

# How to Mail Merge PDF Documents

A step-by-step guide to creating personalized documents with the AutoMailMerge™ plug-in for Adobe® Acrobat®

## Table of Contents

What is a mail merge? .....	2
What do I need to start? .....	2
Step 1: How do you create a PDF form? .....	2
Step 2: How do you add fields to a PDF document?.....	2
Using Acrobat DC to Add Form Fields .....	3
Using Acrobat X / XI to Add Form Fields .....	5
Customizing Field Properties .....	6
Using PDF Forms with the Free Adobe Acrobat Reader .....	9
Step 3: How do you prepare data? .....	10
Step 4: How do you put data into forms? .....	11
Advanced Topic 1: Checking PDF Check and Radio Boxes .....	21
Advanced Topic 2: How to Create Multiline Address Labels.....	22
Advanced Topic 3: Automatic Emailing of PDF forms.....	26

## What is a mail merge?

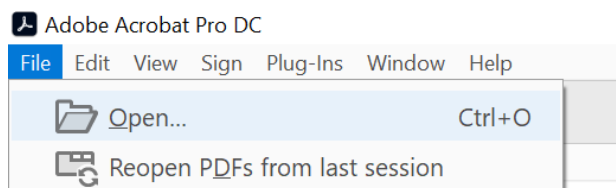
A mail merge is a computer term describing the production of multiple (and potentially large numbers of) documents, from a single template form and a structured data source. This technique is used to create personalized letters, documents, bills, pre-addressed envelopes or mailing labels for mass mailings (or document creation), from a database of names and addresses.

## What do I need to start?

You need a PDF form (a PDF document with fillable fields) and a data file that contains records with information that needs to be placed into the form. You can use Microsoft Excel spreadsheets, Microsoft Access databases or simply a plain text file. Let's start from scratch and create a PDF form and a data file.

### Step 1: How do you create a PDF form?

A PDF *form* is a special kind of PDF document that contains interactive fields where text information can be entered, or check boxes may be selected. You can create a PDF form from any PDF, word processor, image file or a paper document. You will need to add fields to the regular PDF document using form editing tools provided by Adobe Acrobat. Fields are interactive elements where users can either type text or make a selection. If you already have a PDF document you want to use as a template, select "File > Open" from the menu to load this document into Adobe Acrobat:



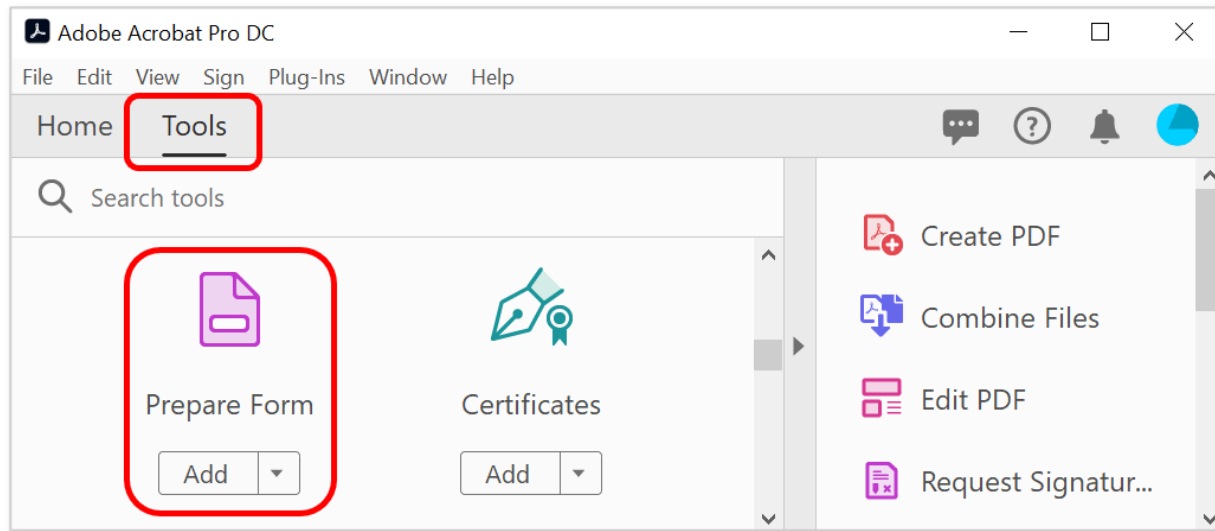
If you have a Microsoft Word document, then either print it to a PDF printer or save it as a PDF using the Microsoft Word "File" menu. You can also use the "File > Create" menu in Adobe Acrobat to create a PDF file from many popular file formats, or by scanning a paper document.

### Step 2: How do you add fields to a PDF document?

We are assuming that you have already created a PDF document at this point and have it open in Adobe Acrobat. The actual selection of steps depends on the version of Adobe Acrobat you are using. If you are using older versions of Adobe Acrobat, then select "Form > Edit Fields..." (or similar) from the Acrobat menu to start adding fields.

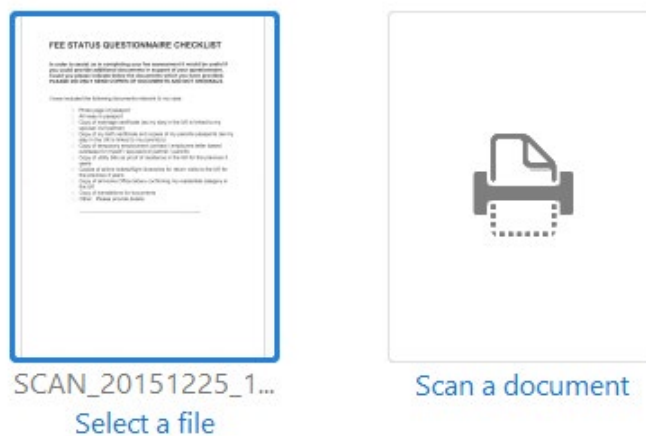
## Using Acrobat DC to Add Form Fields

If you are using Acrobat DC - open a PDF document, select "Tools" on the main toolbar, and find the "Prepare Form" tool. Double-click on the "Prepare Form" icon to open the PDF form editor:

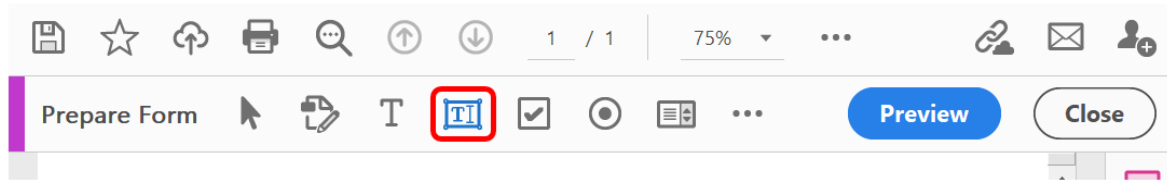


If the currently opened document does not contain any form fields, you will be prompted to either select an existing file or scan a paper document. Click "Start" to use the currently opened document:

## Select a file or scan a document to begin



Once a document is open in the form editor, click the "Add a text field" icon located on the top toolbar:



Move the cursor to a page location where you want to place a text field. You will see a moving blue rectangle that represents a field. Press and hold the left mouse button and drag a rectangle where you want to place a text field. You will be able to change the field's position and size at any time:



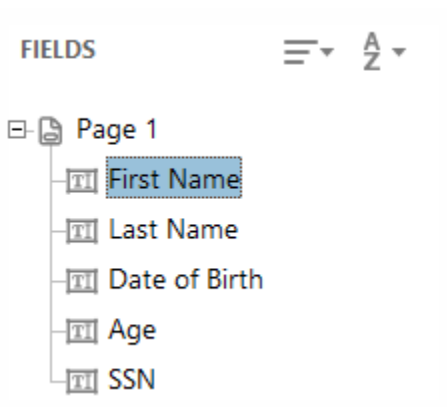
Once the text field is placed, you will be prompted to enter a field name:

First Name	Last Name
<div>Text1</div>	

Field Name:

☐ Required field [All Properties](#)

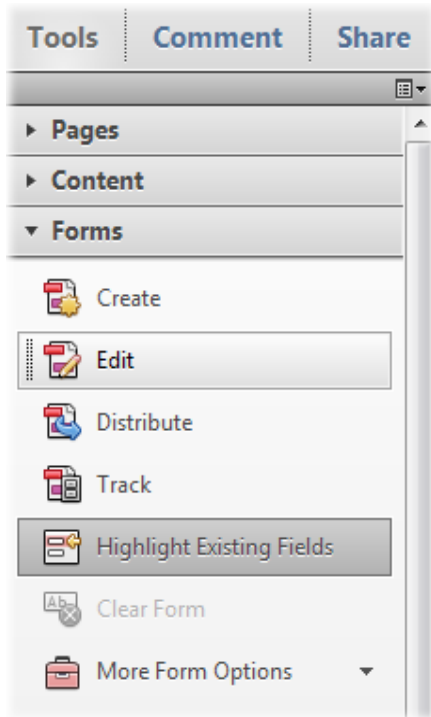
The newly added field will be shown in the "Fields" list on the right-hand side of the screen:



