

Creating HTML Email Blasts in WinSearch

Overview

What is an HTML Email?

- HTML emails have formatting, such as colored text or graphics
- Can be more powerful than a plain text email
- Provides the ability to add images such as company logos

Emailing from WinSearch vs. Word

Emailing from WinSearch

- Emails are logged as one list of names in Activity Log
- **Salutation** field is pulled for email personalization
- Can use all emails for listed people
- Logged emails are logged individually

Emailing from Word Mail Merge

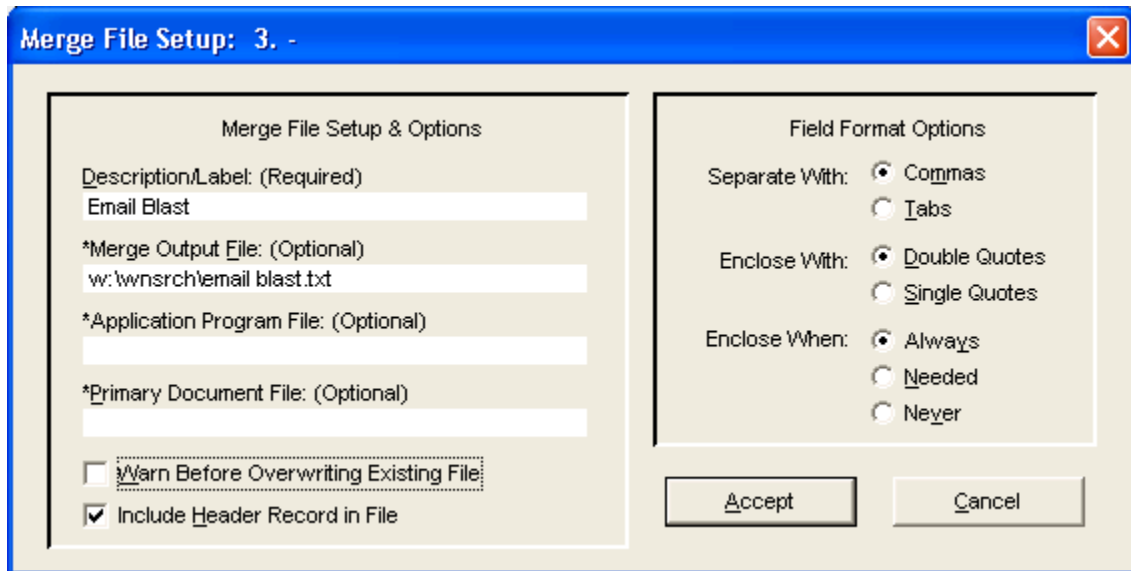
- Emails are logged individually in Activity Log
- You choose whether to use **Salutation** or **First Name** for personalization
- Any filtering for **No Bulk Email**, as setup in WinSearch, is ignored
- Can only use **Primary Email** address

