Document Manager

Email Mail Merge in Document 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 Document Manager.

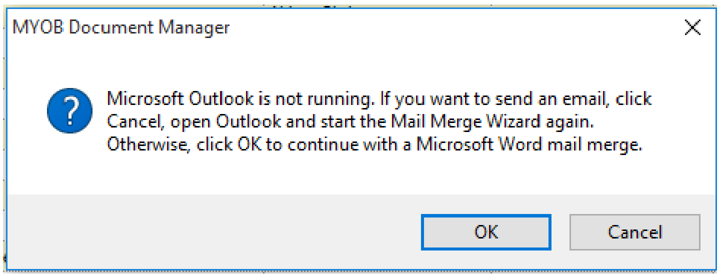
Note that when Document Manager is installed, this mail merge functionality replaces the original mail merge functionality that was available.

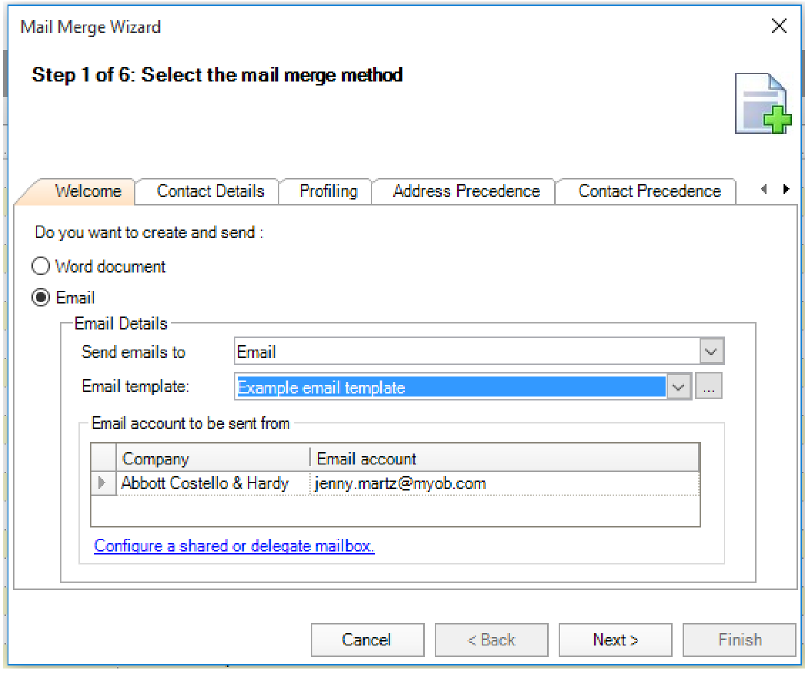
Note: Microsoft Outlook must be running before starting a mail merge. Do not exit out of Outlook while sending emails.

If Outlook is closed during the mailing process, then refer to 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.
   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.





3. Select **Email** as you are wanting to email each client.
4. Select the appropriate email address type in the **Send emails to** area. The system will default in your primary email address.
5. Select the appropriate **Email template** from the drop-down 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.

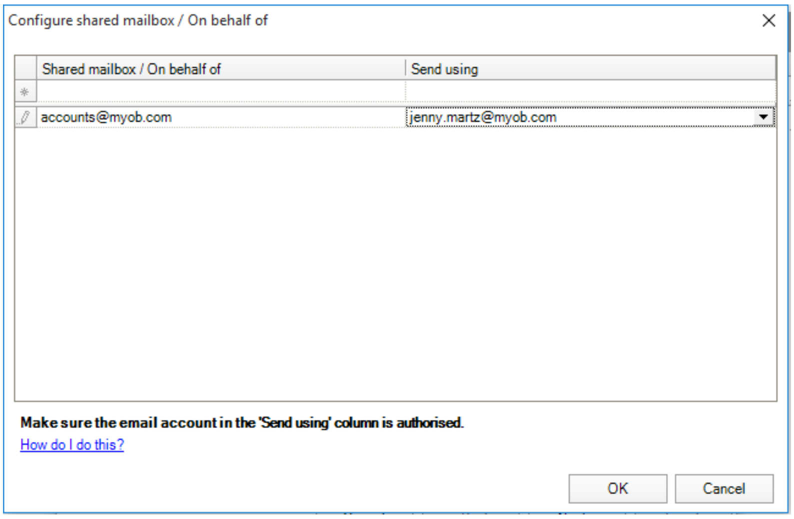
6. In the Email account to be sent from section:

   - 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.

