

YOUINVERSE Invite Process Instructions

Please find attached the Customer- DEM, which I kindly ask you to distribute to your customer database.

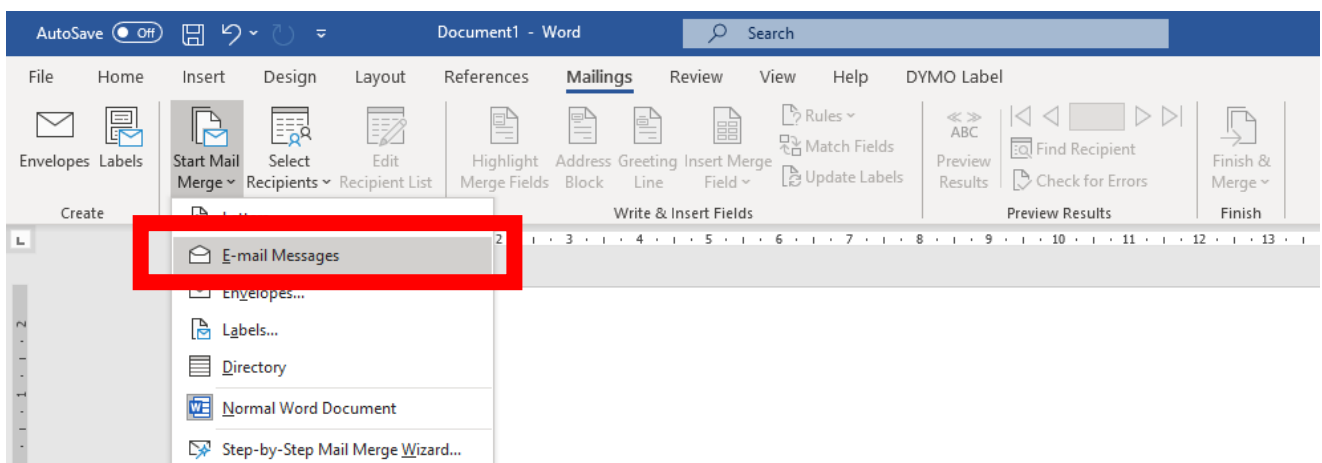
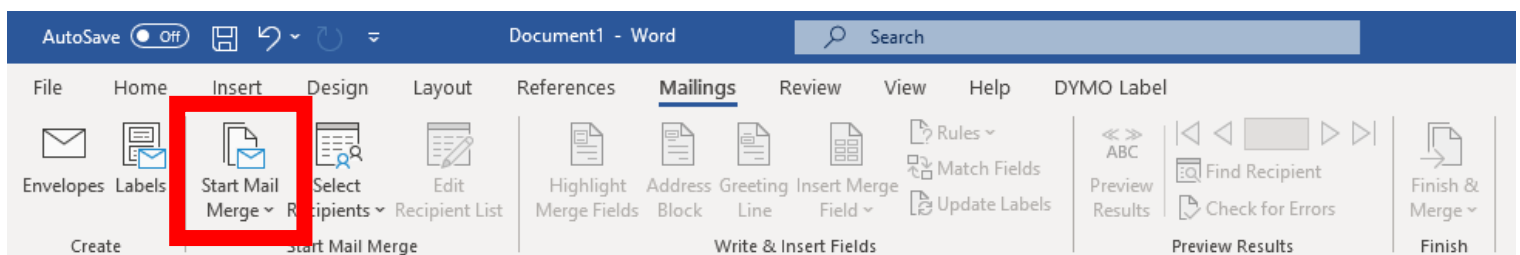
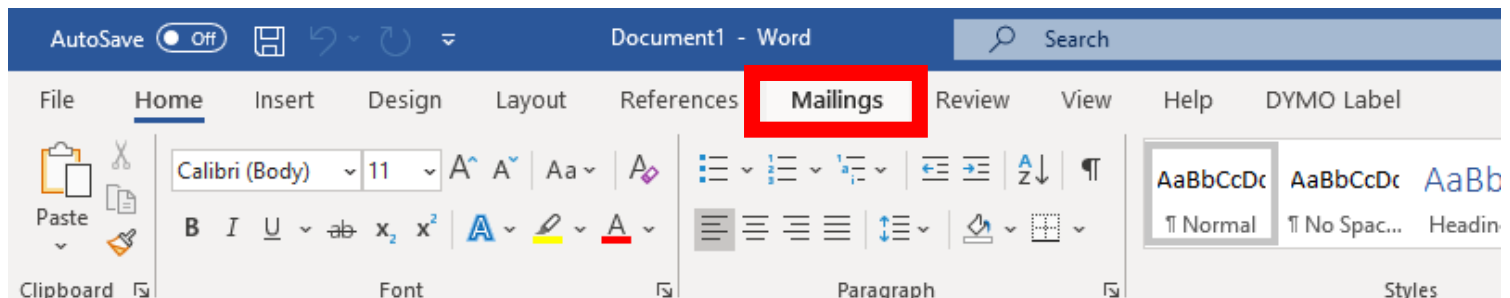
To make the customer name correct in the image, please follow the below steps.