Four Steps to Set Up your Email Blast using WinSearch & Word

Step 1: Create a Mail Merge template for Email Blast in WinSearch

1. Pull up any person, or a list of people in WinSearch.
2. Select the **REPORTS → STANDARD REPORTS** command.

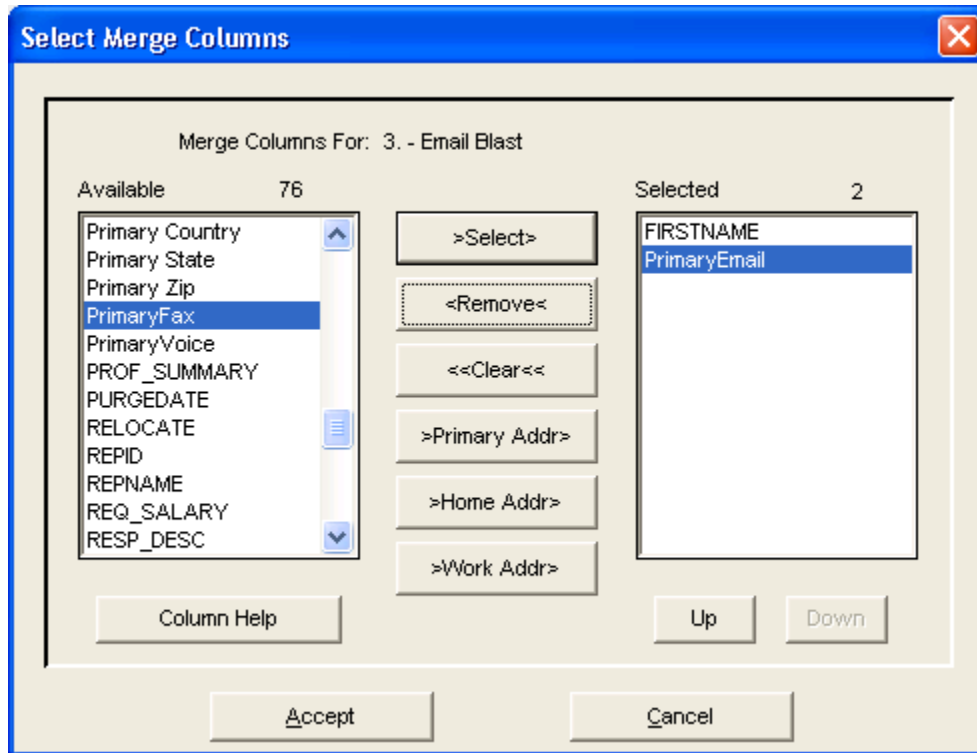
3. Select the **Merge File** button.
4. Select a number (1 through 9) for this new mail merge under Available Merge File Options.
5. Select the Setup Options button to see a dialog box like the one shown below:



6. In the Description/Label field, type a description for this mail merge (e.g. Email Blast).
7. In Merge Output File, type a path and filename for where you want to put the resulting data. The file's extension should be .txt. An example might be W:\WNSRCH\Email Blast.txt or hit **F2** to browse to create a file.
8. In Primary Document File, type a path and filename for where you want to put the Word document that generates the emails. The file's extension is usually .docx. An example is W:\WNSRCH\Email Blast.docx or hit **F2** to browse to create a file.
9. Clear the **Warn Before Overwriting Existing File** check box so you do not have to respond to a reminder when the merge data file you are about to create will replace an existing file.
10. Choose the **Accept** button.

Step 2: Specify your Columns in WinSearch

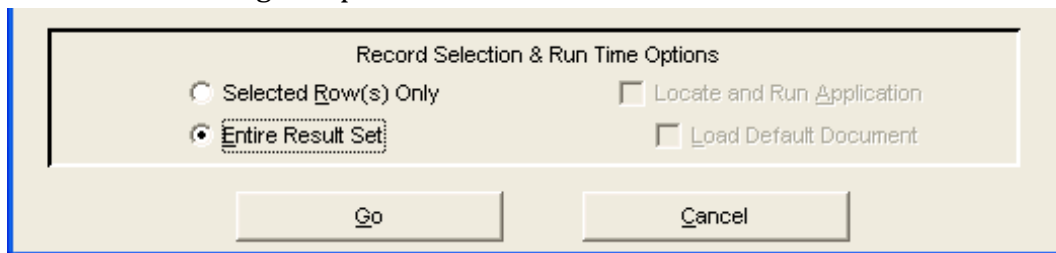
11. Select **Specify Columns** in the **Create Merge File Options** dialog box.



12. Choose the entries that you want available in the mail merge. At a minimum, you need **PrimaryEmail**. You may also want to include **FIRSTNAME**, **LASTNAME**, **COMNAME** (Company Name) or any other entries that you want to include in the body of the email.

14. Choose **Accept** once you have selected all the appropriate fields.

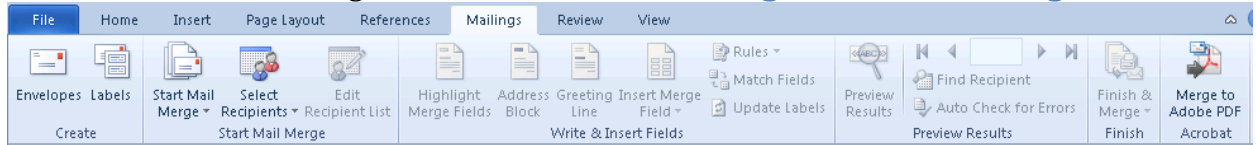
15. Select **Entire Results Set** in the **Create Merge File Options** dialog box, then select **Go**. You will get a message saying that WinSearch has written a number of records to the merge output file. Select **OK**.



16. Open Microsoft Word and start with a new, blank document or an existing document of the email that you have prepared to send.