To use a secondary Microsoft Outlook profile:

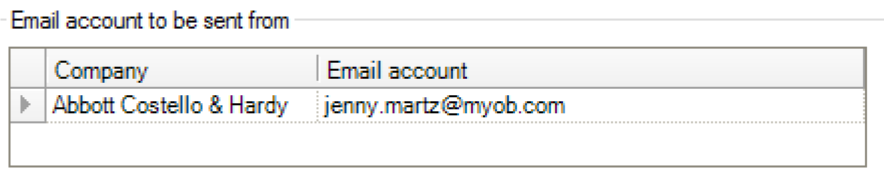
- Click Back.
- Close and reopen Microsoft Outlook.
- Select the Outlook profile containing the email address you wish to send from.
- In the **Mail Merge** wizard, click **Next**.
- Select an email from the **Email account** drop-down.

7. To configure the shared mailbox settings, click **Configure a shared or delegate mailbox**. The table in this window contains a list of manually-configured shared mailboxes.



To enter your shared 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:



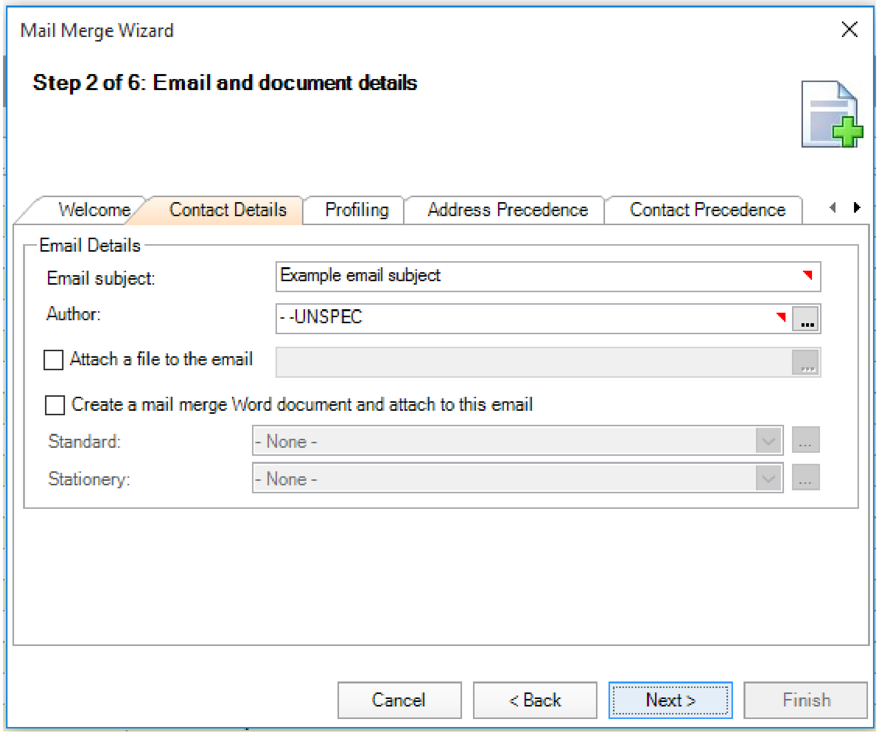
To delete a shared mailbox entry, highlight the row and press **[Delete]**.

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.

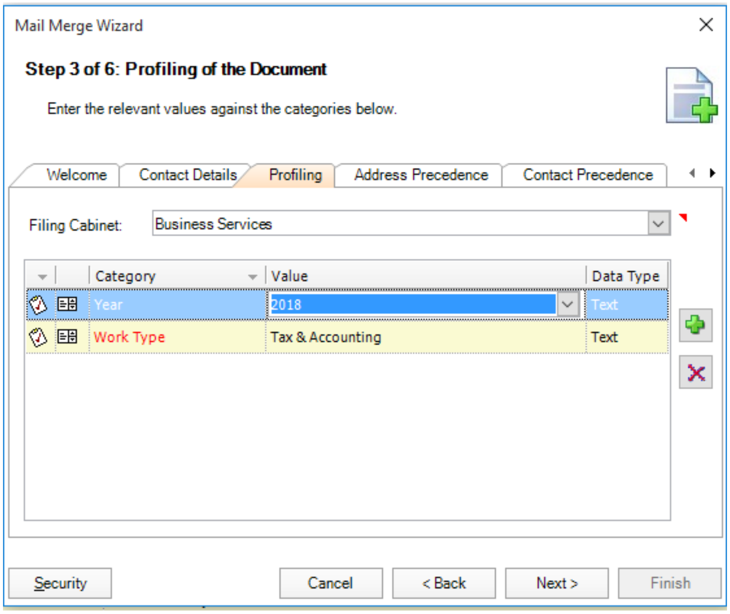
8. Click **Next**. Step 2 of the Mail Merge Wizard is displayed.



