

Create dynamic email template using office 365

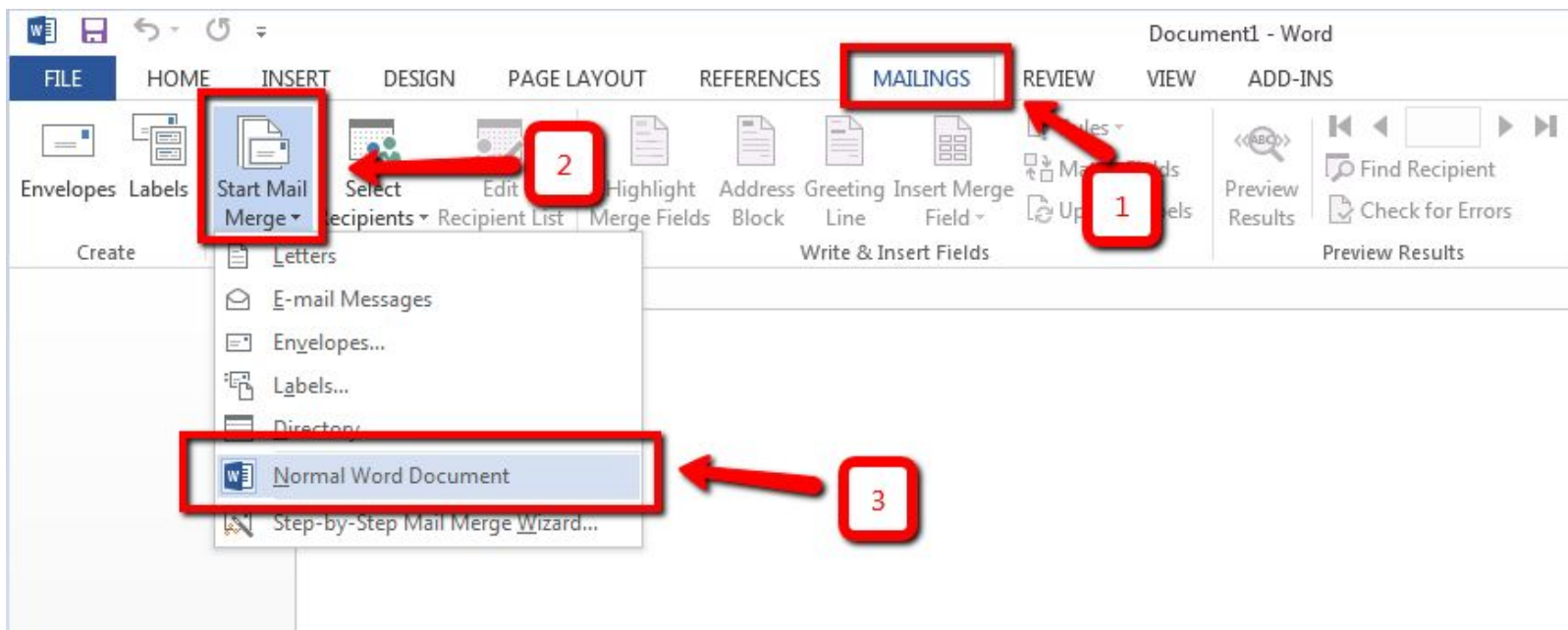
The following guide describes how to create dynamic email template (text, image,link) for sending emails using Word and a data file as a data resource.

NOTES:

- You must have a MAPI-compatible email program installed. The capabilities of Outlook MAPI (Messaging Application Program Interface) make it possible for Microsoft Office Word and Microsoft Office Outlook to share information when sending the merged email.
- You can create the email template using either Word or Outlook.

[1. Set up the email message document](#)

Open a new document. On the Mailings tab, in the Start Mail Merge group, click Start Mail Merge and click Normal Word Document

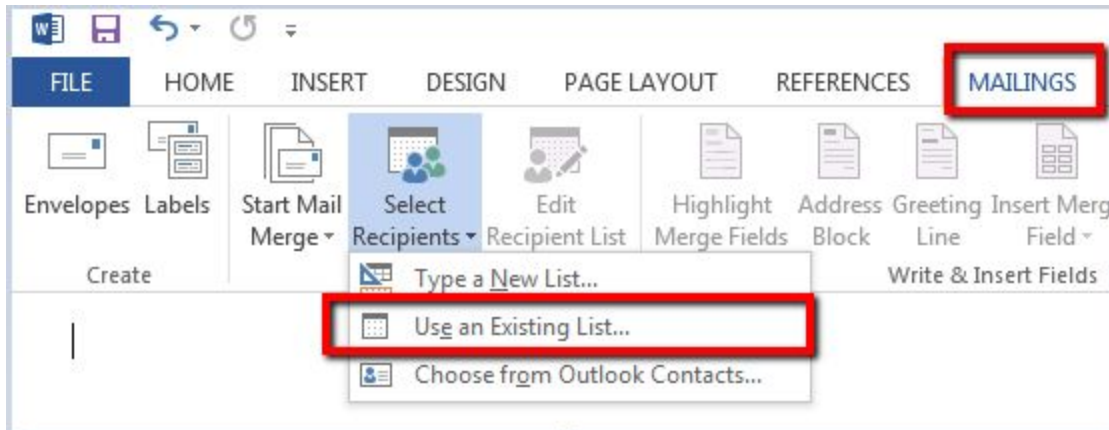


[2. Connect the email message document to a data source](#)

