

How to use Microsoft Outlook to create an MTP batch email

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Updates to the Step-by-Step Guide

1. **September 10, 2024:** Step-by-step guide released.
2. **October 29, 2024:** Focus on using Microsoft Outlook to create an MTP batch email and separate the converting existing text into a new section.
3. **December 12, 2024:** Added how to clear all text formatting in Microsoft Outlook using the Clear All Formatting icon.
4. **March 18, 2025:** Changed the term “Outlook Message Format” to “Outlook Mail Format”. Added the Outlook Mail Format file extensions (.msg and .eml) to the step-by-step guide where needed.

Using Microsoft Outlook to Create an MTP Batch Email

Overview and Preparation

Here are the steps to prepare and create an MTP Batch Email using Microsoft Outlook.

Start with a New Email in Outlook. **Do Not Use an existing Microsoft Outlook email as a starting point.** Using an existing Outlook email as a starting point can cause unseen formatting issues once the email is sent.

FYI: If you want to use an existing Outlook email (or are cutting and pasting from other applications), please review [How to Convert an Existing Outlook Email or Word Document to an MTP Batch Email](#).

1. **Open** Microsoft Outlook and start a New Email.
FYI: MTP uses Outlook as its email editor to create and format emails.
2. **Write** your email copy and subject line in the Microsoft Outlook email. Get it approved.
3. **Personalize** the email copy using MTP Mail Merge Fields such as [First Name] or [Dues Amount]
4. **Format**, bold, underline, and add bullet points or hyperlinks to your email via Outlook Microsoft
5. **Insert** images in your email copy that you want to use for your message, like a Header, Footer, or Logo image
6. **Attach** files such as PDFs to your email
7. **Save** your email as an Outlook Mail Format (.msg or .eml) file
8. **Define** your email list of recipients in MTP using a User Define Report, such as all ACTIVE members or only members that are SUSPENDED
9. **Load** your Outlook Mail Format (.msg or .eml) file into MTP
10. **Review** your email and personalization, if added, in MTP
11. **Send** or **Schedule** your email in MTP
12. **Track** your email in MTP

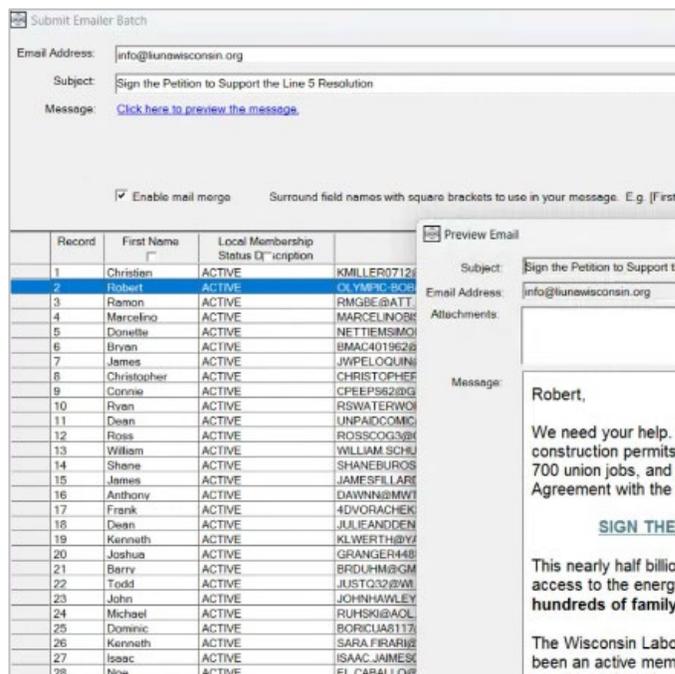


Image: MTP Batch Email

1) Open Microsoft Outlook and start a New Email

Start a New Email (Image 1.0).

Do Not Use an existing Microsoft Outlook email as a starting point. Doing so can result in unseen formatting issues once the email is sent.

If you want to use an existing Outlook email, please review the section [How to Convert an Existing Outlook Email or Word Document to an MTP Batch Email](#).

FYI: MTP uses Outlook as its email editor to create and format emails.