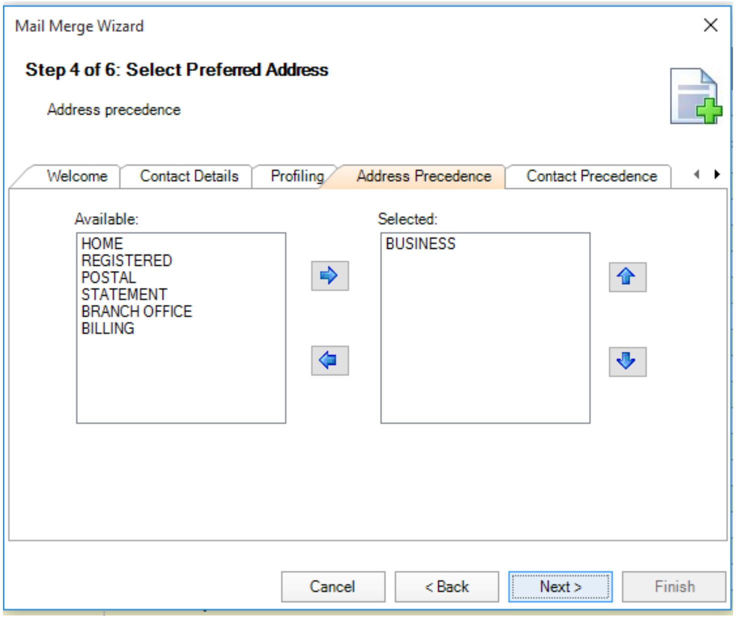
9. The **Email subject** field is automatically filled with the details from the selected email template but can be changed if required.
10. Select the **Author**.
11. Select **Attach a file to the email** if you wish to do so.
    Alternatively, select **Create a mail merge word document and attach to this email**. If you have ticked this option, you will need to select a **Standard** item from the drop-down list or use the ellipsis button to search for the item.

    Select a **Stationery** item to apply a layout and format to the mail merge document, unless the selected Standard does not require one.

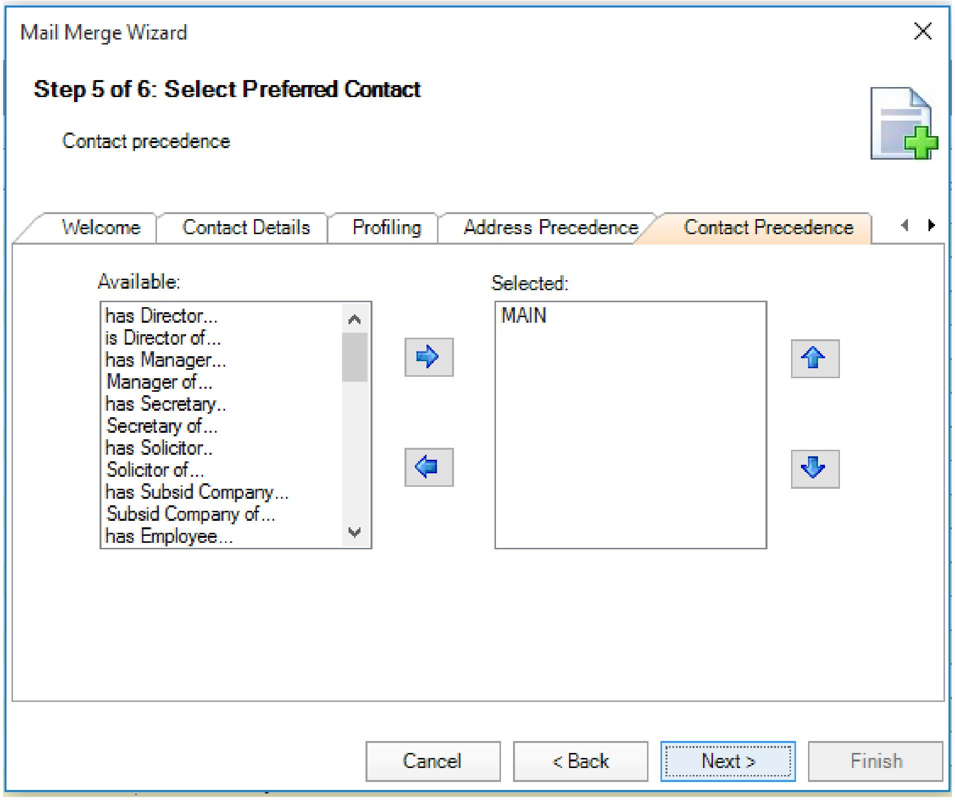
12. Click **Next**. Step 3 of the Mail Merge Wizard is displayed.



