letters in Pearl, please review the [Making the most of Merge letters](#) document on the [Publications and Documents](#) page of the Bromelkamp website.
- The field used as the email address field should only contain one email address per record. The email will fail if there are multiple email addresses for a record.
- With merge to email it is not possible to edit and personalize each email. You can only make general changes which apply to all of the emails by modifying the template prior step 3.