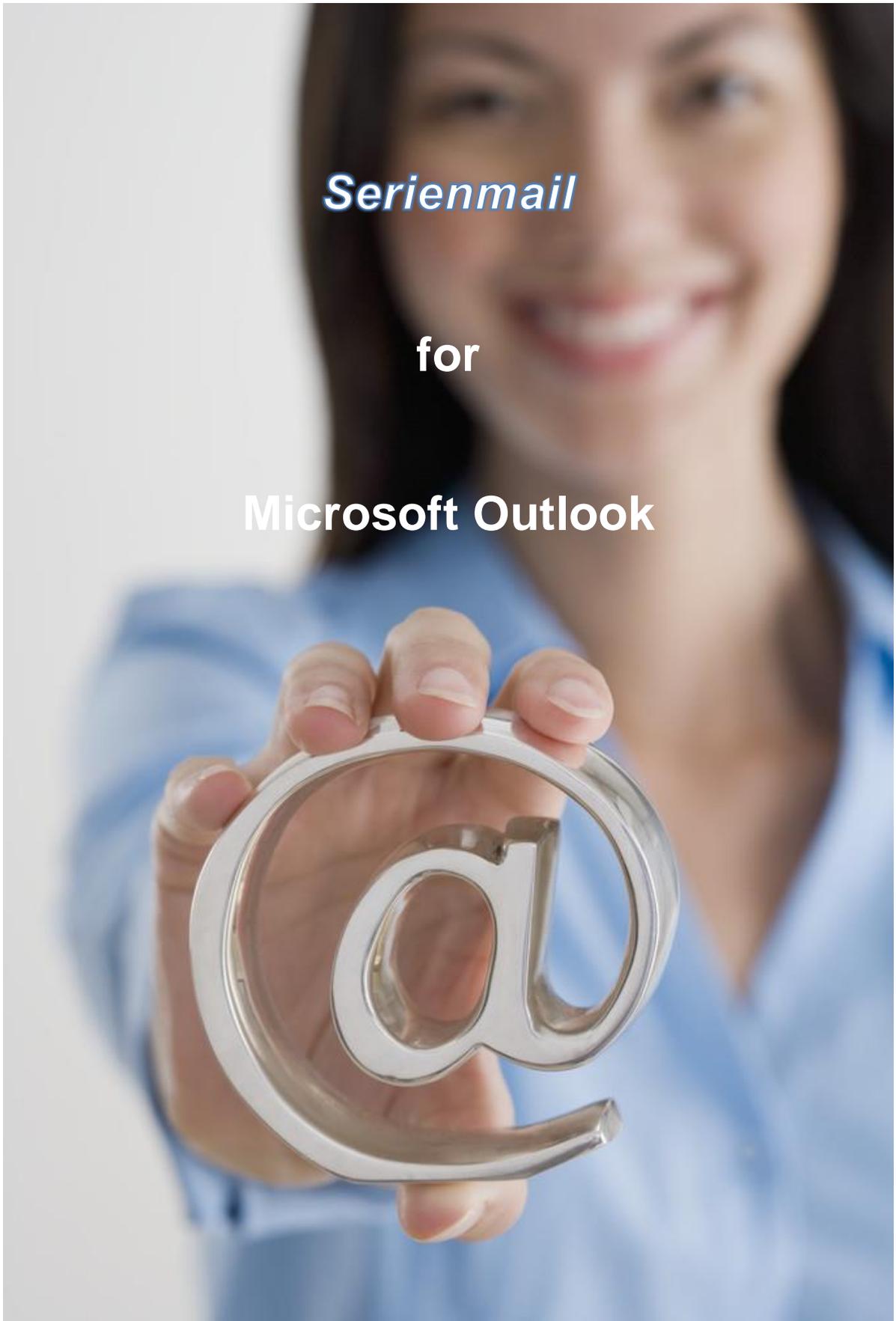
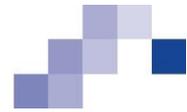


*Serienmail*

for

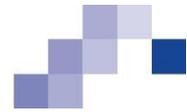
Microsoft Outlook



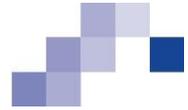


# Contents

<b>1</b>	<b>Bulk e-mails using Microsoft Outlook</b>	<b>4</b>
<b>2</b>	<b>Personalized bulk e-mails with attachments</b>	<b>5</b>
2.1	The Excel-sheet	5
2.2	The e-mail	5
2.3	Send personalized bulk e-mails with attachments	6
2.3.1	Workbook	8
2.3.2	Worksheet	9
2.3.3	E-Mail column	10
2.3.4	Placeholder	11
2.3.5	Recipients	12
2.3.6	Sending	13
<b>3</b>	<b>Bulk e-mails with personalized attachments</b>	<b>16</b>
3.1	Inserting attachments manually	18
3.2	Selecting attachments	18
3.3	Inserting attachments using formulas	19
<b>4</b>	<b>Personalized bulk e-mails with variable subjects</b>	<b>20</b>
<b>5</b>	<b>Bulk e-mails with personalized hyperlinks</b>	<b>25</b>
<b>6</b>	<b>Determine customer satisfaction using <i>Serienmail</i></b>	<b>28</b>
<b>7</b>	<b>Exporting contacts from Microsoft Outlook</b>	<b>33</b>

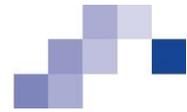


<b>8</b>	<b>Advanced Techniques</b> .....	<b>38</b>
8.1	Selecting recipients .....	38
8.1.1	All included .....	39
8.1.2	All excluded .....	39
8.1.3	Apply Excel-Filter .....	39
8.1.4	Select range.....	39
8.1.5	Send e-mails in packages.....	40
8.2	Notes on placeholders.....	40
8.3	Check placeholders for recipients .....	41
<b>9</b>	<b>Organizational</b> .....	<b>42</b>
9.1	System requirements.....	42
9.2	License .....	42
9.3	Contact.....	42
<b>10</b>	<b>Illustration directory</b> .....	<b>43</b>



## 1 Bulk e-mails using Microsoft Outlook

***Serienmail*** is a powerful tool to create and send personalized bulk e-mails quick and easy using Microsoft Outlook. Simply use your established Excel workbooks. Recipients, e-mail-addresses, salutations and other data will be retrieved and inserted. ***Serienmail*** combines the flexibility of Microsoft Excel in arranging the recipient information with the tools available in Microsoft Outlook for creating and formatting e-mails.



## 2 Personalized bulk e-mails with attachments

The creation of personalized bulk e-mails with an attachment is explained on the following example:

You want to inform all your customers and subscribers about your new product. Information about the product is added to the e-mail as an attachment.

To realize this example, you will need:

- An Excel-sheet containing individual salutations and the e-mail-addresses of the recipients,
- an attachment containing information about your product and
- an e-mail advertising your product.

As you can see, it's not rocket science. Everything else is done for you by *Serienmail*.

### 2.1 The sheet in Microsoft Excel

To advertise your product, you will need the personal salutation for your recipients and their e-mail-addresses.

You can assemble the necessary information using Excel or import them from another source.

A sheet in Excel, which is suitable for our example, could look like this:

	A	B	C
1	Salutation	E-Mail	
2	Dear Mrs. Doe	<a href="mailto:a.doe@it-service-ruhr.de">a.doe@it-service-ruhr.de</a>	
3	Dear Mr. Miller	<a href="mailto:p.miller@it-service-ruhr.de">p.miller@it-service-ruhr.de</a>	
4	Dear Mr. Smith	<a href="mailto:j.smith@it-service-ruhr.de">j.smith@it-service-ruhr.de</a>	

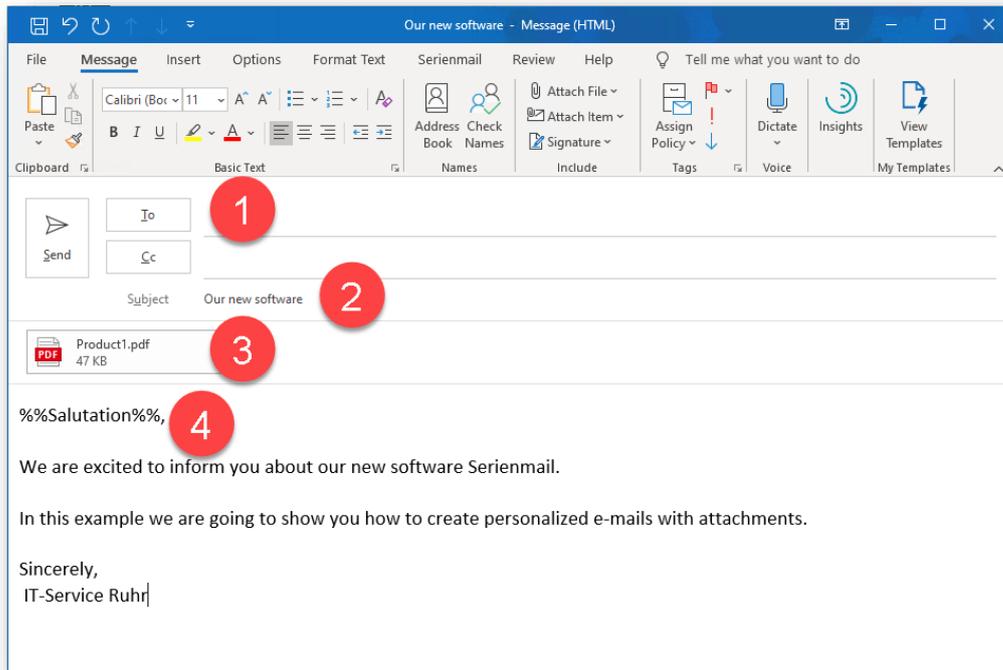
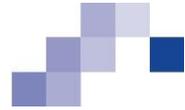
Illustration 1: Sheet in Excel with recipients

- ⚠ Avoid **special characters** and **spaces** inside column titles. Add technical terms, e.g. OrderNo., underlined by Spelling & Grammar, to the dictionary, as placeholders may not be resolved correctly otherwise.

### 2.2 The e-mail

You want to advertise your product effectively and have prepared text for the e-mail as well as your product information sheet.

Consider the four following points in the creation of your e-mail and you are ready to inform subscribers about your product.



**Illustration 2: Information about your product**

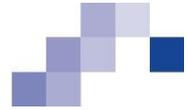
1. Do not fill out the field *To*. Recipients will be added later by **Serienmail**.
  2. Insert a subject for the bulk e-mail, e.g. *Our new software*.
  3. Insert the prepared attachment as usual. Multiple attachments are possible as well.
  4. Add the placeholder **%%Salutation%%** to your mail in order to address all clients personally. The placeholder must match the column title exactly and must be marked by two leading and two closing %%.
- ⚠ Avoid **special characters** and **spaces** inside column titles. Add technical terms, e.g. OrderNr, underlined by Spelling & Grammar, to the dictionary, as placeholders may not be resolved correctly otherwise.

## 2.3 Send personalized bulk e-mails with attachments

After you have created your e-mail, the **Serienmail** assistant will guide you through the next steps to send your e-mails.