13. Select a **Filing Cabinet** from the dropdown list.
14. If **Category** items are displayed, enter values in the relevant fields if required, then click on the **Next** button.
Step 4 of the Mail Merge Wizard is displayed.



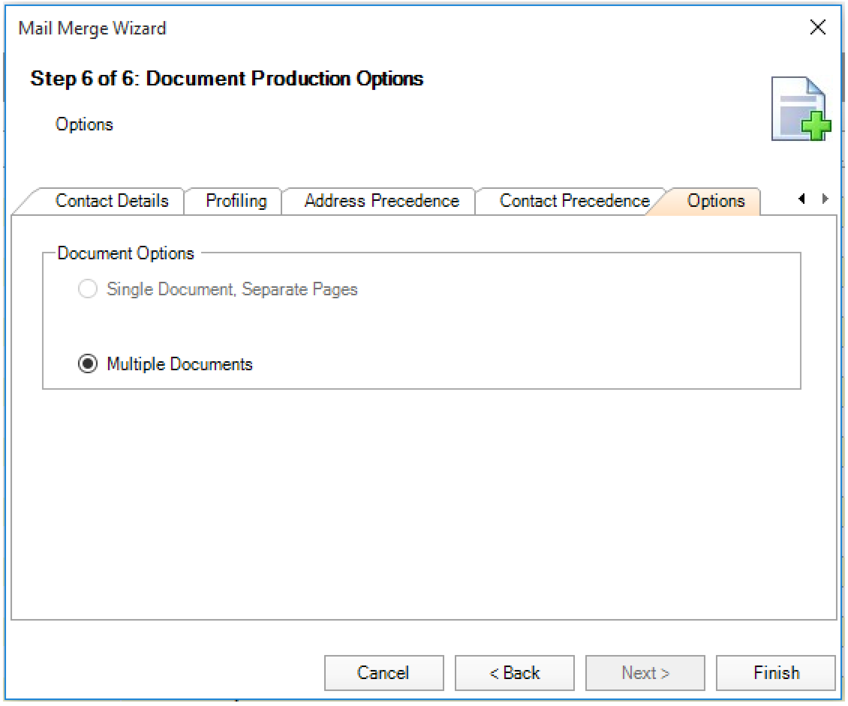
15. The system will default to your Primary address type. This can be changed if required by using the arrow buttons.
16. Select **Next** to continue.
Step 5 of the Mail Merge Wizard is displayed.



17. Select the contact precedence – the system defaults to Main.

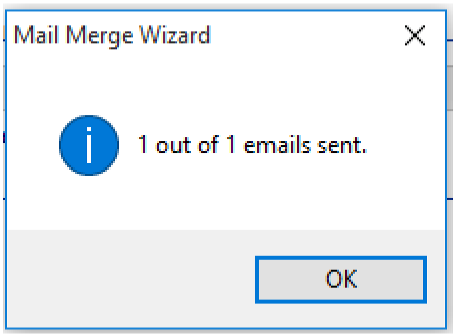
Note: This can be changed to have another association type above MAIN – for example, "has mailing contact", where the system will address the letter to that person at the company and email to that person's email address and not the company's email address.

18. Click **Next**. Step 6 of the Mail Merge Wizard is displayed.



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

Once all emails have been sent a notification appears showing how many emails were sent successfully.



Troubleshooting emailing

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

Australia
1300 555 666
accountants@myob.com.au
myob.com

New Zealand
0800 94 96 99
accountants@myob.co.nz
myob.com