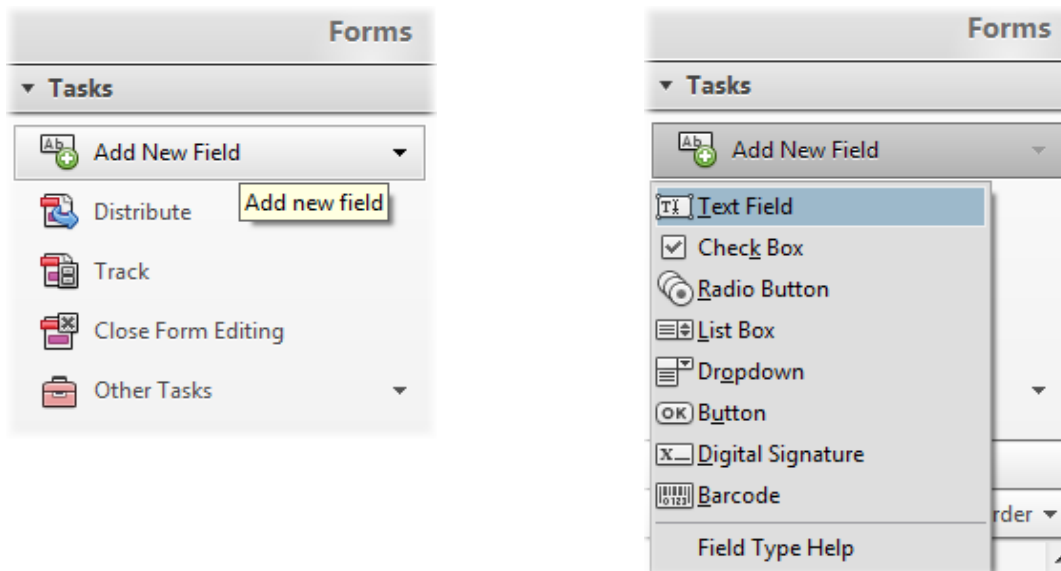
Proceed to the "[Customizing Field Properties](#)" section for the rest of the instructions.

## Using Acrobat X / XI to Add Form Fields

If you are using Adobe Acrobat X or XI, open the “Tools > Forms” panel and click on the “Edit...” icon.



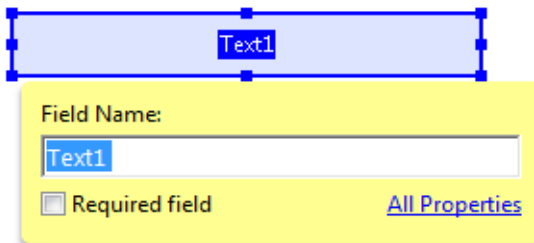
Once a document is open in the form editor, click on the “Add New Field” icon:



Select a field type you want to place on the document and use the mouse to place a text field on the page. Press and hold the left mouse button to draw a rectangle where you want to place the text field.

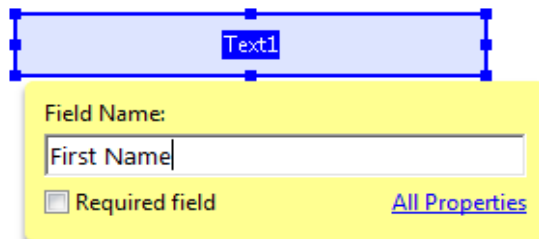
## Customizing Field Properties

The following popup window appears on the screen once a field is placed on the page:



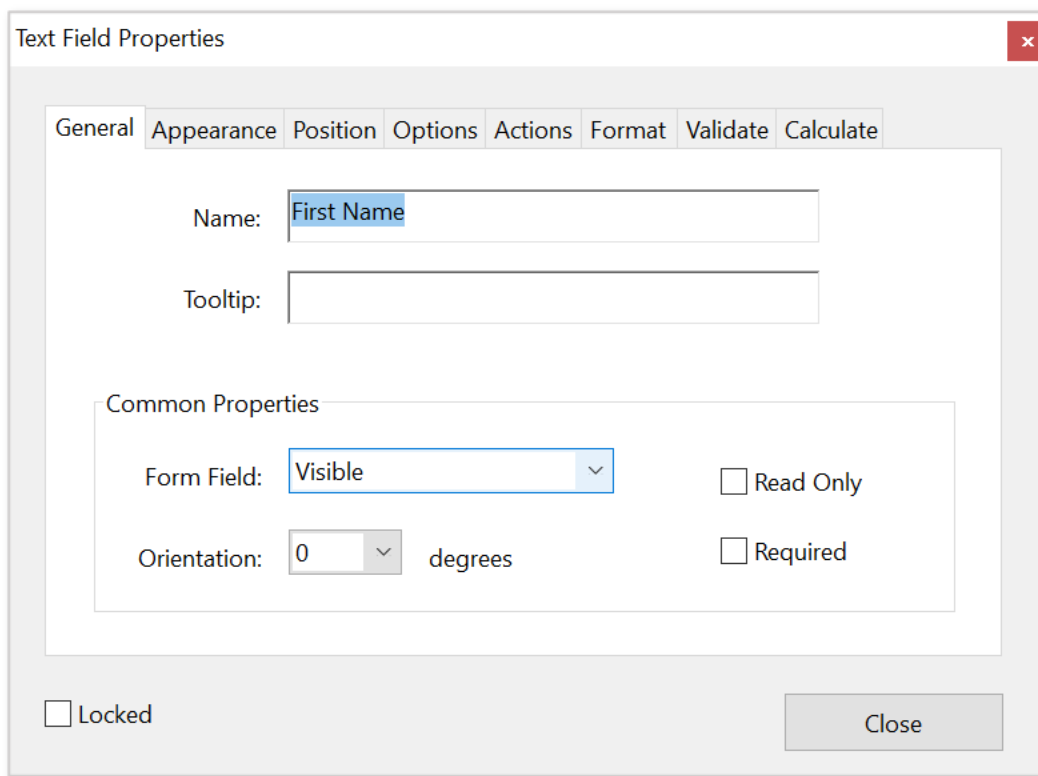
A screenshot of a yellow popup window for field properties. At the top, a light blue rectangular field is shown with a blue border and the text 'Text1' in the center. Below the field, the text 'Field Name:' is followed by a text input box containing 'Text1'. To the left of the input box is a checkbox labeled 'Required field' which is unchecked. To the right of the input box is a blue hyperlink labeled 'All Properties'.

By default, Adobe Acrobat automatically gives all new fields a name such as “Text1”, “Text2” and so on. You can change the field name to something more informative:



A screenshot of a yellow popup window for field properties, similar to the one above. The light blue rectangular field at the top contains the text 'Text1'. In the 'Field Name:' section, the text input box now contains 'First Name'. The 'Required field' checkbox remains unchecked, and the 'All Properties' link is still present.

You will use field names later in the mail merge, when you assign which data fields are used to populate a specific form field. If necessary, click on the “All Properties” link to edit field properties:

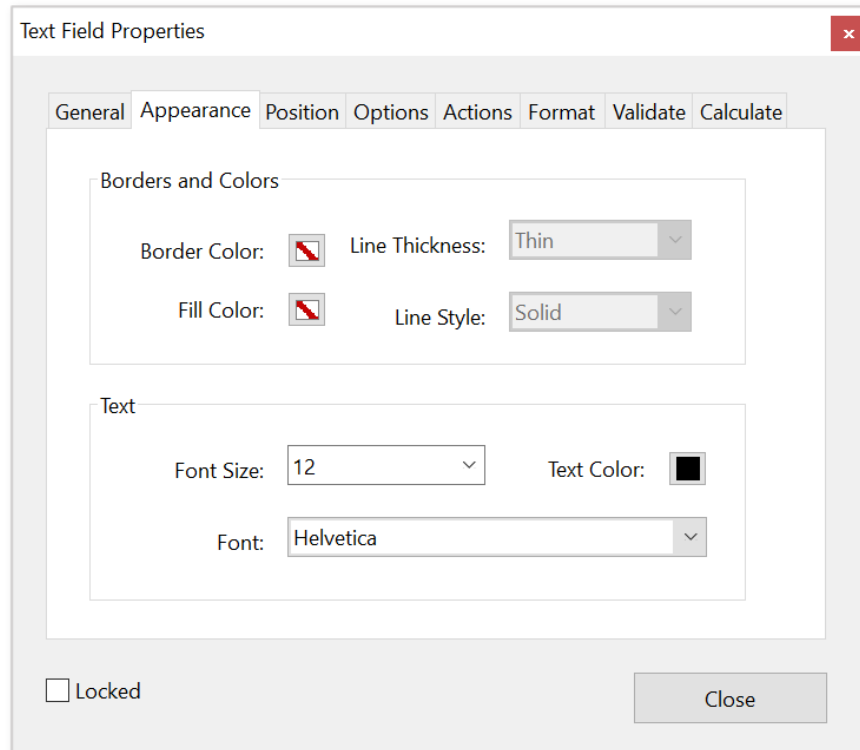


A screenshot of the 'Text Field Properties' dialog box. The title bar says 'Text Field Properties' with a close button (X) on the right. Below the title bar are several tabs: 'General', 'Appearance', 'Position', 'Options', 'Actions', 'Format', 'Validate', and 'Calculate'. The 'General' tab is selected. Inside the dialog, there is a 'Name:' label followed by a text input box containing 'First Name'. Below that is a 'Tooltip:' label followed by an empty text input box. A section titled 'Common Properties' contains a 'Form Field:' label with a dropdown menu showing 'Visible', a 'Read Only' checkbox (unchecked), an 'Orientation:' label with a dropdown menu showing '0' and the word 'degrees', and a 'Required' checkbox (unchecked). At the bottom left is a 'Locked' checkbox (unchecked). At the bottom right is a 'Close' button.

