

How to Mail Merge PDF Documents

A step-by-step guide to creating personalized documents using AutoMailMerge™ plug-in for Adobe® Acrobat®

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What is a mail merge?

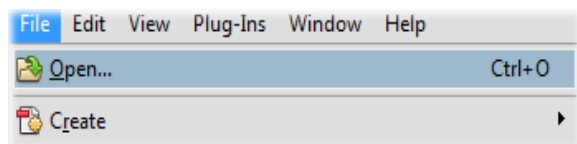
Mail merge is a computer term describing the production of multiple (and potentially large numbers of) documents from a single template form and a structured data source. This technique is used to create personalized letters, documents, bills and pre-addressed envelopes or mailing labels for mass mailings (or document creation) from a database of names and addresses.

What do I need to start?

You need a PDF form (a PDF document with fillable fields) and a data file that contains records with information that needs to be placed into the form. You can use Microsoft Excel spreadsheets, Microsoft Access database or simply a plain text file. Let's start from scratch and create a PDF form and a data file.

Step 1: How to create a PDF form?

PDF *form* is a special kind of PDF document that contains interactive fields where text information can be entered or check boxes may be selected. You can create a PDF form from any PDF, word processor, image file or a paper document. You will need to add fields to the regular PDF document using form editing tools provided by Adobe Acrobat. Fields are interactive elements where user can either type text or make a selection. If you already have a PDF document you want to use as a template, then select "File > Open" menu and load this document into Adobe Acrobat:

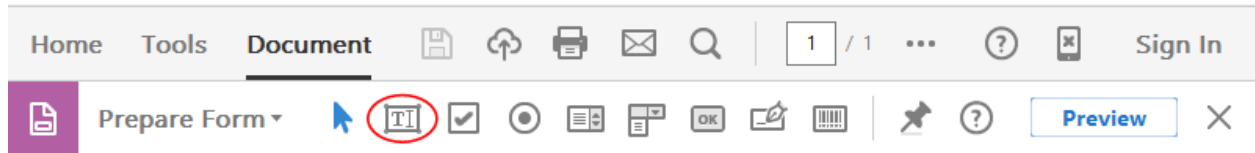


If you have a Microsoft Word document, then either print it to a PDF printer or save it as PDF using Microsoft Word "File" menu. You can also use "File > Create" menu in Adobe Acrobat to create a PDF file from many popular file formats or by scanning a paper document.

Step 2: How to add fields to a PDF document?

We are assuming that you have already created a PDF document at this point and have it open in Adobe Acrobat. The actual selection of steps depends on the version of Adobe Acrobat you are using. If you are using older versions of Adobe Acrobat, then select "Form > Edit Fields..." (or similar) from the Acrobat menu to start adding fields.

Once a document is open in a form editor, click on "Add a text field" icon located on the top toolbar:



Move cursor to a page location where you want to place a text field. You would see a moving blue rectangle that represents a field. Press and hold left mouse button and drag a rectangle where you want to place a text field. You will be able to change field position and size at any time:



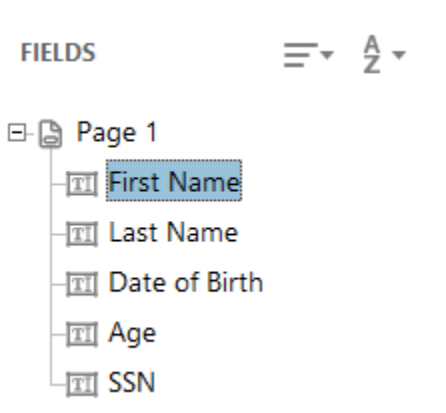
Once the text field is placed, you would be prompted to enter a field name:

First Name	Last Name
<input type="text" value="Text1"/>	

Field Name:

Required field [All Properties](#)

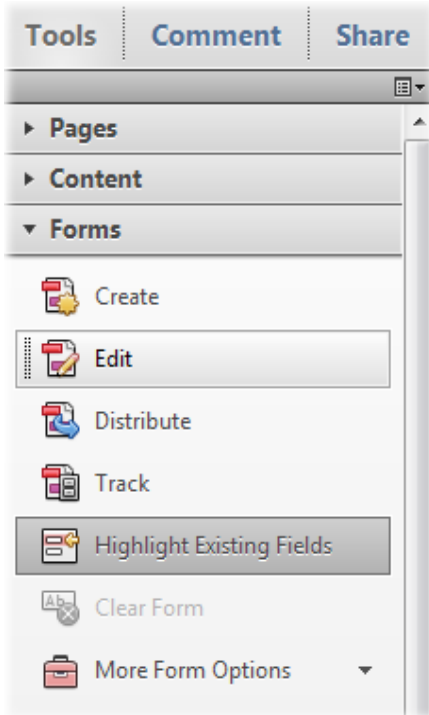
The newly added field will be shown in the "Fields" list on the right-hand side of the screen:



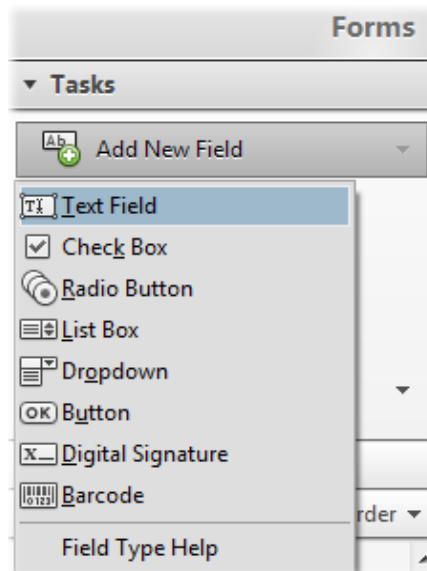
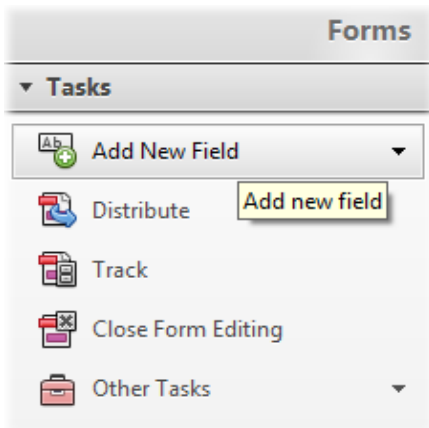
Proceed to "[Customizing Field Properties](#)" section for the rest of the instructions.

Using Acrobat X / XI to Add Form Fields

If you are using Adobe Acrobat X or XI, then open “Tools > Forms” panel and click on “Edit...” icon.



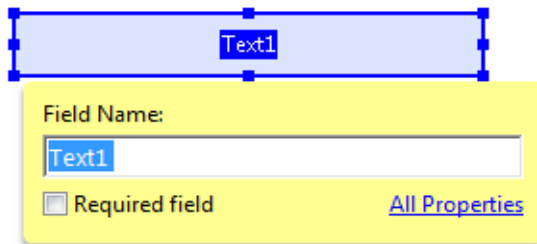
Once a document is open in a form editor, click on “Add New Field” icon:



Select a field type you want to place on the document and use mouse to place a text field on a page. Press and hold left mouse button and drag a rectangle where you want to place a text field.

Customizing Field Properties

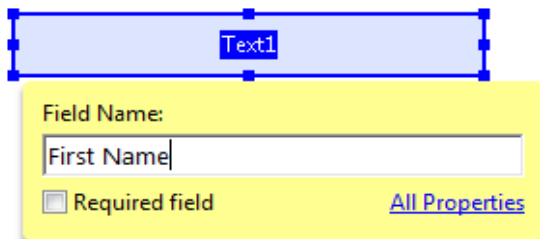
The following popup window appears on the screen once a field is placed on the page:



A screenshot showing a light blue text field with a blue border and a small blue box containing the text "Text1" inside. Below the field is a yellow popup window. The popup window has the following content:

- Field Name:
- Required field
- [All Properties](#)

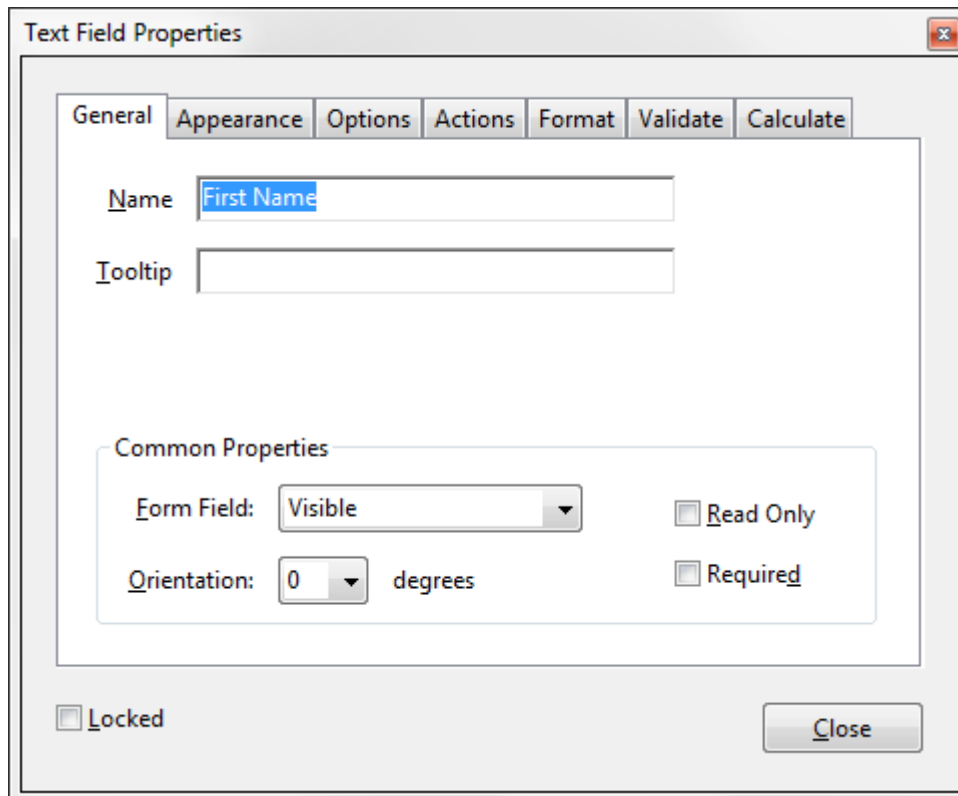
Adobe Acrobat by default automatically gives all new fields a name such as “Text1”, “Text2” and so on. You can change field name to something more informative:



