



Last Updated: April 2007

II.4 Sending Emails with RE using Outlook

This document outlines the steps for sending emails from Raisers Edge using Microsoft Outlook. Note that this type of merge is also possible from within Microsoft Word ONLY if you use Outlook for your email, and that no other mail programs have worked during testing.

1. Create a query of people to send the email to (See “Queries” help for details if needed)

a. Required Criteria

Solicit Code not equal to “Do Not Solicit”

b. Required output fields

i. Constituent ID

Note that this is only required if you want to be able to import the action that this email was sent to the people back into RE

ii. First name

iii. Last name

iv. Org Name

v. Email address

2. If this is a recurring email, save your query.

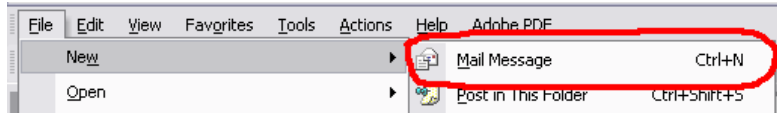
3. Run the query as an export to excel 97-2000.

See “Queries” help for details if needed

4. Open Microsoft Outlook



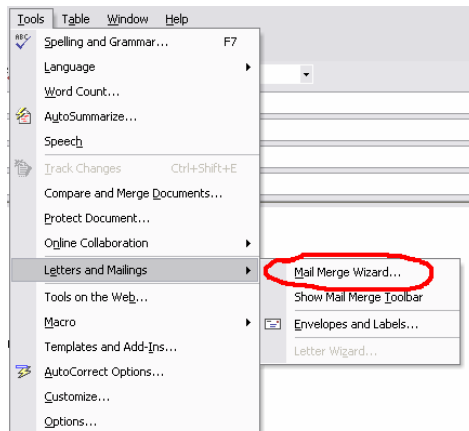
5. Click File, New, New Mail Message, or the new message button on the toolbar



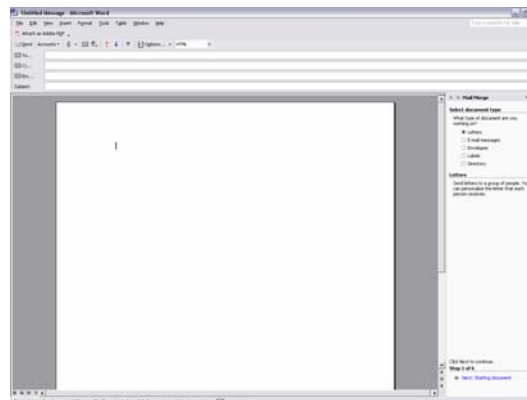
Then



6. Click anywhere in the body of the message
7. Click Tools, Letters and Mailings, Mail Merge Wizard



A new “menu” should appear on the right side of the email

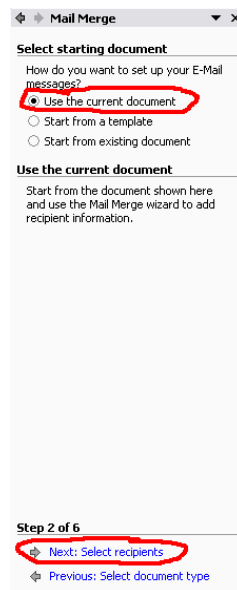




8. Click “E-mail Messages” then click next

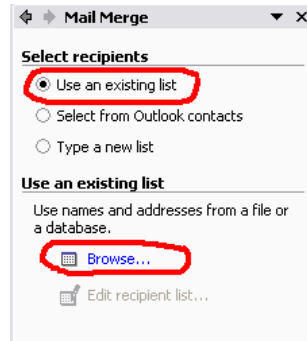


9. Leave “Use the Current Document” selected and click the “Next: Select recipients” link.

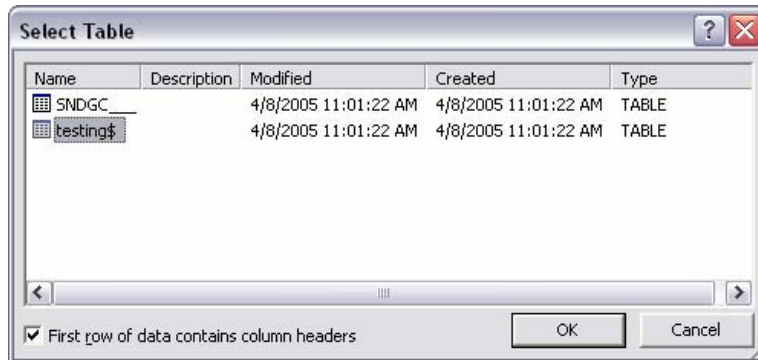




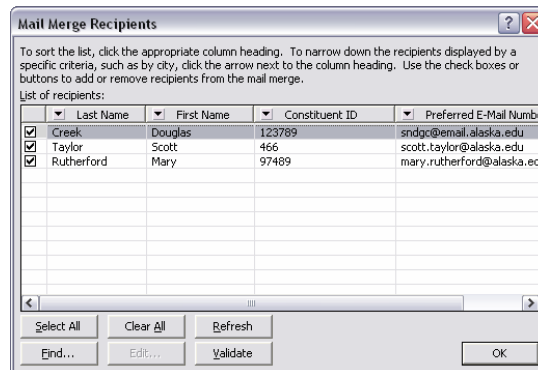
10. Leave “Use an existing list” selected and click “Browse”



- a. Browse to your excel file and click Open
- b. Click the excel sheet that you created (there is no difference between the sheet with a dollar sign and the one without)