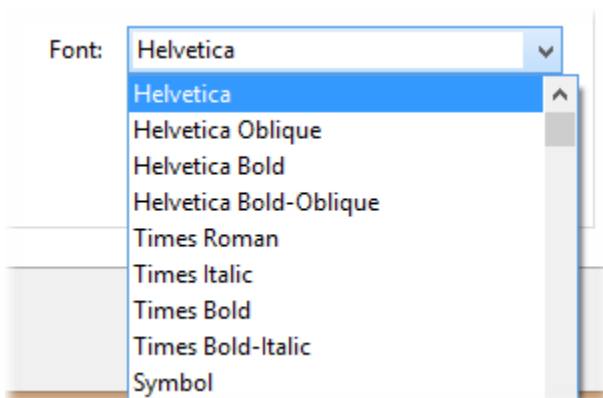
Check the "Read Only" option if it is necessary to protect a text field from any editing by the reader. Fields marked as "Read Only" are non-editable.

Check the "Required" option if it is necessary to force users to enter a value into the field. Users will be required to enter information into this field, and not allowed to leave it blank.

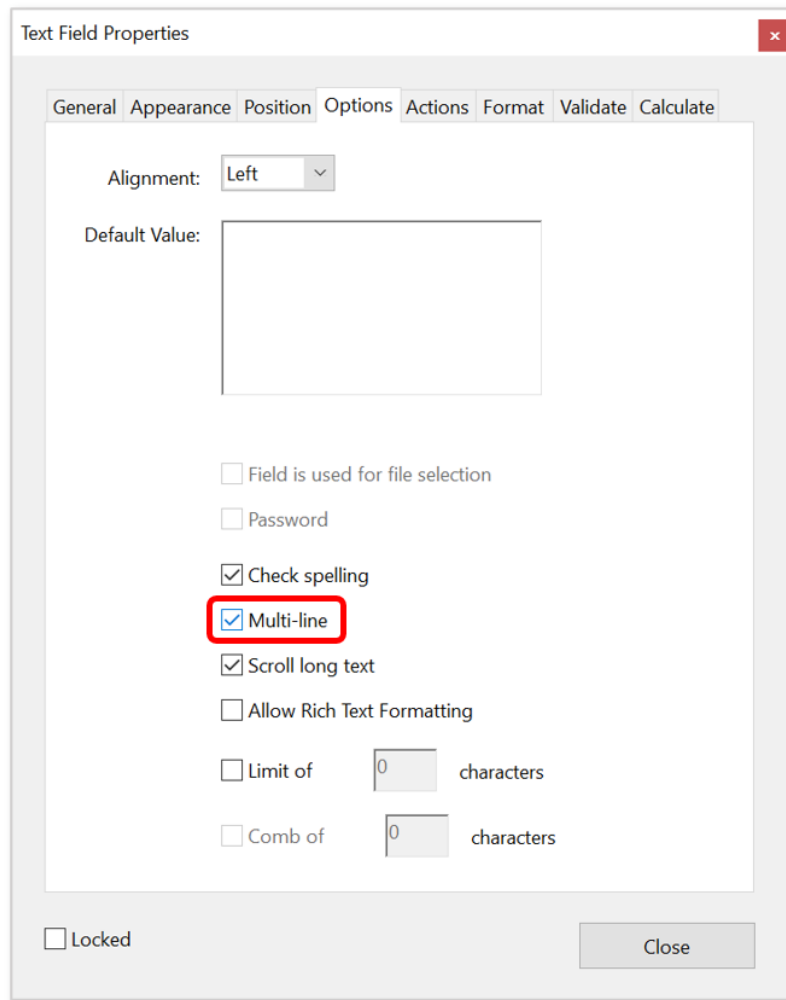
If you want to change the text font or color, select the "Appearance" tab and use the "Font Size" and "Font" menus to choose a desired text appearance. Make sure the field is big enough to display a required number of characters whilst using the selected font settings.



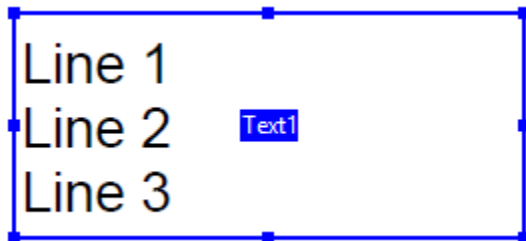
**IMPORTANT:** The resulting PDF file size can be greatly affected by selecting certain fonts. It is recommended to use one of several basic fonts to avoid a file size increase. These fonts are listed at the top of the font list – e.g.: Courier, Helvetica, and Times New Roman etc.



If a field needs to hold multiple lines of text, select the “Options” tab and check the “Multi-line” option:



Make sure the text field is tall enough to show the required number of text lines. You can do that by either typing text into the field or specifying a default value:



Press “Close” in the "Text Field Properties" dialog once you have finished editing all field properties. Repeat the above procedure for every field you need to add to this PDF document. You can access the properties of a PDF field at any time by right-clicking on it and selecting "Properties..." from the popup menu. Make sure you exit the form editor once you're done adding form fields - otherwise some menu items will be inaccessible. Use the "File > Save" menu to save changes to a file.



## Using PDF Forms with the Free Adobe Acrobat Reader

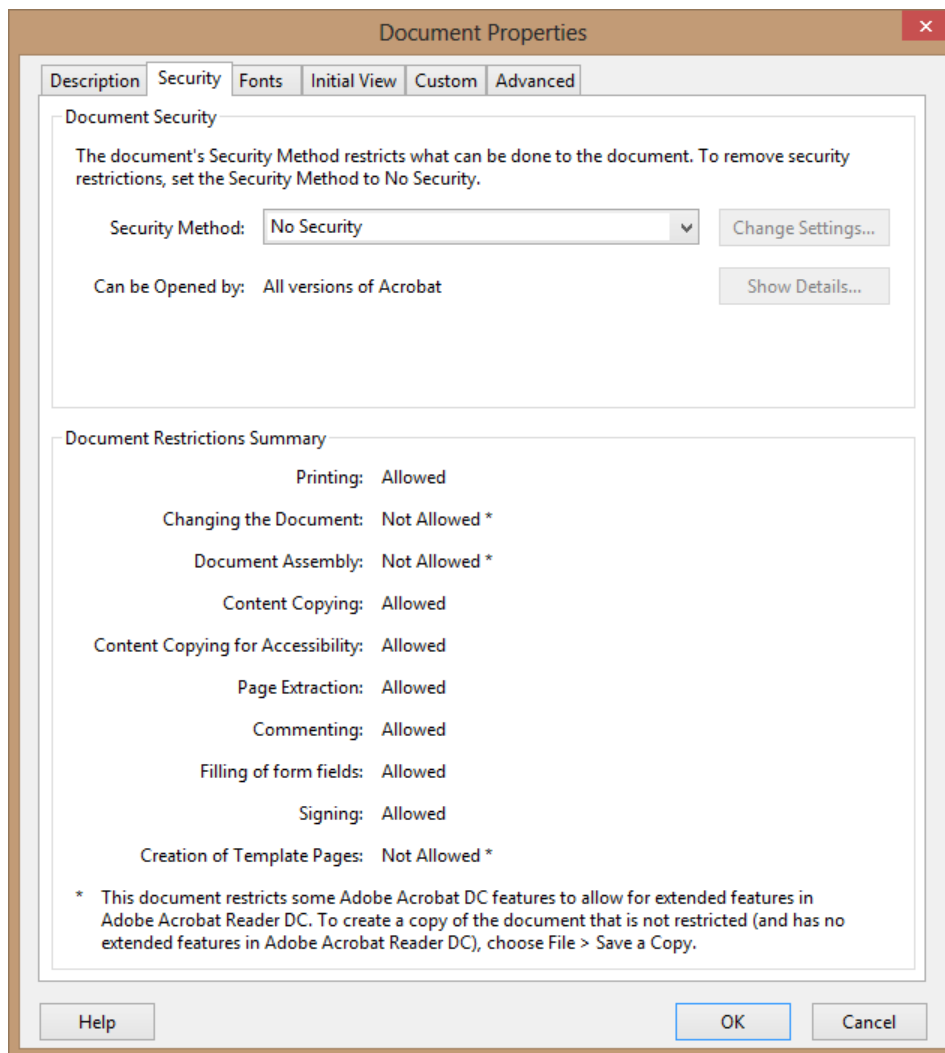
If you are planning to let recipients of the form use a free Adobe Acrobat Reader to **fill and save** this PDF form, then you need to enable “extended rights” for this document. Do this as a final step (after all editing has been done) as once extended rights are enabled, any changes to the document will invalidate such rights and you have to do it again. The actual menu selection for enabling extended rights in Adobe Acrobat Reader is different depending on the version of Adobe Acrobat used:

**Acrobat DC:** Use "File > Save As Other > Reader Extended PDF > Enable More Tools".

**Acrobat X/XI:** Use "File > Save As...> Reader Extended PDF > Enable Additional Features...".

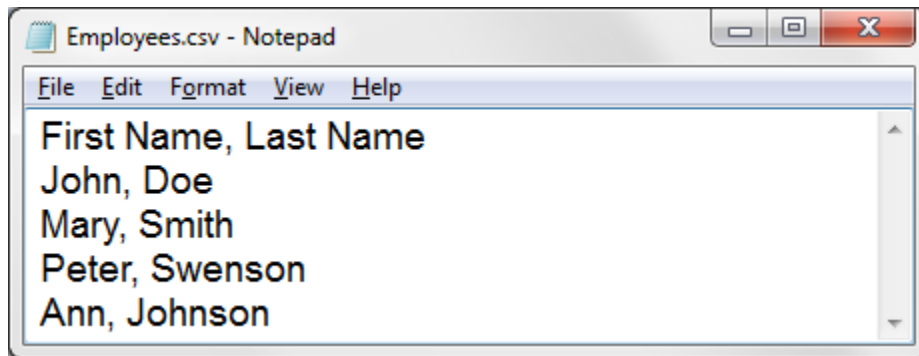
**Acrobat 9 and before:** use either the "Advanced" menu, or check the software manual for version-specific instructions.