If you have any questions, please contact amy.drozdowicz@caseih.com

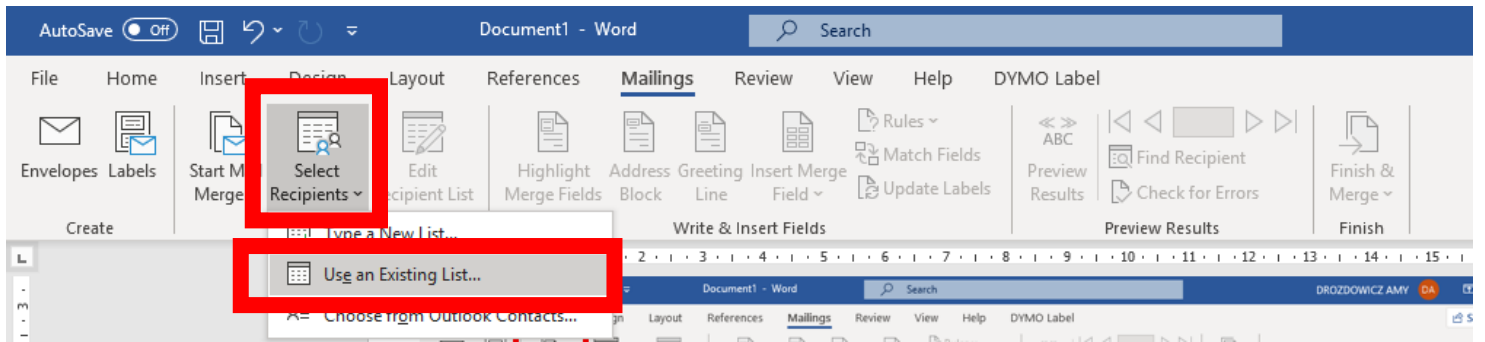
- 1) Download the attached Customer DEM to your computer.
- 2) Create an Excel file with columns containing e.g. Salutation, first name, surname and e-mail address (of your customer database, as below) and save it on your computer.

Salutation	Firstname	Surname	E-Mail
Dear Mr.	Otmar	Riedlhuber	otmar.riedlhuber@cnhind.com
Dear Miss	Amy	Drozdowicz	amy.drozdowicz@caseih.com
Dear Mr.	Charles	Blessley	charles.blessley@cnhind.com

- 3) Open a new Word document – save eg as DEM YOUINVERSE
- 4) Click the “Mailings” tab at the top, then select “Start Mail Merge” followed by “E-mail Messages”.

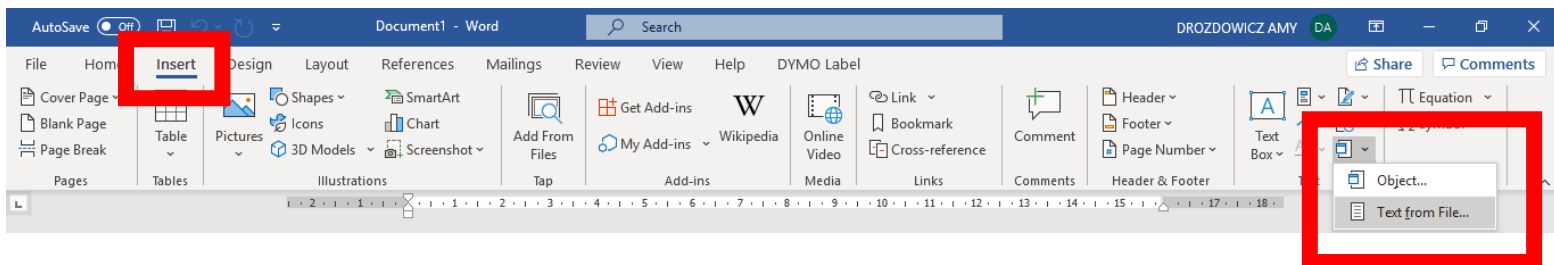


5) Under the same tab (“Mailings”), select “Select Recipients” then “Use an Existing List”.