The data source can be contact list from Outlook or a data file containing a list with data of the email recipients. Make sure the data file has a header labeled 'E-mail address'.

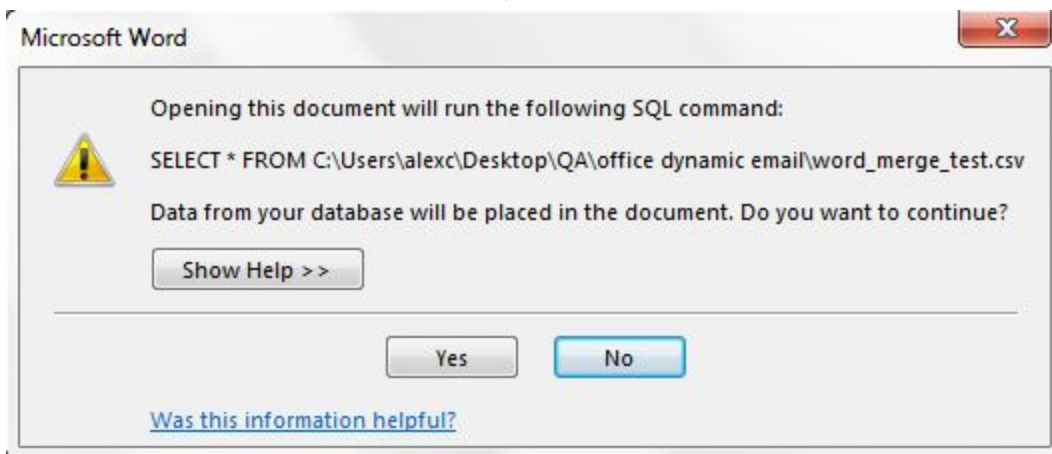
On the Mailings tab, in the Start Mail Merge group, click Select Recipients.

Select "use an existing list" if you have a data file like excel spreadsheet or a csv file.



Note when opening the file after it has been saved (and linked to a data file)

once the document is linked to a data file, Word will ask:



Click No, and select the data file again as described above.

3. Add text and dynamic data to the document

The dynamic data in the document is called Merge Field which corresponds to the column headings in the data file that you select.

It is always surrounded by chevrons (« ») which is indicating that this text is dynamic. In this image the "Address Block" and "Name" are the name of headers from the data file.

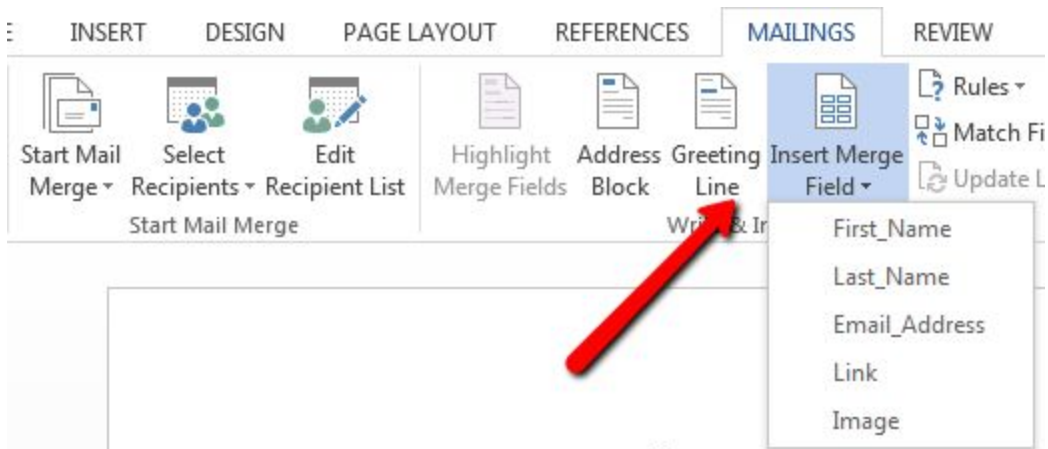


Important keys combination:

1. CTRL+A , F9 - refresh the document
2. ALT+F9 - change from view code of merge field to regular view
3. SHIFT+F9 - when the cursor is on a merge field, it will switch between code view to regular view only for the specific merge field.