Once you are done editing the form, use “File > Save” to save changes. Now this PDF form is ready for the mail merge. You can check the extended rights for any PDF document by selecting "File > Properties" and then choosing the "Security" tab (note the special message at the bottom of the dialog screen):



### Step 3: How do you prepare data?

In many cases you may already have data that needs to go into the form in some kind of spreadsheet or database. If you do not have one, then we are going to show you how to create a very simple data file using just the Notepad text editor. Let's assume we are trying to fill W-2 forms for company employees. We need to create a data file that lists first and last names for each employee. Simply open Notepad and type the following text:



Note that the first line contains comma separated field names ("First Name" and "Last Name") while the rest of the file contains the actual data. Make sure to separate each field by a comma or tab. You can use both types of files with the AutoMailMerge software. Save this data file with either a CSV extension (if using a comma as a separator) or TXT (if you are using tab). Now all the data is ready to be used for a mail merge.

You can also use Microsoft Excel to prepare the data. This is easier since there is no need to type commas or any other field separators. Note that the first row of the spreadsheet needs to contain unique field names:

	A	B
1	First Name	Last Name
2	John	Lennon
3	Paul	McCartney
4	George	Harrison
5	Ringo	Starr
6		

Employees

You can either keep automatic sheet names (such as Sheet1), or rename the worksheet to something like "Employees". This will help to organize data if multiple sheets are going to be stored inside an Excel file.

## Step 4: How do you put data into forms?

We are assuming that at this point we have a PDF form with two text fields (“First Name” and “Last Name”):

<b>d Control number</b>		
<b>e Employee's first name and initial</b>	<b>Last name</b>	<b>Suff.</b>
<b>First Name</b>	<b>Last Name</b>	

and an Employees.xlsx Excel spreadsheet that was created at step 3. Let's start to populate our PDF form with data from the Excel file and create 4 new PDF documents using the AutoMailMerge plug-in for Adobe Acrobat (<http://www.evermap.com/automailmerge.asp>). One output document is created for each record in a data file. Since we have four records in our test spreadsheet, four personalized output files are going to be generated. Make sure you have either a full or trial version of AutoMailMerge installed on your computer in order to perform the rest of this tutorial.

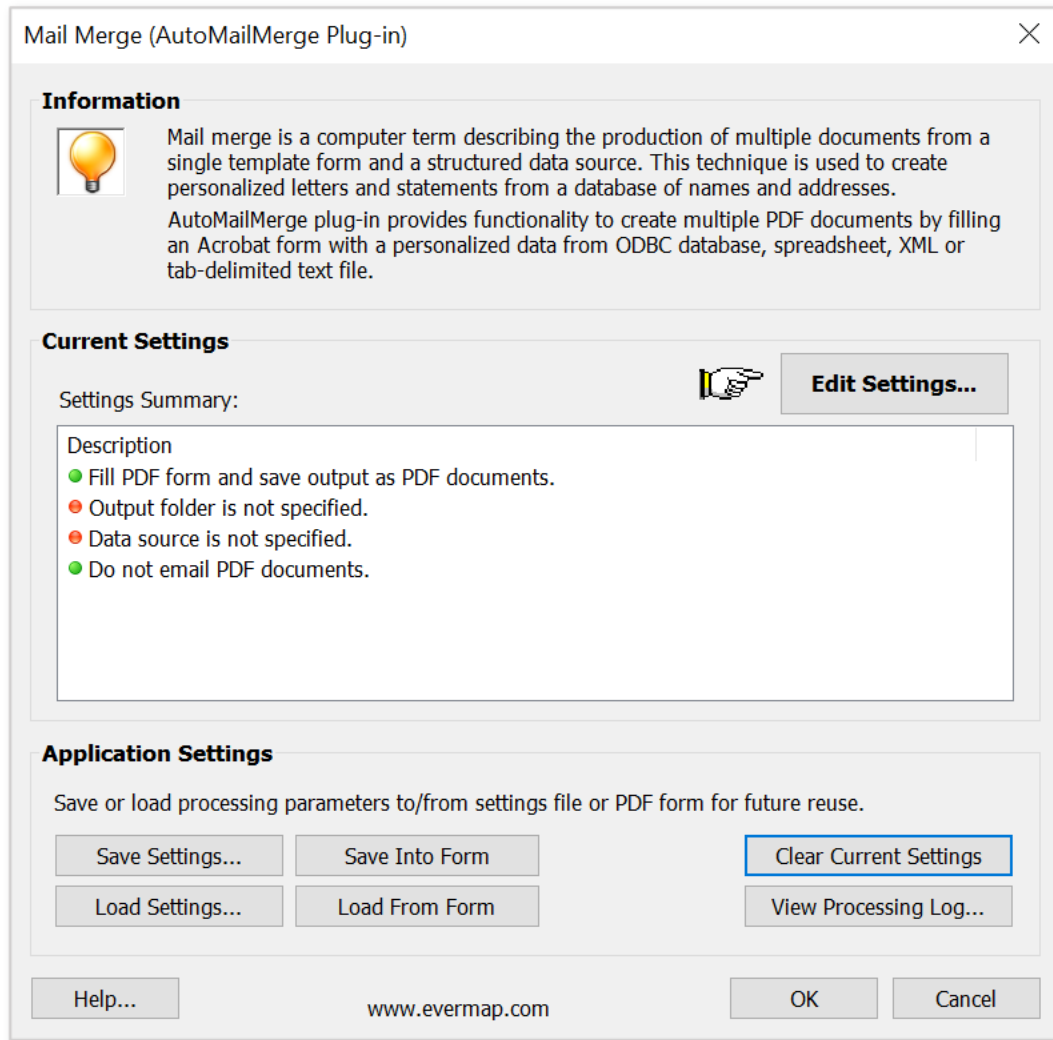
4.1. Start Adobe Acrobat and open a PDF form using the “File > Open” menu. This will open the PDF form we are going to fill with data (this is a simplified W-2 form with just 2 fields):

<b>22222</b>		<b>a Employee's social security number</b>		OMB No. 1545-0008	
<b>b Employer identification number (EIN)</b>		<b>1 Wages, tips, other compensation</b>		<b>2 Federal income tax withheld</b>	
<b>c Employer's name, address, and ZIP code</b>		<b>3 Social security wages</b>		<b>4 Social security tax withheld</b>	
		<b>5 Medicare wages and tips</b>		<b>6 Medicare tax withheld</b>	
		<b>7 Social security tips</b>		<b>8 Allocated tips</b>	
<b>d Control number</b>		<b>9</b>		<b>10 Dependent care benefits</b>	
<b>e Employee's first name and Initial</b> <b>Last name</b> <b>Suff.</b>		<b>11 Nonqualified plans</b>		<b>12a</b>	
		<b>13 Statutory employee</b> <b>Retirement plan</b> <b>Third-party sick pay</b>		<b>12b</b>	
		<b>14 Other</b>		<b>12c</b>	
				<b>12d</b>	
<b>f Employee's address and ZIP code</b>					
<b>15 State Employer's state ID number</b>		<b>16 State wages, tips, etc.</b>		<b>17 State income tax</b>	
		<b>18 Local wages, tips, etc.</b>		<b>19 Local income tax</b>	
				<b>20 Locality name</b>	

**Form W-2 Wage and Tax Statement**   **2019**   Department of the Treasury—Internal Revenue Service

Copy 1—For State, City, or Local Tax Department

4.2. Select “Plug-ins > Mail Merge...” from the Acrobat menu to start AutoMailMerge.



If you already have mail merge settings prepared and saved as a settings file (\*.mms), you can load them by pressing the "Load Settings..." button.

4.3. Press “Edit Settings...” to start configuring mail merge options. This will show a wizard-style dialog that provides a way to specify all mail merge settings in a step-by-step fashion.



4.4. The "Select Data Source". screen provides a way to select a data file and specify data-to-PDF field mappings. This screen can be also used to select a subset of data records - to run the mail merge only on data records that meet a specific search criteria.

Press "Browse..." to select a data file:

**Data Source**

**Select Data Source**  
Select data source to use for filling PDF form

**Information**  
Data source is a database, spreadsheet, XML or tab-delimited file that contains multiple records of information that can be used to fill PDF forms to produce personalized PDF documents.

