

1 Introduction

This article looks at **Easy Mail Merge for Outlook**, a product designed for sending personalised mass e-mails to your Outlook Contacts mailing list. It is intended to help you easily communicate with customers, friends, members, etc. for the purposes of sending newsletters, invitations, etc. by e-mail to keep them informed about new product features, upcoming events and the like. The great thing about Easy Mail Merge for Outlook is that it does not maintain its own database like many other products but rather uses the data stored in your Outlook Contacts folders directly. As a result there is no messy exporting of your Outlook Contacts data into another database, and re-importing back into Outlook to update details about invalid e-mail addresses, etc. This makes it perfect when used in conjunction with Outlook CRM products like [MX-Contact](#).

Although Outlook does have a Mail Merge facility built in, it relies on Microsoft Word to do the mail merging, which is great for personalised letters, but can make the process more complex than it needs to be when all you want to do is send personalised e-mails to your contact/customer base.

Note: To evaluate Easy Mail Merge for Outlook you can download a trial version:

[Download Easy Mail Merge Trial Version](#)

To purchase Easy Mail Merge (US \$ 39.95), click the following link:

[Purchase Easy Mail Merge](#)

2 Relationship Marketing

It is now widely recognised that regular e-mail communication is a vital component in establishing a lasting and trusted relationship with your customers. So it's important to have a simple, easy-to-use but effective means of maintaining contact with your customer base.

Even during the early days of the Internet, business people realized the huge potential of email marketing. However, due to the high level of spamming seen in recent years, more and more people are simply blocking or ignoring marketing emails, especially if they look like junk or bulk emails.

So the question is how to communicate with your contacts in such a way that they can determine the difference between a spam email and your marketing / newsletter email? The answer is of course is to personalise emails so each subscriber receives an email that looks personal. However, without software designed for this purpose, it can take a lot of time to create, personalise and send messages to your entire mailing list.

Using Easy Mail Merge, you can personalise each message, so you can send unique content to each mailing list member. Using records of the imported mail merge fields, Easy Mail Merge allows you to insert variable text or even complex text scenarios.

For example, if you have a product line consisting of 10 products you can send an email to all your customers about upgrading to the latest versions of your products, with different discount coupon codes depending on the product they purchased.

3 Easy Mail Merge for Outlook

Easy Mail Merge is a bulk e-mail product designed for use with Microsoft Outlook. It is designed to help you easily communicate with your mailing list of Outlook Contacts. Easy Mail Merge supports various sources for mail merge sessions, such as Outlook Contacts, Outlook distribution lists or any other mail merge fields stored in regular Windows CSV files. The Outlook Contacts can be in any Outlook Contact-type folder, whether in an Outlook Data File/PST, Outlook Personal Contacts folder (or sub-folders), or Exchange Server Public Folders. This is one of the few products we've reviewed that accesses Exchange Server Public Folders directly, which makes it possible to use with Outlook CRM products such as MX-Contact Workgroup or Corporate Edition that utilizes Exchange Server Public Folders for their data store.

3.1 Features

Easy Mail Merge has several unique benefits which distinguish this product from others:

1. Easy Mail Merge is fully integrated with Microsoft Outlook, but it does not need Microsoft Word for making mail merge sessions;
2. Easy Mail Merge supports various sources for mail merge sessions, such as Outlook Contacts, Outlook distribution lists or any other mail merge fields stored in regular Windows CSV files;
3. Easy Mail Merge features safety features for sending the merged messages, such as allowing you to set delay periods between outgoing emails and to specify how many emails to be sent at once;
4. Easy Mail Merge does not force you to go through a complex interface for sending a simple personalised mass email - you can send the mass merged email as fast as you normally type a regular Outlook email;
5. Easy Mail Merge supports unlimited IF-ELSE logical scenarios, allowing you to define as many merge cases as you need;

3.2 Advantages

Easy Mail Merge has the following advantages

- Easy Mail Merge is easy to use, saving you the time you would need to invest into learning how to use other mail merge solutions, such as the Word mail merge;
- Easy Mail Merge does not use a separate database but accesses your Outlook Contacts directly.
- Easy Mail Merge is an inexpensive “one-time” license purchase. It is software that runs on your PC, not a subscription-based online service that has ongoing costs depending on the number of e-mails delivered. So you don't have to pay for every single message you send out on a recurring basis (what if your user base grows?). Secondly, your activity remains private and safe - you are not giving away your valuable data to any third party (why should they know who you are, what you are communicating and who you are sending to? How are they managing your data? Are they keeping them secure?)

