Practice Manager

Email Mail Merge in Practice Manager

Version 5.4.27 and above

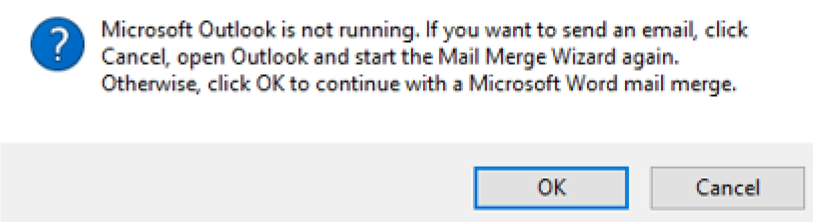
You can easily perform a mail merge from the Find Clients or Find Contacts views using the functionality provided by Practice Manager.

Note: Microsoft Outlook must be running before starting a mail merge. Do not exit out of Outlook while sending emails.

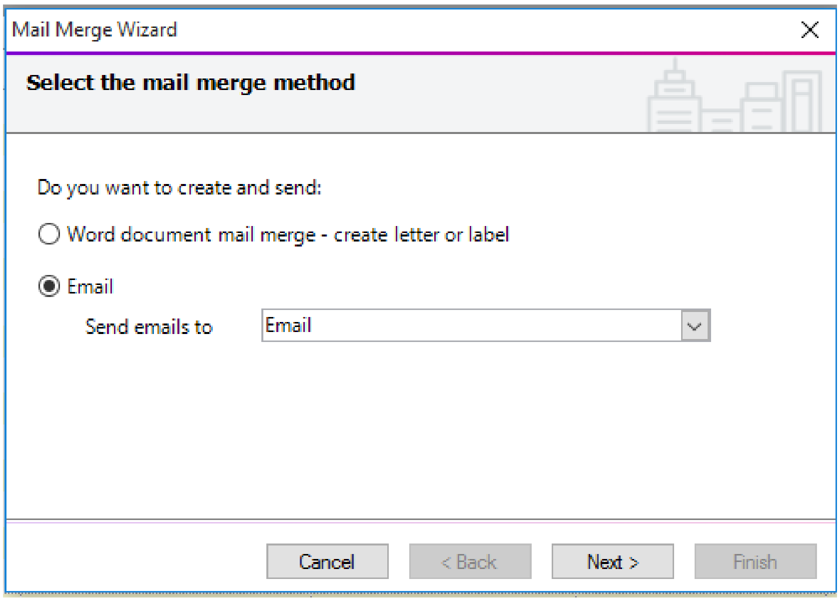
If Outlook is closed during the mailing process, then refer to Knowledge Base article KB 39163 - Troubleshooting emailing issues

How to complete a mail merge

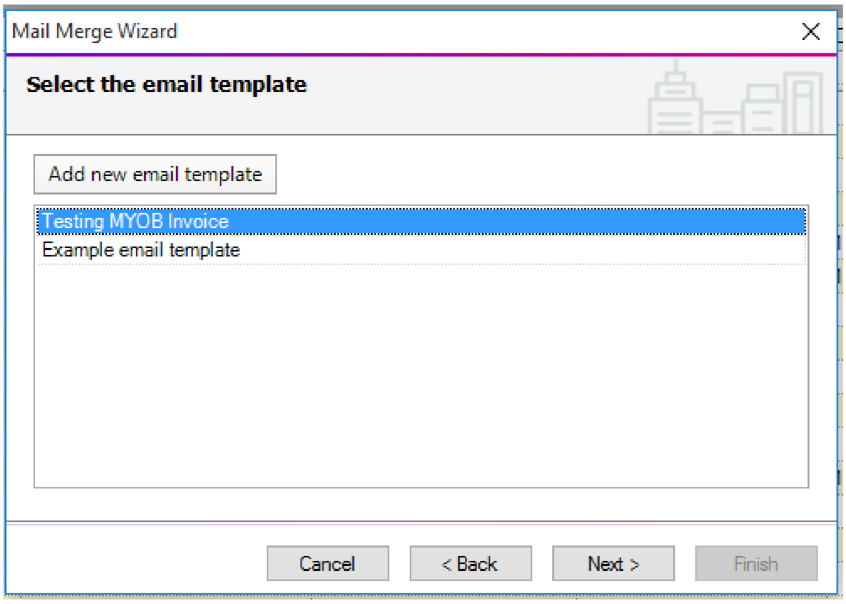
1. Use the Search functionality provided by the **Find Clients** or **Find Contacts** views to create a list of recipients associated with your mail merge.
2. Click the checkboxes to select clients/contacts to be included in the mail merge.
3. Click **Mail Merge Wizard** in the Documents menu on the Task Bar.
   The following screen now appears if Outlook is not running. Click **Cancel**, open Outlook and start the Mail Merge again.