**Data Source**  
Data source:  **Browse...**  
View and Filter Records... Edit Selection... Help...

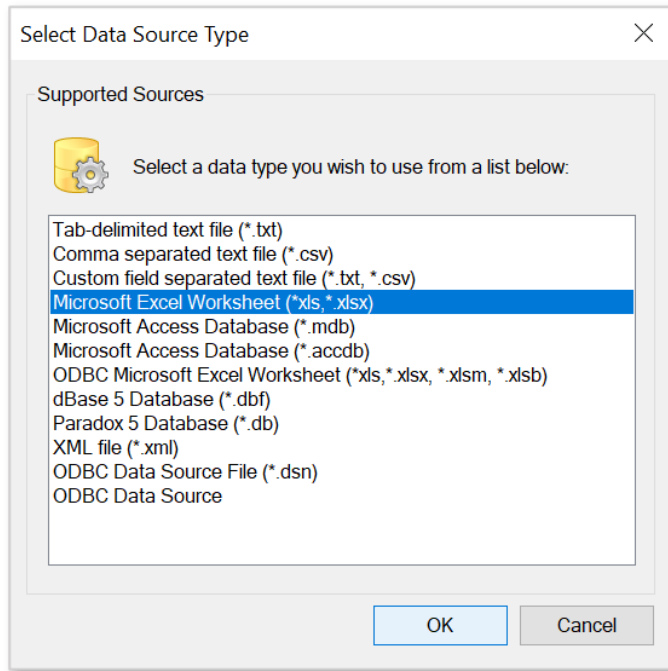
**Mapping Between Data Source and PDF Form Fields**  
Field mapping establishes a correspondence between a data source and PDF form field names. This mapping between fields will be used while filling PDF form.  
Number of form fields: 0 / Number of mappings: 0 ☐ Show only mapped fields

PDF Form Field	Type	Data Source Field

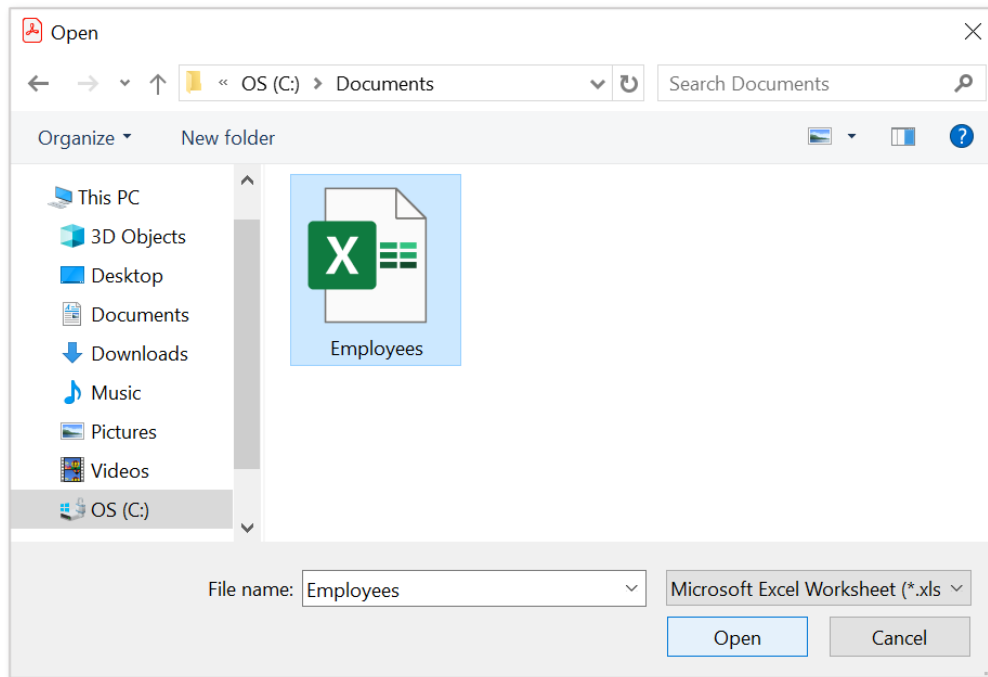
Add Mapping... Guess Mapping Load Mappings...  
Delete Mapping Clear All Save Mappings...

< Back Next > Cancel

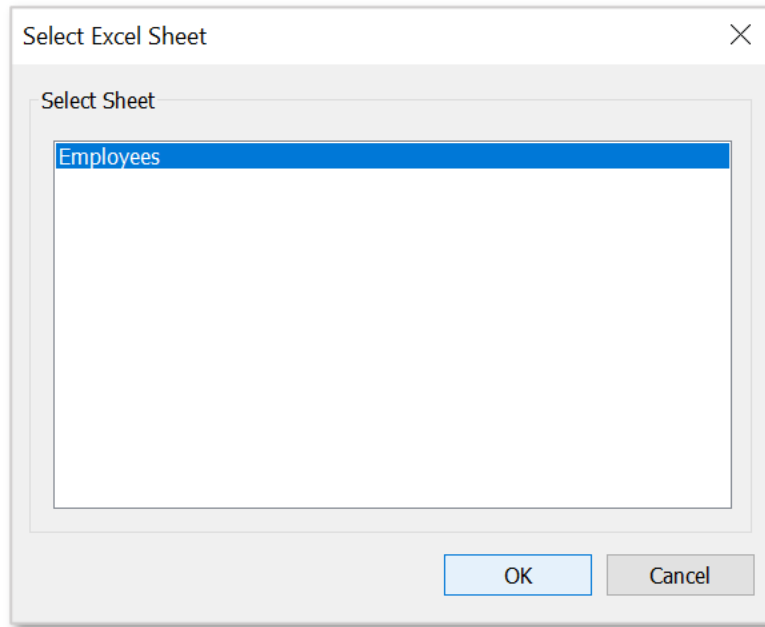
You will be presented with a choice of possible input data source types - select “Microsoft Excel Worksheet” from the list:



Then select the input spreadsheet file in the “Open” dialog:

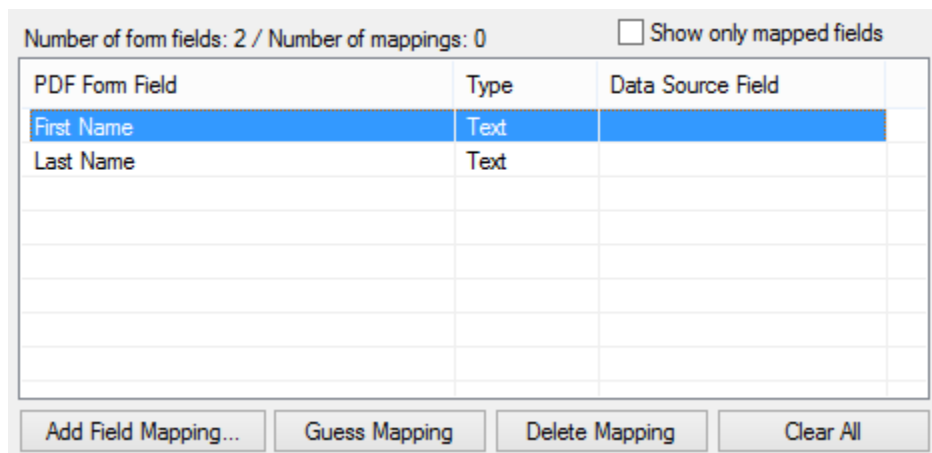


Select "Employees" from a list of available Excel sheets (the actual selection of sheets is different depending on the specific file):



Press "OK" to confirm the selection.

4.5. The next step is to assign correspondence between spreadsheet data fields and PDF form fields. Double-click on a PDF form field name in the list of available fields to assign what data field(s) should be used for filling it. Alternatively, you can press the "Add Field Mapping" button.



You can save time by naming PDF form fields with the same names as corresponding data fields. This allows you to use an automated field mapping procedure. Press the "Guess Mapping" button to automatically assign field mappings based on name similarity. For example, if there are PDF and data fields both named "First Name", then a corresponding mapping will be automatically added.

4.6 . In the "Select Data Field" dialog, select a data field from the list that needs to be used for filling the form field. It is also possible to put multiple data fields into a single PDF field by using [multiple-field expressions](#). Press "Learn More..." to access documentation showing more details.

Select Data Field

Available Fields:

- First Name
- Last Name

Composite Field

☐ Use a multiple-field expression to create a composite field

Enter expression:

For example, if you have two data fields: "Street" and "City", then you can combine them into a single composite field by writing: Send to: [Street], [City]. Where [Street] and [City] refer to corresponding data fields.

Examples of the composite field values created by this expression: "Send to: Lane Ave, Portland" or "Send to: Highland Road, Seattle".

Learn more...

Help... OK Cancel

Press "OK" to confirm the assignment and close the dialog. Repeat the last two steps for each field that needs to get text from a spreadsheet. You should see the following once you have completed all assignments (the list of fields will be different depending on the PDF form and data file used):

Number of form fields: 2 / Number of mappings: 2 ☐ Show only mapped fields

PDF Form Field	Type	Data Source Field
First Name	Text	First Name
Last Name	Text	Last Name

Each PDF form field now has a corresponding spreadsheet field assigned to it. Press "Next >" to move to the next step once you have mapped all fields.



4.7. Use the "Specify Field Options" screen to control if output form fields should remain editable or not. Check the "Flatten output PDF documents" option to make all fields in output documents non-editable. If this option is selected, all fields in output documents will be converted to regular text.