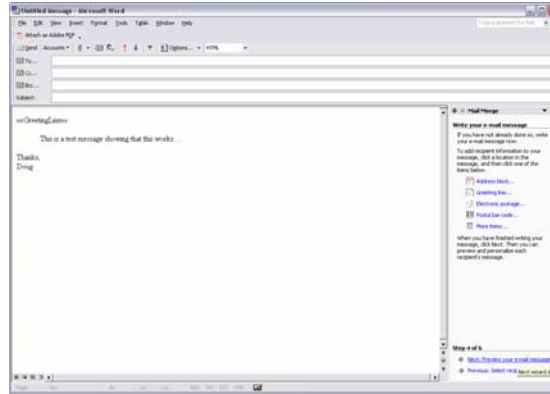


c. Ignore the sort fields options and click ok



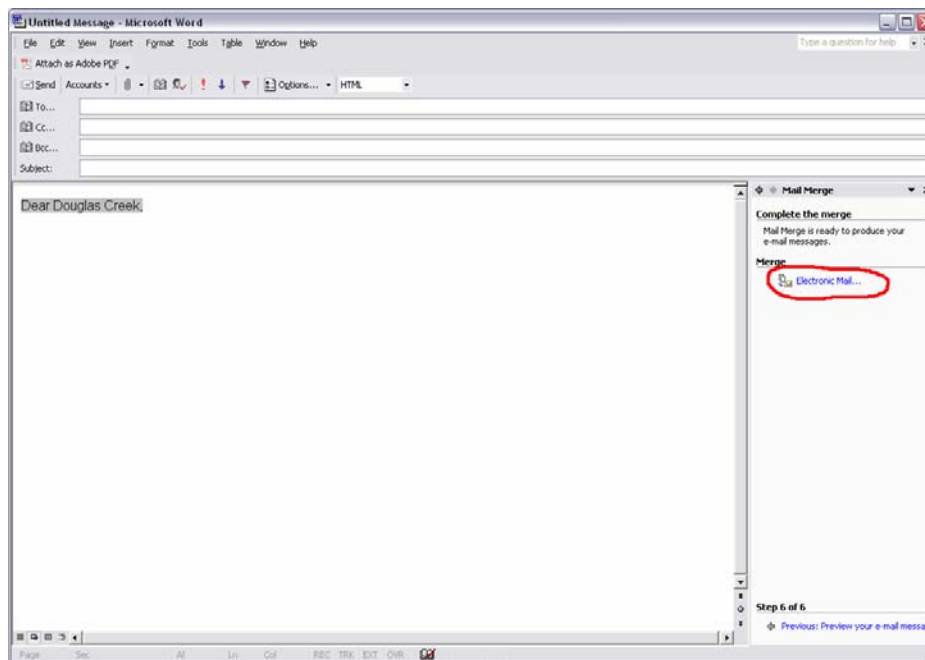
d. Click next to write the letter

11. Write your letter



- The blue fields on the right allow you to select addresses and salutations you would like to have automatically put into the message
- Note that “more items” will allow you to add other fields that you may want dynamic, such as a campus code or gift amount.
- Click next to preview the letter

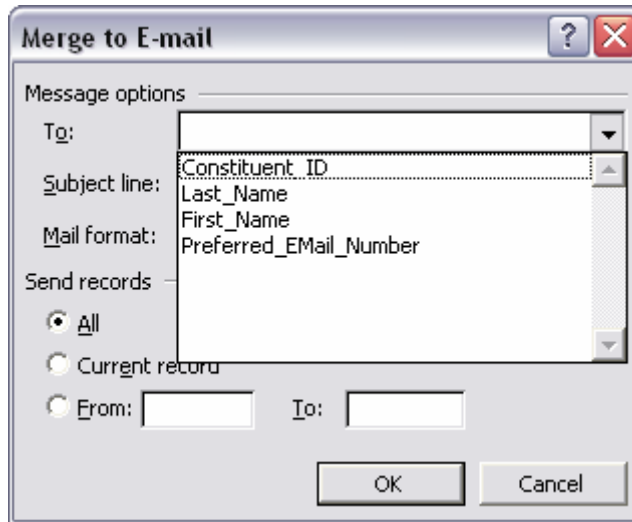
12. Click next to complete the merge



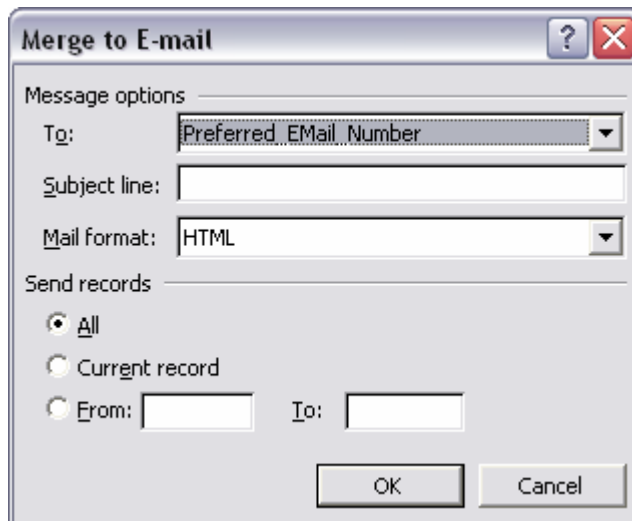


13. Click electronic mail

- a. Select your email heading for the “To” dropdown



- b. Enter a subject if needed



- c. Click Ok

Note that when you click ok, outlook is going to send the message and it is not possible to stop it from sending, so be sure that you have everything as you want to send it out.