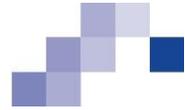
To start the assistant, proceed as follows:

1. Place the cursor anywhere inside the text.
2. Activate the **Serienmail** tab. You will see the following Ribbon:



**Illustration 3: Ribbon *Serienmail***

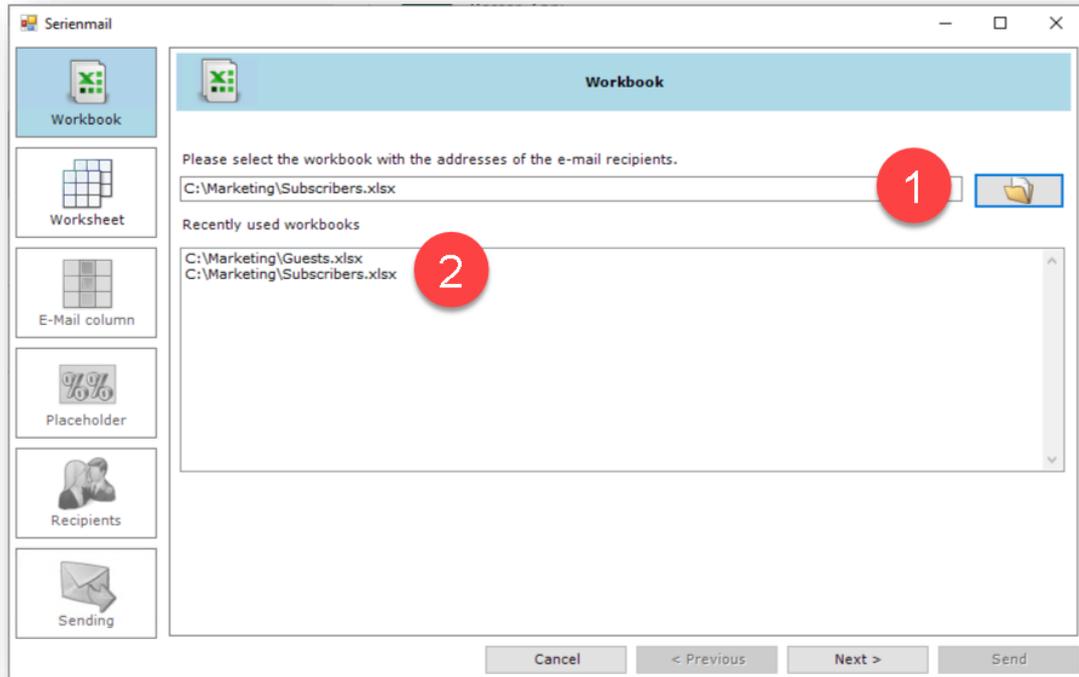
3. Click on the *Sending* button. This will start the assistant that guides you through the next steps.



### 2.3.1 Workbook

In the *Workbook* step of the assistant, you select the data source for *Serienmail*.

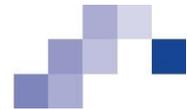
1. First, select the workbook containing the e-mail-addresses of the recipients. ①



**Illustration 4: Selecting a workbook**

The last selected workbooks are shown in *Recently used workbooks*.② If the desired Excel-workbook is part of the list, you can simply click on the corresponding entry.

4. Proceed by clicking on *Next*.



### 2.3.2 Worksheet

In the *Worksheet* step of the assistant, all areas suitable as a data source will be detected. They are then listed inside the *Worksheet* and *Named range* tab.

Choose the range containing the e-mail-addresses for *Serienmail* and proceed by clicking *Next*.

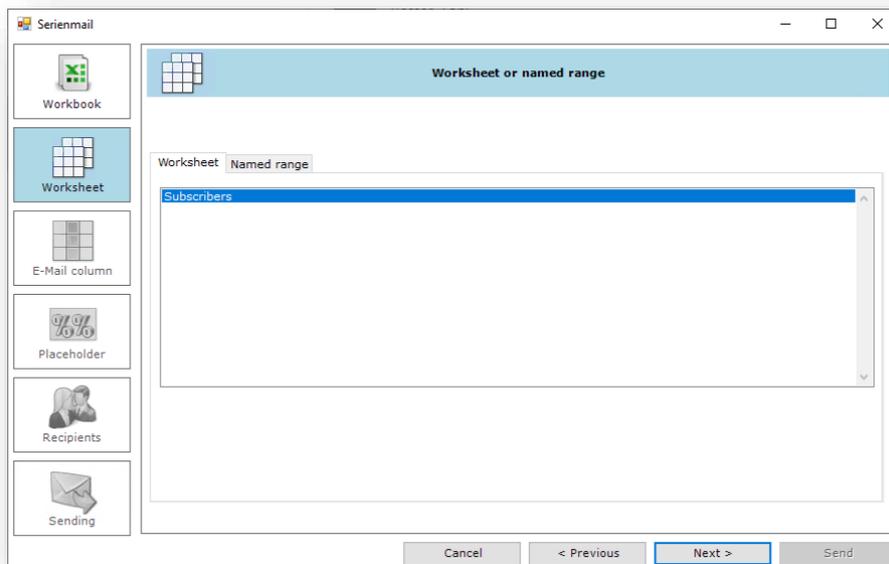
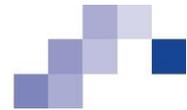
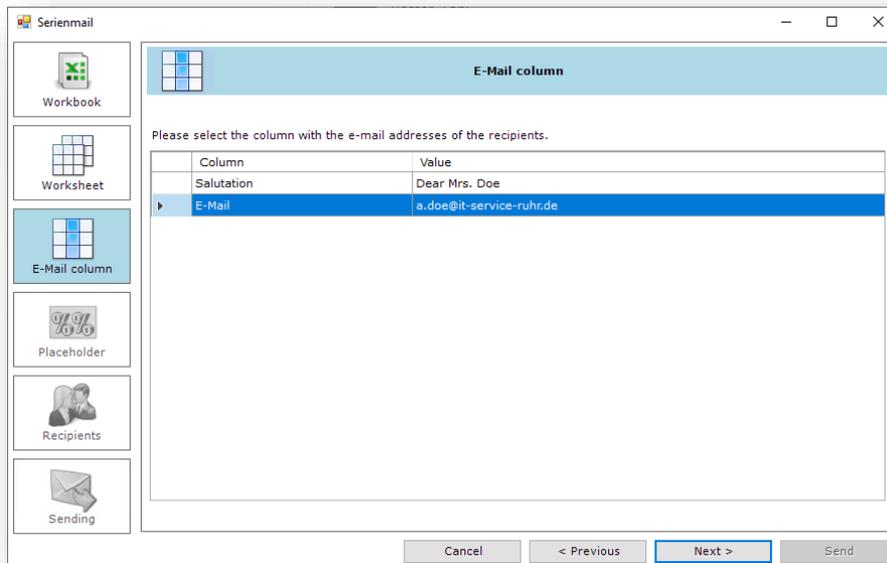


Illustration 5: List of potential data sources



### 2.3.3 E-Mail column

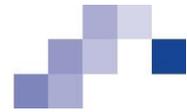
In the *E-Mail column* step of the assistant, column titles and the first record are shown. Here you can check if the columns containing the e-mail-address and the salutation were correctly identified. The first record must always contain at least an e-mail-address. Should that not be the case, the Excel-sheet must be reordered.



#### Illustration 6: Checking e-mail-address

If the column containing the e-mail-address is not recognized, select the row containing the e-mail-addresses of the recipients inside the dialog.

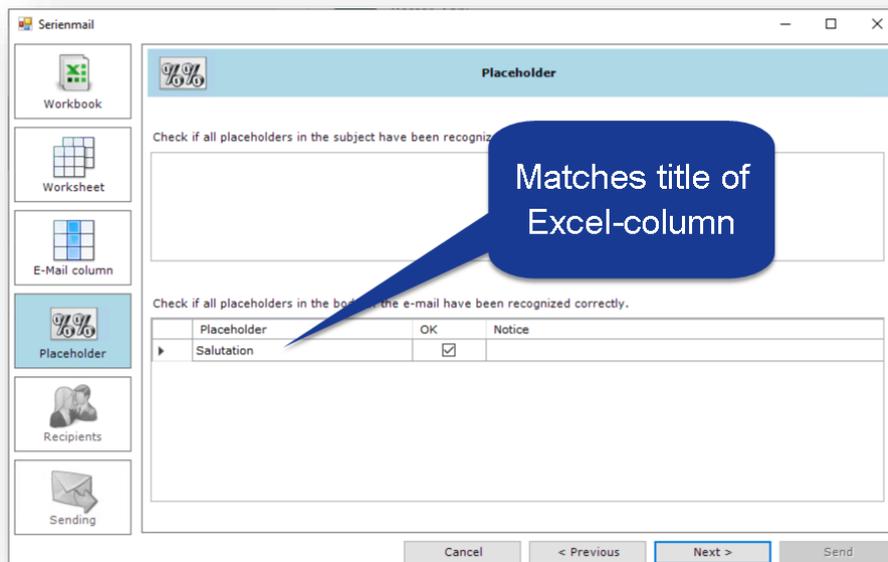
When the correct row containing the e-mail-address is selected, proceed by clicking *Next*.



### 2.3.4 Placeholder

In the *Placeholder* step the assistant checks all placeholders used inside the e-mail text. In order to send the e-mails successfully, two conditions must be met:

1. The placeholders inside the e-mail must match the column titles in Excel 100%.
2. Outlook must not find any “spelling mistakes” inside the placeholders. If placeholders are underlined red (identified as spelling mistakes), add them to your dictionary by right-clicking.



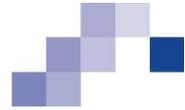
**Illustration 7: Checking the placeholders**

In our example, the placeholder **%%Salutation%%** is found inside the text and as a column title inside the data source. This is shown as an activated checkbox inside the column *OK*.

If there are problems with recognizing the placeholders, quit the assistant. Check,

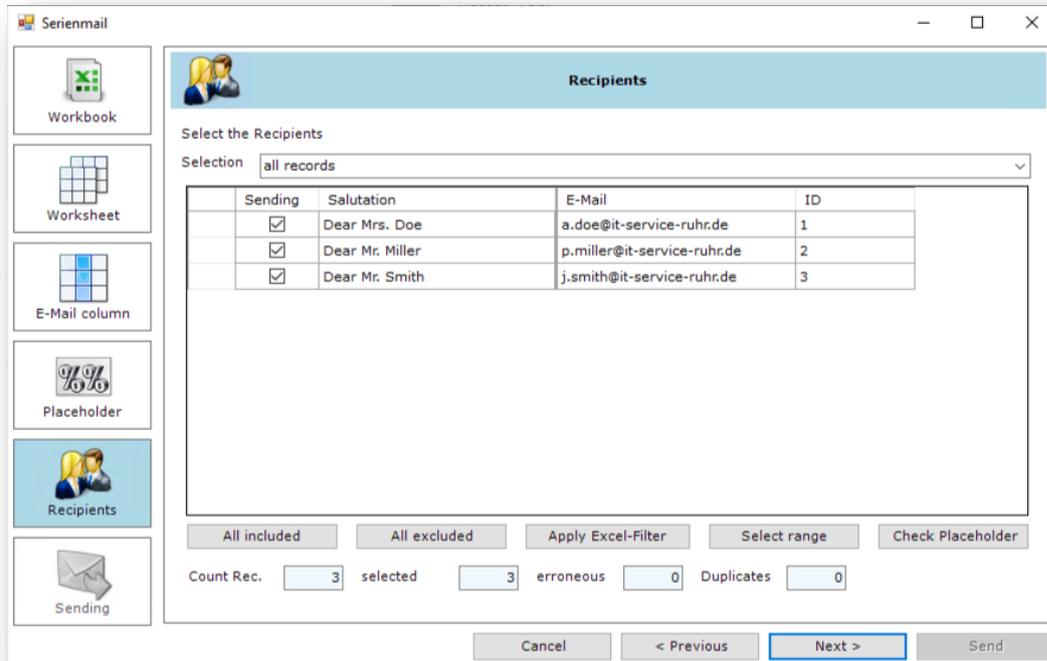
- if the used placeholders are present as column titles inside the workbook in Excel and
- if you have added technical terms, e.g. OrderNr, to the Spelling & Grammar dictionary.

As soon as all placeholders are recognized correctly, you may proceed with the assistant by clicking *Next*.



### 2.3.5 Recipients

In the *Recipients* step of the assistant you can check the list of your bulk e-mail recipients.



**Illustration 8: Checking the recipients**

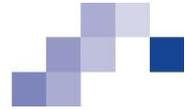
If one or multiple e-mail-addresses were found multiple times, they will be highlighted yellow. If e-mail-addresses do not fit the expected format, e.g. because of a missing @ or the address containing spaces, they will be highlighted red. If required, quit the assistant and correct the invalid e-mail-addresses.

Inside the lower part of this dialog, you can find statistic specifications about your data source. You can see the following information:

Count Rec.	Amount of records available inside the data source.
Selected	Amount of selected records, i.e. for how many records the checkbox in the <i>Sending</i> column is ticked.
erroneous	How many records contain an invalid e-mail-address or lack one. The corresponding records are highlighted red.
Duplicates	How many records have the same e-mail-address. If an address is present multiple times, the e-mail will be sent multiple times as well so that people sharing a single e-mail-address still receive personalized e-mails. The corresponding records are highlighted yellow.