Uncheck the "Flatten output PDF documents" option if you need to have the content of form fields remain editable in the output files.

Press "Next >" to move on to the next step.

Field Options

**Specify Field Options**  
Specify form fields options for output documents

Select Field Options For Output Documents

- ☒ Flatten output PDF documents (all fields will be converted into text/graphics)
- ☐ Make all form fields read-only (fields will appear as non-editable regular text)
- ☒ Remove ".0" from the end of numeric values
- ☒ Remove duplicate spaces
- ☐ Hide all empty text fields in output forms
- ☒ Format dates as: M/D/YYYY

Select form fields that needs to be set "read-only" after filling with data:

Form Field Name	Comment
<input type="checkbox"/> First Name	
<input type="checkbox"/> Last Name	

Clear Selection

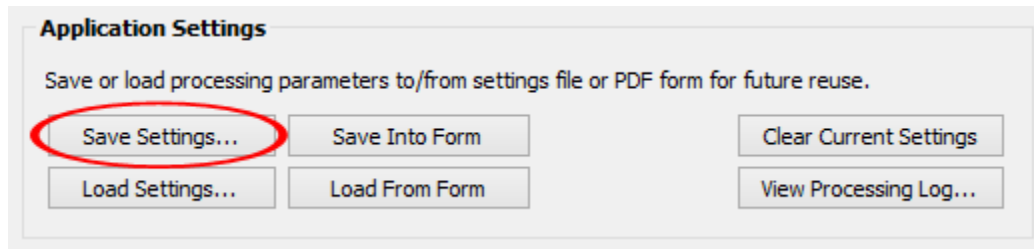
< Back   Next >   Cancel

4.8. Use the "Select Output Options" screen to control where and how to save output PDF documents to. Press "Browse..." to select a desired output folder – the file path will then be displayed:

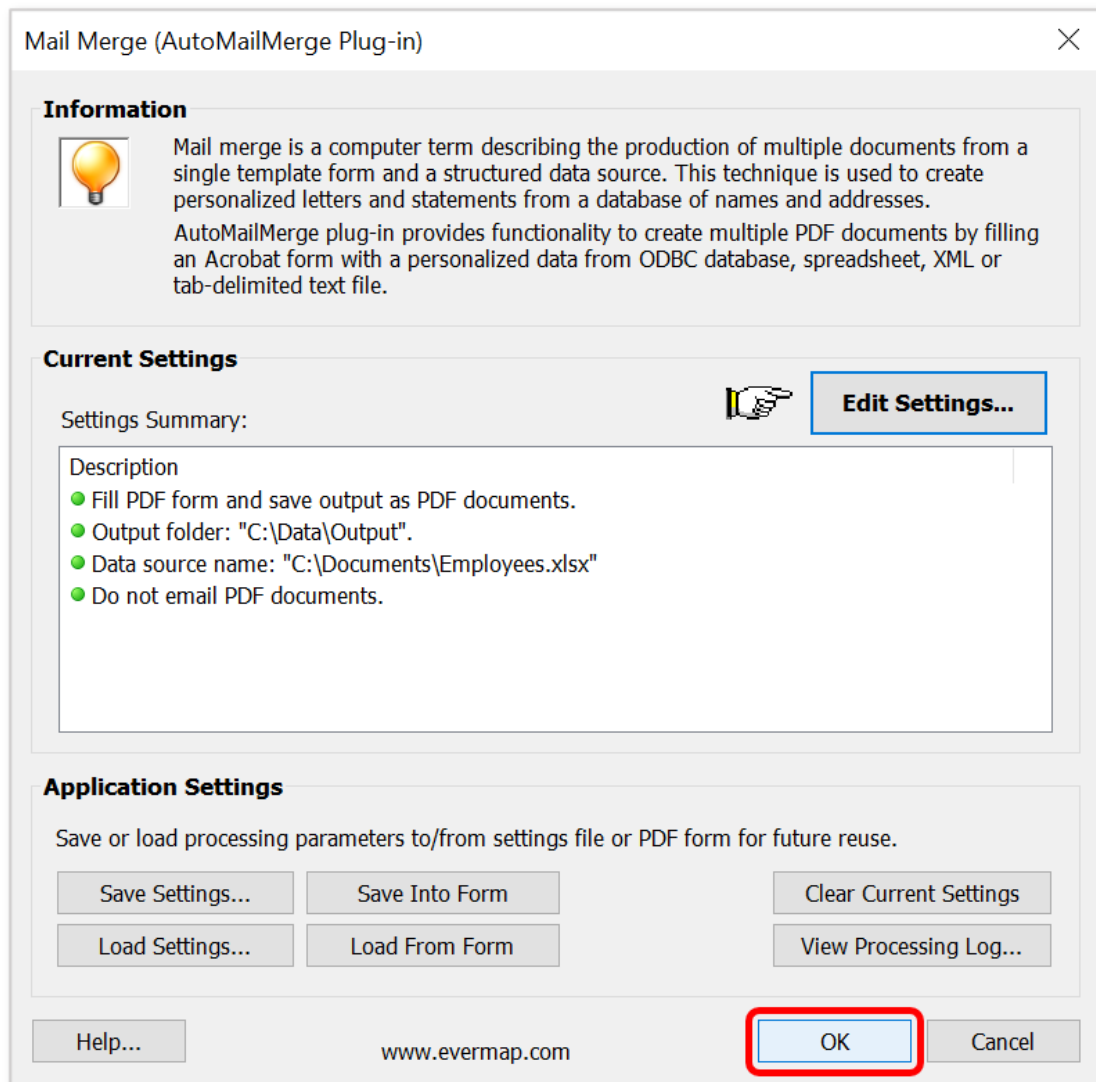
Use the default settings to name each output file using the input file name and an auto-incrementing number. For example, if you are using "MyForm.pdf" as input, all output files will be named MyForm1.pdf, MyForm2.pdf, MyForm3.pdf etc. The software offers a number of different naming options, including using data fields anywhere in the file name by referring to them within [...] brackets. This makes it possible to automatically name output files as John Doe.pdf, Mary Smith.pdf etc. Press "Next >" to move to the next step once you are done specifying file options. You can skip all

remaining screens ("Add Watermark", "Select Document Security", "Select E-mail options" etc.) by repeatedly pressing "Next >" if you are not interested in any additional options. Everything is now ready for running the mail merge.

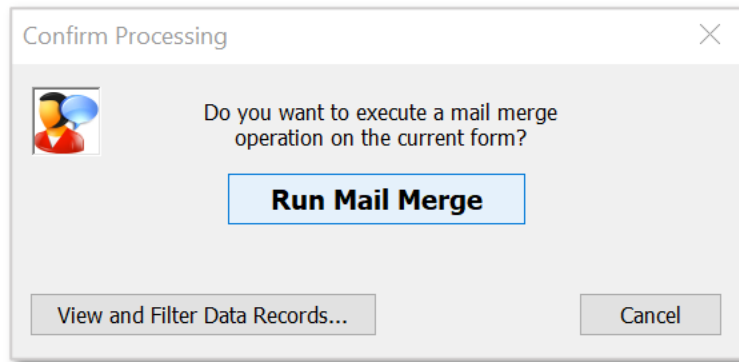
4.9. Optionally, save mail merge settings as an \*.mms file for later reuse by pressing the "Save Settings" button. Use "Load Settings" to load settings back.



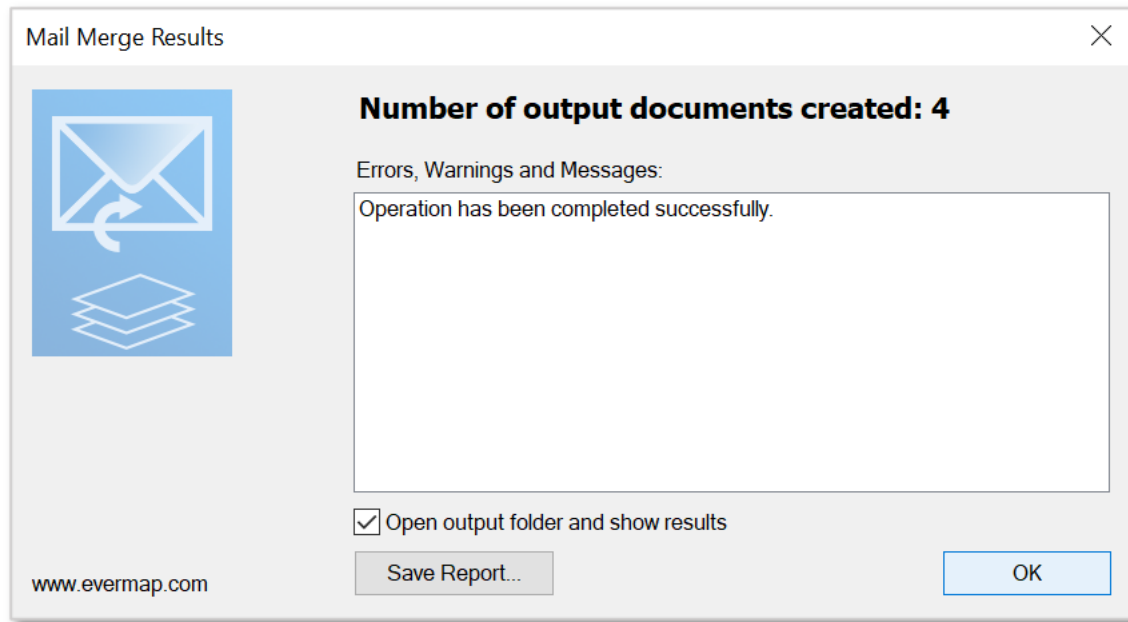
4.9. Press the "OK" button located on the main screen to start producing output documents:



4.10. Press “Run Mail Merge” on the "Confirm Processing" dialog to start mail merge processing:



You should see the “Mail Merge Results” dialog once the mail merge is completed, listing any errors that occurred during the processing.