4. **Select the mail merge method** of the Mail Merge Wizard is displayed.



5. Select **Email** as you are wanting to email each client.
6. Select the appropriate email address type in the **Send emails to** area. The system will default in your primary email address.
7. Click **Next**.
   Select the email template of the Mail Merge Wizard is displayed.



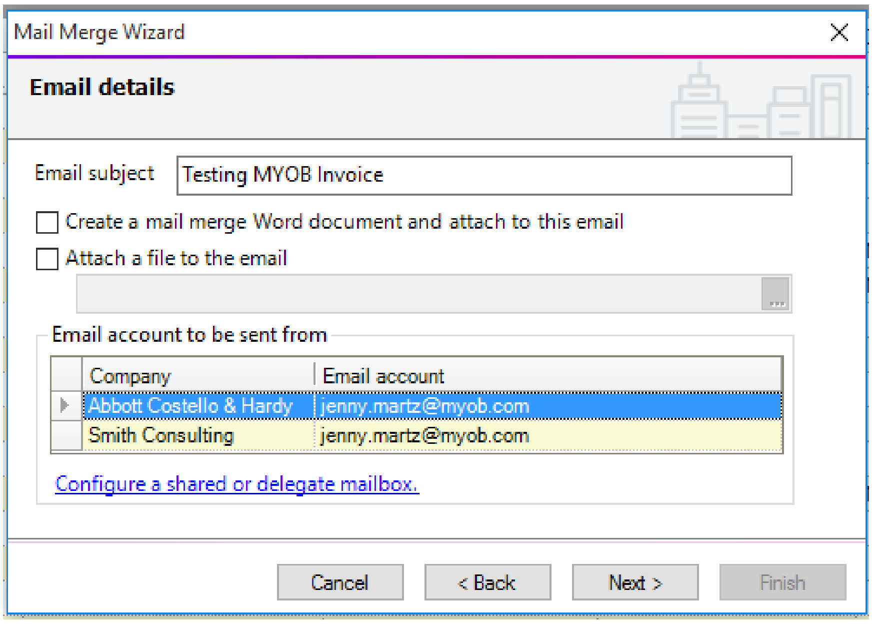
8. Select the appropriate **Email template** from the list.

To create an email template.
Select **Add new email template**.

To edit an email template
Right click on the template and select **Edit template**.

For more details refer to online help.

9. Click **Next**. **Email details** of the Mail Merge Wizard is displayed.



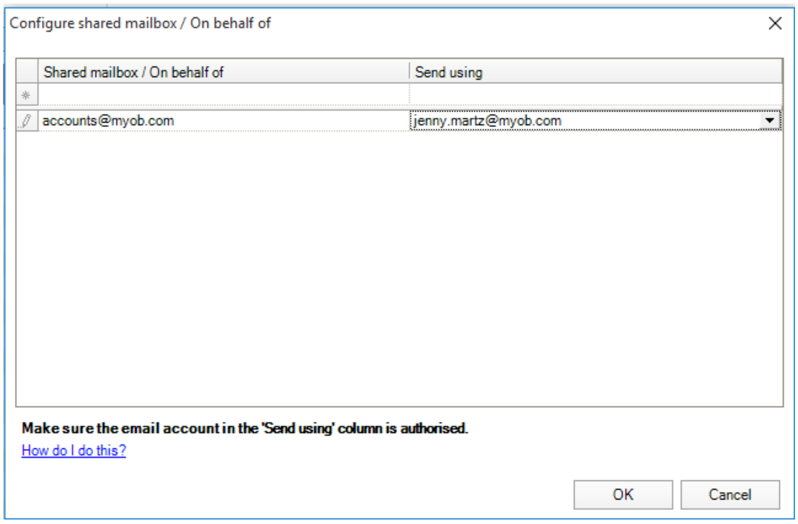
10. The **Email subject** will default from the email template but can be changed if required.
11. Select **Create a mail merge word document and attach to this email**, or **Attach a file to the email**, if you wish to do so.

Note: If you have chosen to Create a mail merge word document and attach to this email, the screen shots will differ when you click **Next** and are discussed later in this document.