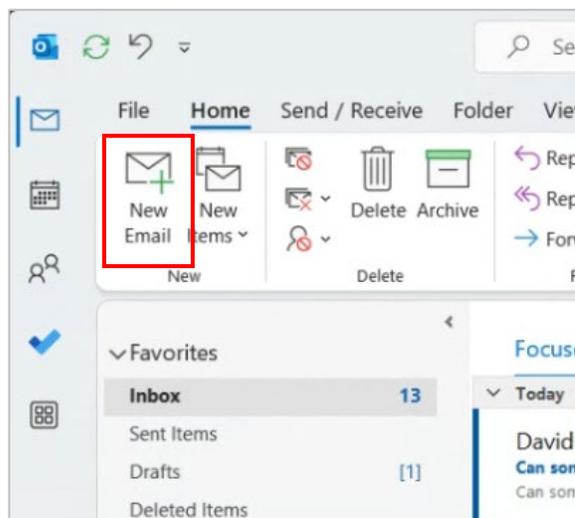


Image 1.0

2) Write Your Email Copy

Write (or re-type) your **New Email** in Microsoft Outlook. Get your copy (i.e., text) and email subject reviewed and approved for messaging, branding, spelling, and grammar rules (Image 2.0).

TIP: Formatting topics not to worry about at this point in the email writing process:

- Bolding
- Italicizing
- Underlining
- Bullet points
- Inserting images
- Inserting mail merge fields such as First Name, etc.

Why?

Don't worry about formatting at this point. When ready, you will format your email and insert images in Microsoft Outlook to create a finalized **Outlook Mail Format** (.msg or .eml) file for your HTML email to be loaded into MTP.

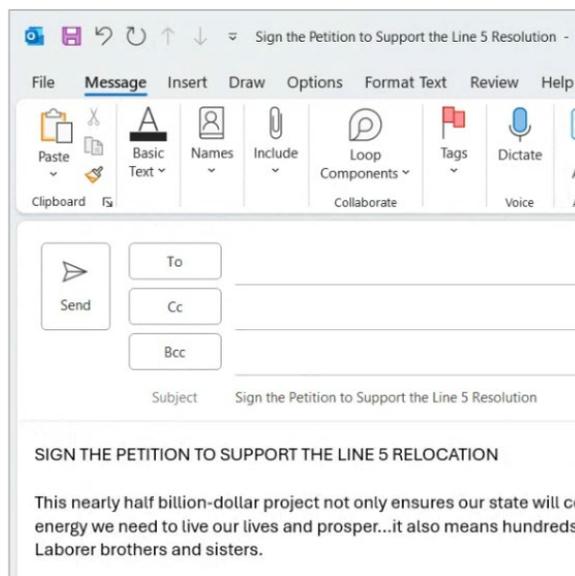


Image 2.0

3) Personalized the email using MTP Mail Merge Fields

One of the most common ways to personalize your email is to use the [First Name] **Mail Merge Field** from MTP to insert the member's first name at the beginning of the email (Image 3.0)

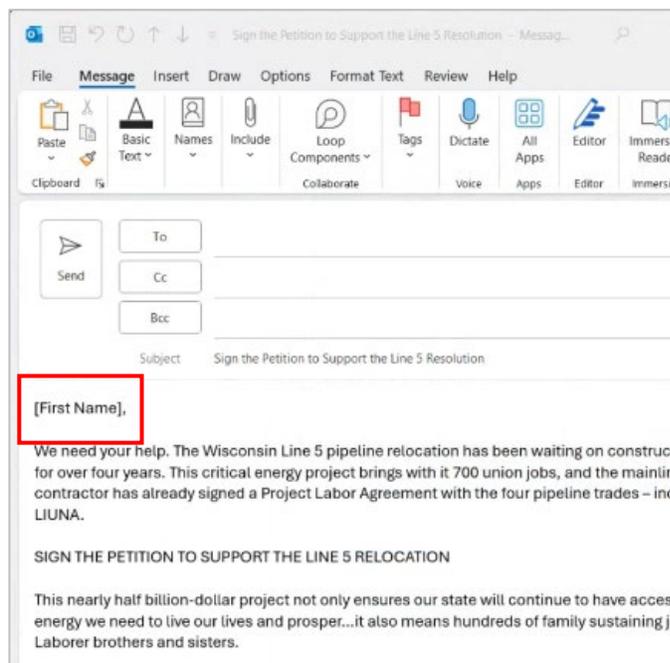
TIP 1: Mail Merge Fields can be found and documented when you export a spreadsheet from MTP using a **User Defined Report**. Each column header contains the Mail Merge Field (i.e., Row 1, the top row) in the exported spreadsheet (Image 3.1).