Press “OK” to close this dialog and open the output folder where generated PDF files are saved. Examine output files by opening them in Adobe Acrobat to see if they satisfy your requirements. If necessary, make adjustments to the processing settings and run the mail merge again.

You can read more in-depth information about the various options offered by AutoMailMerge in the product’s user guide. Select “Help > Plug-in > AutoMailMerge...” from the Acrobat menu to access the software manual.

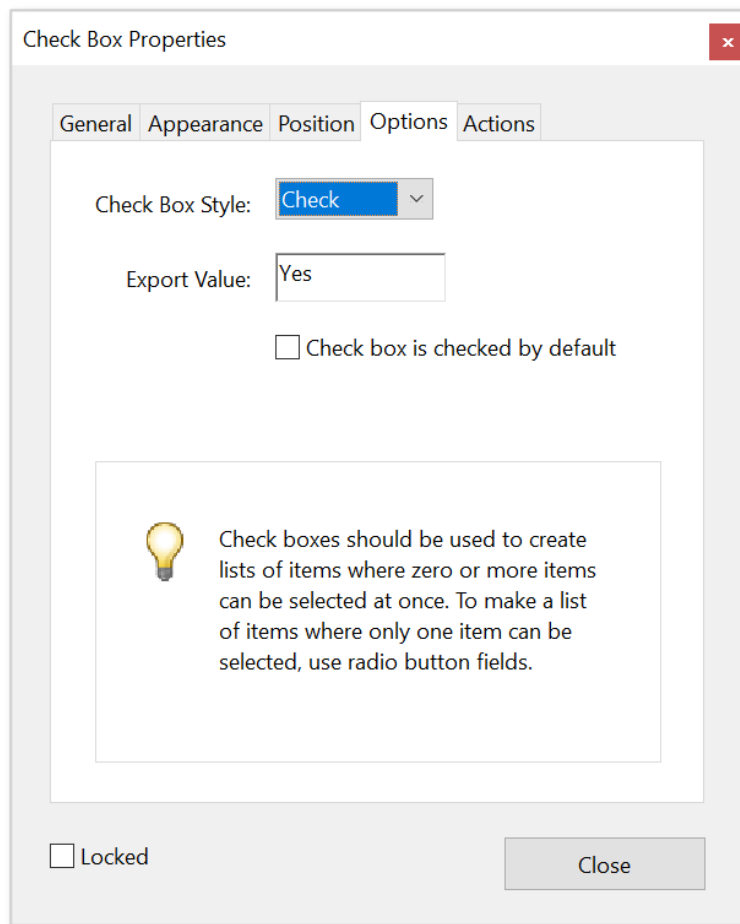
Visit <http://www.evermap.com/automailmerge.asp> for a detailed product overview and to download a free 30-days trial version of the software.

## Advanced Topic 1: Checking PDF Check and Radio Boxes

Check and radio boxes work in the same way as text fields. There are not "checked" or "unchecked", but they are filled with text. If a checkbox's "value" matches an "export value" defined by a specific checkbox field, then Acrobat displays this checkbox as "checked". If these two values do not match, the checkbox appears unchecked. The "Export value" for a checkbox is defined by the designer of a PDF form and can be found in each field's properties (see below for details on how to view and edit it). You can assign any text for the export value and use any text to "fill" a checkbox. Both values are always treated as text.

### How to see or change the "Export Value" of a check/radio box field:

1. Start the Adobe Acrobat form editor by using the "Prepare Form" tool (in Acrobat DC).
2. Right-click on the checkbox field.
3. Select "Properties..." from the popup menu.
4. Select the "Options" tab and verify or edit the "Export Value" entry box. Use the content of the "Export Value" to check this particular checkbox field when filling it with data.



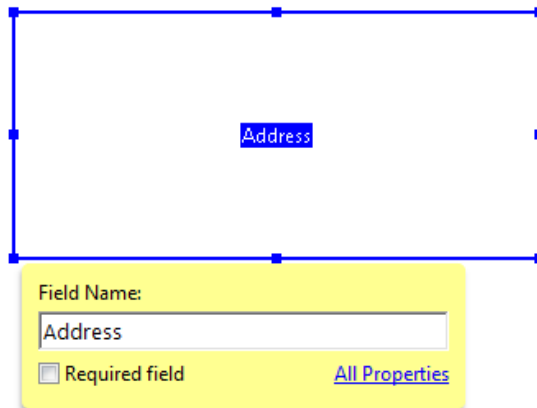
By default, "Export Value" is set to "Yes" for all newly created checkboxes.

Note that the "Export Value" is case-sensitive. It needs to be filled exactly with "Yes" in order to appear checked - not "yes" or "YES".

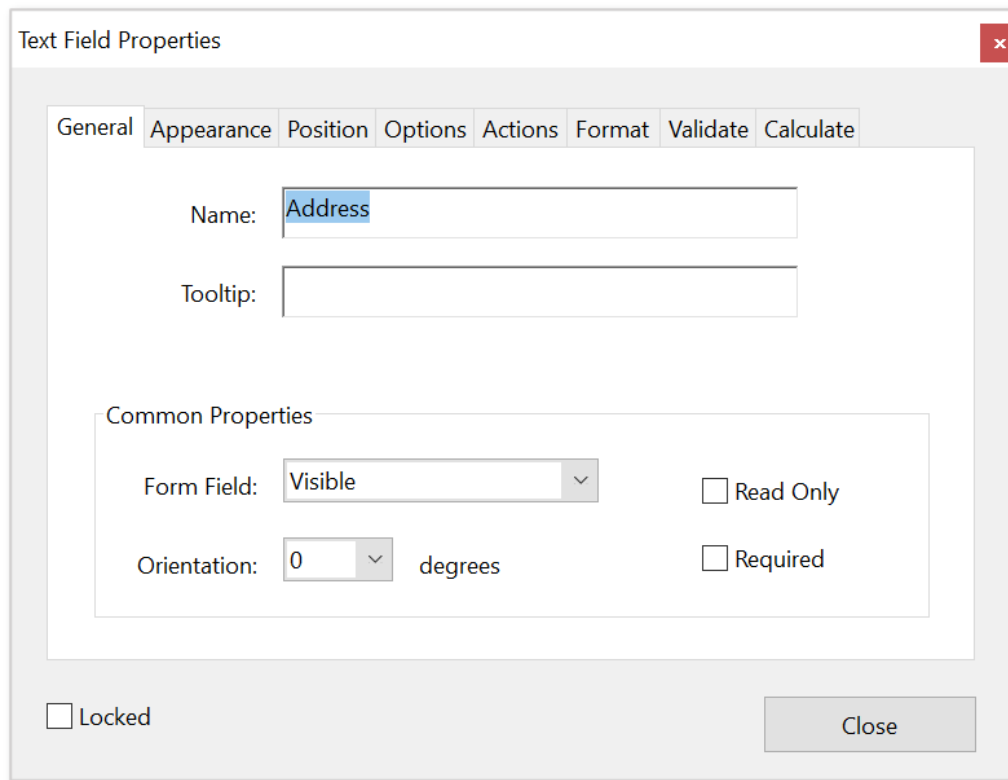
## Advanced Topic 2: How to Create Multiline Address Labels

One of the most common mail merge tasks is adding mailing addresses to newsletters, brochures and other mail correspondence. Please follow these simple steps if you want to add personalized mailing addresses from your customer database or spreadsheet to your correspondence.

1. First, add a single text field to your PDF document that is going to hold a mailing address. Refer to the beginning of this document for detailed instructions on how to add form field to a PDF document. Name this text form field something like "Address". Make sure that this text box is large enough to hold 4-5 lines of text.



2. Right-click on the form field and select "Properties..." from the popup menu. The field's "Text Field Properties" dialog will appear on the screen.



3. Select the “Options” tab and check the “Multi-line” option. This option will allow this field to hold multiple lines of text.

The screenshot shows the 'Text Field Properties' dialog box with the 'Options' tab selected. The 'Alignment' is set to 'Left'. The 'Default Value' field is empty. The 'Multi-line' checkbox is checked. Other options like 'Field is used for file selection', 'Password', 'Check spelling', 'Scroll long text', 'Allow Rich Text Formatting', 'Limit of', and 'Comb of' are unchecked. The 'Locked' checkbox is also unchecked. A 'Close' button is at the bottom right.

Text Field Properties

General Appearance Position **Options** Actions Format Validate Calculate

Alignment: Left

Default Value:

☐ Field is used for file selection

☐ Password

☒ Check spelling

☒ Multi-line

☒ Scroll long text

☐ Allow Rich Text Formatting

☐ Limit of 0 characters

☐ Comb of 0 characters


☐ Locked

Close

4. Press “Close” to close “Text Field Properties” dialog.
5. Save your PDF document with the newly added form field by selecting “File > Save As...” from the menu...
6. Select “Plug-in > Mail Merge...” from the menu to start a mail merge.
7. Press the “Edit Settings...” button to start configuring settings for the mail merge.
8. Press the “Browse...” button to select the input data source file.

