

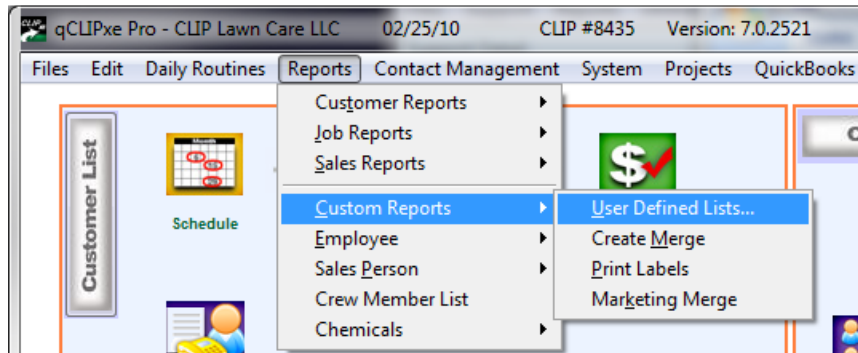
CLIPxe Tips Guide - Emailing Merges

Prerequisites for this guide:

1. You must have office 2007 or higher installed and working (including Word, Outlook, and Excel).
2. You need to have a good understanding of mail merge (look at the Mail Merge 2007 manual on our website if you do not currently understand how to use clip with mail merges).
3. You must be using Clipxe or QClipxe.

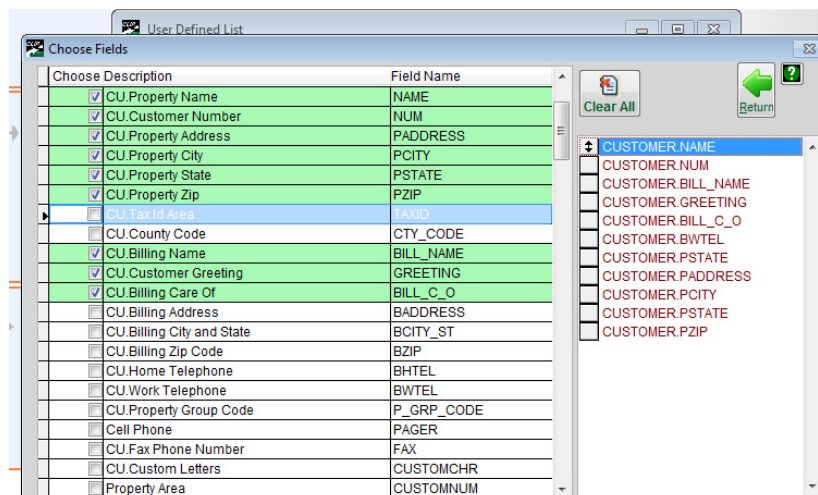
Emailing Merges with the User Defined List

1. Go to Reports>Custom reports>User Defined list.

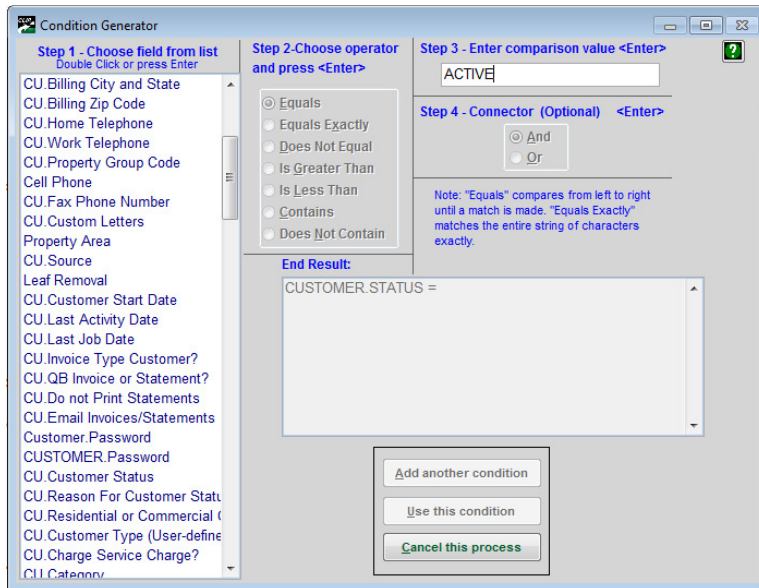


2. Setup the report with the fields and conditions necessary, or choose from your current reports. If you need help with this please see the manual on Mail Merge In Office 2007 document.