After checking the records, proceed by clicking *Next*.

If you do not want to send e-mails to all people found inside the data source, check out the chapter "Selecting recipients" starting on page 38.



### 2.3.6 Sending

In the *Sending* step of the assistant, you can select the following options:

- Test run
- Copy
- Consider Cc column
- Consider Bcc column

If you activate *Test run*, all records are checked to see if all placeholders inside the subject and text can be replaced. The result of the test run is displayed in the browser and sent to you by e-mail.

If you activate *Copy*, copies of the sent e-mails will be saved inside the *Sent* folder. This is the default behavior of Outlook.

The options *Consider Cc column* and *Consider Bcc column* are only activated and changeable if your Excel-sheet contains columns with the title *Cc* or *Bcc*.

If your Excel-sheet contains columns with the title *Cc* or *Bcc*, those options will be activated by default. If you however do not want to send e-mails to *Cc* or *Bcc* recipients, deactivate this option before proceeding.

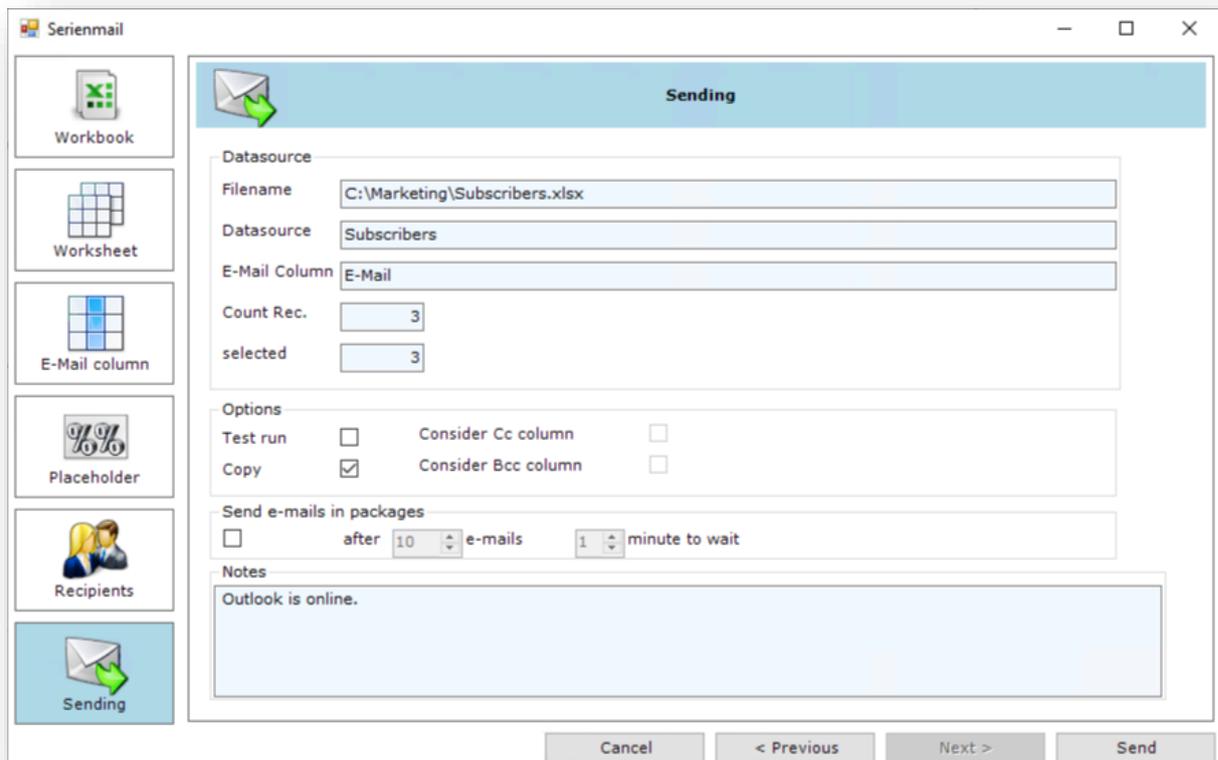
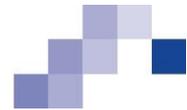
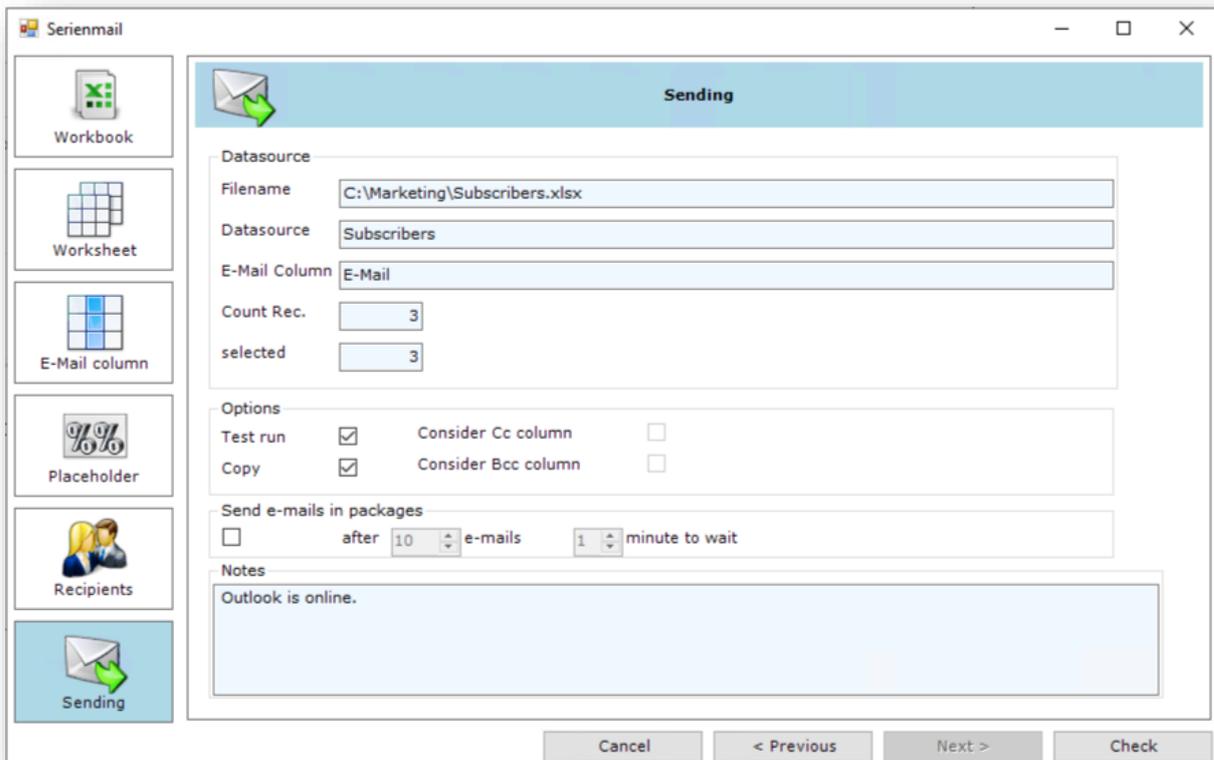


Illustration 9: Sending of bulk e-mails



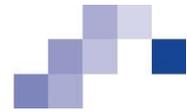
To send the e-mails, click on *Send*. Inside the *Notes* field you can track the amount of already sent e-mails. After all e-mails have been sent, a report will be sent to your e-mail-address and the assistant will close.

If you activated the *Test run* checkbox, the button will change from *Send* to *Check*. All records are checked to see if all placeholders inside the subject and text can be replaced.

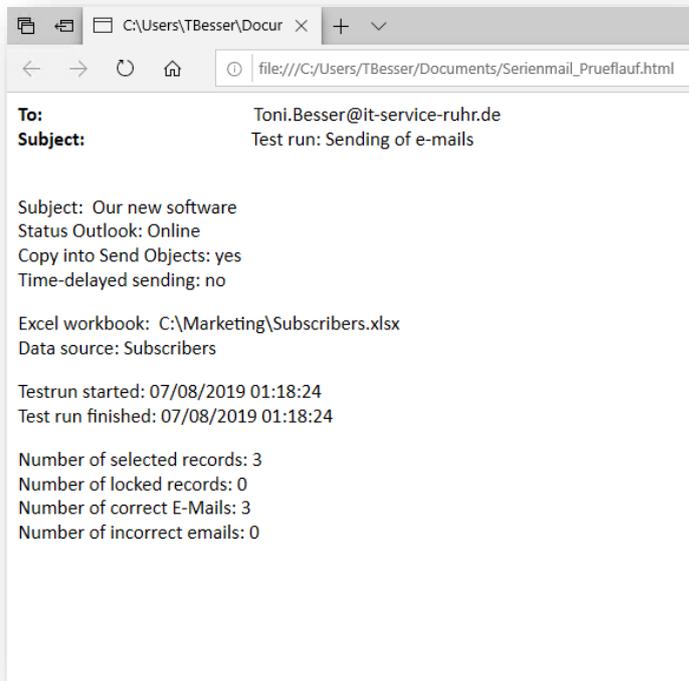


**Illustration 10: Activating test run**

The result of the test run is displayed in the browser and sent to you by e-mail. The report tells you, if and which records contain errors. If at least one placeholder could not be replaced because of missing or invalid values inside the data source, no e-mails will be sent at all. Correct all errors before sending the e-mails.

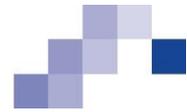


An example for the report of a test run is shown in the following illustration. The contents of the report e-mail are similar.



#### Illustration 11: Results of a test run

If all tests ran to your satisfaction, you can send the bulk e-mails and effectively and individually advertise your product to all your customers and subscribers.



### 3 Bulk e-mails with personalized attachments

*Serienmail* can also be used to send individual attachments to your recipients. We are going to visualize this on the following example:

You invite your customers to an event. The invitations are personalized PDF files, addressing each of your customers individually. You want to invite only your premium customers to the after show as well. For this example, you need an Excel-sheet with the following columns:

- Salutation
- E-Mail
- Attachment1
- Attachment2

The data source inside the Excel-workbook looks like this:

	A	B	C	D
1	Salutation	E-Mail	Attachment1	Attachment2
2	Dear Mrs. Doe	<a href="mailto:a.doe@it-service-ruhr.de">a.doe@it-service-ruhr.de</a>	C:\Marketing\Invitations\Invitation_Doe.pdf	C:\Marketing\Invitations\Invitation_Aftershow.pdf
3	Dear Mr. Miller	<a href="mailto:p.miller@it-service-ruhr.de">p.miller@it-service-ruhr.de</a>	C:\Marketing\Invitations\Invitation_Miller.pdf	
4	Dear Mr. Smith	<a href="mailto:j.smith@it-service-ruhr.de">j.smith@it-service-ruhr.de</a>	C:\Marketing\Invitations\Invitation_Smith.pdf	C:\Marketing\Invitations\Invitation_Aftershow.pdf
5	Dear Mrs. Johnson	<a href="mailto:c.johnson@it-service-ruhr.de">c.johnson@it-service-ruhr.de</a>	C:\Marketing\Invitations\Invitation_Johnson.pdf	

**Illustration 12: Data source with individual attachments**

Warning: If you want to send personalized attachments using *Serienmail*, the column titles must be **Attachment1, Attachment2, etc.**; otherwise *Serienmail* will not be able to detect the attachments correctly.

The files, whose paths and filenames are inside the columns Attachment1 and Attachment2, will be attached to the corresponding e-mails. This way recipients may not only receive different attachments, but also a different amount of attachments. If all recipients shall receive the same attachment, we recommend attaching the file(s) directly to the e-mail.