9. Double-click on the “Address” field in the list (or select it and press “Add Mapping...”):

Mapping Between Data Source and PDF Form Fields

 Field mapping establishes a correspondence between a data source and PDF form field names. This mapping between fields will be used while filling PDF form.

Number of form fields: 1 / Number of mappings: 0 ☐ Show only mapped fields

PDF Form Field	Type	Data Source Field
Address	Text	

10. Check “Use a multi-field expression to create a composite field” option and type an expression:

**[First Name] [Last Name]**

**[Address 1]**

**[Address 2]**

**[City], [State], [ZIP]**

The expression assumes that data fields such as "First Name", "Last Name", "Address 1" etc. actually exist in the input data file. Any text inside [...] is treated as a data field name. All other text is treated as static text and will be inserted into the output "as-is".

Select Data Field

Available Fields:


- Address1
- Address2
- City
- First Name
- Last Name
- State
- ZIP

Composite Field

☒ Use a multiple-field expression to create a composite field

Enter expression:

[First Name] [Last Name]  
 [Address 1]  
 [Address 2]  
 [City], [State], [ZIP]

 For example, if you have two data fields: "Street" and "City", then you can combine them into a single composite field by writing: Send to: [Street], [City]. Where [Street] and [City] refer to corresponding data fields.

Examples of the composite field values created by this expression: "Send to: Lane Ave, Portland" or "Send to: Highland Road, Seattle".

[Learn more...](#)



11. Press “OK” to close the “Select Data Field” dialog. Then complete the rest of the configuration wizard and run the mail merge to produce output documents.

Mailing addresses in your document should look like the following (sample):

**John Doe**  
**2397 NW Pacific Drive**  
**Corvallis, OR, 97330**

The plug-in automatically removes any blank lines in the text if a certain data field (such as “Address 2”) are empty. Use the **{blank}** keyword if it is necessary to preserve a blank line in a composite field:

**[First Name] [Last Name]**  
**{blank}**  
**[Address 1]**  
**[Address 2]**  
**[City], [State], [ZIP]**

The above expression produces the following output (sample):

**John Doe**  
  
**2397 NW Pacific Drive**  
**Corvallis, OR, 97330**

Examine output documents to make sure that the size of the text form field is sufficient to hold the amount of text from all the data records. Enlarge the field if text appears to be cut off on some of the output forms, or reduce the font size. You can change the size and visual appearance of the text field (such as font and color) by [editing it in the Acrobat form editor](#).

## Advanced Topic 3: Automatic Emailing of PDF forms

AutoMailMerge provides the ability to automatically send populated PDF forms to email recipients.

1. The first step is to put email addresses for each data record/recipient into the data file. For example, add an "Email" column to the Excel spreadsheet:

	A	B	C	D
1	First Name	Last Name	Email	City
2	John	Doe	<a href="mailto:john.doe@mycompany.com">john.doe@mycompany.com</a>	Portland
3	Mary	Peterson	<a href="mailto:mary.peterson@yahoo.com">mary.peterson@yahoo.com</a>	Corvallis
4	Peter	Harrison	<a href="mailto:peterharr@outlook.com">peterharr@outlook.com</a>	Newport
5	Mark	Johnson	<a href="mailto:markjohnson@mylawfirm.com">markjohnson@mylawfirm.com</a>	Corvallis

2. In the mail merge settings "Select E-mail Options" dialog, check the "Send emails to the recipients..." checkbox and select the "Email" data field from the "Data source field to use for email address" list.

E-mail

Select E-mail Options

Specify e-mail options to use for creating and sending messages

Email Options

☒ Send e-mails to the recipients using addresses from the data source

Advanced...

☒ Attach mail merged PDF file to email message

E-mail format: Plain Text

☒ User interaction is required for sending e-mails

Message Details

Data source field to use for e-mail address: Email

Cc:

Bcc:

Subject: This is a subject

Message: 

Dear [First Name] [Last Name],  
Please find your monthly statement attached.  
Your Support Team

Help...

Use [field name] to refer to a value of the data source field

☒ Request read receipt

3. Type the desired "Subject" line and enter text for the email message into the "Message" entry field. It is possible to customize each email message by inserting values of data fields into email messages. For example, type the following into the "Message" field:

**Dear [First Name] [Last Name],**  
**Please find your monthly account statement attached.**  
**Your Support Team**

The above example assumes that there are "First Name" and "Last Name" data fields present in the data source. The values from these fields will be inserted into each customized email message, producing something like the following:

**Dear John Doe,**  
**Please find your monthly account statement attached.**  
**Your Support Team**

4. Press "Next >" to advance to the next settings screen. Select the desired emailing method from the screen below. By default, the software will use your currently installed email client:

If you have selected a default emailing method, then no setup is necessary. However, this emailing method comes with certain restrictions. Due to Windows' security policy, you will be prompted to confirm the sending of each email message. It is possible to send emails via the default email client without confirming each outgoing message (uncheck the "Use simple MAPI protocol" option). However, this ability is typically disabled in most corporate environments due to security reasons.

The best method to send emails without any user interaction is via an SMTP email server. Select the "Use SMTP Internet E-mail Server" option if you want to use this method, and press "Next >".

5. You would need to know SMTP server settings for the specific server used at your organization. Enter your name, email address, account user name, account password and SMTP server address.

E-mail Server

**Select E-mail Server**  
Select SMTP e-mail server to use for outgoing e-mail messages

**Information**  
You need to specify outgoing email server parameters (SMTP) in order to be able to send emails. Each of these settings are required to get email delivery working.

**User Information**  
User name and email address are displayed in each outgoing e-mail message to identify you as a sender.  
Your Name:  E-mail Address:

**Logon Information**  
User Name:  Password:

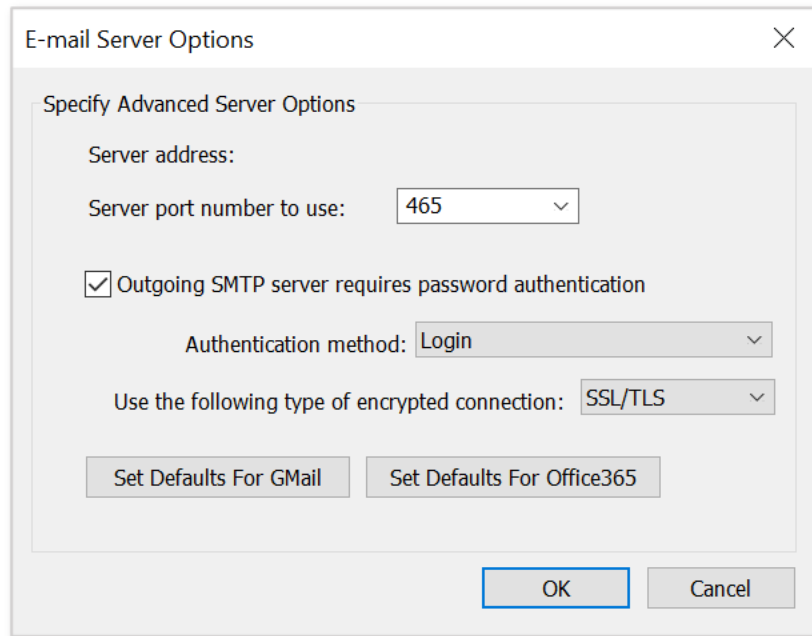
**Server Information**  
E-mail Server (SMTP):  [Advanced Server Options...](#)  
After filling out information on this screen, we recommend you test your account by clicking on "Test Server Settings..." button. (Requires network connection)  
[Test Server Settings...](#) [Help...](#)

Text entered into the "Your Name" field will appear in the "From" field of all outgoing emails. This is the name that all recipients see next to each email message. Addresses entered into the "E-mail Address" field will be used as "reply-to" addresses for all emails.

Make sure that the "User Name" and "Password" matches your SMTP account. These settings are crucial to correctly connect to the SMTP server and send emails.

6. Press the "Advanced Server Options..." button to specify low level details like port number, security protocols and the authentication method.

Here is an example of settings for the Gmail SMTP server:



E-mail Server Options

Specify Advanced Server Options

Server address:

Server port number to use: 465

☒ Outgoing SMTP server requires password authentication

Authentication method: Login

Use the following type of encrypted connection: SSL/TLS

Set Defaults For GMail Set Defaults For Office365

OK Cancel

Press "OK" to save these settings.

Press "Test Server Settings..." to check the server configuration by emailing a test message to your own email address specified in the "E-mail Address" entry field. If all settings are correct, you should receive a test email message shortly. Check the junk mail folder, because it is possible that it will be automatically classified as a junk message.

Press "Next >" to move on to the next screen once you're finished configuring email settings.

**IMPORTANT:** Most SMTP servers have a daily quota for sending emails. If you exceed a daily limit of outgoing email messages, then your account will be temporary suspended until the next day. Please consult your Internet service provider or IT department for details.

Have a question? Email us at [tech@evermap.com](mailto:tech@evermap.com).

You can find other AutoMailMerge tutorials online at:

<https://www.evermap.com/AutoMailMerge.asp#tutorials>.

The software product page is located at the following address:

<https://www.evermap.com/AutoMailMerge.asp>