12. In the **Email account** to be sent from section:

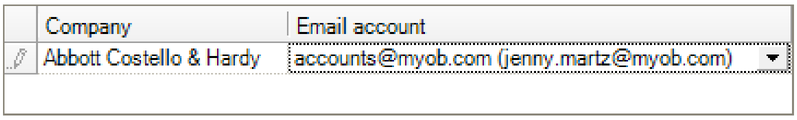
- You can scroll through the **Company** column to see the list of companies assigned to the contacts you have selected
- The **Email account** column is blank the first time you come into this screen.
- Click the **Email account** drop-down to select the email account, delegate account, or shared document used for sending emails. A separate email can be assigned for each company in the list.
- Emails in this list are retrieved from your Microsoft Outlook profile.
- We'll remember the most recent email you selected.

Click **Configure a shared or Delegate mailbox** to configure your mailbox settings:



To enter your mailbox details:

- Type the name of a shared mailbox or delegate email address in **Shared mailbox/On behalf of**
- Select the authorised email address from the **Send using** drop-down
- Click **OK** to save the entry
- You can now select the shared mailbox from the **Email account** drop-down:



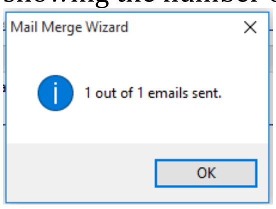
To delete a shared mailbox entry, highlight the row and press [**Delete**].

Tip: To check if your email account is authorised, click **How do I do this?**
Press [F1] for detailed information in our online help.

To use a secondary Microsoft Outlook profile:

- Click Back
- Close and reopen Microsoft Outlook
- Select the Outlook profile containing the email address you wish to send from
- In the **Mail Merge** wizard, click **Next**
- Select an email from the **Email account** drop-down.

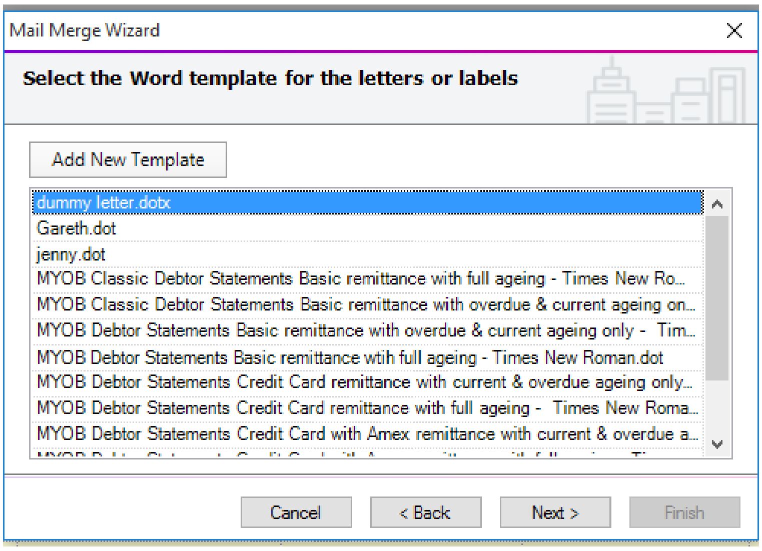
13. After clicking **Finish**, the emailing process is complete and you'll see a message showing the number of emails sent and not sent.



Note: If you encounter any issues then refer to Knowledge Base article 39163 "Troubleshooting emailing issues".

If you selected "Create a mail merge word document and attach to this email", the following screen will appear.

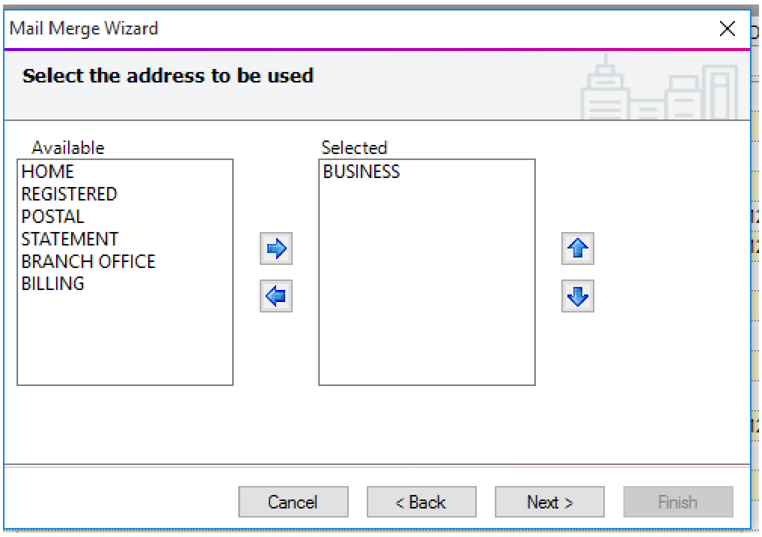
(If you are doing a straight email or attaching a file only, then this screen will not appear.)