3.3 Disadvantages

Easy Mail Merge does have a few drawbacks when compared with other mailing list management products.

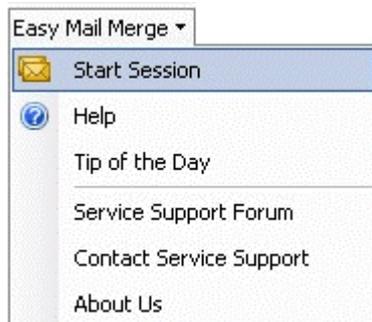
- There is no “bounce back” handling.
- There is no handling of unsubscribes.
- It uses Outlook for delivery of mails, so is slow (when compared to an SMTP mailer). So it is more geared for low volume mass mailings (i.e. don't try it with 20,000 contacts).
- It does not allow the insertion of custom fields into your e-mail message.
- It only allows filtering on Categories (however see a description later of how to get around this).
- It does not allow filtering on custom fields.

4 Operation

Using Easy Mail Merge for Outlook is very simple. Once MS-Outlook is running, you will notice a new Outlook toolbar, named Easy Mail Merge and displayed on the main Outlook window:



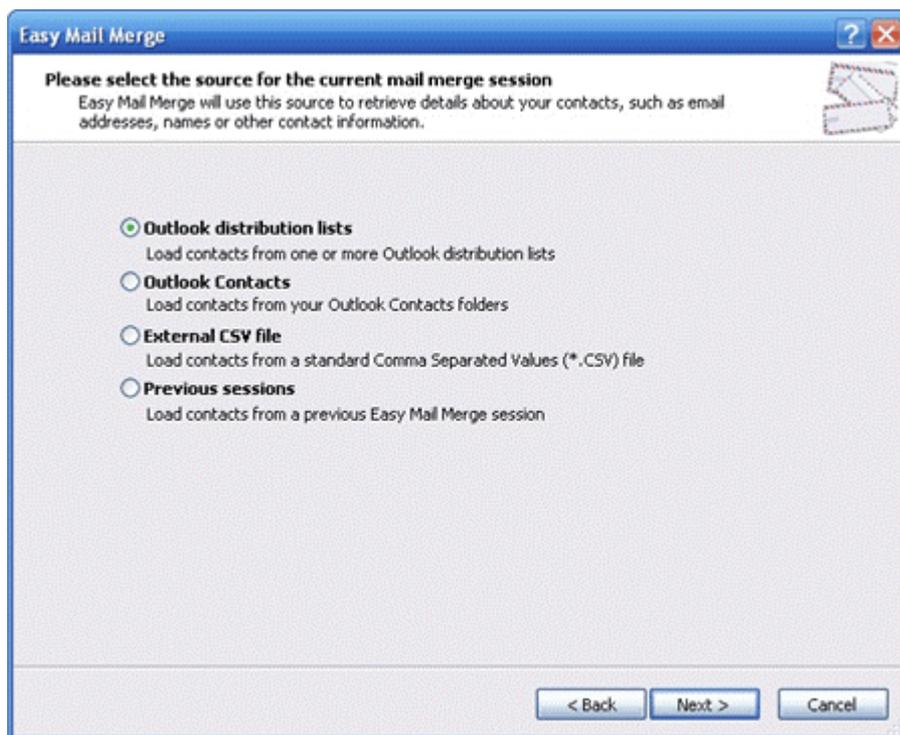
By left clicking on the toolbar button, you can access the main Easy Mail Merge menu. To start your first mail merge, you simply need to click on the "Start Session" button and the data import wizard will open.