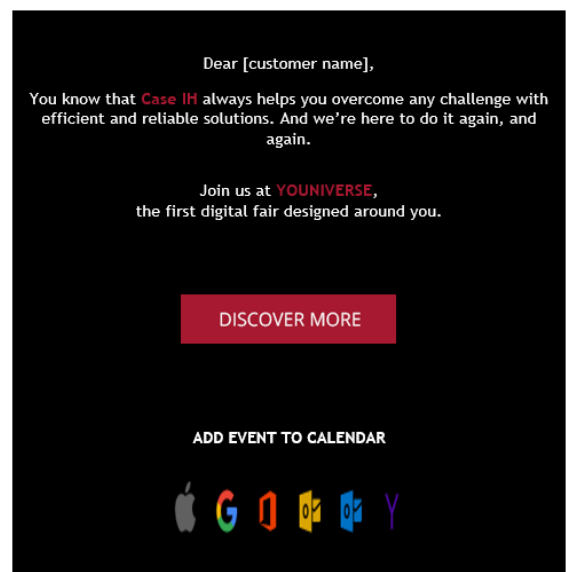
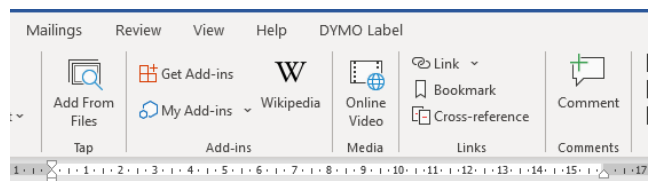
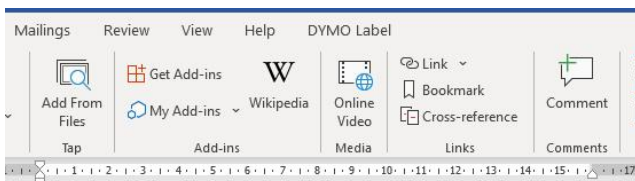


6) Upload the Excel file you created in Step 2.

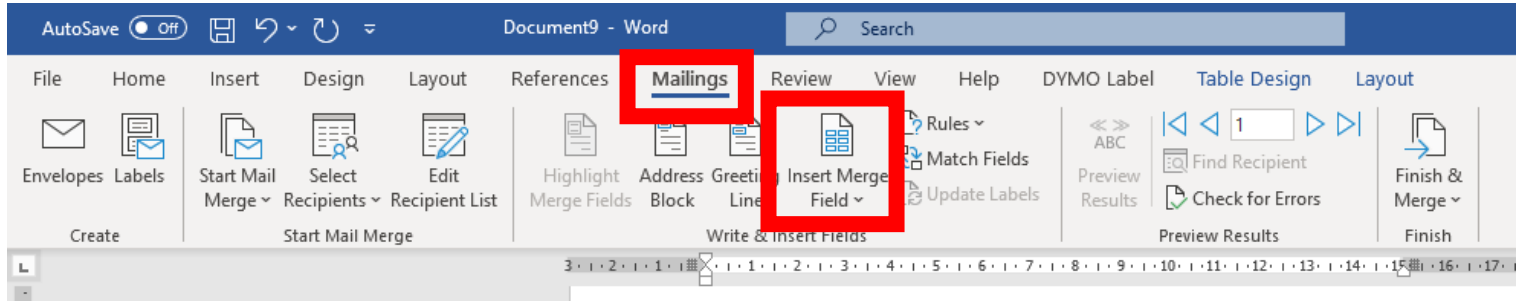
7) In Word, now click the “Insert” tab and select “Object” and here “Text from file”. Now select the HTML-file you saved in Step 1 and click enter.



