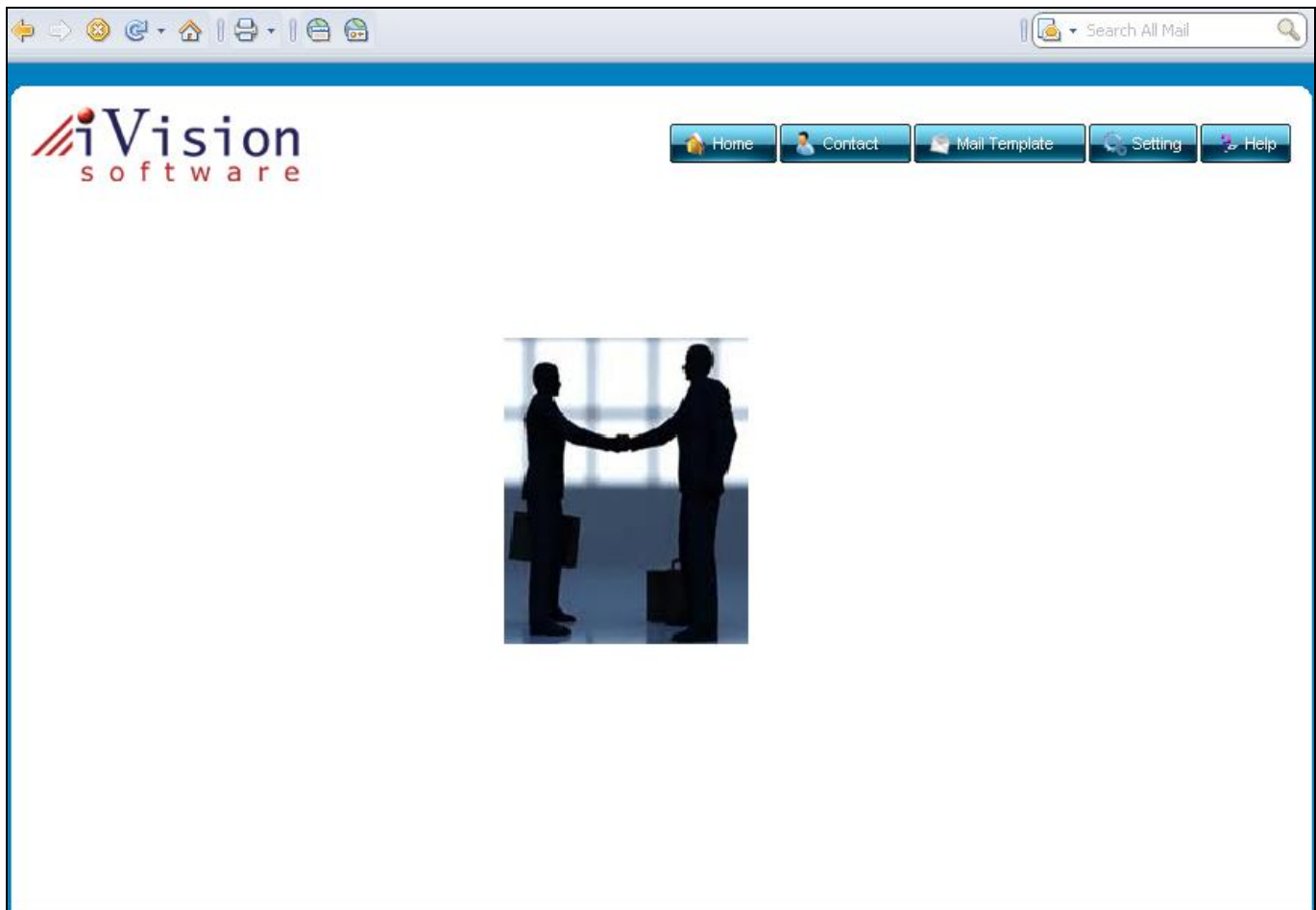


Lotus Notes Mail Merge Tool

This tool helps the users who want to send personalized e-mail to a set of recipients, user can use mail merge tool to create the e-mail messages. Each message has the same kind of information, yet the content of each message is unique. The unique information in each message comes from entries in a data file. Furthermore, with mail merge, each e-mail message is a separate mailing where each recipient is the sole recipient of each message. The tool also allows the users to send a unique attachment through the email. The tool exclusively gives a drag and drop user interface where the user can quickly design his mail template with a great ease. The tool automatically saves the existing mail templates for repetitive use. The user can also modify or delete the existing template.