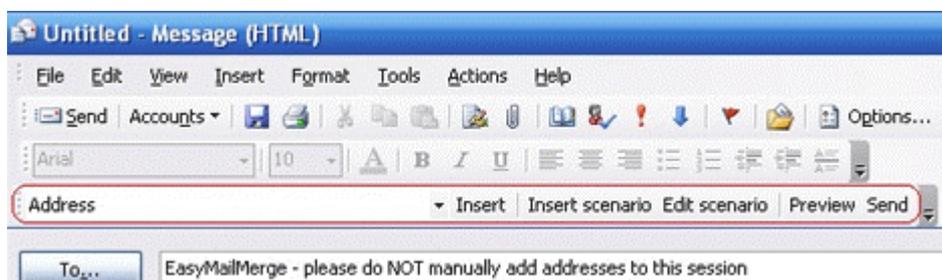
An intuitive wizard interface will guide you through the process of selecting the receivers of your personalised emails. Using the wizard, you can select from where to import the email addresses and related contacts information for the mail merge session. You can choose to:

- Import Outlook distribution lists;
- Import Outlook Contacts;
- Import data from an external CSV file;
- Reuse a previously created mail merge session.

The following screenshot shows the mail merge data import wizard options:

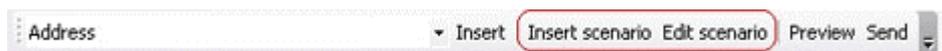


Once you have imported the desired contacts into the mail merge session, you are now ready to start composing the message itself. Easy Mail Merge uses Microsoft Outlook's email editor settings to compose emails. Depending on your Outlook settings, the mail merge wizard will launch the Outlook internal email editor or the MS-Word email editor. You will notice a new Outlook toolbar displayed in the message editor window:

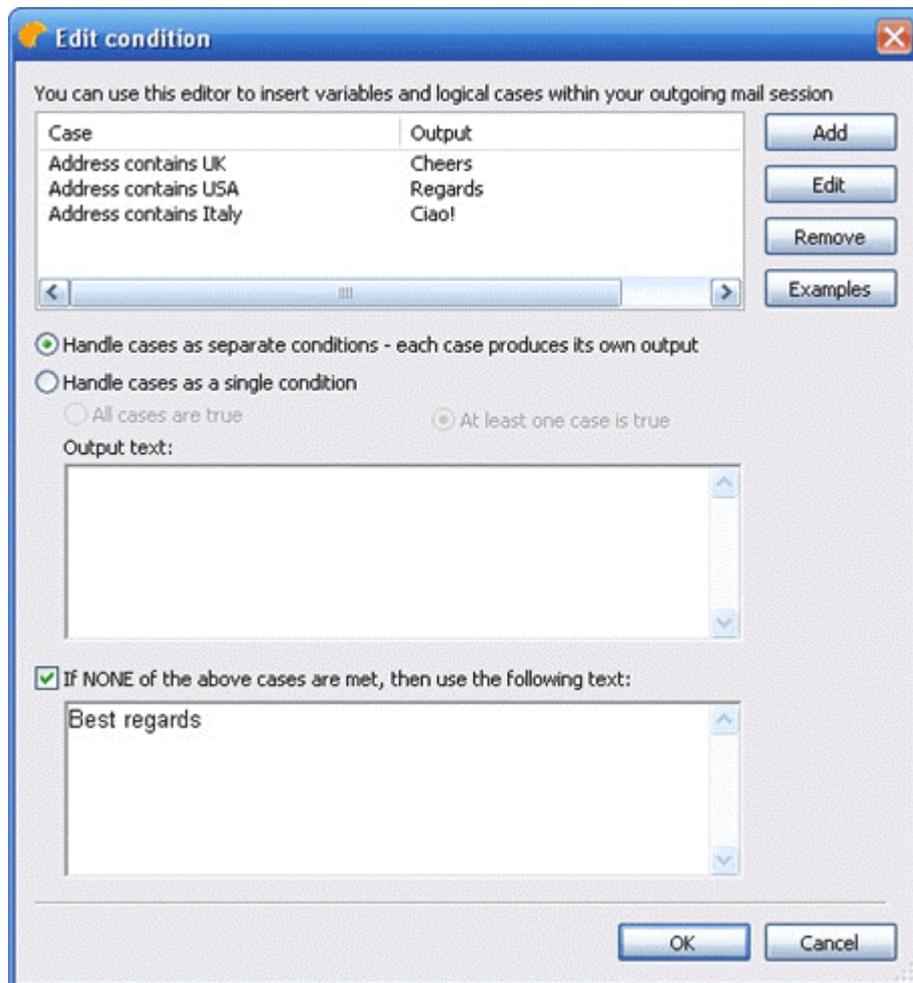


Using the Outlook message editor and the add-in toolbar, you can insert regular text, variable text or text created via logical conditions into the outgoing personalised emails.