A screenshot showing a light blue text field with a blue border and a small blue box containing the text "Text1" inside. Below the field is a yellow popup window. The popup window has the following content:

- Field Name:
- Required field
- [All Properties](#)

You will use field names later in the mail merge where it is necessary to assign what data fields are used to populate a specific form field. Click on “All Properties” link to edit field properties if necessary:



A screenshot of the "Text Field Properties" dialog box. The dialog box has a title bar with a close button. It contains several tabs: "General", "Appearance", "Options", "Actions", "Format", "Validate", and "Calculate". The "General" tab is selected. The "Name" field contains "First Name". The "Tooltip" field is empty. Under "Common Properties", there are two rows of options:

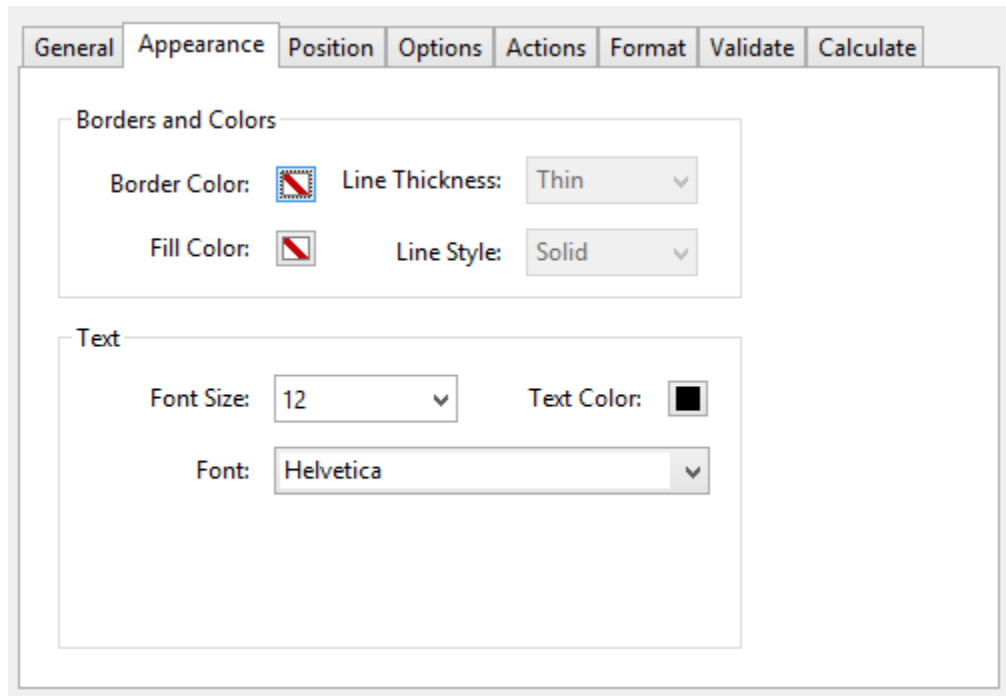
- Form Field: (dropdown menu)
- Orientation: (dropdown menu) degrees
- Read Only
- Required

At the bottom left, there is a checkbox for "Locked". At the bottom right, there is a "Close" button.

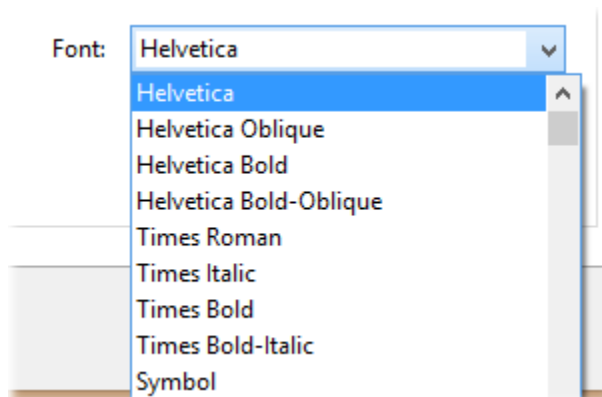
Check "Read Only" option if it is necessary to protect a text field from any editing by the reader. Fields marked as "Read Only" are non-editable.

Check "Required" option if it is necessary to force users to enter a value into the field. Users will be required to enter information into this field and not allowed to leave it blank.

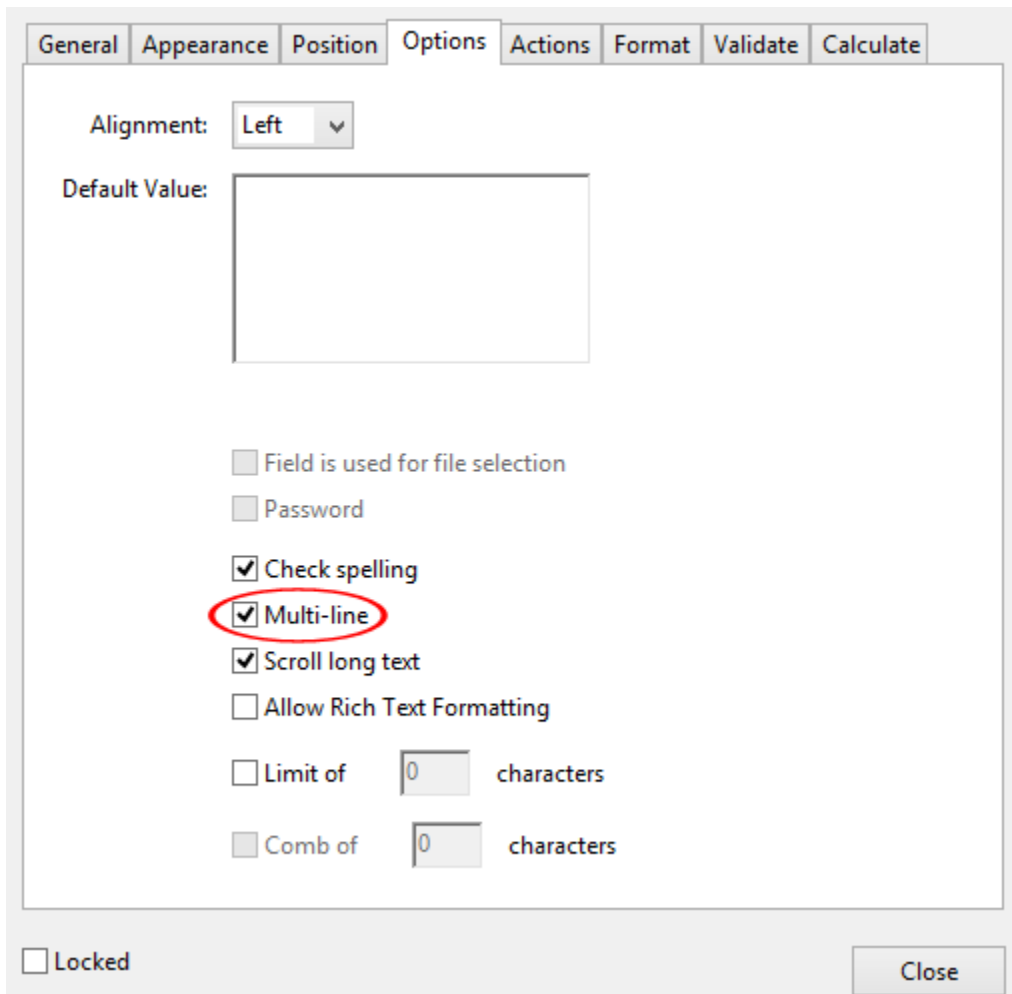
If you want to change text font or color, then select "Appearance" tab and use "Font Size" and "Font" menu to choose desired text appearance. Make sure that field is big enough to display a required number of characters while using selected font settings.



IMPORTANT: The resulting PDF file size can be greatly affected by selecting certain fonts. It is suggested to use several of the basic fonts to avoid file size increase. These fonts are listed at the top of the font list and comprise of the followings styles: Courier, Helvetica, and Times New Roman.

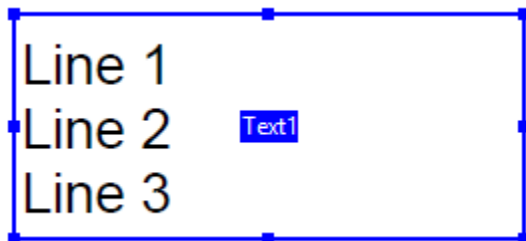


If a text field needs to hold multiple lines of text, then select "Options" tab and check "Multi-line" option:



The screenshot shows the 'Text Field Properties' dialog box with the 'Options' tab selected. The 'Multi-line' checkbox is checked and circled in red. Other options include 'Check spelling', 'Scroll long text', 'Allow Rich Text Formatting', 'Limit of 0 characters', and 'Comb of 0 characters'. The 'Default Value' field is empty, and the 'Alignment' is set to 'Left'.

Make sure that text field is tall enough to show required number of text lines. You can do that by either typing text into the field or specifying a default value:



Press "Close" button in "Text Field Properties" dialog once you have finished editing all field properties. Repeat the above procedure for every field you need to add to this PDF document. You can access properties of any PDF field at any time by right-clicking on it and selecting "Properties..." from a popup menu. Make sure to exit form editor once done adding form fields, otherwise some menu items will be inaccessible. Use "File > Save" menu to save changes to a file.