a. Adding static text and dynamic data which is text

Edit the document so it will contain all the text you need. If you want to add a dynamic text click 'Insert Merge Field' button under Mailings tab and select which header you would like to add to the document:



In this guide, we will use the above headers from the data file (First_Name, Last_Name, Email_Address, Link, Image)

b. Adding dynamic image

For dynamic image you have to manually type the following text. You open each statement with the mark { } by CTRL+F9.

```
{ IF { INCLUDEPICTURE { IF TRUE "{ MERGEFIELD Image }" \d \* MERGEFORMAT } } {  
INCLUDEPICTURE { IF TRUE "{ MERGEFIELD Image}" \d \* MERGEFORMAT } }
```

B.1. Save the document as word macro document, exit Word and open the file again.

B.2 CTRL+A and refresh the document by F9

B.3 Mark the entire text (CTRL+A) and see a visual example by ALT+F9

c. Adding dynamic link of the dynamic image

Mark the entire statement of the dynamic image (from the previous section). Under Insert tab, click Hyperlink to add a link. Add a link (for example www.idomoo.com) Now you see that the statement code line changed to:

```
{HYPERLINK "http://www.idomoo.com"}
```

Mark the link text inside the apostrophes and delete it. Instead, insert the merge field 'Link' by Insert Merge field button (under Mailing tab)

d. Add macro code to automate the dynamic url per dynamic image process

ALT+F8 to access the macro window, under macro name write "Select_all_and_updat_fields" and click create.

In the window copy the following code and click save:

```
Sub AcceptAllChangesInDoc()  
,  
' AcceptAllChangesInDoc Macro  
' Accepts all changes in document, ignoring filter settings.  
,  
    ActiveDocument.AcceptAllRevisions  
  
End Sub  
  
Private Sub MailMergeApp_MailMergeBeforeRecordMerge(ByVal _  
    Doc As Document, Cancel As Boolean)  
  
    Dim intZipLength As Integer  
  
    Select_all_and_updat_fields
```

```
'ActiveDocument.Fields
'ActiveDocument.Fields.Update
'For Each f In ActiveDocument.Fields
    'If f.Type = wdFieldMergeField Then
        'f.Result.Text = "the text you want"
    '    f.Update
    '    End If
'Next ' f
'UpdateAllFields

' ActiveDocument.SelectAll

End Sub

Public Sub UpdateAllFields()
    Dim rngStory As Word.Range
    Dim lngJunk As Long
    Dim oShp As Shape
    lngJunk = ActiveDocument.Sections(1).Headers(1).Range.StoryType
    For Each rngStory In ActiveDocument.StoryRanges
        'Iterate through all linked stories
        Do
            On Error Resume Next
            rngStory.Fields.Update
            Select Case rngStory.StoryType
                Case 6, 7, 8, 9, 10, 11
                    If rngStory.ShapeRange.Count > 0 Then
                        For Each oShp In rngStory.ShapeRange
                            If oShp.TextFrame.HasText Then
                                oShp.TextFrame.TextRange.Fields.Update
                            End If
                        Next
                    End If
                Case Else
                    'Do Nothing
            End Select
            On Error GoTo 0
            'Get next linked story (if any)
            Set rngStory = rngStory.NextStoryRange
        Loop Until rngStory Is Nothing
    Next
End Sub
Sub Select_all_and_updat_fields()
'
' Select_all_and_updat_fields Macro
'
    Selection.WholeStory
    Selection.Fields.Update
End Sub
```

- e. Save the file, close it and open it again. CTRL+A, F9 to refresh the document. Make sure that in code mode you see:
 {HYPERLINK "{ MERGEFIELD Link}"} and not a specific link (in case there is static url, change it to the mergefield link)
 You are ready to preview or send the emails without previewing.

Note that you can edit the format of the merge field by selecting it (including the chevrons signs) and apply the format like a regular text.

4. Preview and complete the merge

After you add fields to your email message main document, you are ready to preview the merge results. When you are satisfied with the preview, you can complete the merge and send the emails.

Under Preview Results group of the Mailings tab, you can choose “Preview Results”, browse through each email message by using the Next Record and Previous Record buttons or “Find a Recipient”. In order to see each record you need to mark the whole document (CTRL+A) and refresh the page (F9)



If you are ready to send the emails, click “Finish & Merge”, and then click “Send Email Messages”

- In the To box, select the name of the field that stores recipients' email addresses.
- In the Subject line box, type a subject line for the message.
- In the Mail format box, click HTML

For more detailed information please read this:

<https://support.office.com/en-us/article/Use-mail-merge-to-send-personalized-email-messages-to-your-email-address-list-6ac6b411-ac8d-48b3-8bcb-588b460c18ff>