TIP 2: Mail Merge Fields used in email copy must be written exactly as they are displayed, i.e., capitalize letters and spaces with square brackets (left and right).

TIP 3: Left and Right Square Brackets are required to frame the Mail Merge Field within the email copy.

Example: [First Name] and [Training Id Number]

View the chart below for some of the most common **MTP Mail Merge Fields** used to personalize your Text-only or HTML Outlook email.



Merge Field with Square Brackets - Image 3.0

	A	B	C	D	E	F	G	H
1	Training Id Number	First Name	Middle Initial	Last Name	Suffix	City	State	Postal Code
2		9865 AARON		FAIR		CHICAGO	IL	60619
3		26851 AARON		SANCHEZ	JR	CHICAGO	IL	60629
4		187003 AARON	M	ROHDE		CEDAR LAKE	IN	46303
5		31433 ABEL		VILLARREAL		MERRIVILLE	IN	46410
6		26358 ADAM	M	RUCKER		CHICAGO	IL	60647
7		186830 ADDIE		BROWN		COUNTRY CLUB HILLS	IL	60478
8		189154 ADRIAN		VILLASENOR		PLAINFIELD	IL	60586
9		186844 ALBERT		VANCE		MERRILLVILLE	IN	46410
10		88365 ALBERTO		ACUAHUITL		LAKE STATION	IN	46405
11		90007 ALEJANDRO		DE LA TORRE		SCHAUMBURG	IL	60193

Spreadsheet Header Fields - Image 3.1

MTP Merge Field Chart (below)

Personalization Options	MTP Mail Merge Fields
• First Name	• [First Name]
• Last Name	• [Last Name]
• Suffix	• [Suffix]
• Street Address	• [Address]
• City	• [City]
• State	• [State]
• Postal Code	• [Postal Code]
• Primary Phone	• [Primary Phone]
• Mobile Phone	• [Mobile Phone]
• Email Address	• [Email Address]
• Membership Type (Local)	• [Membership Type Description]
• Local Membership Type (TC only)	• [Local Membership Type Classification]
• Membership Status (Local)	• [Membership Status Description]
• Local Membership Status (TC only)	• [Local Membership Status Description]
• Card Number	• [Card Number]
• Training ID Number	• [Training Id Number]

<ul style="list-style-type: none"> • Local Number • Amount • Dues Amount • Net Due • Paid Thru Date • Local Initiation Date • International Initiation Date 	<ul style="list-style-type: none"> • [Local Name] • [Amount] • [Dues Amount] • [Net Due] • [Paid Thru Date] • [Initiation Date] • [Insert Date]
--	--

4) Format, bold, underline, and add bullet points or hyperlinks to your email via Outlook Microsoft

Now, you are ready to format your email.

In Outlook, modify and add the following to format and attach files to your email as needed (Image 4.0).

- Bolding
- Italicizing
- Underlining
- Highlighting
- Paragraphs
- Hyperlinks
- Don't forget to personalize your email with **MTP Mail Merge Fields** such as [First Name]



Footer Image - Image 4.0

5) Insert images that you want to use in the email messages, like a Header, Footer or Logo image

Re-leverage images, such as header or footer images already used in your organization's Outlook emails.

In Outlook, add/insert your images with the **Insert > Picture (This Device...)** menu in Microsoft Outlook (Image 5.0).

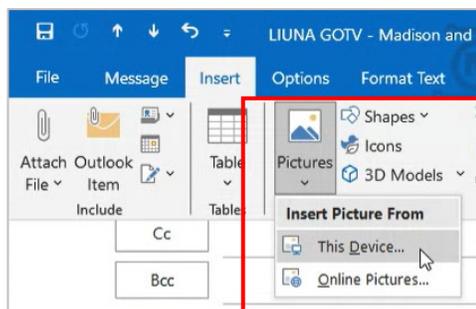


Image 5.0

Your images should be saved on your local computer as an image file in one of the three types below (Image 5.1).