Using PDF Forms with Free Adobe Acrobat Reader

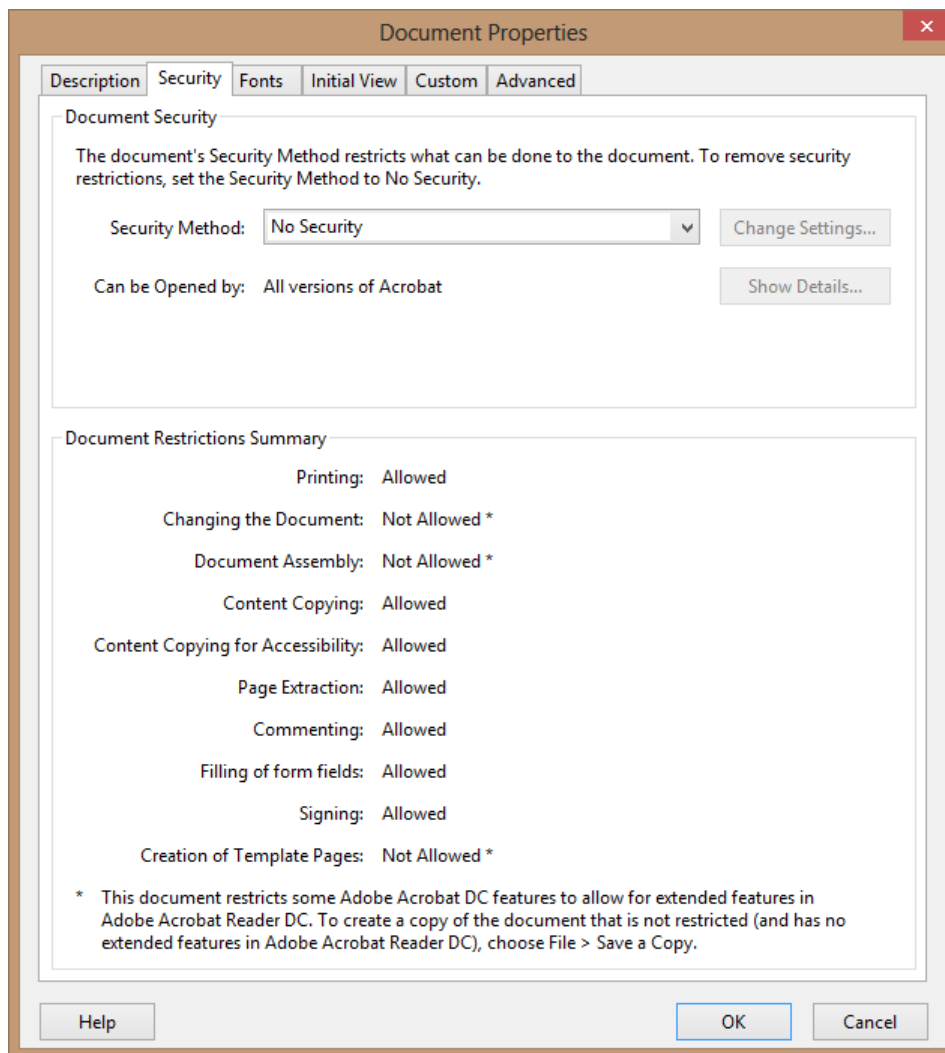
If you are planning to let recipients of the form use a free Adobe Acrobat Reader to **fill and save** this PDF form, then you need to enable “extended rights” for this document. Do this as a last stage (after all editing have been done) since once extended rights are enabled any changes to the document will invalidate such rights and you have to do it again. The actual menu selection for enabling extended rights in Adobe Acrobat Reader is different depending on the version of Adobe Acrobat used:

Acrobat DC: Use "File > Save As Other > Reader Extended PDF > Enable More Tools" menu.

Acrobat X/XI: Use “File > Save As...> Reader Extended PDF > Enable Additional Features...” menu.

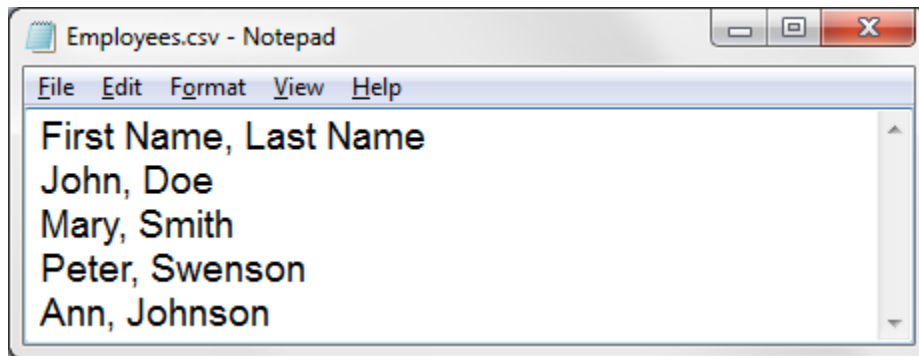
Acrobat 9 and before: either use "Advanced" menu or check software manual for version-specific instructions.

Once you are done editing the form use “File > Save” menu to save changes. Now this PDF form is ready for the mail merge. You can check for extended rights any PDF document by selecting "File > Properties" and then choosing "Security" tab (note a special message at the bottom of the dialog screen):



Step 3: How to prepare data?

In many cases you may already have data that needs to go into the form in some kind of spreadsheet or database. If you do not have one, then we are going to show how to create a very simple data file using just Notepad text editor. Let's assume we are trying to fill W-2 forms for company employees. We need to create a data file that lists first and last name for each employee. Simply open Notepad editor and type the following text:



Note that a first line contains comma separated field names ("First Name" and "Last Name") while the rest of the file contains actual data. Make sure to separate each field by a comma or tab. You can use both types of files with AutoMailMerge software. Save this data file with either CSV extension (if you are using comma as a separator) or TXT (if you are using tab). Now all data is ready to be used for a mail merge.

You can also use Microsoft Excel to prepare the data. It is going to be easier since there is no need to type commas or any other field separators. Note that the first row of the spreadsheet needs to contain unique field names:

	A	B
1	First Name	Last Name
2	John	Lennon
3	Paul	McCarthy
4	George	Harrison
5	Ringo	Starr
6		

You can either keep automatic sheet name (such as Sheet1) or rename the worksheet to something like "Employees". This will help to organize data if multiple sheets are going to be stored inside an Excel file.

Step 4: How to put data into forms?

We are assuming that at this point we have a PDF form with two text fields (“First Name” and “Last Name”):

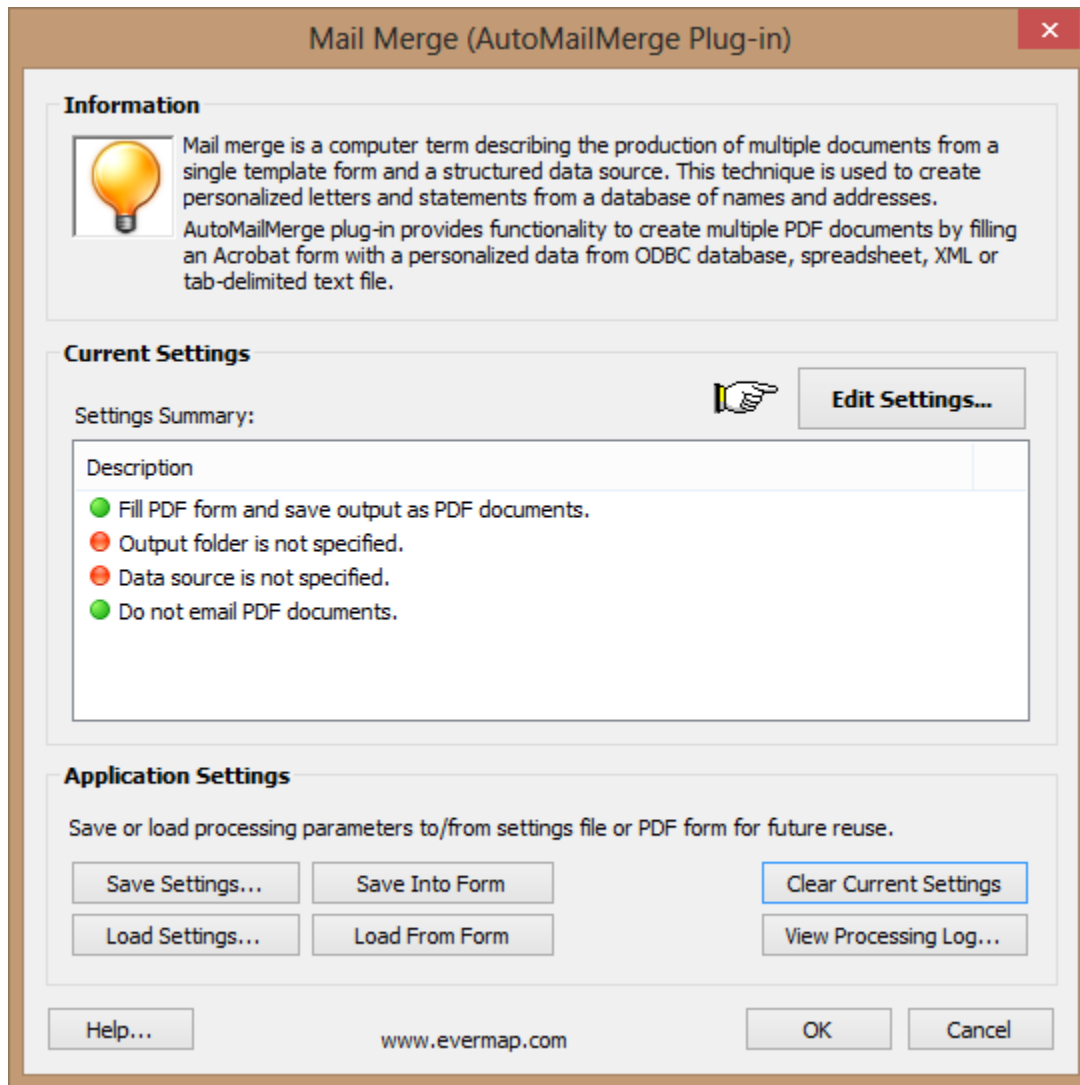
d Control number		
e Employee’s first name and initial	Last name	Suff.
First Name	Last Name	

and Employees.xlsx Excel spreadsheet that was created at step 3. Let’s start to populate our PDF form with data from Excel file and create 4 new PDF documents using AutoMailMerge plug-in for Adobe Acrobat (<http://www.evermap.com/automailmerge.asp>). One output document is created for each record in a data file. Since we have 4 records in our test spreadsheet, then 4 personalized output files are going to be generated. Make sure you have either a full or trial version of AutoMailMerge software installed on your computer in order to perform the rest of this tutorial.