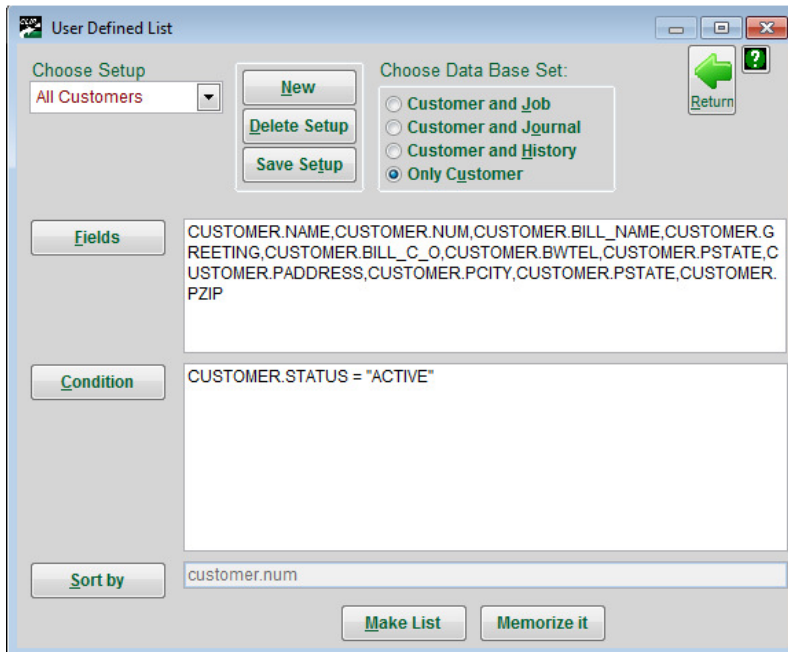
For this mail merge I am just including the fields necessary to get the basic customer information on a document (Account number, name, greeting, billing name, billing care of, property address, city, state, zip, and the work and home telephone).



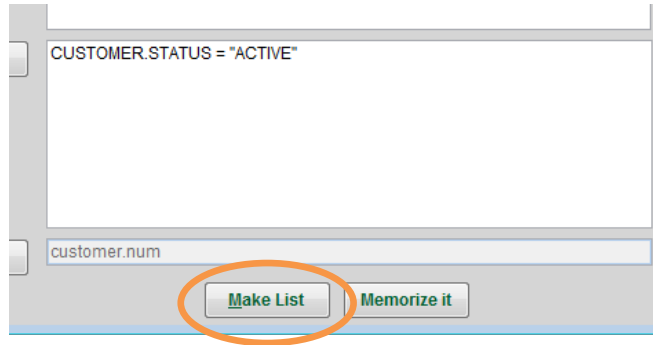
For this example I am just using a condition of customer status is active:



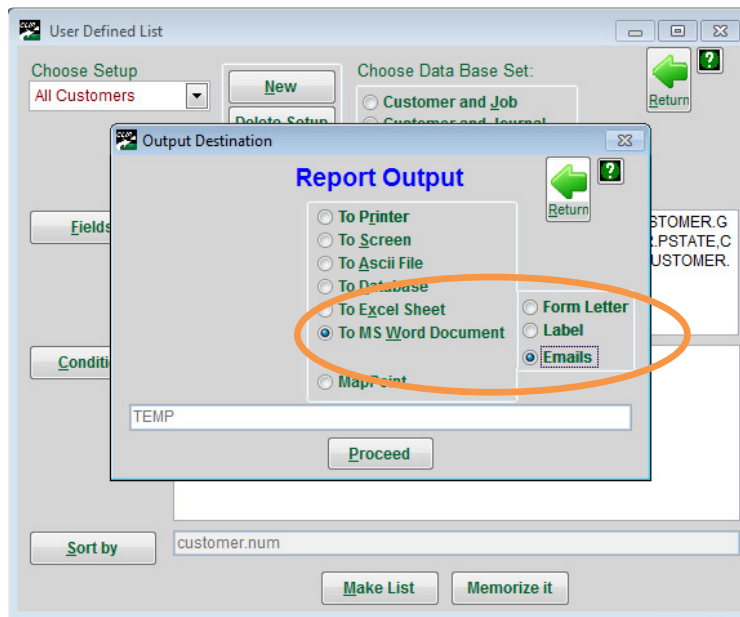
So here is the information that I have under the User Defined list:



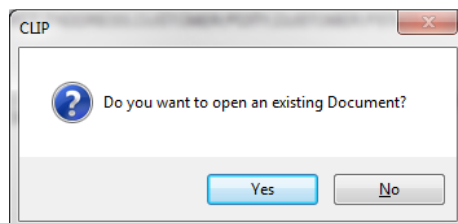
3. Now click on the make list button on the user defined list.