Step 3: Complete Merge Setup in MS WORD

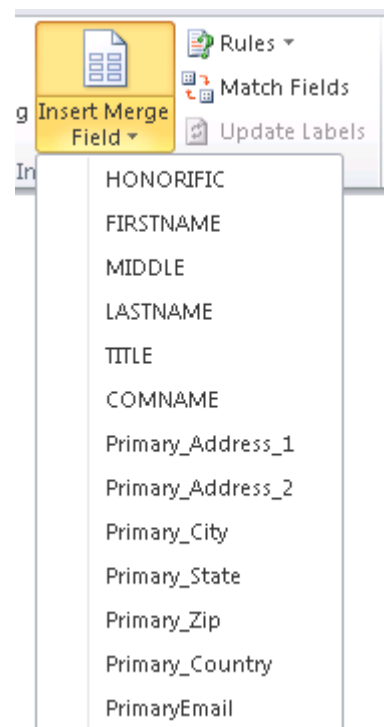
17. Switch to the Mailings ribbon then **Start Mail Merge** and **E-Mail Messages**.



18. Click the **Select Recipients** button and then choose **Use Existing List**.

19. Find and double-click the merge output file that you created in WinSearch. You will need to change Files of Type to All Data Sources or to Text Files (*.txt).

20. Type what you want to put in the email in the body of the document. You are likely to modify this each and every time you send the blast email. Remember that you can also click the **Insert Merge Fields** button to add entries from the person such as the first name.



21. Click on **Finish & Merge** button in the Mailings ribbon then choose **Send E-Mail Messages**.

22. Choose PrimaryEmail for the To entry and enter the Subject line for the emails that you are about to send.

23. Choose **OK**. At this point, the emails are sent out one-by-one. You will start to see them appearing in your Outbox and/or Sent Items.

24. Select the **FILE** → **SAVE** command in Word, and save this document to a location that you will subsequently choose in WinSearch. If you want to share this mail merge primary document with other WinSearch users, put the file in a network location.

25. Close Microsoft Word.

Step 4: Complete the mail merge blast setup

26. In WinSearch, Select the **REPORTS** → **STANDARD REPORTS** command again and select the **Merge File** button.
27. Choose the option number that you are setting up and choose **Setup Options**.
28. Move to **Primary Document File**, press **F2** and find the Word document that you saved in step 20. Hit **Accept**.

Merge File Setup: 2. - Email Blast

Merge File Setup & Options

Description/Label: (Required)
Email Blast

*Merge Output File: (Optional)
w:\wnsrch\email blast.txt

*Application Program File: (Optional)

*Primary Document File: (Optional)
w:\wnsrch\happy holidays everyone.doc

Warn Before Overwriting Existing File

Include Header Record in File

Field Format Options

Separate With: Commas
 Tabs

Enclose With: Double Quotes
 Single Quotes

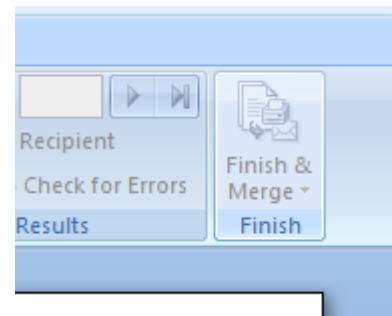
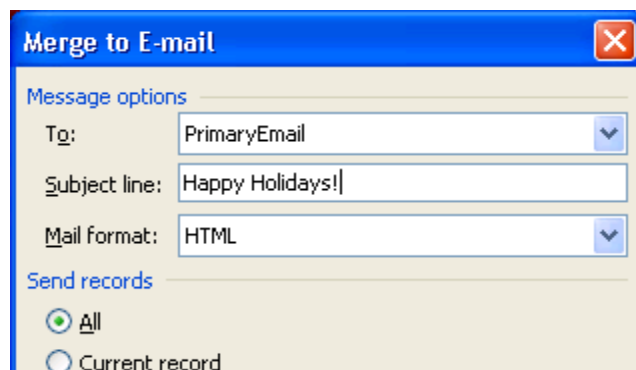
Enclose When: Always
 Needed
 Never

Accept Cancel

29. You can now choose **Cancel** to the **Create Merge File Options** dialog box to finish with its setup. If you want, you can test it out using the steps described under *Using an Existing Email Blast Mail Merge*.