4.1. Start Adobe Acrobat and open a PDF form using “File > Open” menu. This will open a PDF form we are going to fill with data (this is a simplified W-2 form with just 2 fields):

22222		a Employee’s social security number	OMB No. 1545-0008			
b Employer identification number (EIN)		1 Wages, tips, other compensation		2 Federal income tax withheld		
c Employer’s name, address, and ZIP code		3 Social security wages		4 Social security tax withheld		
		5 Medicare wages and tips		6 Medicare tax withheld		
		7 Social security tips		8 Allocated tips		
d Control number		9 Advance EIC payment		10 Dependent care benefits		
e Employee’s first name and initial Last name Suff.		11 Nonqualified plans		12a		
		13 Statutory employee Retirement plan Third-party sick pay		12b		
		14 Other		12c		
				12d		
f Employee’s address and ZIP code						
15 State	Employer’s state ID number	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.	19 Local income tax	
					20 Locality name	

4.2. Select “Plug-ins > Mail Merge...” from Acrobat menu to start AutoMailMerge.

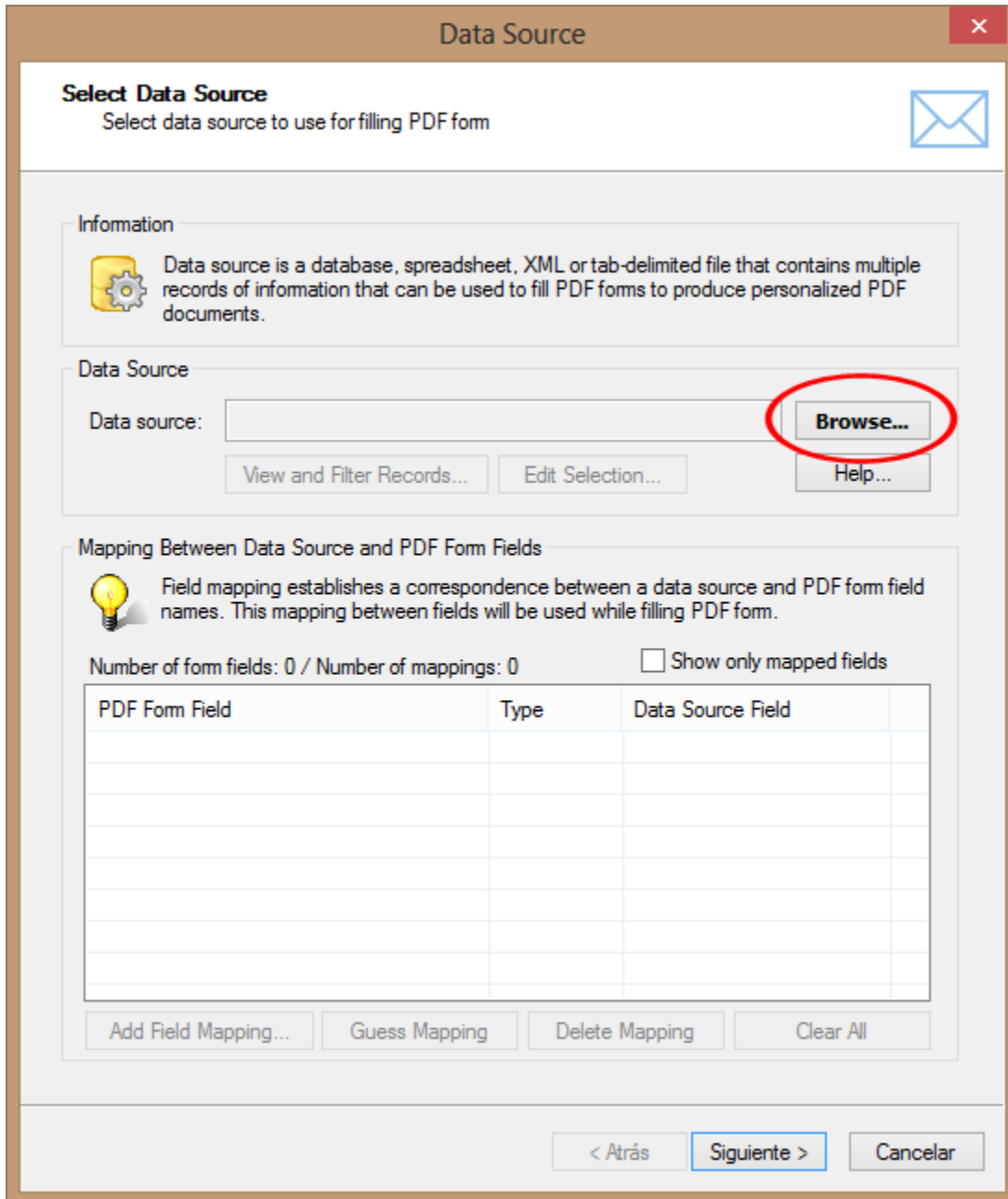


If you already have mail merge settings prepared and saved as settings file (*.mms), then you can load the settings by pressing "Load Settings..." button.

4.3. Press “Edit Settings...” button to start configuring mail merge options. This will show a wizard-style dialog that would provide a way to specify all mail merge settings in step-by-step fashion.



4.4. The "Select Data Source". screen provides a way to select a data file and specify data-to-PDF field mappings. This screen can be also used to select a subset of the data records to run mail merge only for data records that meets a specific search criteria.



Select Data Source
Select data source to use for filling PDF form

Information
Data source is a database, spreadsheet, XML or tab-delimited file that contains multiple records of information that can be used to fill PDF forms to produce personalized PDF documents.

Data Source
Data source: **Browse...**
View and Filter Records... Edit Selection... Help...

Mapping Between Data Source and PDF Form Fields
Field mapping establishes a correspondence between a data source and PDF form field names. This mapping between fields will be used while filling PDF form.
Number of form fields: 0 / Number of mappings: 0 Show only mapped fields

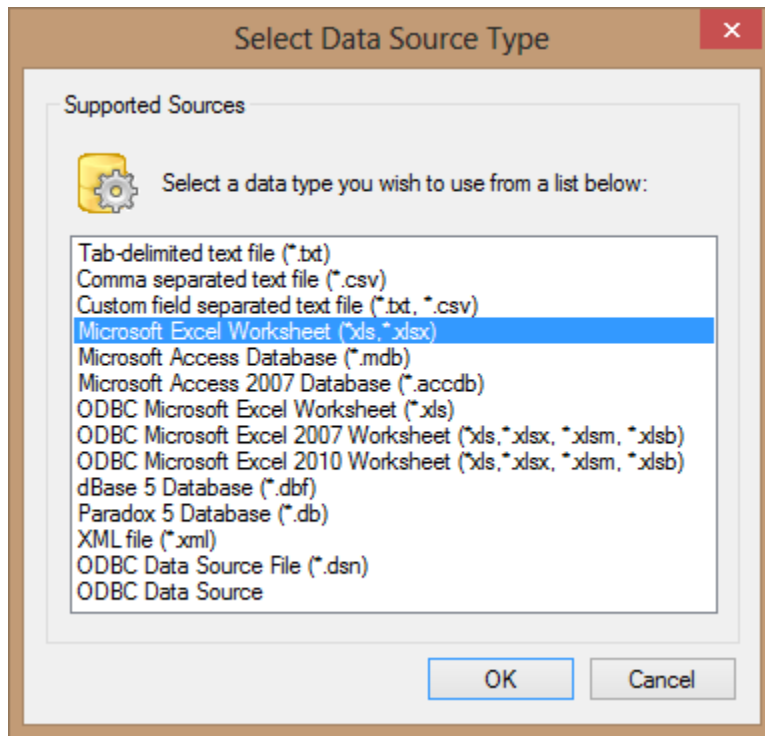
PDF Form Field	Type	Data Source Field

Add Field Mapping... Guess Mapping Delete Mapping Clear All

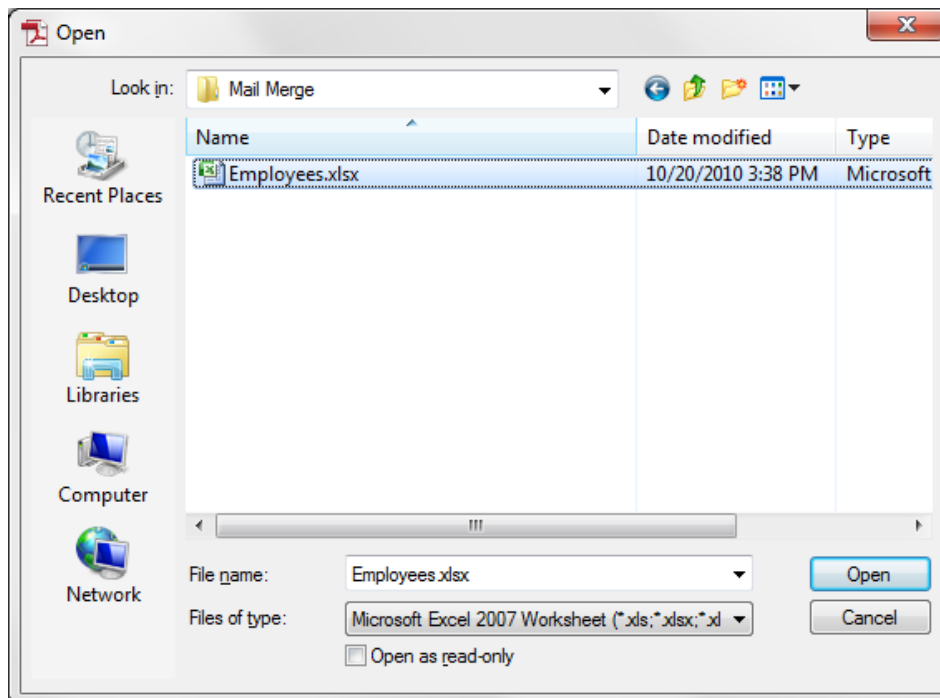
< Atrás **Siguiente >** Cancelar

Press "Browse..." button to select a data file. You will be presented with a choice of possible input data source types.