*Serienmail* recognizes every column with the title AttachmentX (X being any number) as a column containing file paths of designated attachments. An e-mail using this feature could look like this:

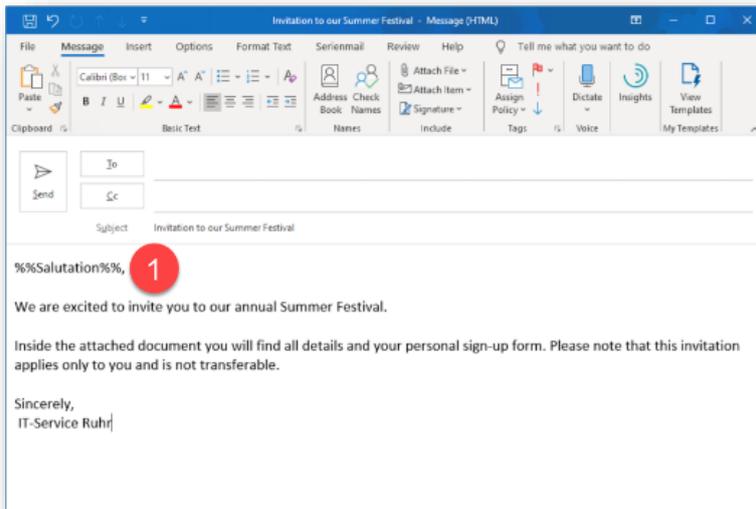
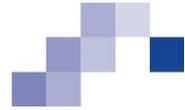
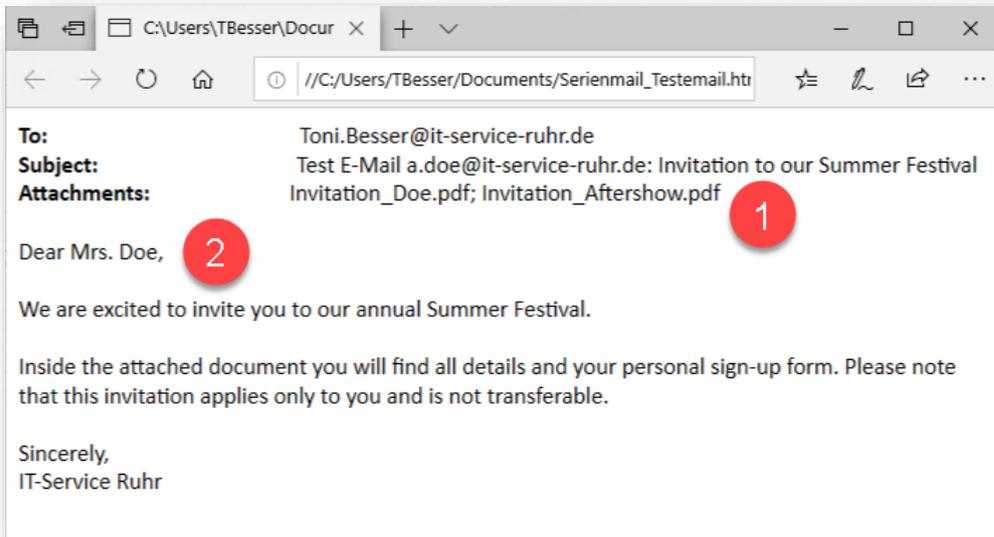


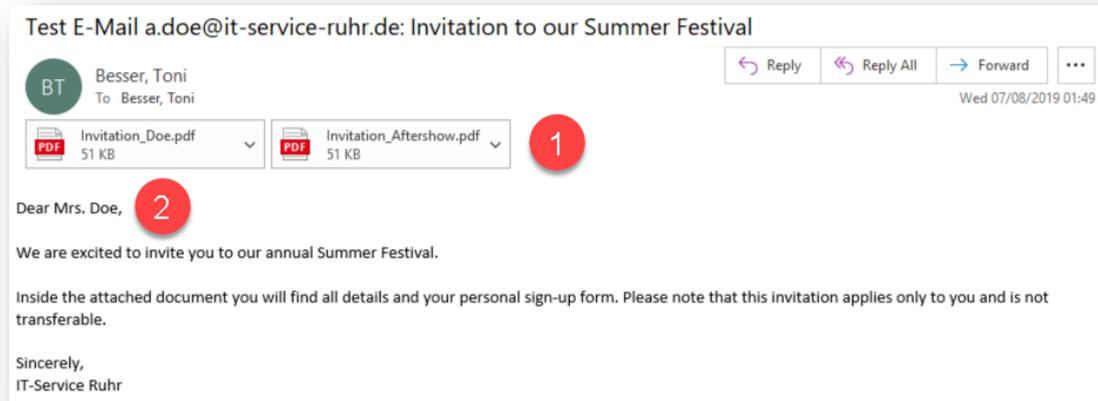
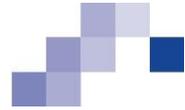
Illustration 13: E-mail with personalized attachments

As you see, the e-mail contains just a single placeholder<sup>①</sup> and is therefore very clear.

Proceed with the creation of your mail as usual. If you click on *Check Placeholders*, the following information is displayed in the browser and sent to you by e-mail.



You see the customer being greeted personally<sup>②</sup> and the e-mail containing two attachments; *Invitation\_Doe.pdf*<sup>①</sup> and *Invitation\_Aftershow.pdf*<sup>①</sup>.



**Illustration 14: E-mail with resolved placeholders and personalized attachments**

**Serienmail** requires the whole, absolute file paths inside the sheet in Excel to attach files correctly.

It does not matter to **Serienmail**, how the paths are inserted into the sheet in Excel. You can enter them manually or let them be inserted automatically by using our prepared workbook in Excel with integrated formulas and macros.

### 3.1 Inserting attachments manually

For attachments to be recognized by **Serienmail**, the whole, absolute file path including file name and extension must be entered in the corresponding column of the sheet in Excel.

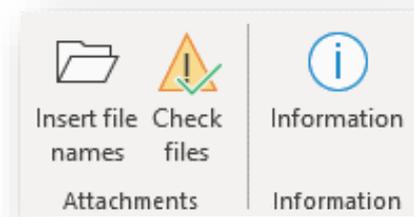
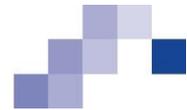
This very tedious process can be shortened using our prepared workbook in Excel; files can be selected easily or inserted with formulas.

### 3.2 Selecting attachments

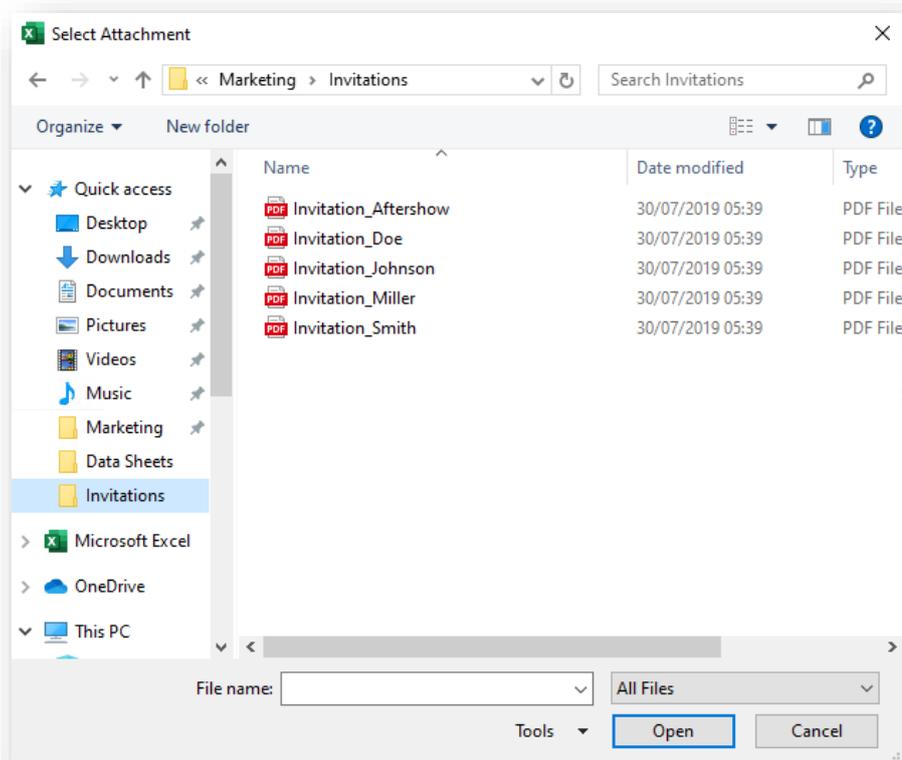
The workbook *Serienmail\_Attachment.xlsm* contains macros helping you to insert attachments in **Serienmail**. You can save and use this workbook anywhere you like. To use this workbook efficiently, the recipient data must be copied into this specific workbook.

You can either copy single records or whole sheets in Excel. Then proceed as follows:

1. Place the cursor inside the cell you want to insert the file path of the attachment into. If you select multiple cells, the file path will be inserted into all selected cells.
2. Select the *Serienmail* tab and click on *Insert file names*.



3. Inside the dialog, navigate to the file you want to attach to your bulk e-mails later.

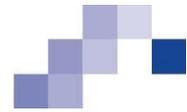


4. Select the desired file and click on *Open*. All information required by **Serienmail** will be inserted automatically.

### 3.3 Inserting attachments using formulas

Another way to insert file paths for **Serienmail** into an Excel-sheet is using formulas.

If, for example, invoices are saved inside a folder C:\Data with file names Invoice\_<Invoice-Nr.>, a formula can be used to generate the required file paths for **Serienmail**. An example for such a formula is provided inside the workbook *Serienmail\_Attachment.xlsx* in the sheet *Attachment\_Formula*. You can use this formula as a basis for your own formula. This formula can be copied to and used inside any Excel-workbook.



## 4 Personalized bulk e-mails with variable subjects

You can send personalized bulk e-mails with variable subjects using *Serienmail*. We will explain this process on the following example:

You arranged appointments with different clients at your exhibition. Using a bulk e-mail, you want your visitors to confirm their appointments. We are going to use the following placeholders in our example:

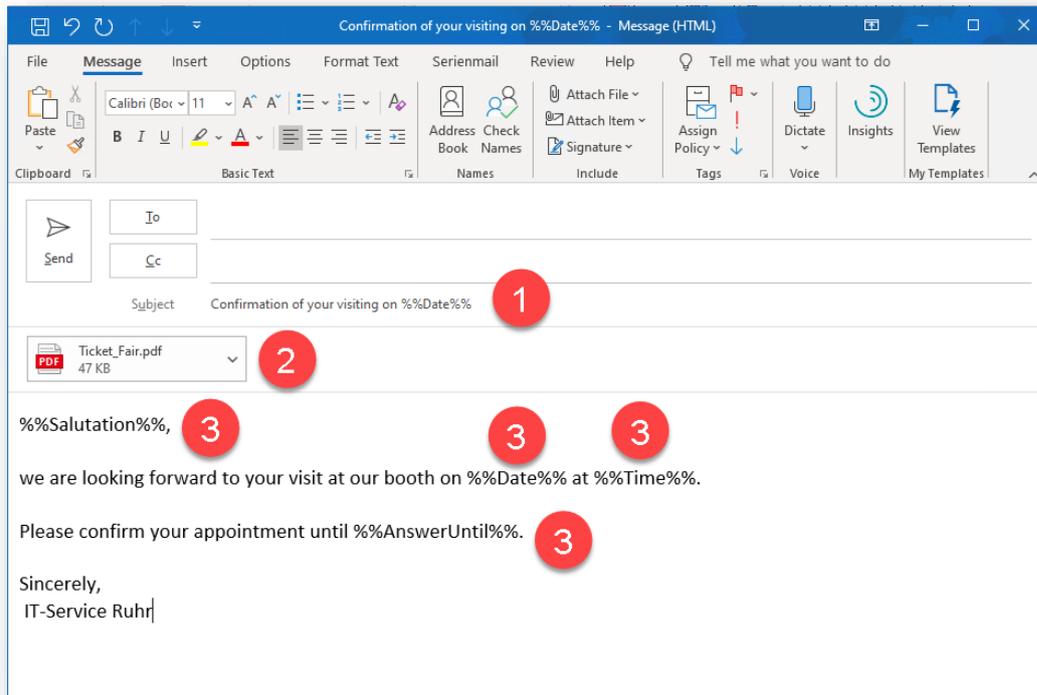
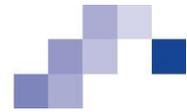
- Salutation
- E-Mail
- Date
- Time
- AnswerUntil

The recipients and necessary information are saved inside an Excel-worksheet:

	A	B	C	D	E
1	Salutation	E-Mail	Date	Time	AnswerUntil
2	Dear Mrs. Doe	<a href="mailto:a.doe@it-service-ruhr.de">a.doe@it-service-ruhr.de</a>	September 20, 2019	10:00 AM	September 14, 2019
3	Dear Mr. Miller	<a href="mailto:p.miller@it-service-ruhr.de">p.miller@it-service-ruhr.de</a>	September 21, 2019	3:00 PM	September 15, 2019
4	Dear Mr. Smith	<a href="mailto:j.smith@it-service-ruhr.de">j.smith@it-service-ruhr.de</a>	September 21, 2019	5:30 PM	September 15, 2019

**Illustration 15: Data source appointment confirmation**

Along the confirmation request, you are sending your visitors a ticket for the exhibition. The e-mail could look like this:



**Illustration 16: Bulk e-mail appointment confirmation**

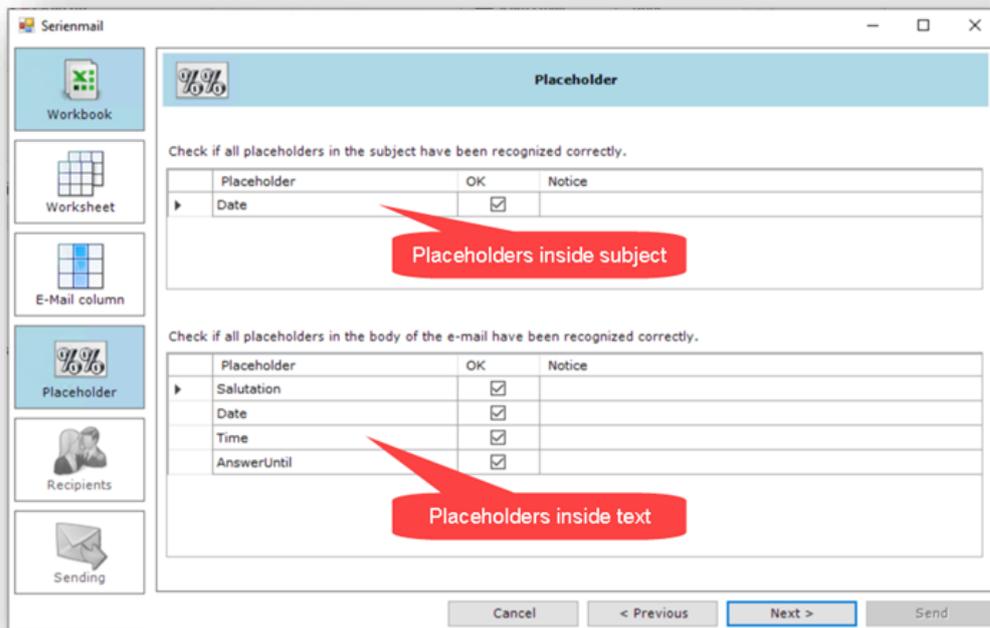
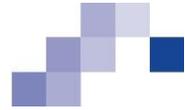
The subject<sup>①</sup> as well as the e-mail-text<sup>③</sup> contain placeholders. The attachment<sup>②</sup> is inserted as usual.

The subject of your bulk e-mail is kept variable by the placeholder **%%Date%%**. Every one of the recipients receives the appointment date already inside the subject.

Inside the e-mail-text the salutation, the appointment date, the appointment time and the date by which you want an answer, are kept variable.

The sending-assistant is started as usual by clicking on *Sending* inside the **Serienmail** tab.

You are using a total of four placeholders inside your mail. You can check if all placeholders have been correctly recognized in the *Placeholders* step of the assistant. The placeholders inside the subject are listed inside the upper half, the placeholders inside the e-mail-text inside the lower half.



#### Illustration 17: Checking multiple placeholders

When working with placeholders, accidental logical errors may occur (e.g. confounding date and time). Checking your placeholders before sending is recommended strongly.

Select any address inside the *Recipients* step and click on *Check Placeholders*. A preview of the corresponding e-mail is opened inside your browser and sent to your e-mail-address.

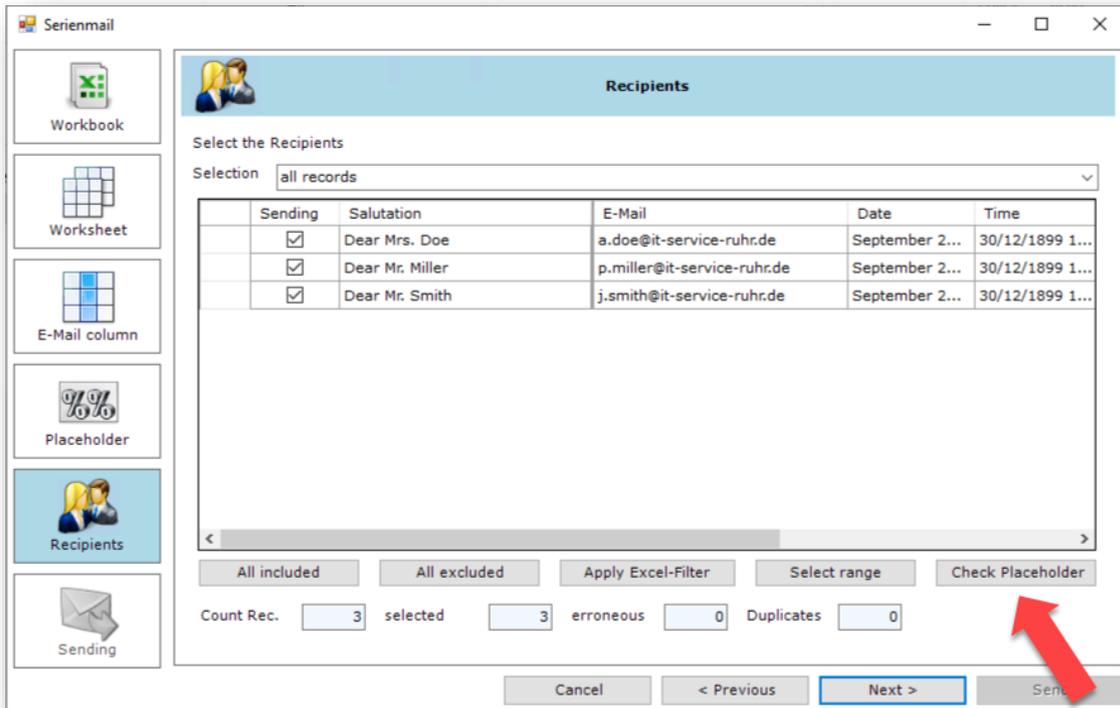
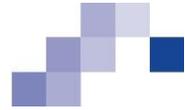


Illustration 18: Check placeholders

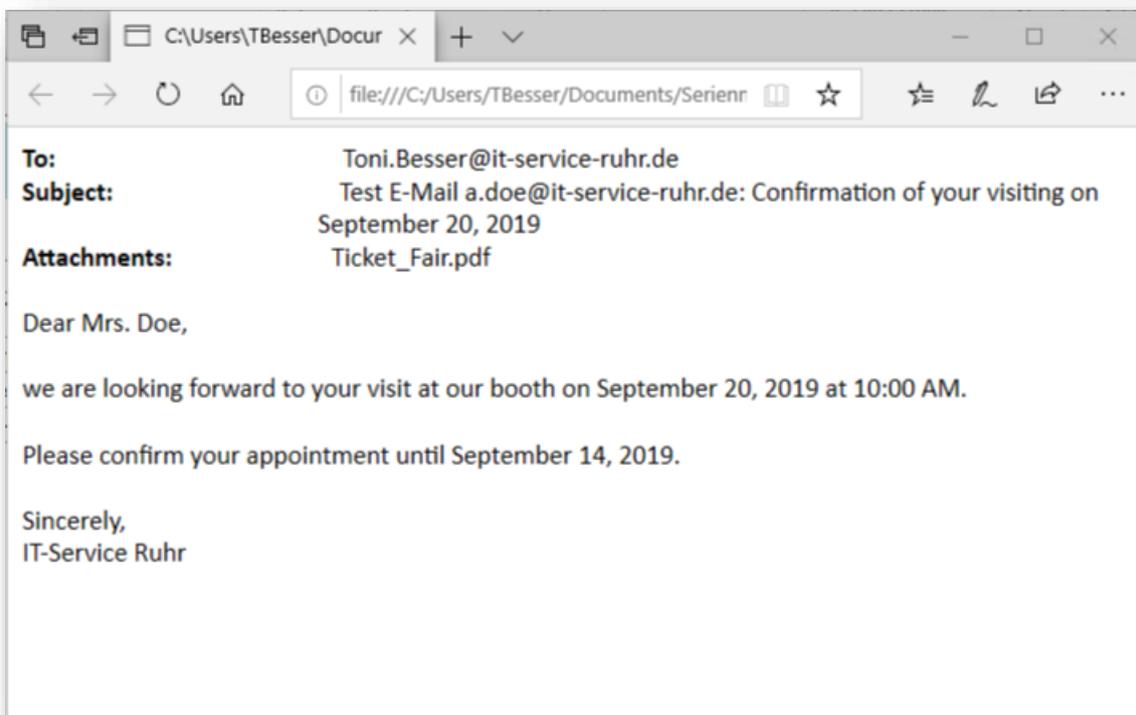
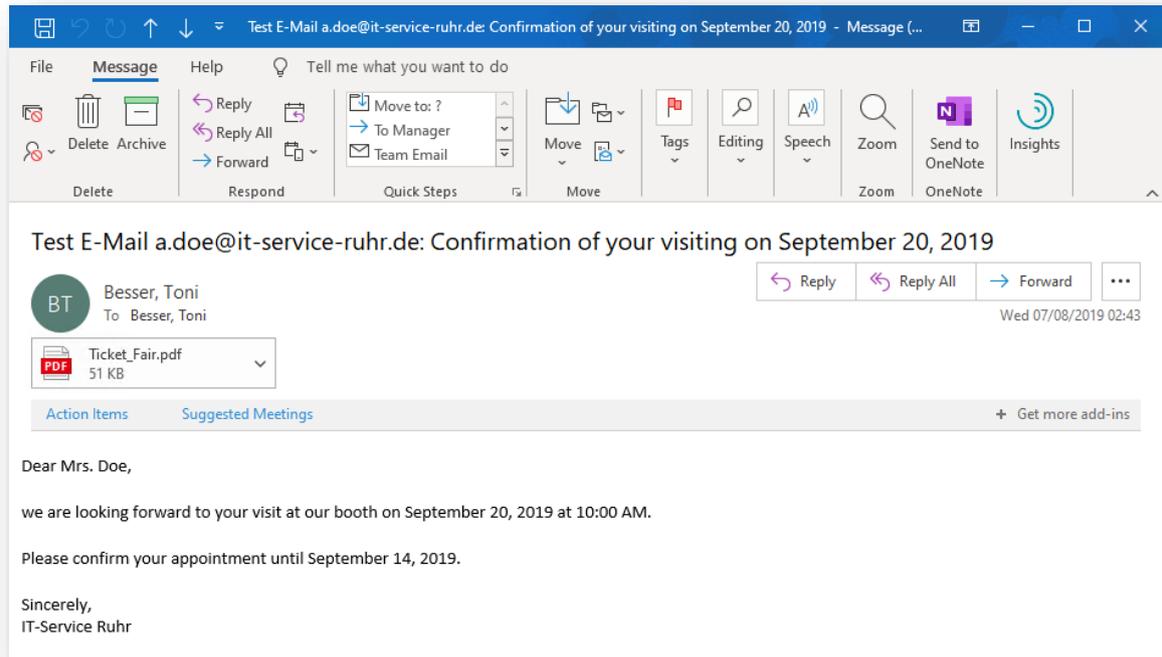
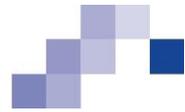
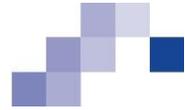


Illustration 19: Result of checking placeholders (inside browser)



**Illustration 20: Result of checking placeholders (inside e-mail)**



## 5 Bulk e-mails with personalized hyperlinks

You want to draw your client's attention to specific websites and enable them to visit those websites as easy as possible. Depending on the target group, different hyperlinks should be inserted into different e-mails respectively.

