ACT! UNIVERSITY

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A Newsletter Dedicated to expanding your expertise with ACT!

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Boost sales with personalized letters — in no time flat

✎ **Applications:** ACT! Classic/2006/2007, Microsoft Word 2000/2002/2003

AT A GLANCE

If you don't communicate regularly with your customers, they may not remember you the next time they need your merchandise or services. But you don't have time to write a unique letter to each client. Instead, create a letter template that you can combine with a mail merge. You'll save loads of time without sacrificing your personal touch.

To efficiently create a stack of personalized customer letters, we'll:

- Examine how ACT! works with Microsoft Word to create personalized letters.
- Maximize ACT!'s built-in templates to save you even more time.
- Send printed letters in customized envelopes for a professional touch.
- Use your email client to send email campaigns – and save paper and postage costs.

A simple thank you letter, discount notification or new product notice makes your clients feel like more than just a number — and keeping in touch doesn't have to be a chore. Whether you're trying to retain loyal customers or reaching out to new prospects, ACT!'s mail merge capabilities are a surefire timesaver.

How it works

ACT!'s mail merge feature helps you stay in contact with your customers by writing letters. With ACT!'s templates and your word processor (Microsoft Word or ACT!'s word processor), you can write a letter once — then ACT! fills in the information specific to each customer. You can send a personalized letter to hundreds of customers without writing, spell checking, personalizing or saving hundreds of documents. In this article, we'll focus on using ACT! with Microsoft Word, not ACT!'s word processor.

It's in the fields

When you use ACT!'s mail merge feature, you personalize the letters by merging ACT! data with the letter. You'll insert field placeholders that represent field values from your ACT! database, and then choose which contacts' data will fill the placeholders.

Start with ACT! templates

For the easiest way to get started, head to ACT!'s built-in templates. You can create your own template from scratch, but you'll find it much quicker to edit an existing template.

Create your own template: We focus on editing existing ACT! templates in this article. To create a template from scratch, begin by selecting Write | New Letter/E-mail Template from the menu bar.

To edit an existing ACT! template:

1. Select Write | Edit Template from the menu bar (Write | Edit Document Template in Classic).
2. The Open dialog displays a list of templates you can choose. Select a template whose name matches the letter type you want to write and click Open. (We chose Letter.adt.)
3. As shown in **Figure 1**, ACT! launches Microsoft Word and the template displays the field placeholders and any other text built in to the template.

4. Simply highlight the text ***Type body of letter here***, and type your letter.
5. When complete, select File | Save As from the menu bar.
6. Enter a new, meaningful name for the template in the File Name text box and click Save.

Tip: You may want to save your customized template to a different folder than the default folder for ACT! templates. You'll have an easier time finding the template you want in the future.

Insert field placeholders

Now that you see how easily you can add your own text to a template, let's look at inserting additional field placeholders. You can add placeholders any time you edit an ACT! template. The primary types of placeholders people use most are the Contact placeholders (specifically <First name> or <Salutation>), and My Record placeholders.

Insider tip: Use My Record placeholders instead of just typing your personal information so you can share your templates with others. When they use the templates, their My Record values will appear on the letter — not yours.

To insert a field placeholder:

1. Place your cursor in the Word document where you want to insert the field placeholder.
2. Select ACT! | Show Field List from the menu bar if you can't see the Add Mail Merge Fields dialog box in Word.
3. Select a field type from the Select Field Type dropdown list. (In Classic, select the appropriate option button in the Field Type section of the tab.)
4. Select a field value from the list box and click Add (Insert in Classic).
5. Repeat to add as many fields as you want. We added the My Record field E-mail, as shown in **Figure 2**.
6. Drag and drop the newly added fields to different locations in the Word document, if desired.

Ready, set, merge

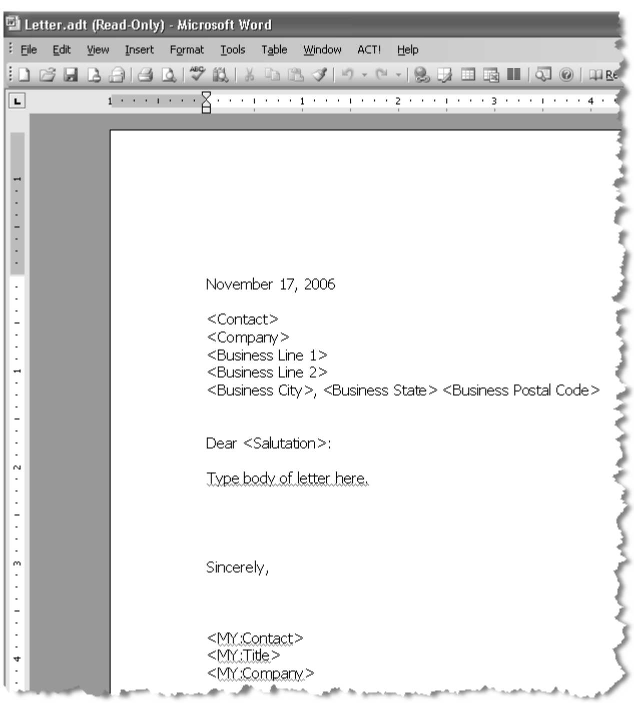
Once you've created a new template and saved it, you're ready to write and print the actual letters that will go to your customers. Test the mail merge with one contact first to make sure it's right.

