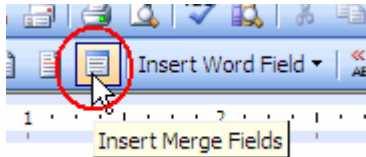


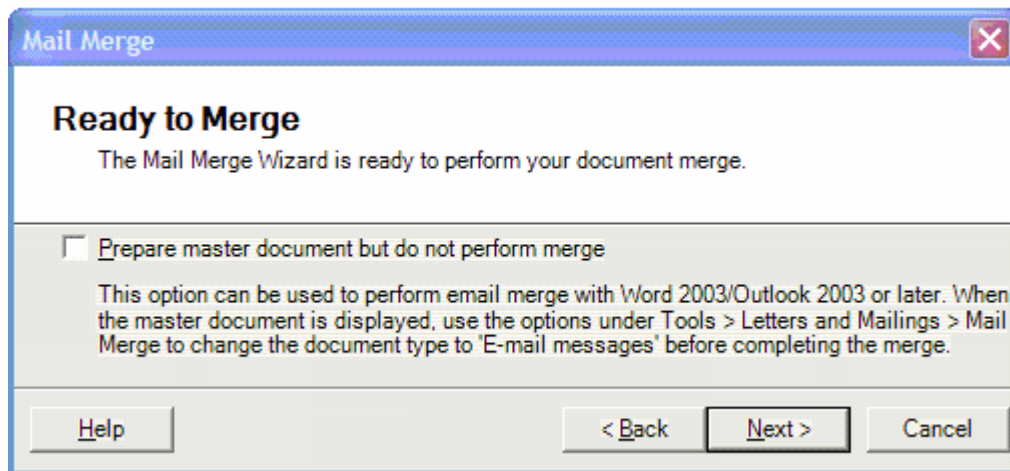
Here are step by step instructions on how to do an email merge in REA 9.
You must have Microsoft Office 2003 to use this feature of REA 9.

Creating You Email

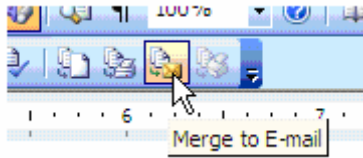
1. Open the contact table.
2. Click the Write menu and select Document Templates.
3. Click the New button and create your email. If you want to add fields from the contacts records such as their greeting or first name you can select those in Word using the Insert Merge Fields button.



4. Save your email template in Microsoft Word and go back to REA 9.
5. Close the Document Template window in REA 9.
6. If you want to do an email merge to multiple contacts query for them first.
7. Press {F3} or Click the Write menu and select Mail Merge.
8. Select Current Contact or All contacts in query as needed.
9. Select your document from the list.
10. If you would like to create a history fill in the history record. You can click the More button at the bottom right of the Create History Record dialog to change things like the event type to Email instead of the default of Letter.
11. Click Next.



12. Check the box that says Prepare master document but do not perform merge.
13. Click Next
14. Click the toolbutton in Microsoft Word that says Merge to E-mail when you hold your mouse over it. The toolbutton should look similar to the one below.



15. Fill in the Merge to E-mail dialog.

A screenshot of the 'Merge to E-mail' dialog box. The dialog has a blue title bar with the text 'Merge to E-mail' and a close button. It is divided into two sections: 'Message options' and 'Send records'. Under 'Message options', there are three fields: 'To:' with a dropdown menu showing 'Contact_Email', 'Subject line:' with a text box containing 'Put your Email Subject line here', and 'Mail format:' with a dropdown menu showing 'HTML'. Under 'Send records', there are three radio buttons: 'All' (selected), 'Current record', and 'From: [text box] To: [text box]'. At the bottom, there are 'OK' and 'Cancel' buttons.

16. In the To section select the Contact_Email field from the list. This is the field in the record(s) REA passed to Microsoft Word that contain the email address for each contact in your list.
17. Enter the Subject line, each email will have the same subject line.
18. Decide the Mail format, HTML keeps formatting and pictures but not every email system can support those although most can.
19. Click OK.
20. Your email(s) will automatically be sent from Outlook. Each contact in the merge will receive an individual email addressed to them and it will come from your default Outlook email account.

(858) 729-0154
www.gorea.com