

- The messages will go to your drafts folder and then be sent the next time Outlook does a send/receive

To create a mail merge:

1. Plan to do a test run – before actually completing this with your list, send the message to yourself and perhaps a co-worker as well.
2. Make sure your template is good to go and exactly the way you want it to be sent
3. Create a lookup of the contacts you want to send the mail merge to
4. Do the merge:
 - From the “Write” menu in ACT!, choose “Mail Merge”
 - Click “Next” to skip the welcome screen
 - Choose “E-mail” and click “Next”
 - Hit the “Browse” button and select your template, then click “Next”
 - Select “Current lookup” and click “Next”
 - Enter the subject line and select the e-mail record history type you’d like to use (see the “E-mail history types” box earlier in this guide for an explanation)
 - If you wish to send an attachment with the e-mail (same attachment for all recipients) click the “Add” button and choose your file.
 - “Return Receipt” will request that each user opt to send you a return receipt once they’ve read your message
 - Click “Next”
 - Choose what ACT! should do if you’ve selected anyone with no e-mail address. If you don’t care that some might be missing their e-mail address, choose “Omit those records from the e-mail merge” else I suggest the last option which will stop the merge and show you who is missing an address.
 - Click “Finish” to complete the merge

Best Practices for Mail Merges

Here are some useful tips to keep in mind when working with mail merges:

- Some users report Outlook crashes when sending merges to large numbers of ACT! contacts. Try to keep your merges to somewhere around 50 contacts or less. Your mileage may vary.
- If you are sending large numbers of e-mail merges, you increase your risk of being flagged for sending spam, which can lead to your recipients not getting your message. Consider an e-mail marketing service like Swiftpage / ACT! E-marketing for sending blasts to large groups.

ACT! Features Within Outlook

Once you’ve successfully configured e-mail integration with Outlook in the ACT! preferences and restart Outlook, you may notice you’ve got some new icons and features. ACT! integration provides a number of convenient ways to enhance productivity and give you flexible control over what e-mail gets recorded to history.

The ACT! Toolbar

The most obvious sign of ACT! and Outlook integration is the appearance of the ACT! toolbar inside of Outlook, which adds four new buttons to the mail screen.