To test the new template for one contact:

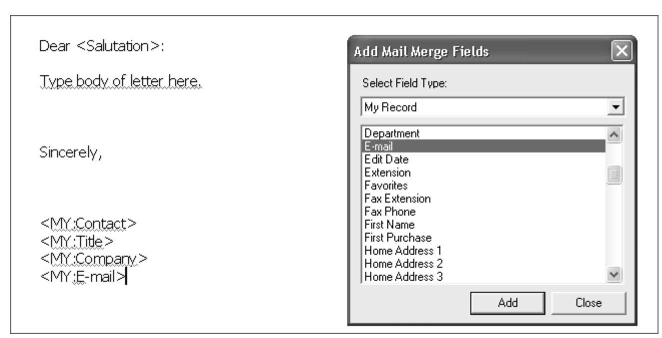
1. Perform a lookup of the contact you want to use in your test.
2. Select Write | Other Document from the menu bar.
3. Browse to and select the template you want to test; click Open.
4. ACT! launches Word which opens the template and inserts the appropriate data in the field placeholders.
5. Review the Word document to ensure accuracy.

Lookup the mail recipients

To begin the formal merge process, you must perform a lookup of the recipient contacts. You have several ways to look up the right set of contacts. Specifically, you can look up by



1: With a basic template, ACT! offers you several field placeholders and some basic text — you do the rest.



2: Use the Add Mail Merge Fields dialog box to add any number of field placeholders you want.

- Field
- Group or company
- Advanced lookup
- Contact List view tagged records

Perform the merge

With your contact lookup complete, you're ready to merge. The steps are quite different in 2006 and Classic, so we'll break them out.

To perform a mail merge in 2006:

1. Select Write | Mail Merge to open the Mail Merge Wizard. Click Next.
2. On the Select Output page of the wizard, select the Word Processor option button and click Next.
3. On the Select Template page, click the Browse button, and then navigate to and select the template you want to use; click Open. Click Next.
4. On the Select Contact page shown in **Figure 3**, select Current Lookup and click Next.
5. Review your choices on the final page of the wizard and click Finish.

To perform a mail merge in Classic:

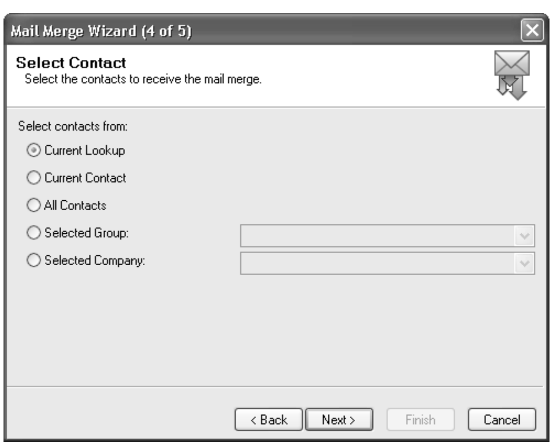
1. Select Write | Mail Merge to open the Mail Merge Wizard.
2. On the What Contacts? page of the wizard, select Current Lookup, as shown in **Figure 4**. Click Next.
3. On the Send How? page of the wizard, select Word Processor. Click Next.
4. On the What Template? page, click the Browse button, and then navigate to and select the template you want to use; click Open. Click Finish.

Word creates a single Word file with each of the letters in the document, as shown in **Figure 5**. Review the letters and then print them.

