Allied Financial Software Knowledgebase

How do I perform a mail merge to a group but have the mail merge use email?

Solution: Once your template has been created, make sure that all contacts in the group that you are going to merge to have a valid email address. If any do not, some or all of the mail merge may fail.

To perform a mail merge to a group, follow these steps:

Click the large Groups button on the bottom toolbar. If no group is currently selected, it will display . A list will appear displaying the groups in the open database. Click the desired group to select it. The counter on the main toolbar will change to show the number of contacts in the group. This group is now the current lookup. Choose the Write menu, and click Mail Merge. The Mail Merge dialog box appears. In the Template group box, select the template that you want to use, Do not double-click it. Under "Send output to," click E-mail. Click Current Lookup. Enter a subject, and check desired options. Click OK to begin the mail merge. Do not stop the merge once it has begun.

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