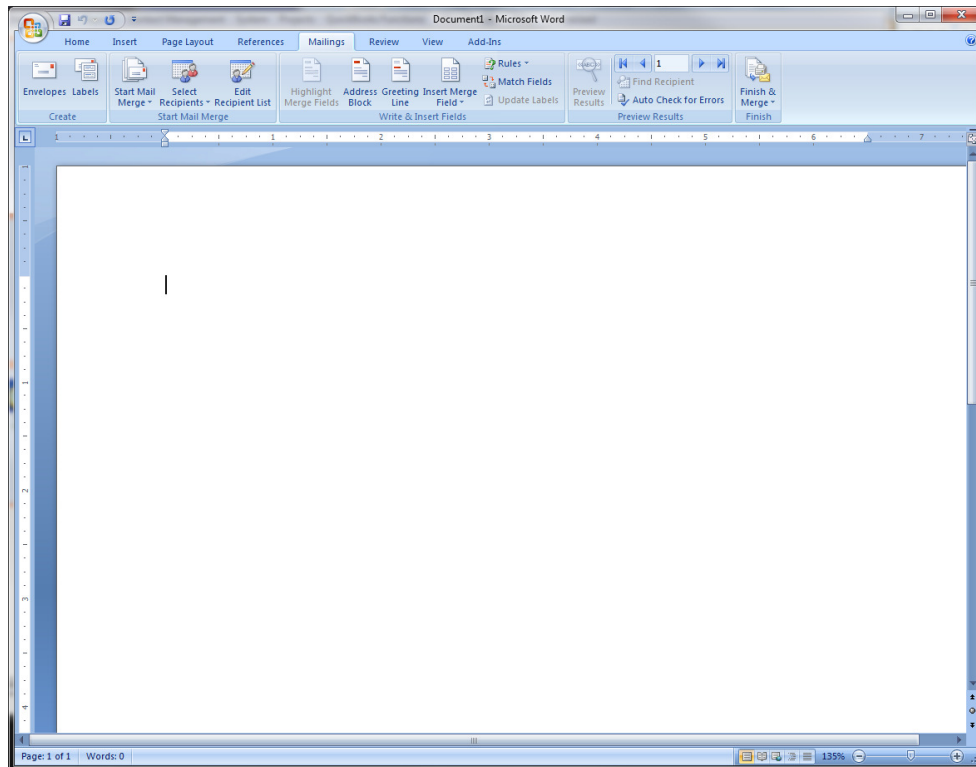
This pops up the Report output list. Choose the "To MS Word Document" option. Then click on the "Emails" option (note that this is only in the 7.0.2521 version or higher).



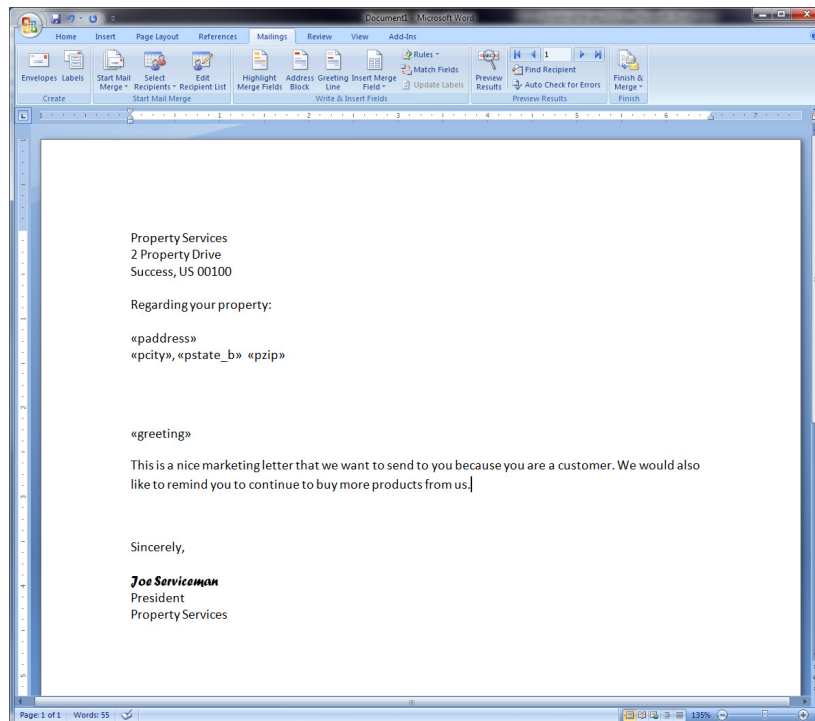
Clip will ask you if you want to open an existing document. For this example I will click on no and create the merge from a blank document.