The Scenario Editor can be accessed via the Easy Mail Merge toolbar of the Outlook window, while you are editing the outgoing personalised message. In order to insert a new text scenario, you need to focus your text prompter at the message content location where you want to insert the scenario, then click on the "Insert Scenario" button from the toolbar:



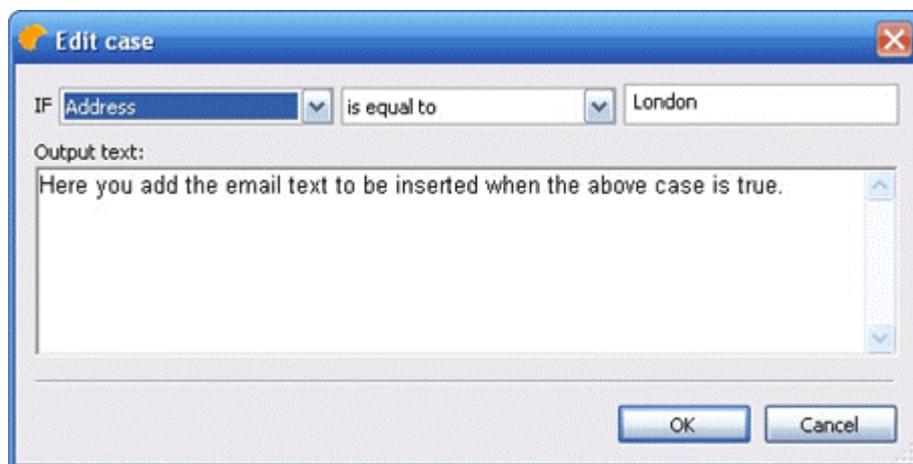
The following Scenario Editor window will open so you can edit the text script for your mail merge session:



To insert a new mail merge case, you need to click on the **Add** button of the above Scenario Editor. The Add button will open the individual Case Editor. The Case Editor has 4 fields:

The first one is the field selector, allowing you to choose to which imported field the case applies;

The second one is the operator of the field, allowing you to choose the true status of the selected field: is empty, is not empty, is equal to, is not equal to, contains.



If you are ready to send out the personalised emails, simply click on the **Send** button from the Easy Mail Merge toolbar. The regular Outlook Send button does not work while you are in the Easy Mail Merge mode. The add-in Send button will open an Easy Mail Merge window, allowing you to specify sending options for the current session:



When sending a mail merge session created with Easy Mail Merge, the program will automatically generate individual outgoing email messages for all your list members. For example, if you have 200 newsletter subscribers, Easy Mail Merge will generate 200 unique, personalised emails, each email having a single member email address in its "To" field.

This is an advantage when used with a product like MX-Contact, because each mail is then automatically linked to the relevant contact, and so will appear in the Contacts E-Mail Tab.

5 Evaluating Easy Mail Merge

To evaluate Easy Mail Merge for Outlook you can download a trial version:

[Download Easy Mail Merge Trial Version](#)

6 MX-Contact: Managing Contact Lists with Outlook/Exchange

If you're looking for an application to assist you with managing a contact list of some kind, whether it be customers, prospects, members, suppliers or whatever, check out [MX-Contact](#). **MX-Contact** is a CRM, Contact Management and Sales Automation package that runs inside Microsoft Outlook 2000, 2002, 2003 or 2007. The system utilises all the standard functionality of Outlook but provides many additional features that transform Outlook into a powerful Contact Management and CRM system.



www.mxcontact.com

MX-Contact has 7 different versions available catering for a single user through to an enterprise with thousands of users, with data storage in an Outlook Data File, Exchange Server Public Folders, or Microsoft SQL Server.

MX-Contact comprises a **Base System**, with optional **Sales, Marketing and Support** modules that can be added at any time. So you can use MX-Contact for managing the contacts and/or companies you deal with, and the interactions (phone calls, e-mails, appointments, etc.) you have with them, plus use it to manage your sales opportunities, events and/or customer support incidents, by adding any of the available modules.