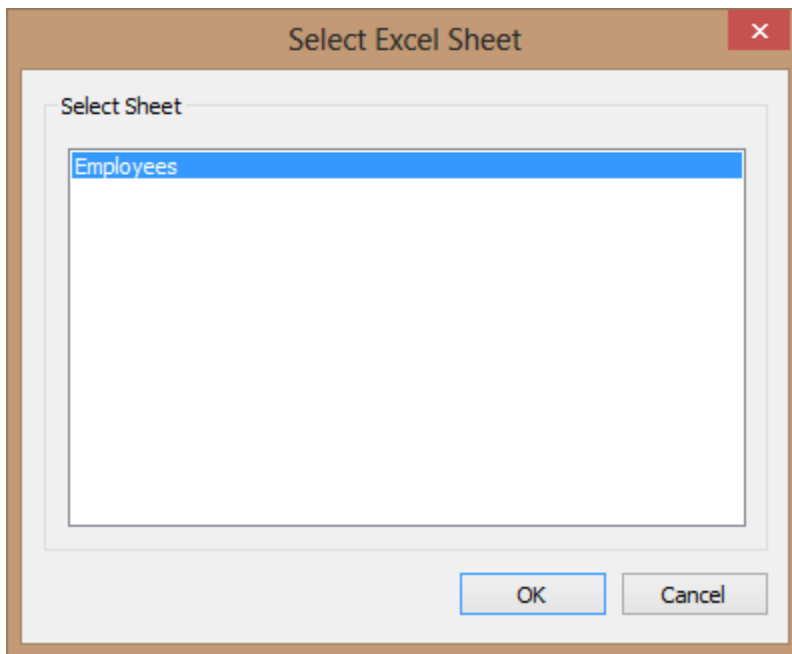
Select "Microsoft Excel Worksheet" from the list:



Select the input spreadsheet file in "Open" dialog:

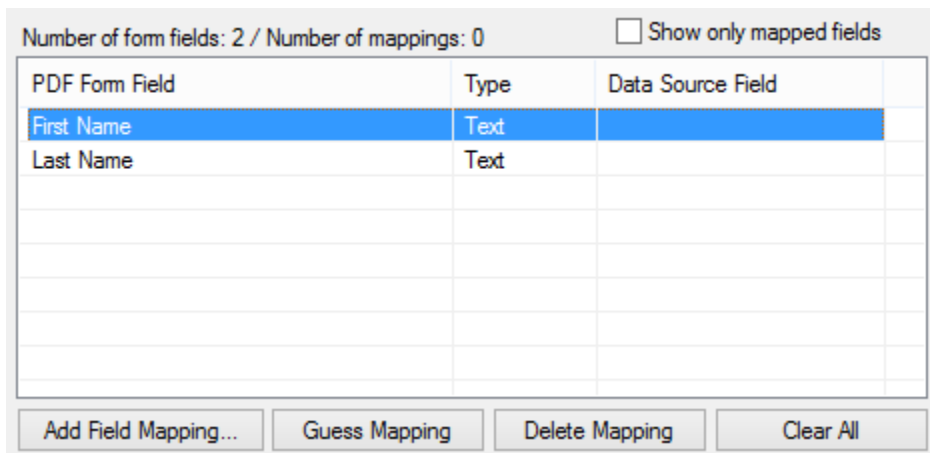


Select "Employees" from a list of available Excel sheets (the actual selection of sheets is different depending on the specific file):



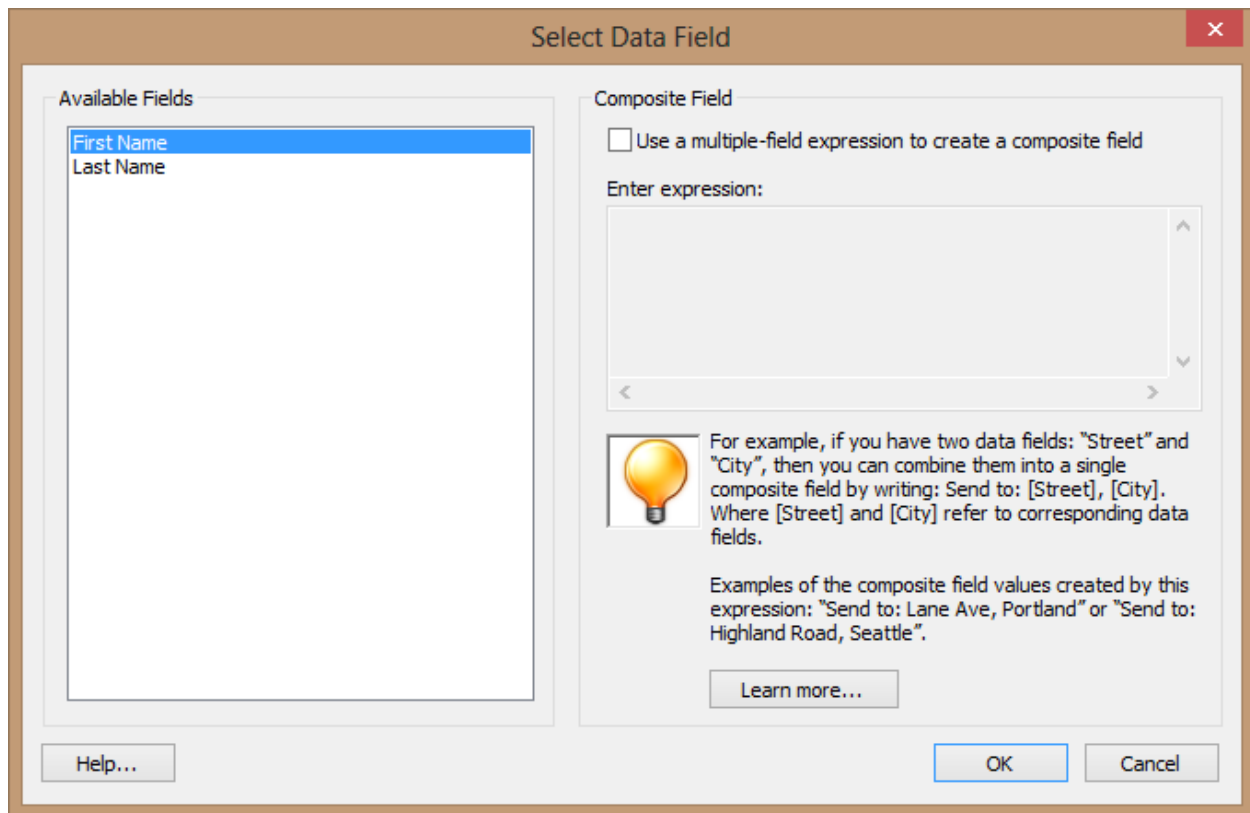
Press "OK" button to confirm selection.

4.5. The next step is to assign correspondence between spreadsheet data fields and PDF form fields. Double-click on a PDF Form field name in the list of available fields to assign what data field(s) to use for filling it. Alternatively, you can press "Add Field Mapping" button.



You can save time by naming PDF form fields with the same names as corresponding data fields. This would allow using automated field mapping procedure. Press "Guess Mapping" button to automatically assign field mappings based on name similarity. For example, if there are PDF and data fields both named "First Name", then a corresponding mapping will be automatically added.

4.6 . Select a data field that needs to be used to filling from a list of available data fields in "Select Data Field" dialog. It is also possible to put multiple data fields into a single PDF field by using [multiple-field expressions](#). Press "Learn More..." button to access documentation for more details.



Press "OK" button to make an assignment and close the dialog. Repeat last two steps for each field that needs to get text from a spreadsheet. You should see the following once you have completed the assignment (the list of fields will be different depending on PDF form and data file used):

Number of form fields: 2 / Number of mappings: 2 Show only mapped fields

PDF Form Field	Type	Data Source Field
First Name	Text	First Name
Last Name	Text	Last Name

Each PDF form field has now a corresponding spreadsheet field assigned. Press "Next >" button to move to the next step once you have mapped all fields.

4.7. Use "Specify Field Options" screen to control if output form fields should remain editable or not. Check "Flatten output PDF documents" option to make all fields in output documents non-editable. If this option is selected, then all fields in output documents will be converted to text.

Uncheck "Flatten output PDF documents" option if you need to have content of form fields to remain editable in the output files.

Field Options

Specify Field Options
Specify form fields options for output documents

Select Field Options For Output Documents

- Flatten output PDF documents (all fields will be converted into text/graphics)
- Make all form fields read-only (fields will appear as non-editable regular text)
- Remove ".0" from the end of numeric values
- Hide all empty text fields in output forms
- Format dates according to Windows preferences

Select form fields that needs to be set "read-only" after filling with data:

Form Field Name	Comment
<input type="checkbox"/> First Name	
<input type="checkbox"/> Last Name	

Clear Selection

< Back Next > Cancel

Press "Next >" button to move to the next step.

4.8. Use "Select Output Options" screen to control where and how to save output PDF documents. Choose output folder by pressing a "Browse..." button and selecting a desired output folder:

Output Files

Select Output Options
Specify output folder and document saving options

Output Options

Output folder: C:\Data2\Test

Save each copy of the filled form as a separate PDF document
 Export FDF file for each filled form
 Do not overwrite existing files (always create a unique name)
 Print each output file to default printer using current print settings
 Shrink pages to printable area while printing
 Perform garbage collection (slower, but may create smaller file sizes on some forms)
 Linearize documents for fast network access (may increase processing time)
 Output a compound document that will contain all filled forms

Compound document filename: CompoundDocument.pdf

File Naming

Insert Before: Base Filename: Form Filename + Number Insert After:

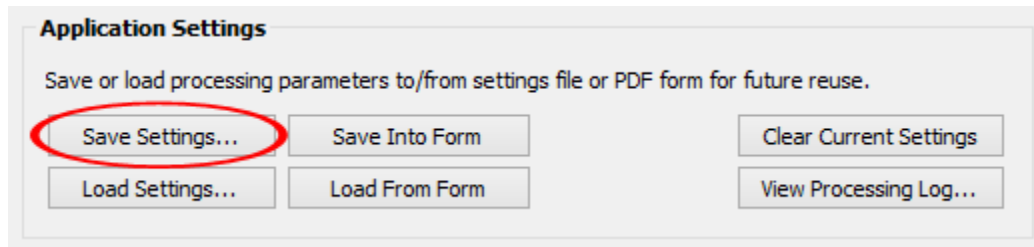
You can easily customize any part of the output filename using data source field values. Type [field name] to insert a value of the field "field name" into any part of the output file name.

Leave default settings that will name each output file using input file name and an auto-incrementing number. For example, if you are using MyForm.pdf file as input, all output files will be named MyForm1.pdf, MyForm2.pdf, MyForm3.pdf and so on. Software offers a number of different options including using data fields anywhere in the file name. It is possible to automatically name output files as John Doe.pdf, Mary Smith.pdf and etc.