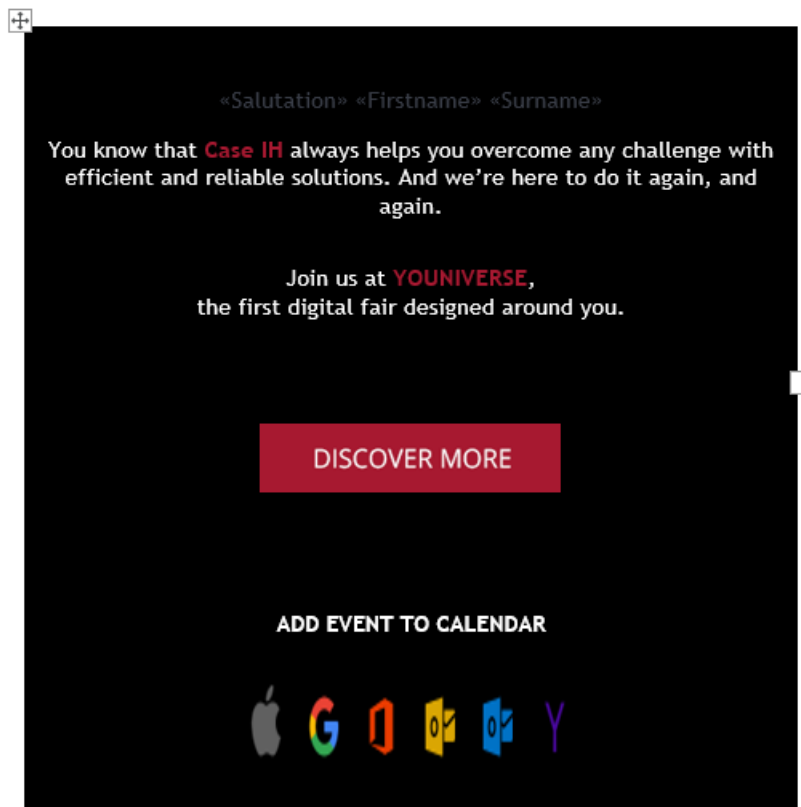
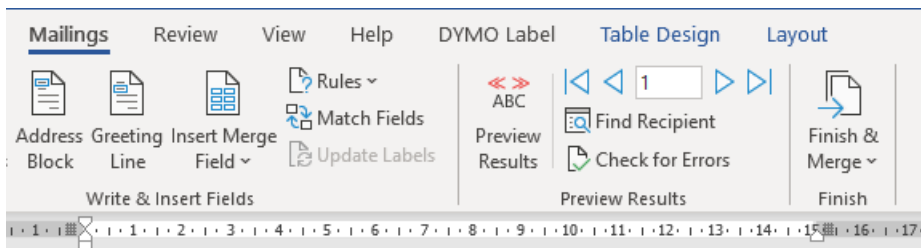
8) Your Word Document should now look like the below:



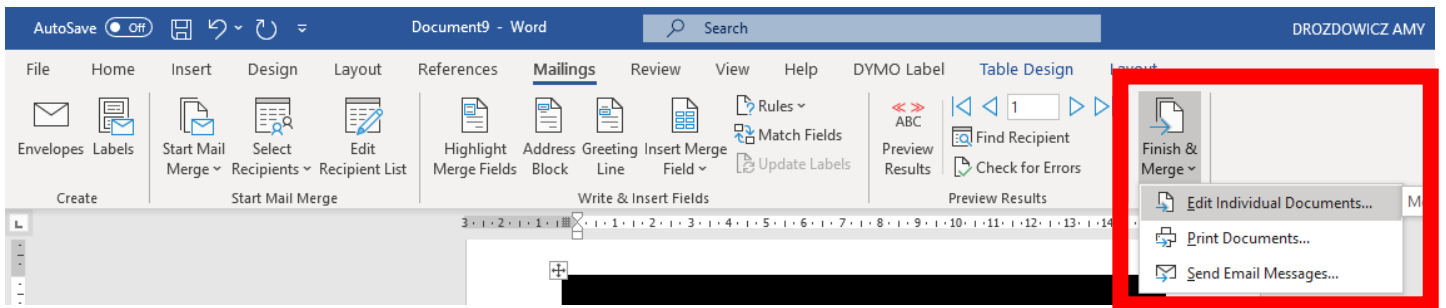
- 9) You will see the second page starts with “Dear [customer name],” highlight this text and then delete.
- 10) Go back to the “Mailings” tab and select “Insert Merge Field”