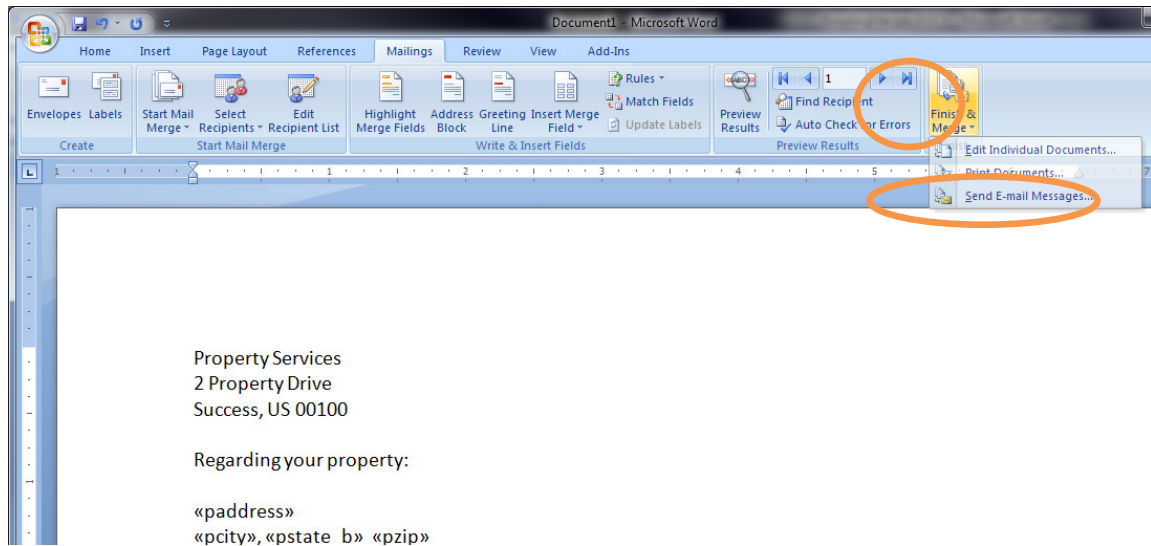
Now Microsoft word opens up with my new document:



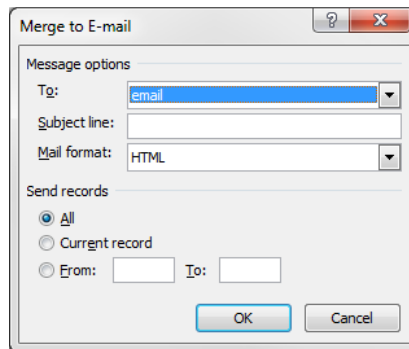
Insert your merge fields and format as shown in the Mail Merge with Office 2007 manual.



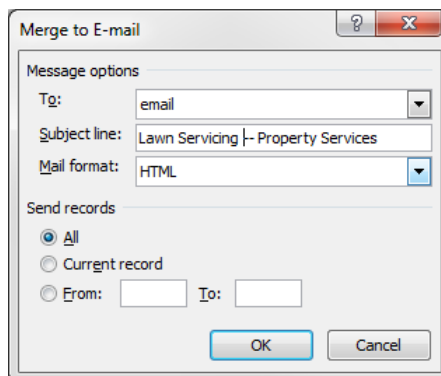
Click on the "Finish and merge button" Then click on the "Send Email Messages..."



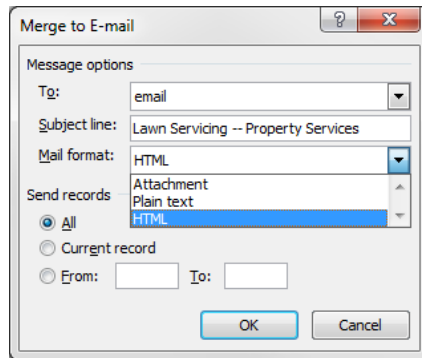
Then make sure that the "To" field has the "email" field in it.