For this bulk e-mail, the following placeholders are necessary:

- Salutation
- Link1

Configuring the hyperlink requires the following placeholders inside the Excel-sheet:

- Link1\_Text
- Link1\_Address

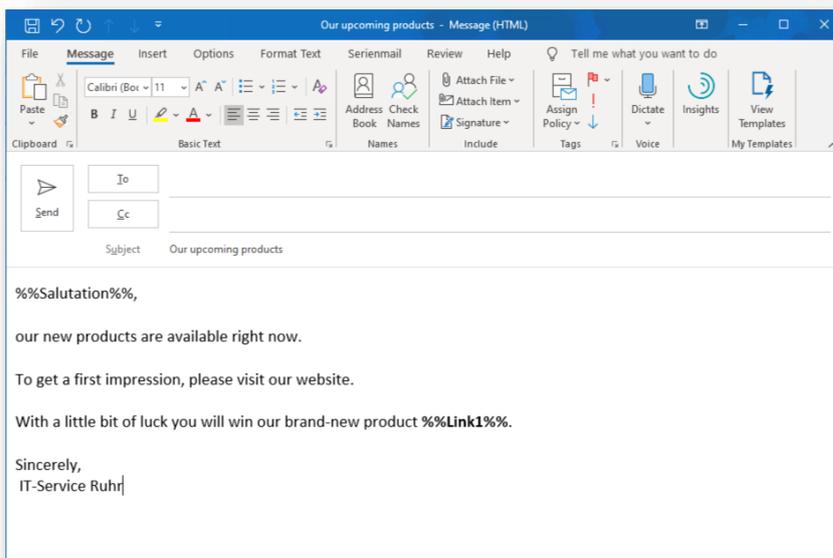
The Excel-sheet could look like the following example:

	A	B	C	D
1	Salutation	E-Mail	Link1_Text	Link1_Address
2	Dear Mrs. Doe	<a href="mailto:a.doe@it-service-ruhr.de">a.doe@it-service-ruhr.de</a>	InWrite 2.0	<a href="http://company.com/products/inwrite_2">http://company.com/products/inwrite_2</a>
3	Dear Mr. Miller	<a href="mailto:p.miller@it-service-ruhr.de">p.miller@it-service-ruhr.de</a>	CalcFast Plus	<a href="http://company.com/products/calcfast_plus">http://company.com/products/calcfast_plus</a>
4	Dear Mr. Smith	<a href="mailto:j.smith@it-service-ruhr.de">j.smith@it-service-ruhr.de</a>	Presenter Gold	<a href="http://company.com/products/presenter_gold">http://company.com/products/presenter_gold</a>

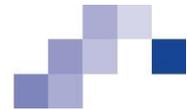
### Illustration 21: Data source with different hyperlinks

Be careful that the column titles must be named *Link1\_Text* and *Link1\_Address* when the placeholder `%%Link1%%` is used inside the e-mail.

The corresponding e-mail could, for example, look like this:



### Illustration 22: E-mail with variable hyperlink

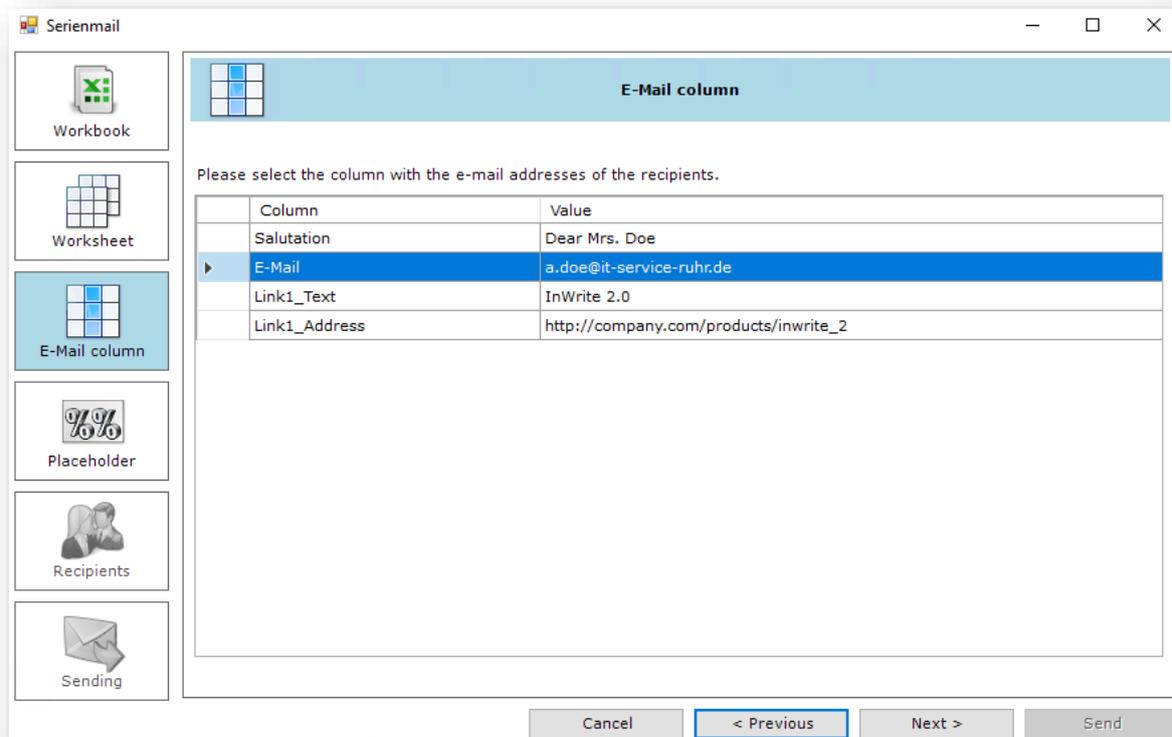


If a placeholder beginning with **Link** and followed by a number is recognized inside the text, the data source is searched for column titles that also begin with Link and are followed by a number. For example, the placeholder **Link1** is replaced with data from the following columns:

Column title	Required	Meaning
Link1_Text	yes	The text to display for the hyperlink
Link1_Address	yes	The address of the hyperlink

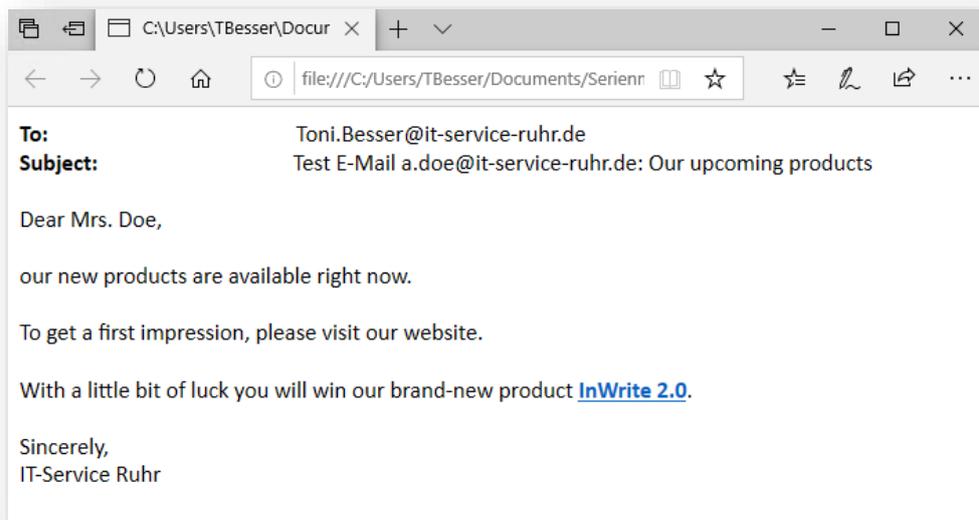
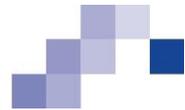
The Link1\_Text and Link1\_Address columns must exist in the data source as column tiles for the Link1 placeholder to be resolved.

The *E-mail column* dialog of the assistant illustrates this context as follows:

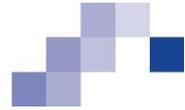


**Illustration 23: Different hyperlinks**

The result of the check in the browser looks as follows:



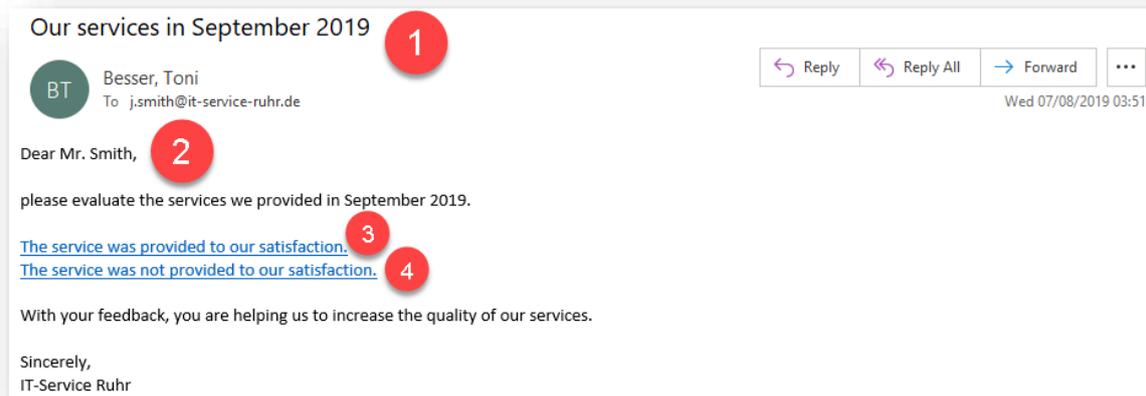
**Illustration 24: Result of the check for e-mails with variable hyperlinks**



## 6 Determine customer satisfaction using *Serienmail*

*Serienmail* lets you conduct customer satisfaction surveys for your products or services that your customers can respond to with just one click.

In our example, you want to know if customers were satisfied with your services in September<sup>①</sup>. The email that one of our customers<sup>②</sup> receives looks like this:



**Illustration 25: Example e-mail for determining customer satisfaction**

Customers can click one of the links in the e-mail depending on whether they were satisfied or not. There are 2 possible answers: The customer was satisfied with the service<sup>③</sup> or the customer was not satisfied with the service<sup>④</sup>.

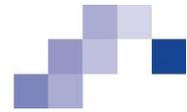
The following placeholders are required for this e-mail:

- Salutation
- Month
- Link1
- Link2

The customer should click on the placeholder Link1 if he was satisfied with your service. If your customer was not satisfied with your service, they should click on the Link2 placeholder.

To control your customers' responses, you need the following placeholders inside the Excel-sheet:

- Link1\_Text
- Link1\_To
- Link1\_cc
- Link1\_Subject
- Link2\_Text
- Link2\_To
- Link2\_cc



- Link2\_Subject

The recipient generates a new e-mail by clicking Link1 or Link2. If your customer has clicked link1, the information defined at Link1\_An, Link1\_cc, Link1\_Subject and Link1\_Text will be transferred to the e-mail. If your customer clicks on Link2, the corresponding information will be transferred to the e-mail. The recipient can complete the e-mail with additional information before sending it.

Using the placeholders Link1 and Link2 as well as the dependent placeholders, you can control the answer e-mails of your customers and have them sent e.g. to different employees for processing.

Below is an excerpt from the Excel-sheet. Due to space constraints, the part in which the placeholders for Link2 are defined is missing.

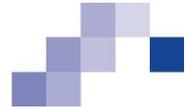
A	B	C	D	E	F	G
Salutation	Month	E-Mail	Link1_Text	Link1_To	Link1_cc	Link1_Subject
Dear Mrs. Doe	September 2019	<a href="mailto:a.doe@it-service-ruhr.de">a.doe@it-service-ruhr.de</a>	The service was provided to our satisfaction.	<a href="mailto:feedback@it-service-ruhr.de">feedback@it-service-ruhr.de</a>		Services in %%Month%% were provided to our satisfaction.
Dear Mr. Miller	September 2019	<a href="mailto:p.miller@it-service-ruhr.de">p.miller@it-service-ruhr.de</a>	The service was provided to our satisfaction.	<a href="mailto:feedback@it-service-ruhr.de">feedback@it-service-ruhr.de</a>		Services in %%Month%% were provided to our satisfaction.