<http://www.free-contact-manager.com/>

7 Using Easy Mail Merge with MX-Contact

7.1 Setting up the Contacts Folder as an Address Book

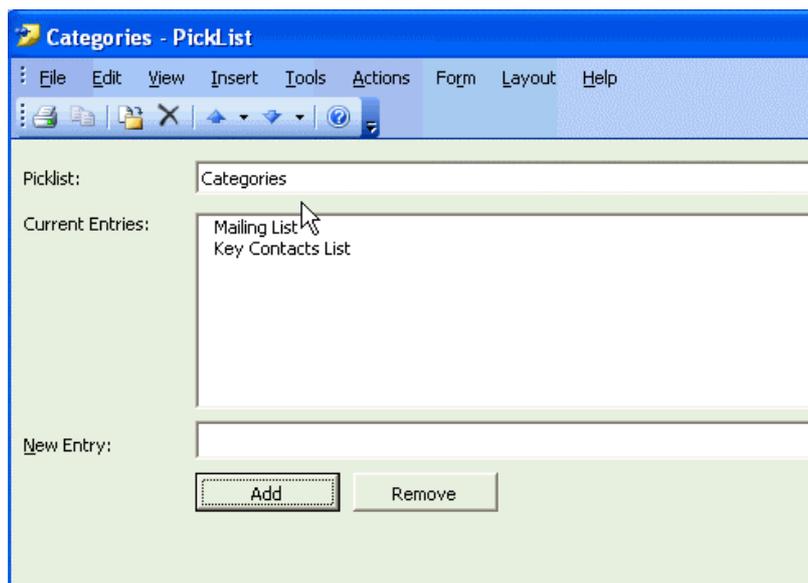
One important point to note if you're using it with MX-Contact or any product that accesses Public Folders (for more information on Public Folders, see [What are Public Folders](#)), is that you must mark the Contacts folder as an Outlook Address Book. For details refer to the link below:

[Setting up the MX-Contact Contacts folder as an Outlook Address Book](#)

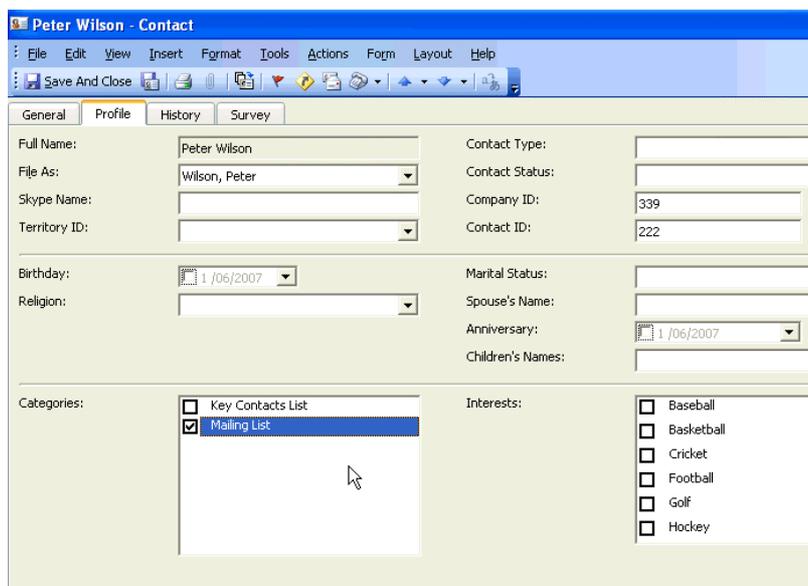
7.2 Defining Categories

Because Easy Mail Merge can only use Categories to filter on, it is recommended that you use the **Categories** field on the Profile tab of the Contact form to flag contacts for your Mailing List. Do as follows:

1. Select the **Picklists** folder from the **MX-Contact** menu (on the main Outlook menu bar).
2. Open the **Categories** Picklist.
3. Add **Mailing List** as a Category, plus any additional categories required:



4. These categories will now appear on the **Profile** tab of the Contact form:



7.3 Updating Categories of Multiple Items

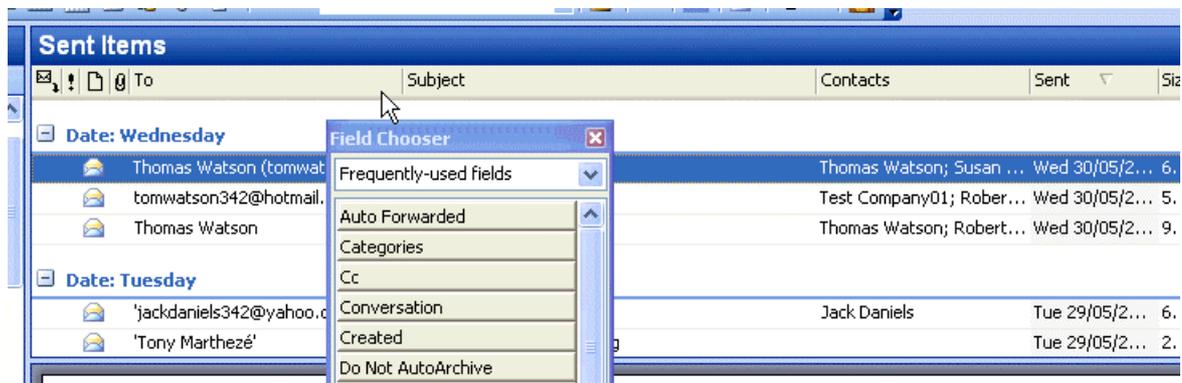
If you want to update the **Categories** field of multiple contacts to mark them as being on your mailing list, please refer to the following Tips/Tricks page:

http://www.outlookwise.com/OutlookWise/Tips_Tricks/Outlook_Updating_Categories.asp

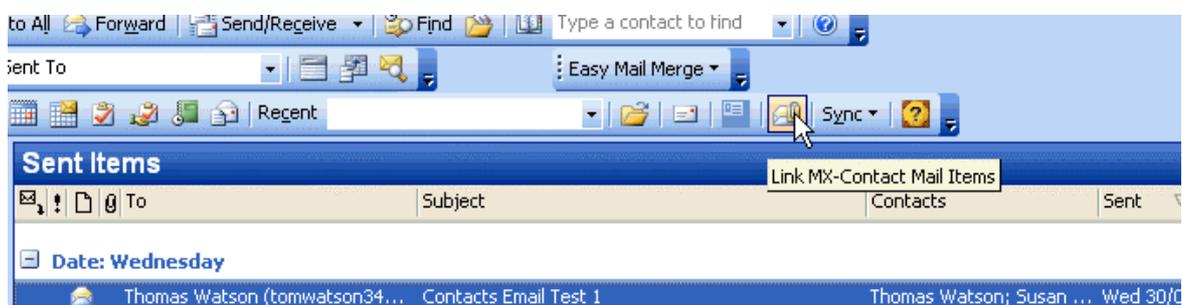
7.4 Linking Sent E-Mails

If you send out a large number of e-mails rapidly in succession, it quite often happens that they will not always be linked automatically to the contacts/company. The reason is because the Outlook New Item “event” does not fire for every mail that lands in the **Sent Items** folder when many mails land in the folder rapidly in succession.

To check this, add the **Contacts** field to the Sent Items view, so that you can see which e-mails are linked. You will find this field in the "All Contacts" list of fields:



Then select those e-mails that are not linked, and click the **Link MX-Contact Mail Items** button on the MX-Contact Toolbar:



This will link all the mails in one operation.

8 About OutlookWise and ExchangeWise

[OutlookWise](#) is both a web site and newsletter aimed at keeping Microsoft® Outlook® users up-to-date with news, information and articles of interest on Outlook and Exchange Server, as well as reviews of add-on products and utilities, all geared to enhancing your knowledge of Outlook and increasing your productivity.

If you've found this article helpful, please [subscribe to the monthly newsletter](#).

If you would like to contribute an idea or article, or tell us about an exciting product or utility that complements Outlook and/or Exchange Server, please feel free to [e-mail](#) us.

OutlookWise is a service to the Outlook community from [ExchangeWise](#), which is a specialist software company focusing on the development and marketing of applications and utilities that enhance the functionality of Microsoft Outlook and Exchange Server.

OutlookWise is edited by [Brian Drury](#), founder of ExchangeWise, and the architect of [MX-Contact](#), a CRM, Contact Management and Sales Automation System for Microsoft Outlook. Brian has over 20 years experience in the IT industry and has focused on CRM, Messaging and Collaboration systems for the last 16 years.