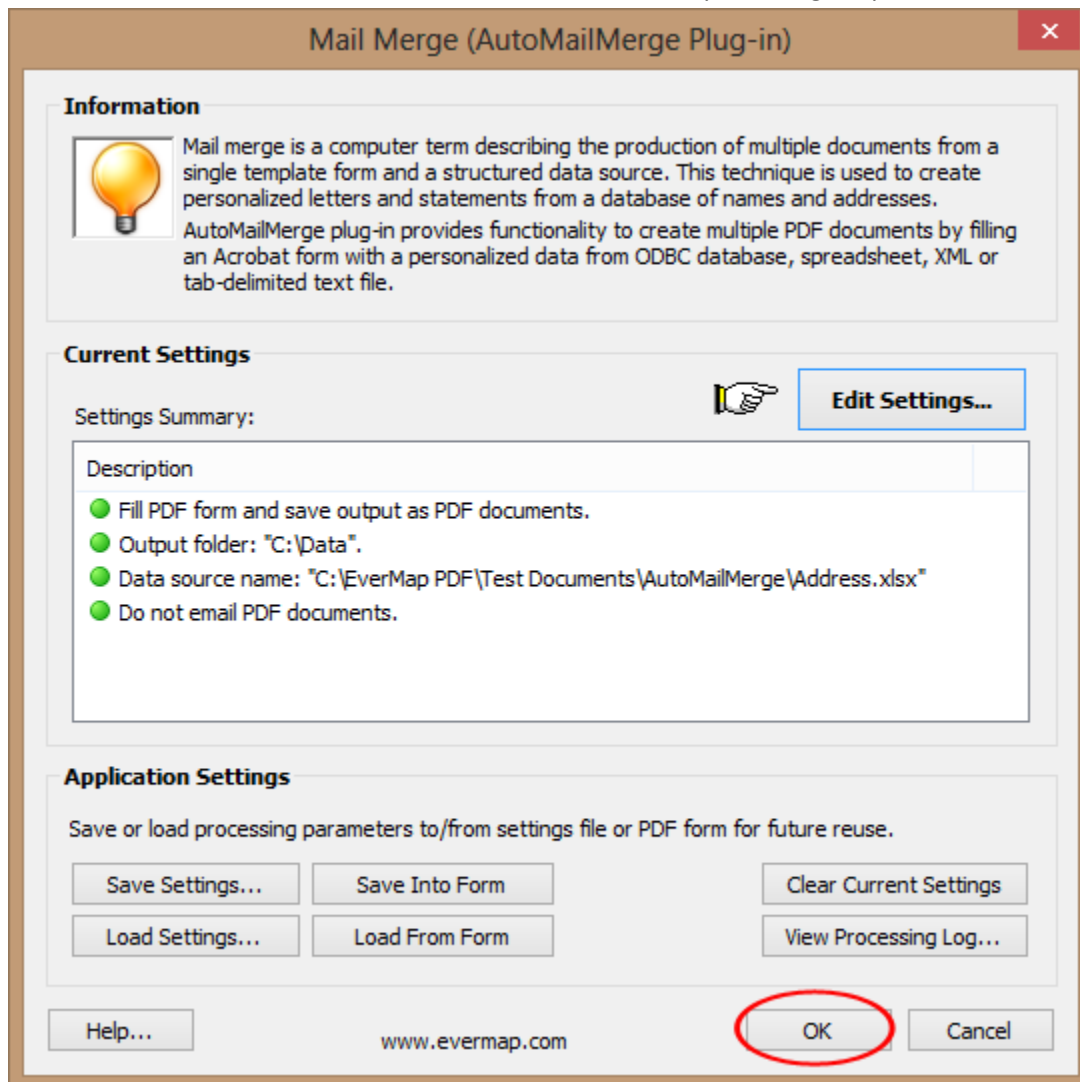
Press "Next >" button to move to the next step once you are done specifying file options. You can skip

all remaining screens (“Add Watermark”, “Select Document Security”, “Select E-mail options” and etc.) by clicking on “Next >” button if you are not interested in any additional options. Everything is now ready for running a mail merge.

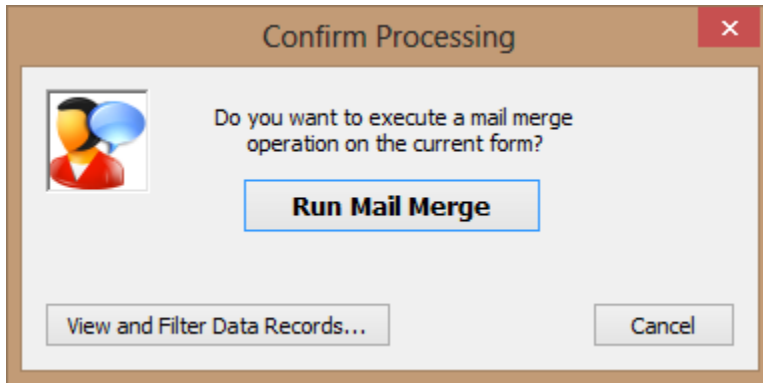
4.9. Optionally, save mail merge settings into *.mms file for later reuse by pressing "Save Settings" button. Use "Load Settings" button to load settings back.



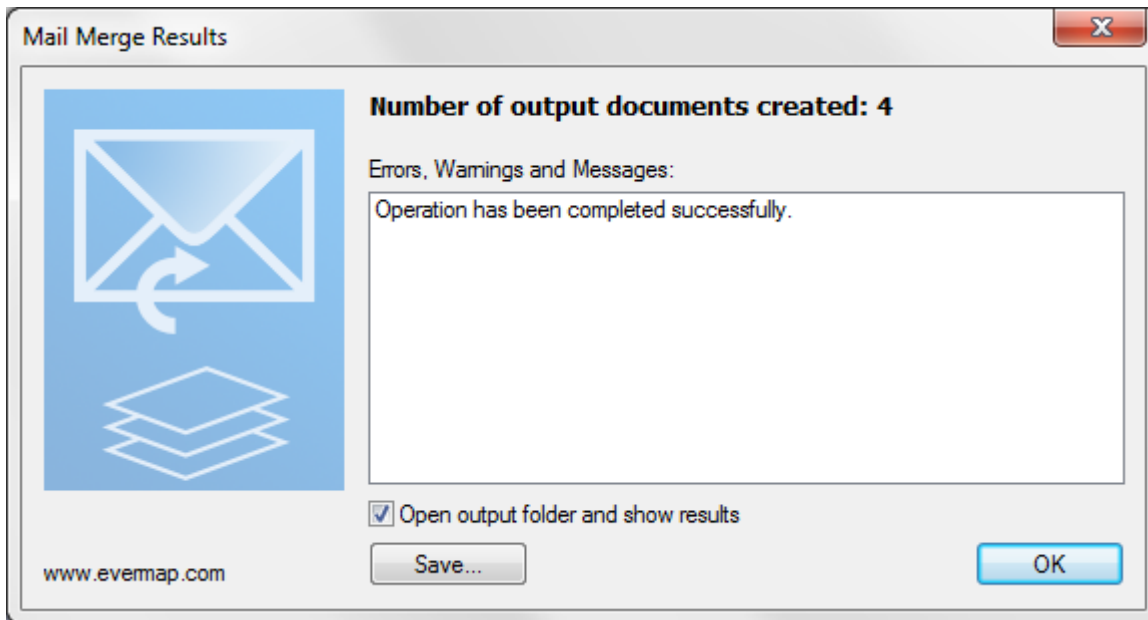
4.9. Press “OK” button located on the main screen to start producing output documents:



4.10. Press “Run Mail Merge” button on "Confirm Processing" dialog to start mail merge processing:



You should see “Mail Merge Results” dialog once a mail merge is completed. This dialog will list any errors that occurred during the processing.



Press “OK” button to close this dialog and open an output folder where generated PDF files are stored. Examine output files by opening them in Adobe Acrobat to see if they satisfy project requirements. Make adjustments to processing settings and run mail merge again, if necessary.

You can read more in-depth information about various options offered by AutoMailMerge software in the product user’s guide. Select “Help > Plug-in > AutoMailMerge...” from Acrobat menu to access the software manual.

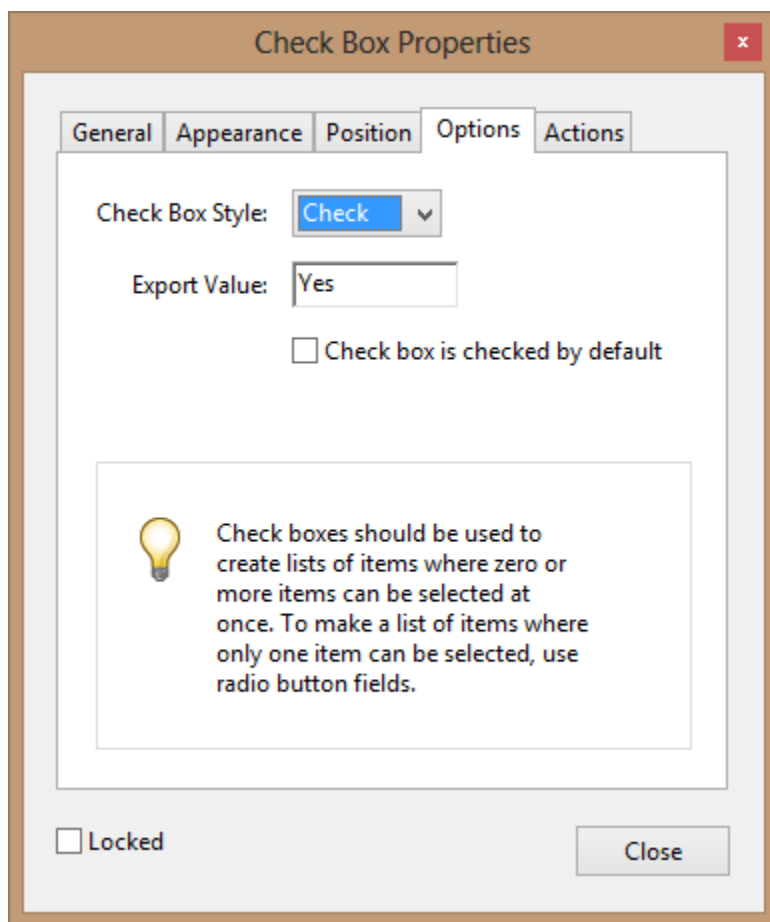
Visit <http://www.evermap.com/automailmerge.asp> for a detailed product overview and to download a free 30-days trial version of the software.

Advanced Topic 1: Checking PDF Check and Radio Boxes

Check and radio boxes work in the same way as text fields. There are not "checked" or "unchecked", but they are filled with text. If a checkbox's "value" matches an "export value" defined by specific checkbox field, then Adobe Acrobat displays this checkbox as "checked". If these two values do not match, then checkbox appears unchecked. "Export value" for a checkbox is defined by the designer of a PDF form and can be found in each field's properties (see below for details how to view and edit it). You can assign any text for the export value and use any text to "fill" a checkbox. Both values are always treated as text.