A Mail Merge Tool has been developed for Lotus Notes. This Tool will allow a user to create and send customised mail-merge emails to a set of recipients, based on Excel spreadsheet data & Notes address book. This Tool overcomes limitations in integrating Microsoft Office's built-in mail merge functions with Notes email clients.

This document provides an overall guide on using the Lotus Notes Mail Merge Tool. The Notes agents themselves also provide a lot of contextual help, validation, and confirmation dialogs for the end user should they need assistance.

Arrange the mail merge data in an Excel Spreadsheet:

- The Spreadsheet should contain columns of data, with a header row.


1	Mail_ID	Name	EMP ID	Contact NO	Attachment Type
2	kaivalyas@ivisionsoftware.com	Kaivalya	101	12345678	xlsx
3	atulm@ivisionsoftware.com	Atul	102	23345678	docx
4	anils@ivisionsoftware.com	anil	103	2323	xlsx
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					

- A **TO** column containing email addresses should be created, and optionally, **SUBJECT** and **CC** columns may also be provided. These special columns will populate the corresponding standard email fields, but also may be used in the email body.

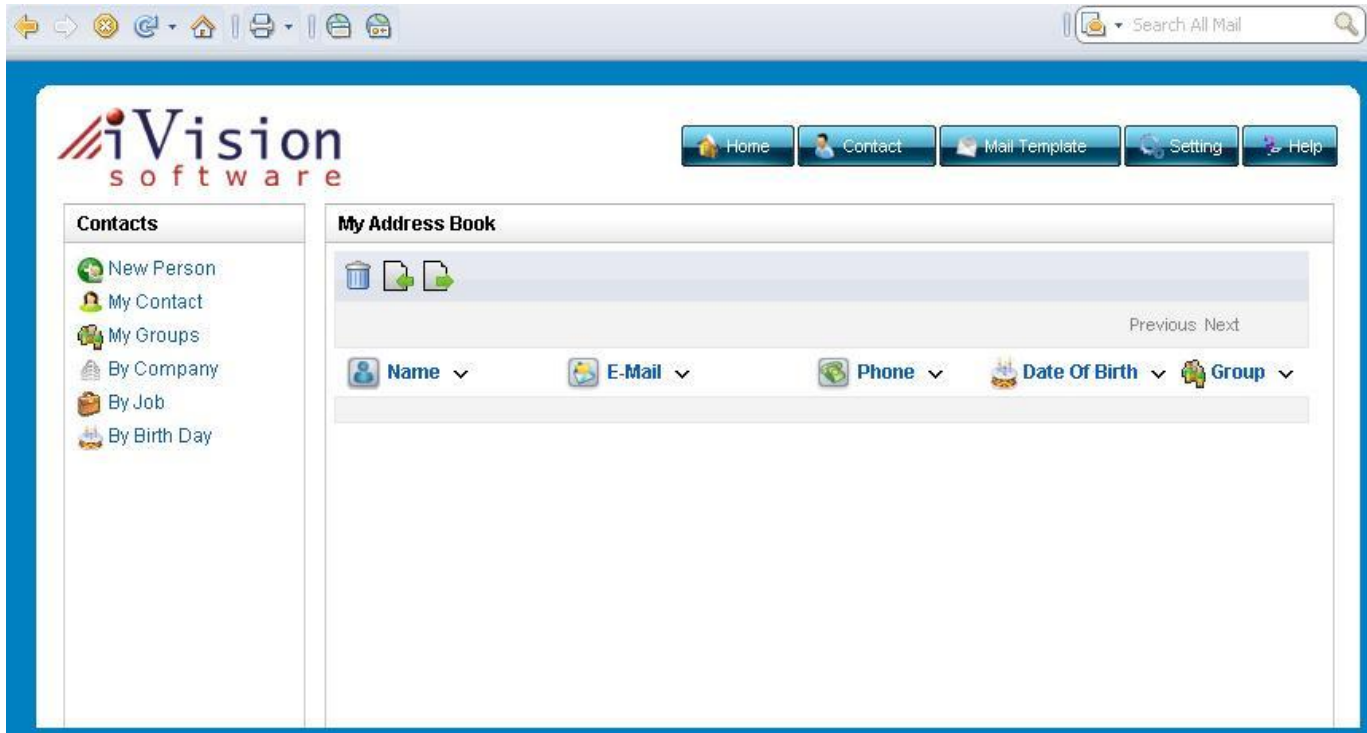
Address Book Selection

Select Address Book for Mail Merge

Lotus Notes Excel

Next Step 

- Include other columns which you to customise a mail-merge email for each recipient (e.g. **FIRST NAME, SURNAME, Employee Code, Email Address, and Company Number etc.**)
- Cells may contain Excel formulae to derive their value; however, any cell formatting will be ignored.