**Illustration 26: Data source - satisfaction survey**

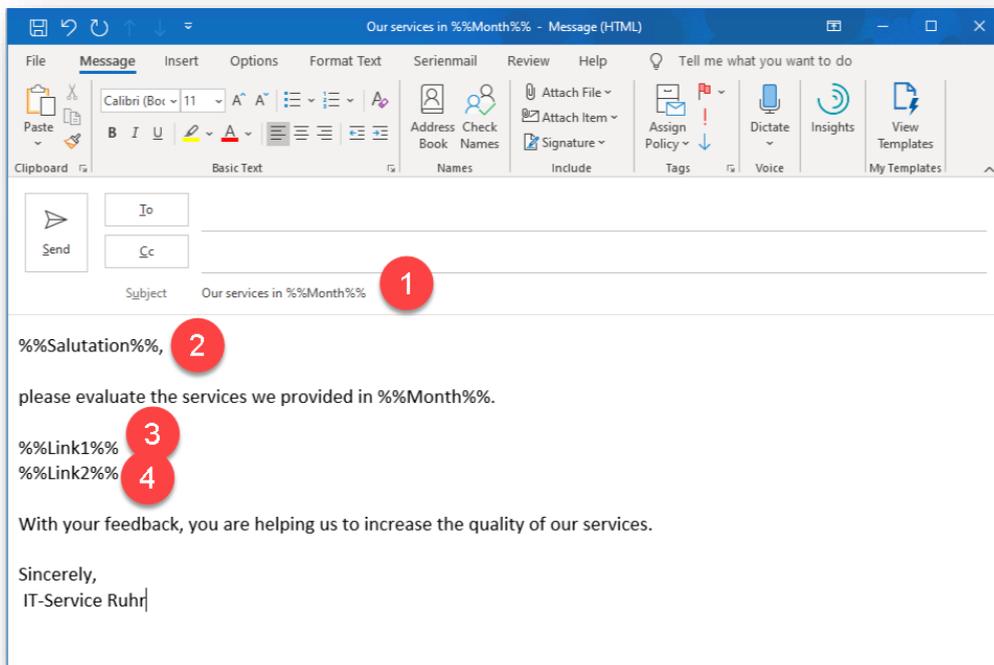
If a placeholder that starts with **Link** and is followed by a number is detected inside the data source, it searches for columns which also start with link and the respective number. For the placeholder **Link1**, the data source is searched for the following columns:

Column title	Required	Meaning
Link1_Text	yes	The text to display for the hyperlink
Link1_To	yes	One or more e-mail addresses to which the recipient should return the reply.
Link1_cc	no	One or more e-mail addresses to which the recipient should return the response as cc.
Link1_Subject	yes	Subject of the reply e-mail

Additional columns that start with Link1 are not considered.



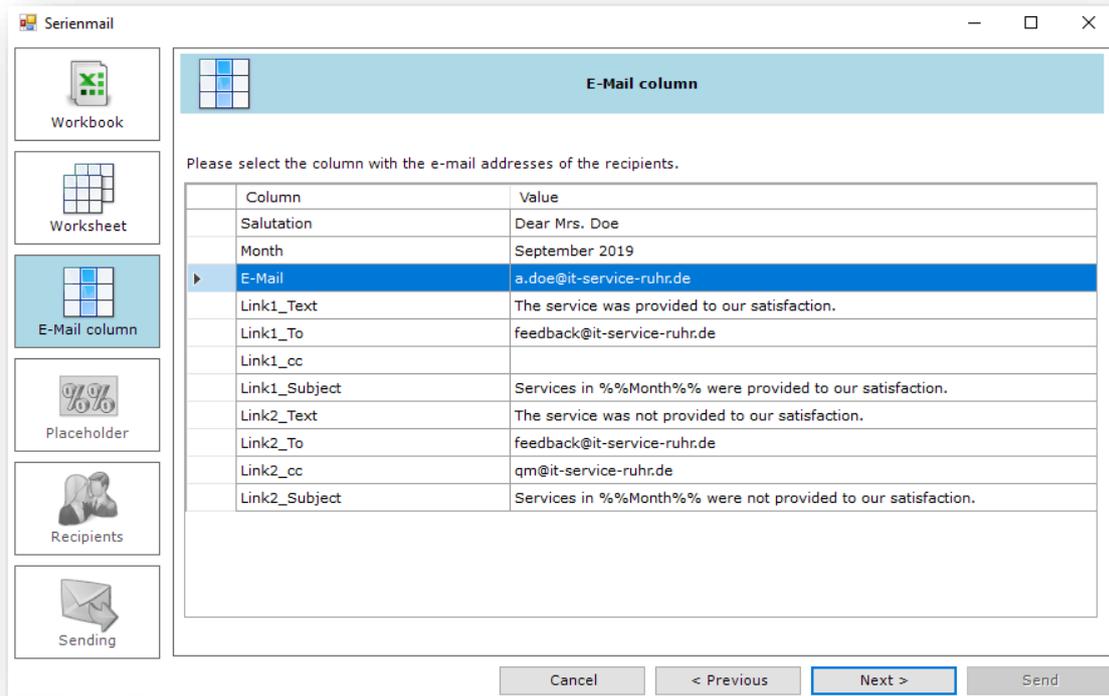
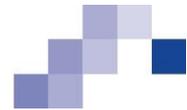
Your corresponding e-mail may look like this:



#### Illustration 27: E-mail satisfaction survey

The subject<sup>①</sup> and the salutation<sup>②</sup> are kept variable in this e-mail. Via the placeholders Link1<sup>③</sup> and Link2<sup>④</sup>, the customer can submit an evaluation of the services at the click of a mouse.

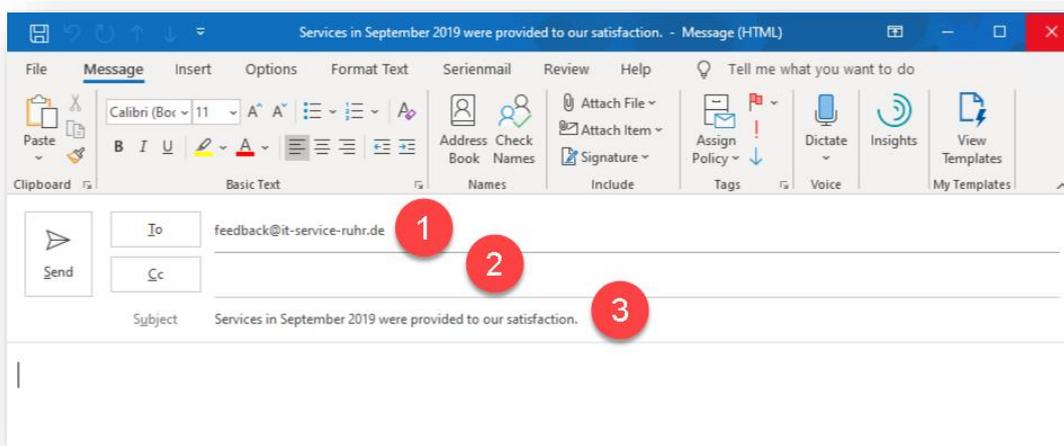
In the *E-Mail column* step of the assistant, this context is illustrated as follows:



**Illustration 28: Assignment of link placeholders**

The e-mail your customer receives has been shown already in Illustration 25: .

If the customer clicks on the first hyperlink in the e-mail, the following e-mail appears in response.

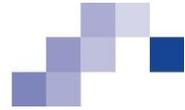


**Illustration 29: Reply satisfaction survey**

In this example, the e-mail will be sent to the responsible employee<sup>①</sup> and, if necessary, to other employees in Cc<sup>②</sup>. The subject<sup>③</sup> already implies that the customer was satisfied with the services. If the customer clicks on the second hyperlink, the recipients of the e-mail and

the subject may change accordingly. This immediately reveals that the customer was not satisfied.

In both cases, the customer can add individual texts to the e-mail so that he can begin a dialogue with you.



## 7 Exporting contacts from Microsoft Outlook

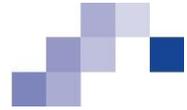
If you want to send personalized bulk e-mails to recipients that you have saved as contacts inside a Microsoft Outlook contact folder, you need to export the contacts to an Excel-sheet. In Excel, you can control and change the recipients' salutations if necessary. **Serienmail** offers the following options for exporting contacts:

1. Export of the selected contacts,
2. Export all contacts of a selected contact folder.

To export contacts from Outlook to Excel, proceed as follows:

1. Switch to the Contacts folder.
2. If you want to export only selected contacts, select the contacts to include one at a time by holding down the CTRL key.
3. In the *Start* tab of the ribbon in the **Serienmail** group, click the *Export* button.





4. The following dialog opens:

Exporting contacts to Excel

Folder with contacts

Name

Selection

All Contacts in the selected folder

selected contacts in the current view

Salutations

female

male

neutral

Additions to salutation

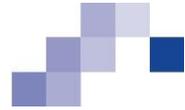
with last name      punctuation mark

with first name

without Salutation

Messages

Number of selected contacts: 1



5. Check whether you want to adopt the default salutations. Click the *Show* button to preview the salutation formulas in the *Messages* box. By default, the salutations look like this:

Exporting contacts to Excel

Folder with contacts  
Name: Contacts

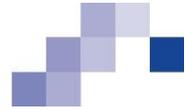
Selection  
 All Contacts in the selected folder  
 selected contacts in the current view

Salutations  
female: Dear Mrs.  
male: Dear Mr.  
neutral: Dear Sirs

Additions to salutation  
 with last name      punctuation mark: .  
 with first name  
 without Salutation

Messages  
Salutations:  
female: Dear Mrs. Smith,  
male: Dear Mr. Doe,  
neutral: Dear Sirs,

Export   Show   Reset   Cancel



6. If you prefer other salutations, change them appropriately and click the *Show* button again for control. For example, in the following dialog image you can see salutation formulas with first names:

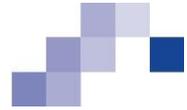
The screenshot shows a dialog box titled "Exporting contacts to Excel". It has several sections:

- Folder with contacts:** A text box labeled "Name" containing "Contacts".
- Selection:** Two radio buttons: "All Contacts in the selected folder" (unselected) and "selected contacts in the current view" (selected).
- Salutations:** Three text boxes: "female" (Dear), "male" (Dear), and "neutral" (Dear member).
- Additions to salutation:** Three radio buttons: "with last name" (unselected), "with first name" (selected), and "without Salutation" (unselected). A "punctuation mark" dropdown menu is set to ".".
- Messages:** A text area containing the text: "Salutations: female: DearAnn, male: DearJohn, neutral: Dear member." This section is highlighted with a red border.

At the bottom, there are four buttons: "Export", "Show" (highlighted with a blue border), "Reset", and "Cancel".

By clicking on the *Reset* button, the default formulas are re-entered.

7. Click the *Export* button. A new workbook is created in Excel containing the contacts from Outlook. Only contacts that have an e-mail address are considered. For all contacts with a filled *Last Name* field, Serienmail tries to determine the gender of the contact. Only if the gender of the person is known, the corresponding salutation formula is generated. Any academic titles such as Dr. or Professor will also be considered.

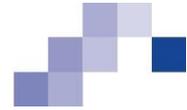


After exporting the contacts to Excel, the result is displayed inside the *Messages* part of the dialog:

The Excel-sheet looks like this:

	A	B	C	D	E	F	G	H
1	<b>Prefix</b>	<b>Title</b>	<b>FirstName</b>	<b>LastName</b>	<b>Company</b>	<b>City</b>	<b>E-Mail</b>	<b>Salutation</b>
2	Mrs.		Alice	Doe	IT-Service Ruhr		<a href="mailto:a.doe@it-service-ruhr.de">a.doe@it-service-ruhr.de</a>	Dear Mrs. Doe,
3	Mr.		Patrick	Miller	IT-Service Ruhr		<a href="mailto:p.miller@it-service-ruhr.de">p.miller@it-service-ruhr.de</a>	Dear Mr. Miller,
4	Mr.		John	Smith	IT-Service Ruhr		<a href="mailto:j.smith@it-service-ruhr.de">j.smith@it-service-ruhr.de</a>	Dear Mr. Smith,
5	Mrs.		Celia	Johnson	IT-Service Ruhr		<a href="mailto:c.johnson@it-service-ruhr.de">c.johnson@it-service-ruhr.de</a>	Dear Mrs. Johnson,
6								

To send the bulk e-mail to these exported contacts, save the excel workbook.