How to see or change "Export Value" of the check or radio box field:

1. Start Adobe Acrobat form editor by using "Prepare Form" tool (in Acrobat DC).
2. Right-click on the checkbox field.
3. Select "Properties..." from a popup menu.
4. Select "Options" tab and verify or edit "Export Value" entry box. Use content of the "Export Value" to check this particular checkbox field when filling it with data.



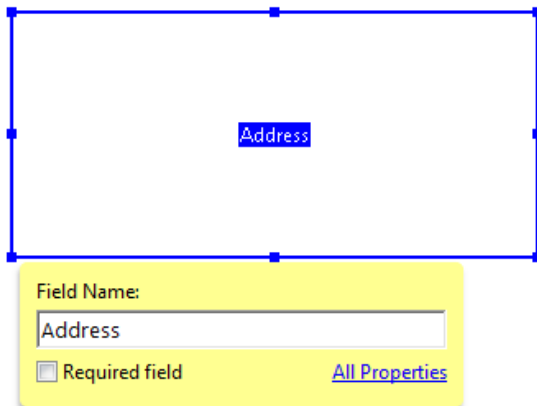
By default, "Export Value" is set to "Yes" for all newly created checkboxes.

Note that the "Export Value" is case-sensitive. It needs to be filled exactly with "Yes" in order to appear checked, not "yes" or "YES".

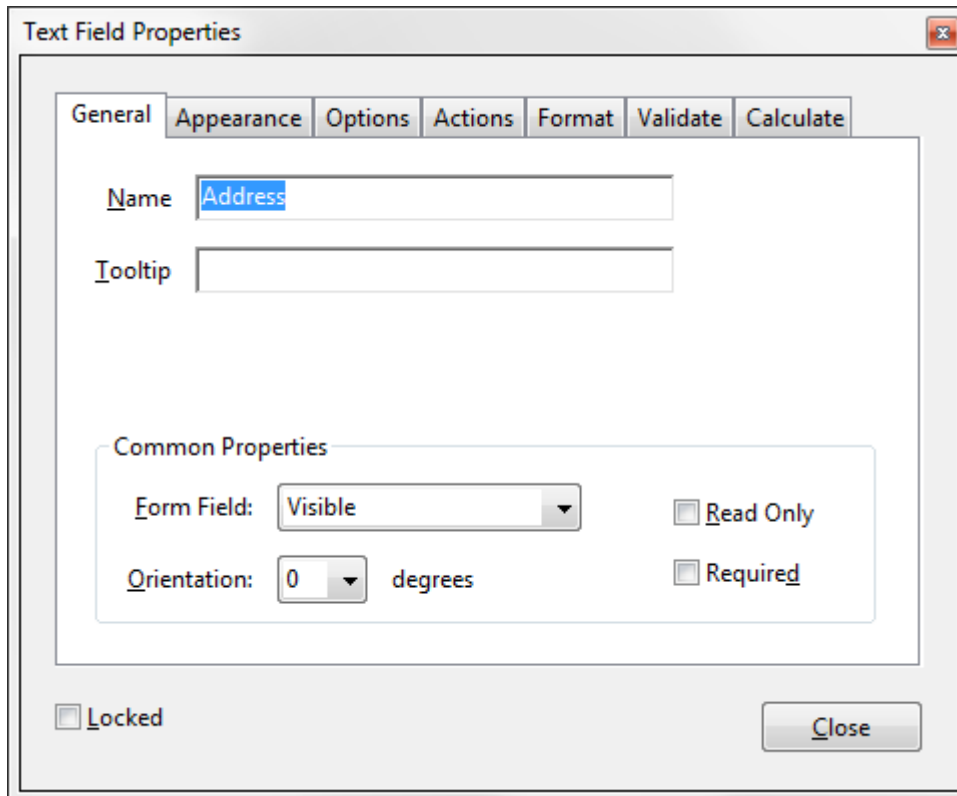
Advanced Topic 2: How to Create Multiline Address Labels

One of the most common mail merge tasks is adding mailing addresses to newsletters, brochures and other mail correspondence. Please follow these simple steps if you want to add personalized mailing addresses from your customer database or spreadsheet to your correspondence.

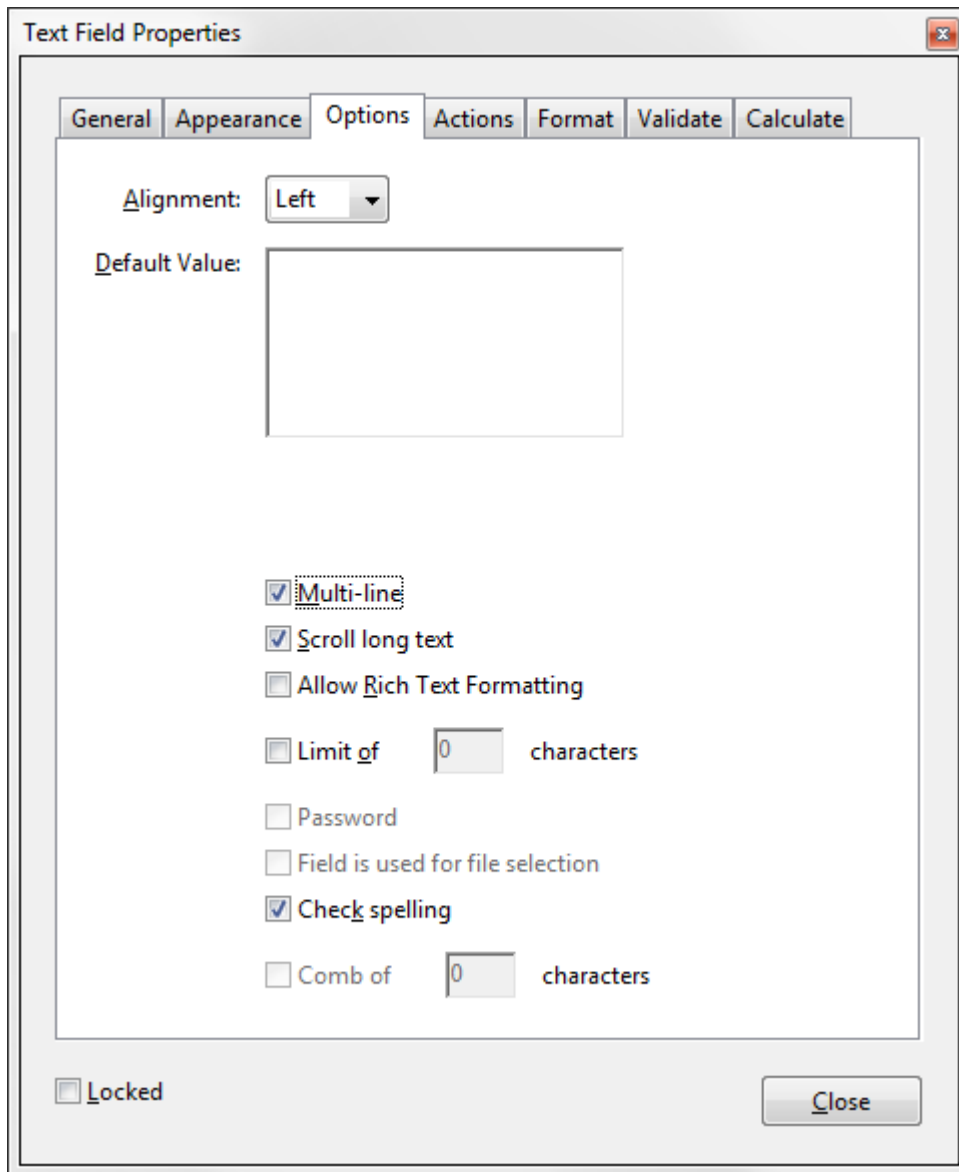
1. First, add a single text field to your PDF document that is going to hold a mailing address. Refer to the beginning of this document for detailed instructions on how to add form field to a PDF document. Name this text form field something like "Address". Make sure that this text box is large enough to hold 4-5 lines of text.



2. Right-click on the form field and select "Properties..." from popup menu. You should see a field's "Text Field Properties" dialog to appear on screen.

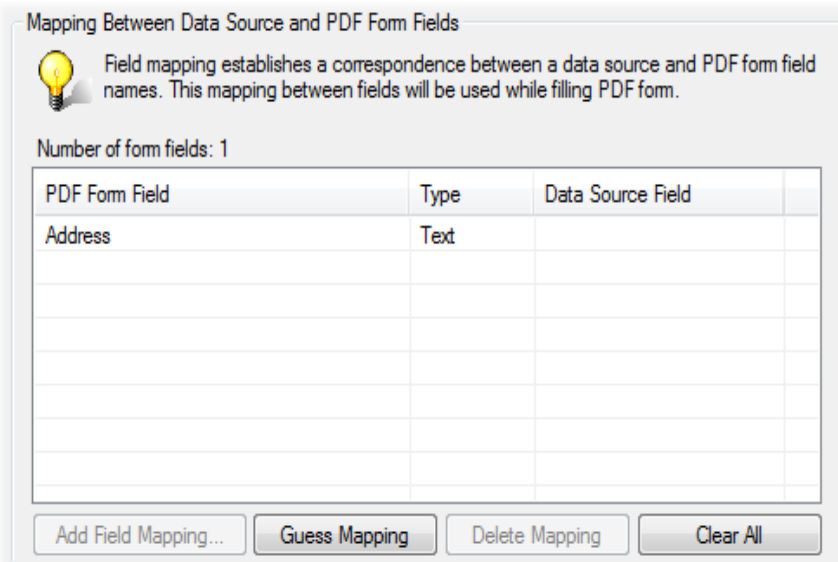


3. Select “Options” tab and check “Multi-line” option. This option will allow this field to hold multiple lines of text.



4. Press “Close” button to close “Text Field Properties” dialog.
5. Save your PDF document with newly added form field by selecting “File > Save As...” from the menu..
6. Select “Plug-in > Mail Merge...” from the menu to start a mail merge.
7. Press “Edit Settings...” button to start configuring settings for the mail merge.
8. Press “Browse...” button and select input data source file.