Using an Existing Email Blast Mail Merge

1. In WinSearch, select the people whom you want in the resulting email blast. This can be by using Lookup features, a person's form or table window, a search list containing people, or a saved list containing people.
2. Select the **REPORTS** → **STANDARD REPORTS** command to open the **Standard Report Options** dialog box.
3. Select the **Merge File** button to open the **Create Merge File Options** dialog box.
4. Select number 1 through 9 for the mail merge settings that you have set up for the email blast. Each number represents a collection of mail merge settings including which entries from a person is placed in the resulting data file. You can create your own as described in the following sections.
5. Choose **Entire Result Set** to include everyone in the list. **Selected Rows Only** allows you to pick which records that you want in the email blast.
6. Select the **Go** button. This will create the merge data file, start your word processor, and open the Word document.
7. Edit the Word document to contain what you want in the email blast.
8. Click on **Finish & Merge** button in the **Mailings ribbon** then choose **Send E-mail Messages**.
9. Type the emails **Subject** in that text box and choose **OK**.



Querying a Saved List to Skip No Bulk Emails

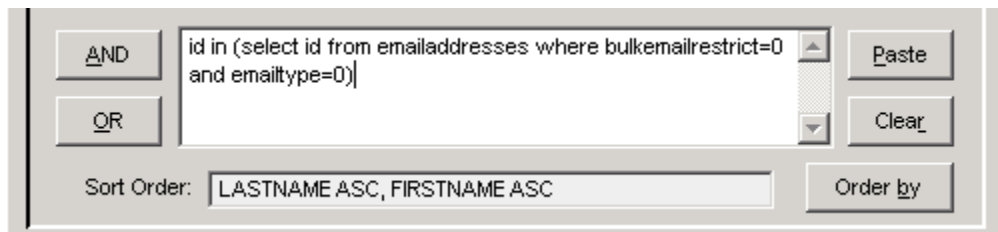
You need to be able to skip the people whom have indicated that they do not want bulk emails. To do this, you want to put the people whom you will send the blast email to into a saved list and then from the saved list, run the query before creating the merge. Once you have the saved list and the memorized query set up, the day-to-day operation is limited to:

- Clear out the previous contents of the saved list.
- Add the people whom will get the blast email to the saved list.
- Open the saved list that you have for this purpose.
- Execute the memorized query to omit those whose primary email address has been marked to not receive bulk emails. This is done with the **Query | Memorized Queries** command.
- Send the blast email.

To set up the memorized query which you only need to do once:

1. Login as the SYSADM user if possible so that the memorized query is available to all users.
2. Open any saved list.
3. Select the **Query | Advanced SQL Query** command.
4. Put the following text in the box in the middle:

id in (select id from emailaddresses where bulkemailrestrict=0 and emailtype=0)



The screenshot shows a query editor window. On the left, there are two buttons labeled 'AND' and 'OR'. In the center, a text box contains the SQL query: 'id in (select id from emailaddresses where bulkemailrestrict=0 and emailtype=0)'. To the right of the text box are two buttons: 'Paste' and 'Clear'. Below the text box, there is a 'Sort Order:' label followed by a dropdown menu showing 'LASTNAME ASC, FIRSTNAME ASC' and an 'Order by' button.

5. Click **New**
6. Type **Saved List Exclude Bulk Emails** or something similar for the name of the memorized query.
7. Select the **Public** and **Show On Menus** check boxes.

8. Click **Save** to retain this query.
9. Click **Execute** to verify that you have set up the query criteria correctly.

To create a Saved List for Blast Emails which you set up once and continually reuse:

1. Select the **Lists | Saved Lists** command.
2. Select the **New** button
3. Type **Send Blast Emails** or something else as the name of the saved list.
4. Select **Save** to create the new list.

To clear out a Saved List for Blast Emails (so you can fill with a new list)

1. Select the **Lists | Saved Lists** command.
2. Find the saved list among the listed names.
3. Choose Clear then OK to the confirmation prompt.

To put people into the saved list

1. Find the person in a form window or highlight one or more people in a table window regardless of whether the people are listed in a persons table, search list, saved list or contacts/employees detail table.
2. Start the process of adding them to the list with one of these steps:
 - Select the **Edit** menu and choose **Add Record(s) to List**
 - Right-click the row and choose **Add Record(s) to List**
3. Highlight the saved list to add the highlighted people then choose **Select**.