## 8 Advanced Techniques

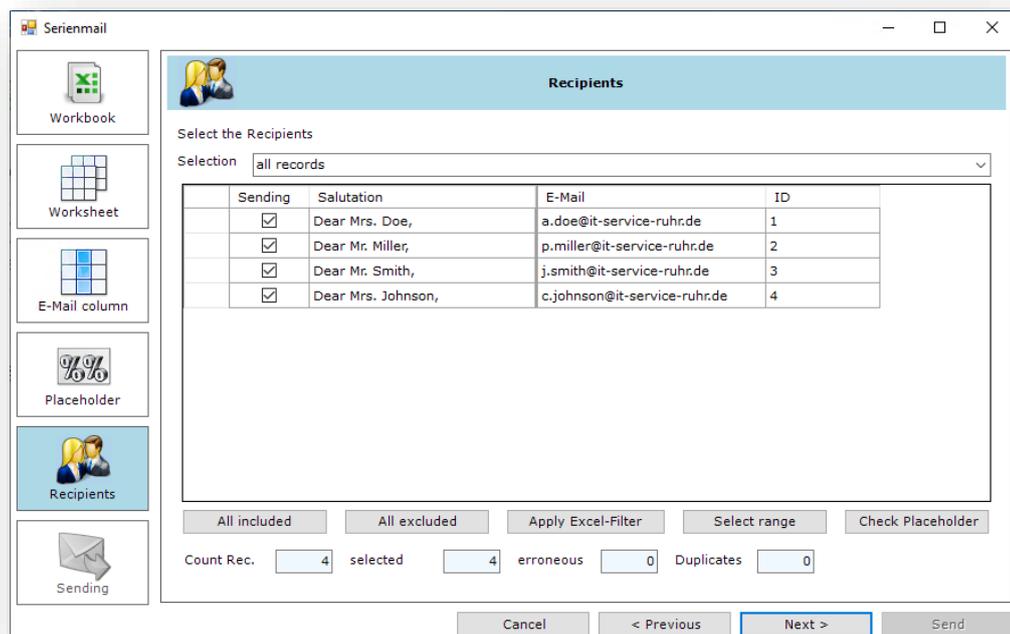
### 8.1 Selecting recipients

It is often the case that you do not want to write to all recipients from a data source, but only to a certain part. For that, you can narrow down the recipients of your data source in the following dialog.

1. You can use the check box in the *Recipients* step on each address to define whether the mail should be sent or not.
2. You can use the *Apply Excel-Filter* button to select only the addresses previously defined in the Excel-sheet using the filter function.
3. You can use the *Select range* button to select a specific block, such as records 20 to 50, as the recipients.

Recipients are considered when sending the bulk e-mail, where

- the check box in the column *Sending* is activated and
- a valid e-mail address is entered.

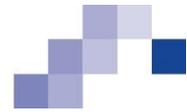


**Illustration 30: Selecting recipients**

If one or more e-mail addresses have been found multiple times inside the data source, they will be highlighted yellow.

If the desired recipients have been selected, click the *Next* button to start sending the e-mails.

If you have a large data source, you can use the *Selection* field to view specific records and therefore do not need to look through the entire list.



### 8.1.1 All included

Clicking the *All included* button will activate the *Sending* check box for all recipients who have a valid email address. This may be useful if you have previously deactivated a larger number of addresses and want to undo this.

### 8.1.2 All excluded

Click the *All excluded* button to exclude all recipients from sending. This may be useful if you want to address only individual recipients from a larger list. You can then activate the few desired addresses manually.

### 8.1.3 Apply Excel-Filter

If you have filtered the records in Excel, you can apply this filter with a click on the bulk e-mails you want to send.

1. Make sure that you have applied the filters in Excel and saved the workbook with the filtered records.
2. Open *Serienmail* and select the filtered Excel-workbook as the data source.
3. In the 5th step of the assistant (*Recipients*), click the *Apply Excel-Filter* button.
4. In the *Sending* column, only the records that were selected by the filter in the Excel-sheet are now activated.

### 8.1.4 Select range

If you want to send e-mails to a specific range of records, you can do so by using the *Select Range* button. The following dialog opens. Select the range of records which should receive the e-mails.

Select range

Datasource

Filename C:\Marketing\Members.xlsx

Datasource Sheet1

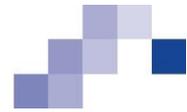
Count Records 4

Filter

from Record 1

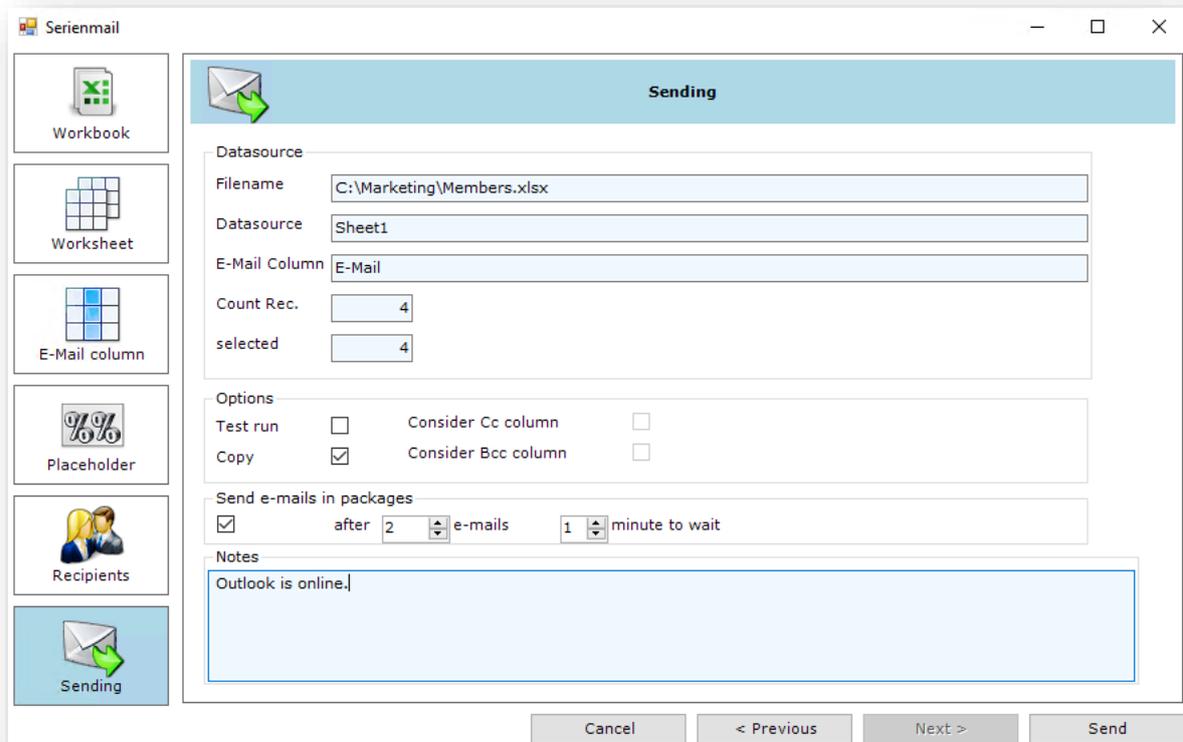
to record 4

OK Abbrechen



### 8.1.5 Send e-mails in packages

If you do not want to send all e-mails at once, but rather to pause automatically after a certain number of e-mails, activate the option *Send e-mails in packages*.

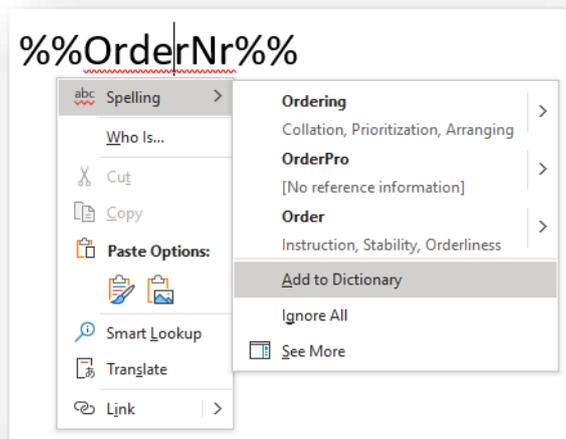
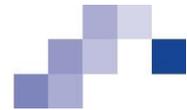


## 8.2 Notes on placeholders

The placeholders in the subject and message body of the e-mail are of particular importance because they are replaced for each recipient using the information from the column of the same name in the Excel-sheet.

Please consider the following notes:

1. Placeholders may contain only upper-/lowercase letters and numbers. Special characters as underscore, hyphen, space, etc. or characters that can be interpreted as HTML tag cannot be used.
2. If you want to format the placeholders, make sure that the %% characters and the placeholder name are formatted identically.
3. Placeholders named Link1, Link2, Link3, etc. may only appear in the message body and not in the subject of the e-mail message because of their special function.
4. Placeholders may not have the names Attachment1, Attachment2, Attachment3, etc. as they are used to identify variable file attachments.
5. If a placeholder is underlined red (as a spelling error), the successful sending of the bulk e-mail is prevented. Add the name of the placeholder to the dictionary as shown.

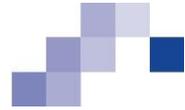


**Illustration 31: Fix spelling errors in placeholders**

In this example, the placeholder `%%OrderNr%%` is interpreted as an error. Add the word *OrderNr* to the dictionary by right-clicking.

### 8.3 Check placeholders for recipients

If you want to verify that the placeholders assigned in your email are resolved correctly, click the *Check Placeholders* button. All placeholders inside the subject and text of your e-mail are checked for whether they can be resolved or not. The result of the test run is displayed in the browser and sent to you by e-mail.



## 9 Organizational

### 9.1 System requirements

Serienmail version 2.00 will only run if the following system requirements are met on your PC:

- Microsoft Outlook for Office 365 or Microsoft Outlook 2019 or Microsoft Outlook 2016 or Microsoft Outlook 2013 or Microsoft Outlook 2010
- .NET Framework 4.6.1 or higher

### 9.2 License

The license of **Serienmail** is personal and depends on the primary email address of the person using **Serienmail**.

If the necessary authorizations have been granted in the e-mail system (preferably on the Exchange server), this person can also send bulk e-mails from general addresses, such as info@..., newsletter@..., etc.

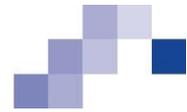
If this person's primary e-mail address changes, the license must be transferred to the new primary e-mail address.

In this case, contact us either via [info@it-service-ruhr.de](mailto:info@it-service-ruhr.de) or by phone at +49 23 24 / 70 89 4-0

### 9.3 Contact

If you have any questions about the application of the program or would like to give suggestions for program extensions, do not hesitate and call us at the phone number +49 23 24 / 70 89 4 - 0.

You can also send us an e-mail to the address [info@it-service-ruhr.de](mailto:info@it-service-ruhr.de).



## 10 Illustration directory

Excel-sheet with recipients .....	5
Information about your product.....	6
Ribbon <i>Serienmail</i> .....	7
Selecting a workbook .....	8
List of potential data sources .....	9
Checking e-mail-address.....	10
Checking the placeholders .....	11
Checking the recipients .....	12
Sending of bulk e-mails .....	13
Activating test run.....	14
Results of a test run .....	15
Data source with individual attachments.....	16
E-mail with personalized attachments .....	17
E-mail with resolved placeholders and personalized attachments .....	18
Data source appointment confirmation .....	20
Bulk e-mail appointment confirmation.....	21
Checking multiple placeholders .....	22
Check placeholders.....	23
Result of checking placeholders (inside browser).....	23
Result of checking placeholders (inside e-mail).....	24
Data source with different hyperlinks .....	25
E-mail with variable hyperlink .....	25
Different hyperlinks.....	26
Result of the check for e-mails with variable hyperlinks .....	27
Example e-mail for determining customer satisfaction .....	28
Data source - satisfaction survey.....	29
E-mail satisfaction survey .....	30
Assignment of link placeholders .....	31
Reply satisfaction survey.....	31
Selecting recipients .....	38
Fix spelling errors in placeholders .....	41