Type out the subject line as you want it to appear as the Subject for the email.



Choose the "Mail format" from the dropdown list.

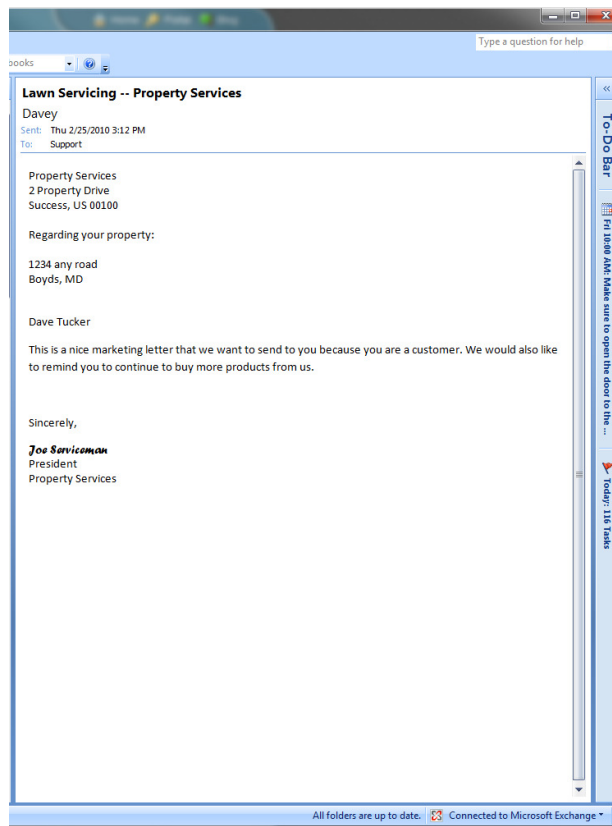


The 1st option "attachment" will include the email as an attached word document in the email.

The second option "plain text" will send it with only the text in the email. This should not be used if you have pictures in your document.

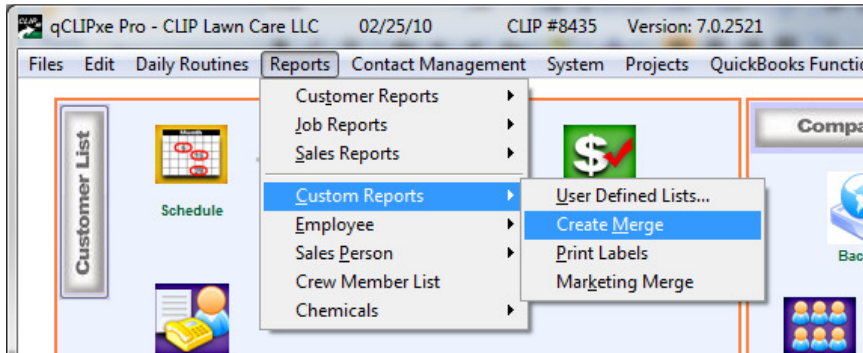
The third option "HTML" will send it with your document inside of the email, and it will include any pictures inside of the document in the main body of the email. This usually the best way to send to document. If you send a document with pictures using the "Plain text" option it probably will NOT work.

The customer will receive the email in their inbox. This is an example of a "HTML" mail format.