1. Select the **word letter template** and select **Next**.

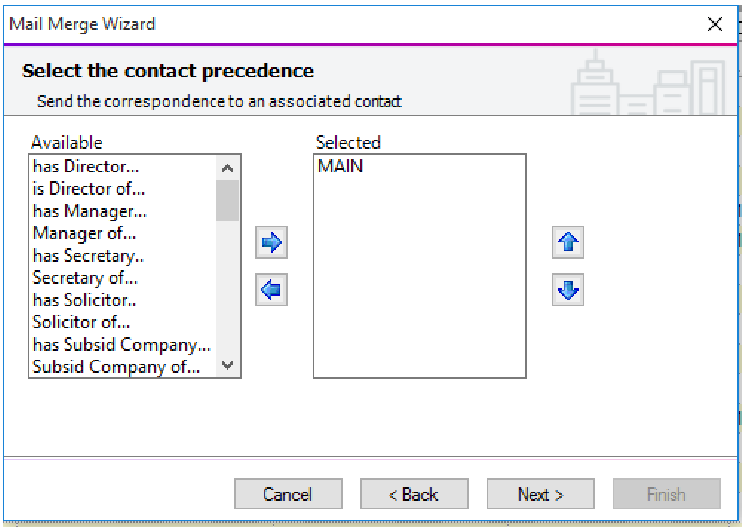
   Select the address to be used of the Mail Merge Wizard is displayed.

(If you are doing a straight email or attaching a file only, then this screen will not appear.)



2. Click **Next**. **Select the contact precedence** of the Mail Merge Wizard is displayed.

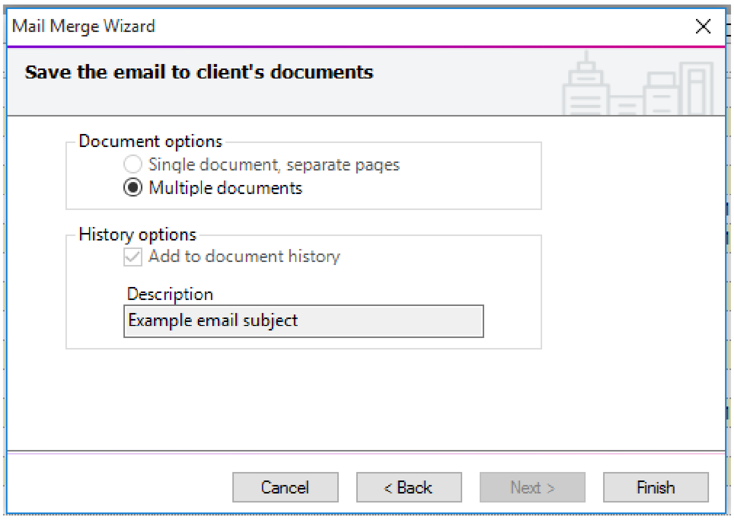
(If you are doing a straight email or attaching a file only, then this screen will not appear.)



Note: This can be changed to have another association type above MAIN – for example, "has mailing contact", where the system will address the letter to that person at the company and email to that person's email address and not the companies email address.

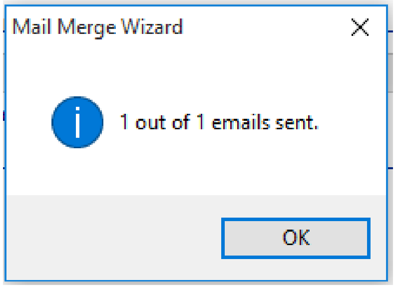
3. Select **Next** to continue.

   Select the Save the email to client's documents **of the Mail Merge Wizard is displayed.**



4. The system defaults to Multiple documents. Click **Finish**.

5. Once all emails have been sent the following window is displayed.



Troubleshooting emailing

For steps on troubleshooting the emailing process, refer to Knowledge base article KB 39163 - Troubleshooting emailing issues