9. Double-click on the “Address” form field in the list of available fields:



10. Check “Use a multi-field expression to create a composite field” option and type an expression:

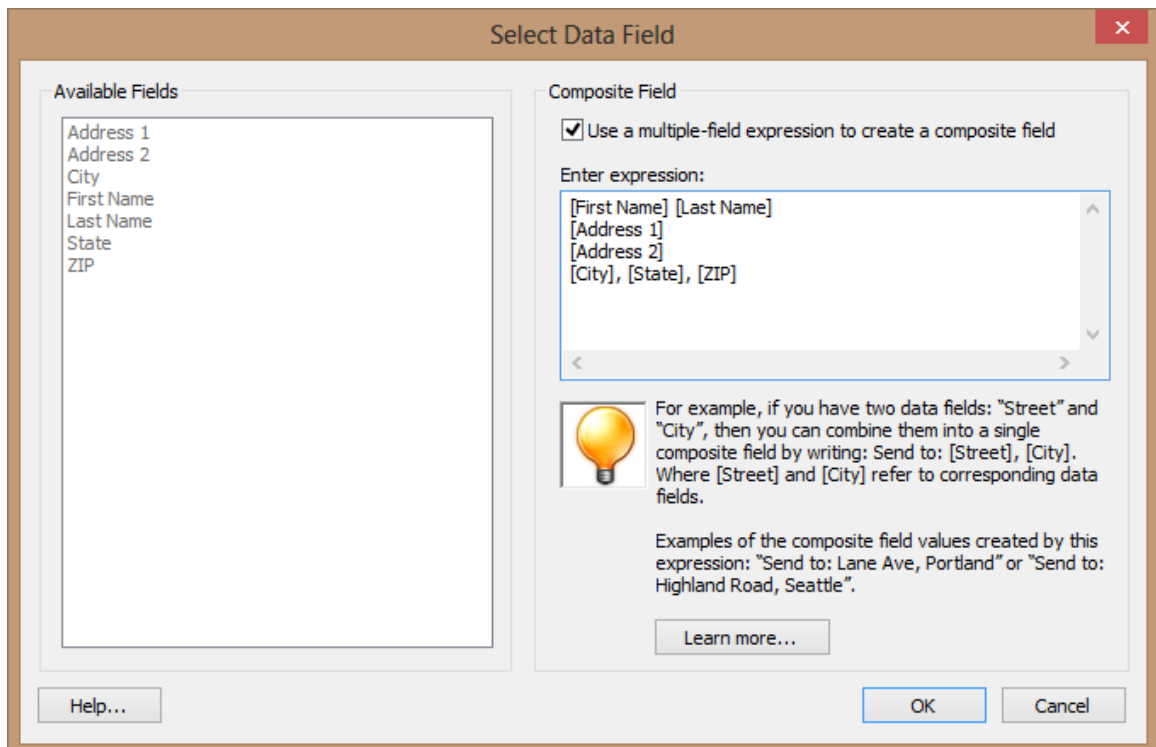
[First Name] [Last Name]

[Address 1]

[Address 2]

[City], [State], [ZIP]

The expression assumes that data fields such as "First Name", "Last Name", "Address 1" and etc. actually exist in the input data file. Any text inside [...] is treated as a data field name. All other text is treated as static text and will be inserted into output "as-is".



11. Press “OK” button to close “Select Data Field” dialog. Complete the rest of the configuration wizard. Run mail merge to produce output documents.

Mailing addresses in your document should look like the following (sample):

John Doe
2397 NW Pacific Drive
Corvallis, OR, 97330

The plug-in automatically removes any blank lines in the text if a certain data fields (such as “Address 2”) are empty. Use **{blank}** keyword if it is necessary to preserve a blank line in a composite field:

[First Name] [Last Name]
{blank}
[Address 1]
[Address 2]
[City], [State], [ZIP]

The above expression produces the following output (sample):

John Doe

2397 NW Pacific Drive
Corvallis, OR, 97330

Examine output documents to make sure that the size of the text form field is sufficient to hold amount of text from the all data records. Enlarge the field if text appears to be cut off on some of the output forms or reduce font size. You can change size and visual appearance of the text field (such as font and color) by [editing it in Acrobat form editor](#).

Advanced Topic 3: Automatic Emailing of PDF forms

The AutoMailMerge plug-in provides ability to automatically send populated PDF forms to email recipients.


1. The first step is to put email addresses for each data record/recipient into a data file. For example, add "Email" column to the Excel spreadsheet:

	A	B	C	D
1	First Name	Last Name	Email	City
2	John	Doe	john.doe@mycompany.com	Portland
3	Mary	Peterson	mary.peterson@yahoo.com	Corvallis
4	Peter	Harrison	peterharr@outlook.com	Newport
5	Mark	Johnson	markjohnson@mylawfirm.com	Corvallis

2. In mail merge settings wizard, check "Send emails to the recipients" checkbox and select "Email" data field from "Data source field to use for email address" pull-down list.

Select E-mail Options

Specify e-mail options to use for creating and sending messages



Email Options

Send e-mails to the recipients using addresses from the data source Advanced...
Filled and personalized PDF form will be attached to each e-mail message.

E-mail format: Plain Text User interaction is required for sending e-mails

Message Details

Data source field to use for e-mail address: Email

Cc:

Bcc:

Subject:

Message:

Help... Use [field name] to refer to a value of data source field

Request read receipt

3. Type desired "Subject" line and enter text for the email message into "Message" entry field. It is possible to customize each email message by inserting values of data fields into email message. For example, type the following into "Message" field:

Dear [First Name] [Last Name],
Please find attached your monthly account statement.
Your Support Team


The above example assumes that there are "First Name" and "Last Name" data fields present in a data source. The values from these fields will be inserted into each customized email message, producing something like the following:

Dear John Doe,
Please find attached your monthly account statement.
Your Support Team

4. Press "Next>>" button to advance to the next settings screen. Select desired emailing method from the screen below. By default, the software will use your currently installed email client:


Select E-mail Server Type

Specify E-mail server type to use for sending filled PDF forms




Server Type

Use SMTP Internet E-mail Server

 Select this server type if you need to send large number of e-mails without user interaction. You will need to specify an outgoing SMTP (Simple Mail Transfer Protocol) server in order to use this option.

Use Your Default E-mail Program (MAPI Enabled)

 Select this option if you want to use your existing MAPI enabled e-mail software (such as MS Outlook) to email filled forms. All mail will be send from a default user account.

Use Simple MAPI protocol (if using Outlook Express or Thunderbird)

Due to Microsoft Windows security restrictions you will be prompted to confirm sending each e-mail message. This option is not suitable for sending large volumes of email and requires user interaction.

If you have selected a default emailing method, then no setup is necessary. However, this emailing method comes with certain restrictions. Due to Windows security policy you will be prompted to confirm sending of each email message. It is possible to send emails via current email client without confirming each outgoing message (uncheck "Use simple MAPI protocol" option). However, this ability is typically disabled in most corporate environments due to security reasons.

The best method to send emails without any user interaction is via SMTP email server. Select "Use SMTP Internet E-mail Server" option if you want to use this method and press "Next>>" button.

5. You would need to know SMTP server settings for the specific server used at your organization. Enter your name, email address, account user name, account password and SMTP server address.

Select E-mail Server
Select SMTP e-mail server to use for outgoing e-mail messages

Information
You need to specify outgoing email server parameters (SMTP) in order to able to send emails. Each of these settings are required to get email delivery working.

User Information
User name and email address are displayed in each outgoing e-mail message to identify you as a sender.

Your Name: E-mail Address:

Logon Information

User Name: Password:

Server Information

E-mail Server (SMTP):

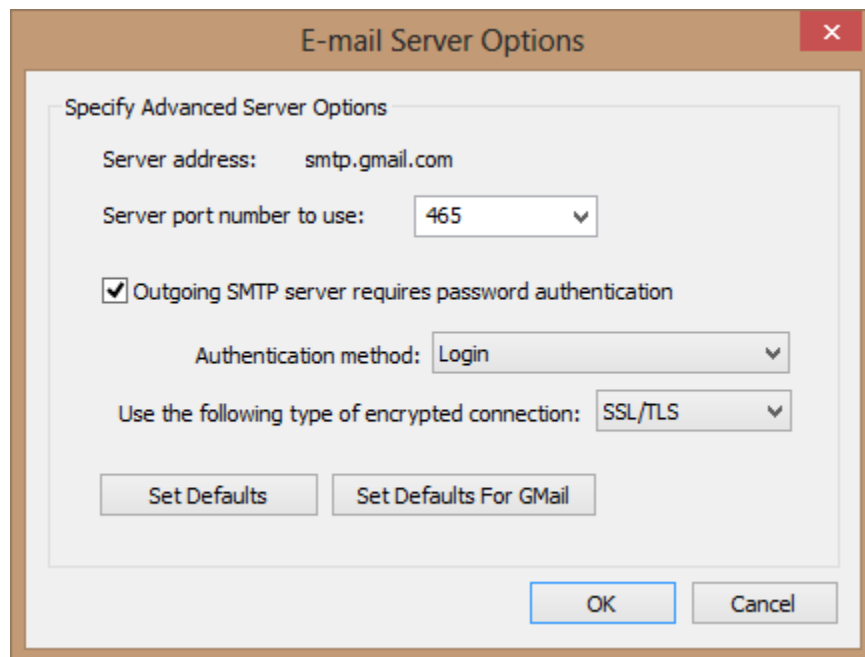
After filling out information on this screen, we recommend you test your account by clicking on "Test Server Settings..." button. (Requires network connection)

Text from entered into "Your Name" field will appear in the "From" field of all outgoing emails. This is the name that all recipients see next to each email message. Address entered into "E-mail Address" field will be used as "reply-to" address for all emails.

Make sure that "User Name" and "Password" matches your SMTP account. These settings are crucial for correct connection to the SMTP server and sending emails.

6. Press "Advanced Server Options..." button to specify low level details like port number, security protocols and authentication method.

Here is an example of settings for Gmail server:



Press "OK" button to save settings.

Press "Test Server Settings..." button to check server configuration by emailing a test message to your own email address specified in "E-mail Address" entry field. If all settings are correct, you should receive a test email message shortly. Check junk mail folder, because it is possible that it will be automatically classified as junk message.

Press "Next >>" button to move to the next screen once finished configuring email settings.

IMPORTANT: Most SMTP servers have a daily quota for sending emails. If you exceed a daily limit of outgoing email messages, then your account will be temporary suspended until next day. Please consult your Internet service provider or IT department for details.

Have a question? Email us at tech@evermap.com.

Other AutoMailMerge tutorials:

“Creating and Printing Multiple Labels per Page” is available for download from <http://www.evermap.com/AutoMailMerge/PrintingMultipleLabelsPerPage.pdf>

Software product page is located at the following address:

<http://www.evermap.com/AutoMailMerge.asp>