Print envelopes

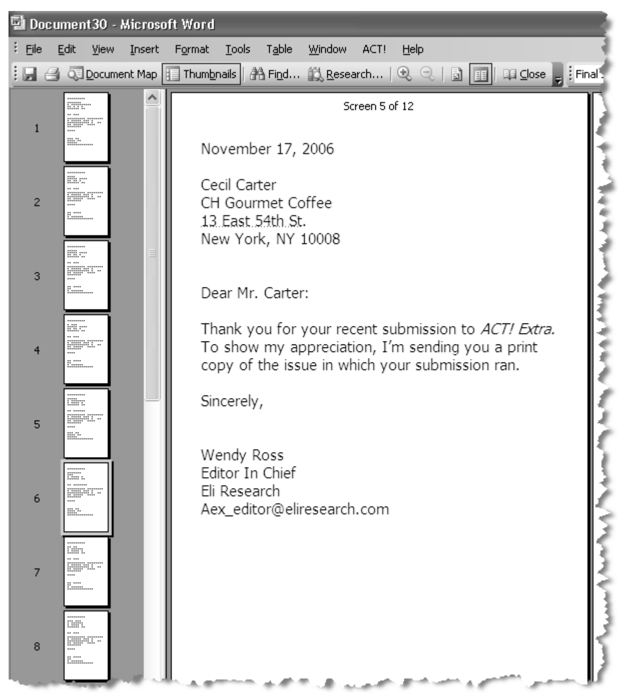
If you're sending your letters by mail, you'll want to print envelopes, too. To do so:

1. Perform a lookup of the same contacts for which you printed letters.
2. Select File | Print.
3. Select Envelopes from the Printout Type list box (Printout Type dropdown list in Classic).



3: With the 2006 Mail Merge Wizard, you choose your letter recipients.

4: With the Classic Mail Merge Wizard, you choose your recipients on the wizard's first page.



5: For every recipient, ACT! creates a page in Word in a single Word document.

4. Select an envelope size.
5. Click Print or click Edit Template to edit the envelope template.

Send it fast with email

You might have noticed that instead of sending the mail merge to Word you can send it to email. The process is quite simple and could save you a bundle on paper, envelopes, and postage. **Snag:** When you perform email merges, your emails are distributed automatically, so there's no chance to review them before they go out. Before you proceed be sure your template is just right.

Tip: You should send a test message to a colleague or yourself before you send it to your customers.

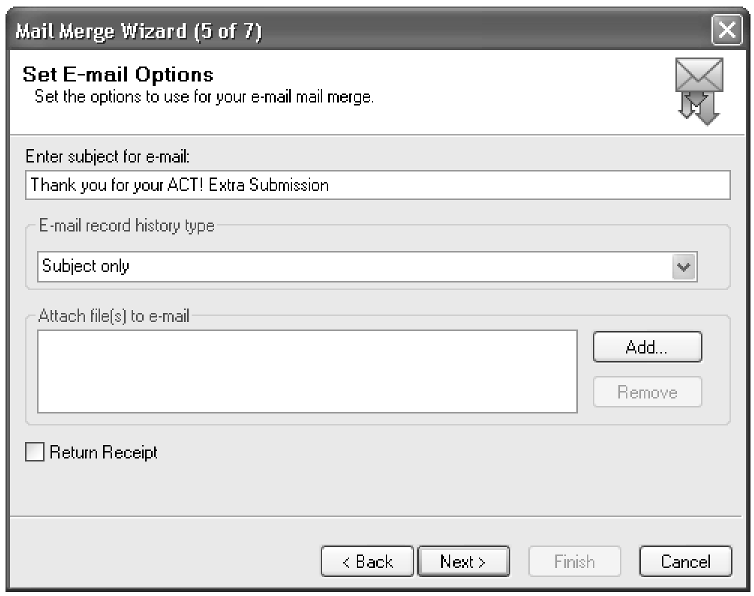
To perform an email mail merge:

1. Follow the steps for your version to step through the Mail Merge Wizard to the method selection page.
2. Select the Email option button and then proceed through the wizard.
3. When you reach the Set E-mail Options page, configure the email-specific settings, as shown in **Figure 6**. You can even add an attachment.
4. Click Next for 2006. ACT! asks you to choose how ACT! should treat contacts with no email address. Make your selection and click Next.
5. Click Finish. ACT! creates an email message in your email client for each contact with an email address, and sends the messages.

Benefit from field placeholders for one-offs

Often in business we need to write personalized letters or documents that we won't need more than once, but that require information from our ACT! database. Let's say you have a six page contract in which you need to place specific names, company names, and other field values. You won't send the contract to dozens of customers — just one. You could copy and paste the information from ACT! or you could create a template just for the contract.

To do so, simply edit an existing template — or create a blank one in 2006 — and then write the contract, inserting the appropriate field placeholders as we described in this article. If the bulk of the contract is already written in another Word doc, you can paste that text into the open template. **Alternative:** Browse to the contract in Windows Explorer, rename the .doc file extension to ***.adt***, and then edit that template from ACT!.



6: Setup your email subject, a History note, and attach files in a single page of the wizard. You can even request a return receipt.