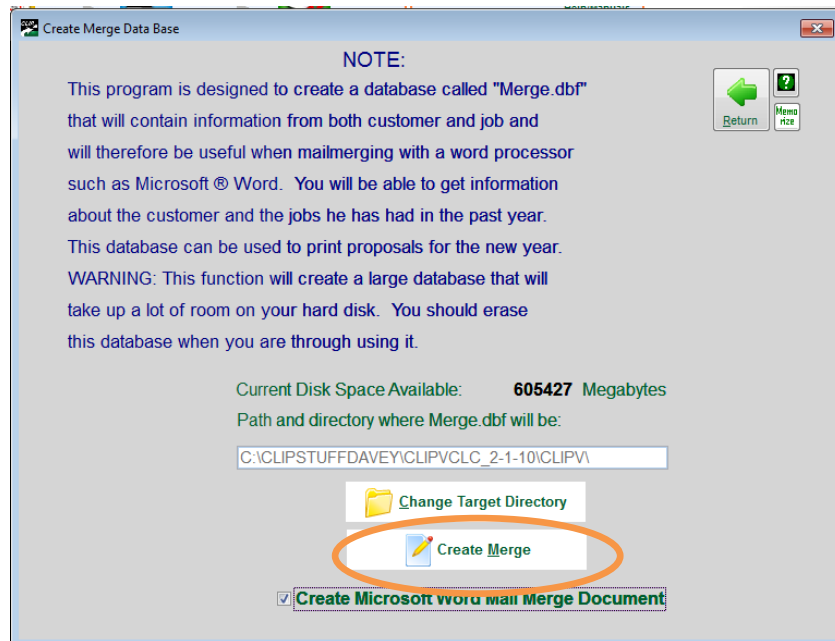


Using Email Mail Merge With the "Create Merge" option in CLIPxe

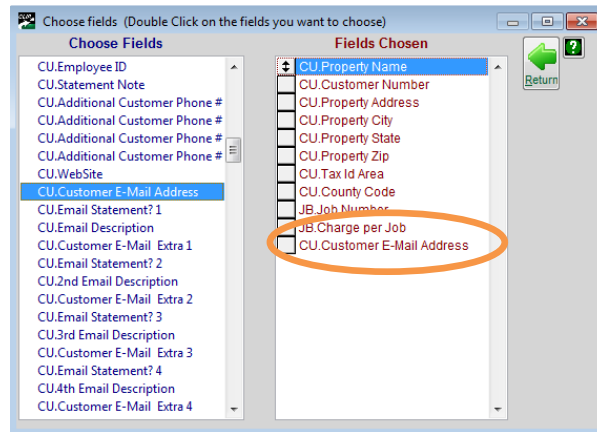
1. Open up Clipxe and go to the Reports>Custom reports>Create Merge



2. Setup the merge, then click on the "Create Merge" button.

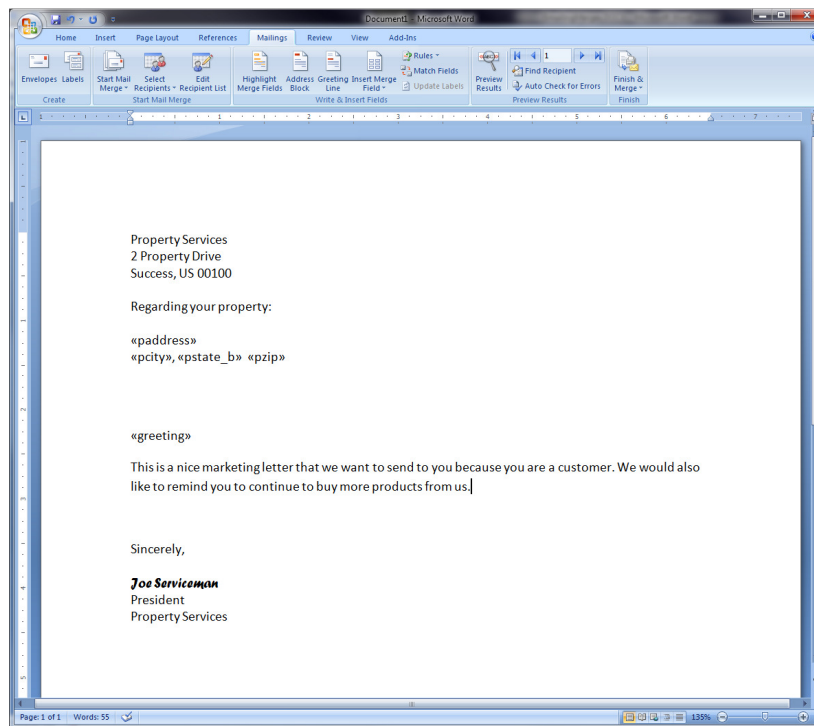


3. When choosing the fields be sure to include the "CU.Customer Email" field.



4. Choose the other options that you need along with your condition, and create the merge. Clip will process your selection and then open a word document.

Insert your merge fields and format text etc. as shown in the Mail Merge with Office 2007 manual.



Click on the "Finish and merge button" Then click on the "Send Email Messages..." From here on out it is the same as the instructions for emailing on page 5 of this manual.

You can use the Email mail merge functions for emailing company newsletters, up sell letters, and other marketing letters right to your customers inbox!!