Quick Start Guide To:

[[Mail Merges]] in the Advanced Editor

A mail merge is the method of pulling contact information from your database and populating the information into a designated location within your emails. This is extremely helpful for personalizing mass emails with each person's first and/or last name. For example, you can pull the first names of every single person in your database that you are sending to right into your email, so that "Dear [[First Name]]" would show up as "Dear John," "Dear Sue," "Dear Bill," etc. This Quick Start Guide provides information for inserting mail merges into your email templates.

Inserting Mail Merge Tags

1. Log into the Sage E-marketing for Sage CRM portal via this link: http://swiftpage.com/logineditor.htm.

2. Click on the Template Editor button. (You can bypass steps 1 and 2 by clicking on the Sage E-marketing for Sage CRM icon within program you use Sage E-marketing for Sage CRM in—ACT!, SalesLogix, Excel, etc.—and clicking on the Edit Template button.)

3. Once in the Advanced Template Editor, place your cursor where you want to put the mail merge field and then click on the Mail Merge drop down box (in the bottom row of the toolbar at the top).

4. You should see a list of standard fields and also fields from your database.

Select one of the Mail Merge options and the mail merge will automatically be put into your template, formatted as it should be.

    a. **Note:** the Mail Merge can be used anywhere in a template, but the most important thing is that the mail merge field itself matches up exactly with a field in your database or it will not know where to pull the correct merging information. For instance, [[Name]] or [[firstname]] in your template will not pick up a field called First Name in your database.

    b. **Another note:** you can use any custom mail merge field you like, so long as the field exists in your database. The convention for any mail merge is the database field name in double square brackets, so—even if it does not appear in your dropdown menu—you could type [[Favorite Color]] in your template and it will merge correctly with a field in your database called Favorite Color.

    c. **Note for imported templates:** if you wish to put a mail merge field in an imported template, simply use the convention listed in the step above to type in your mail merge field before you import your template. For example, put the text [[First Name]] into your imported template, and when you import the HTML file and send it, that field will merge with a First Name field in your database.