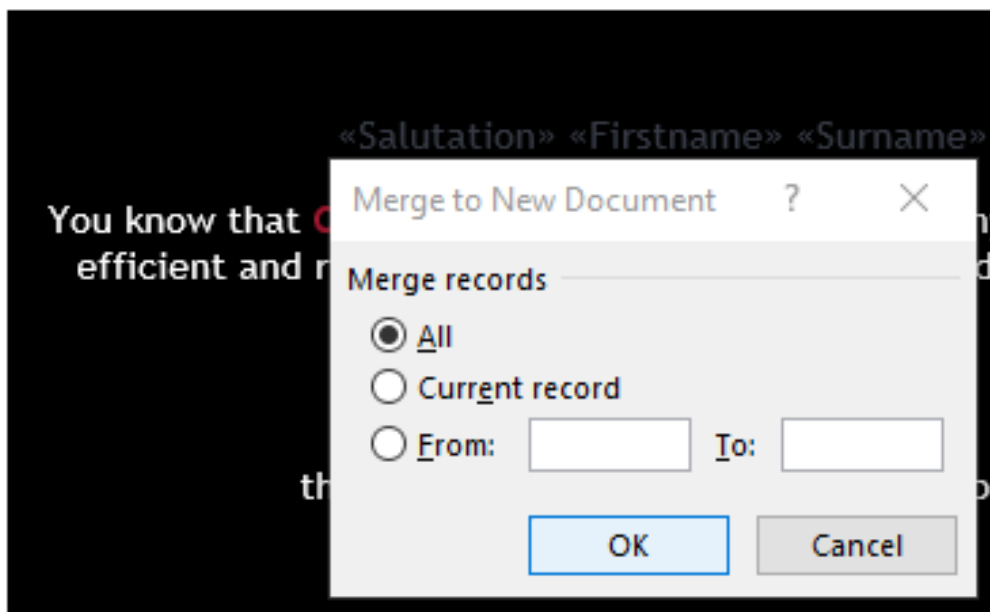
- 11) Choose “salutation” and repeat for “first name” and “surname” ensuring you put a space between each.
- 12) Your document should now look like this:



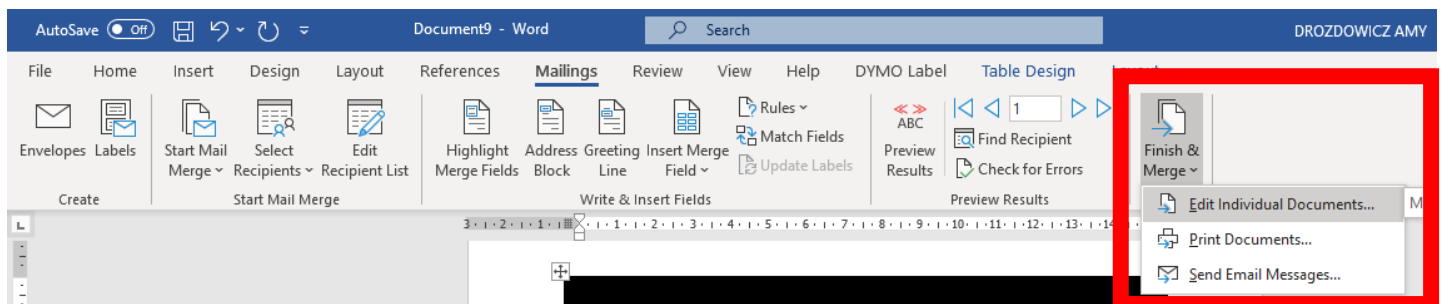
13) To test this has worked, you can select “Finish & Merge” then “Edit Individual Documents”.



14) The following box will appear, select “All” then press “OK”



15) If you are happy that your names have merged successfully, you can go back to “Finish & Merge” then select “Send Email Messages...”



16) The following box will appear, populate the fields to match the below:

Merge to E-mail ? X

Message options

To: Email Address

Subject line: YOUNIVERSE

Mail format: HTML

Send records

All

Current record

From: To:

OK Cancel

17) Your emails will now send – you can check this in your Sent Items.