Draft a new email in Notes to use as a mail merge template:

- Compose a new email. The draft email will be a 'template' for the new mail merge documents.
- The email body should include text tokens which correspond to the spreadsheet column headings.
- Each token must be presented in UPPERCASE, surrounded by square brackets (e.g. **[FIRST NAME]**, **[SURNAME]**, **[Employee ID]** etc..). You may include the special tokens (**[TO]**, **[CC]** and **[SUBJECT]**).
- All text formatting, attachments and links around the tokens in the email body will be preserved in merged emails.
- All occurrences of a token will be replaced, so you can use the same token several times in the email body.
- The standard email fields, **To**, **Cc** and **Subject**, are treated specially and will be populated by any the spreadsheet column with that header, so you can leave those blank in the template (or they will be overwritten).
- Save the draft email.

Select the draft email and run the 'Create Mail Merge' Notes agent:

- Select the new email you drafted as a template with the necessary text tokens to replace.
- From the 'Actions' menu, select the 'Mail Merge -> Create Mail Merge' action.
- The agent will guide you through selecting a spreadsheet file, validating the document tokens against spreadsheet headers, and generating the draft mail-merge documents in a batch for each of the spreadsheet data rows.
- A group ID will be assigned to the mail-merge documents for sending later.

Address Book Selection

Do you want to attach unique document by ID?

Yes No

- You can update the entries of new employee

iVision
software

Home Contact Mail Template Setting Help

New Person Entry for Address Book (* Marked with Mandatory)

Personal Information

Group Name

First Name*

Last Name*

Date of Birth

Gender: Male Female

Marital Status: Single Married

Contact Details

Address

City

State

Country

Pin Code

Communication

E-Mail*

Mobile No.

Phone No.

Office No. Ext. No.

Professional Details

Employee ID*

Company

Job Title

Designation

Location

Joining Date

Reporting To

Attachment Details

File Name

File Extension

Other Information

Information_1

Information_2

Information_3

Information_4

Information_5

Save Save & Add Another Cancel

Preview and validate resulting draft emails

- The new mail-merge draft emails can be viewed from the 'Drafts' folder in Notes.
- Check a few of emails have the correct text, formatting, and recipient addresses.
- If any emails are not correct, delete the generated draft emails, modify your spreadsheet or mail-merge email template accordingly, and create a new mail-merge batch.

Fields Name	Design Mail Template
(FirstName) (LastName) (DateOfBirth) (Gender) (MaritalStatus) (Address) (City) (State) (Country) (PinCode) (EMail) (MobileNo) (PhoneNo) (OfficeNo) (ExtentionNo) (EmployeeId) (CompanyName) (JobTitle) (Designation) (Location) (JoiningDate) (ReportingTo) (Information_1) (Information_2) (Information_3) (Information_4) (Information_5)	<p>Save Next Step Close</p> <p>To : (EMail)</p> <p>CC :</p> <p>Subject :</p> <p>Browse... Upload</p> <p>Format</p> <p>Font Size</p>




Run the 'Send Mail Merge' Notes agent:

- You may choose to delete unnecessary drafts, or send specific drafts manually as a regular email.
- To send the unsent emails as a group, select from the actions menu: 'Mail Merge -> Send Mail Merge'.
- You will be prompted for the group ID of the documents to send (the program will 'remember' the last mail merge group ID, or you can select one document in the batch to use its group ID).

- A dialog will be displayed confirming the number of unsent draft emails in the group, and the date they were created.
- You may then confirm that dialog to continue to send the emails. Each sent document will move from the 'Drafts' to the 'Sent' folder in Notes.
- If any error occurs during sending, the remaining affected emails can be fixed, and any unsent emails in the group can be sent by running the action again and providing the same group ID.



➤ Mail sent to individual

Template	Mail
<ul style="list-style-type: none"> New Template My Template Sent Mail	<p>To : details@gmail.com CC : Subject : Test mail.</p> <p>Hi rasika,</p> <p>Check your details..</p> <p>Age - 25 Address - pune Department - lotus</p> <p>Regards, Mail Merge.</p>