- .JPG – JPG File Interchange Format
- .JPEG – JPEG File Interchange Format
- .PNG – Portable Network Graphics



Footer Image - Image 5.1

6) Attach files such as PDFs to your email

Re-leverage files, such as PDFs that are already used in your organization.

Ideally, these files, such as PDFs, should be saved on your local computer (i.e., your Desktop).

In Outlook, add/insert your files with the **Insert > Attach File** menu in Microsoft Outlook or **Cut & Paste** from Windows Explorer (Image 6.0).



Image 6.0

7) Save your finalized (and approved) email as an Outlook Mail Format (.msg or .eml) file

Once you have personalized, formatted, inserted images, or attached files to your email in Outlook and you are happy with how it will be viewed/received by your members, save it as an **Outlook Mail Format**.

What are the steps?

A. In Outlook, click **File > Save As** (Image 7.0).

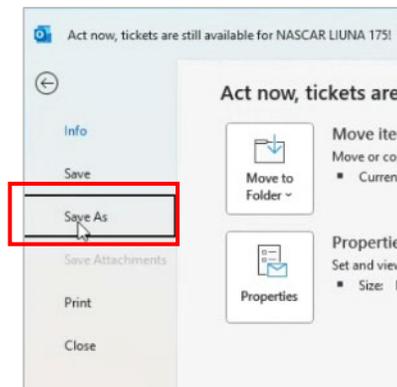


Image 7.0

B. In the **Save As** window, find the folder location (or create a new folder) where you will save all your **Outlook Mail Format (.msg or .eml)** files for re-use (or to re-leverage) at a later point in time (Image 7.1).

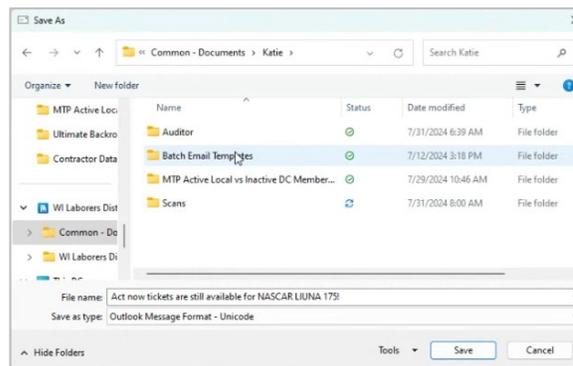


Image 7.1

TIP: If you don't have a folder, create a Batch Email Templates folder (or something similar) to share all the Outlook Mail Format (.msg or .eml) files with other staffers.

C. Rename the file using the **Year-Month-Date** format with the email subject at the end. This is a best-practice file management technique for determining when this email was sent. (Image 7.2)

Example: 2024-07-31 Act now tickets are still available for NASCAR LIUNA 175!

- D. Click the **Save as type:** pop-down menu to select **Outlook Mail Format (.msg or .eml)** (Image 7.2)
- E. Click **Save**

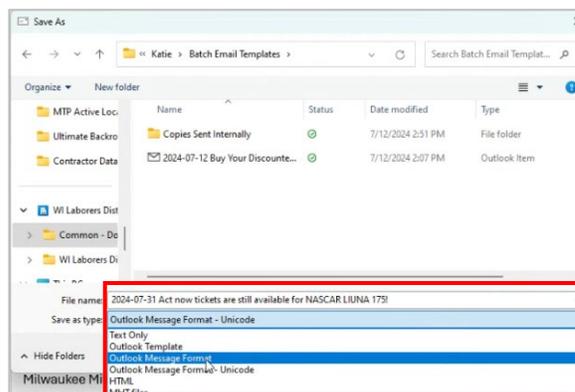


Image 7.2

8) Define your email list of recipients in MTP using a User Define Report

This step assumes you know how to create and modify a **User Defined Report** in MTP.

FYI: If you need help using **User Define Report** capabilities in MTP, please contact **MTP Support** at **(440) 439-7000**.

- A. Open **MTP**.
- B. **Question:** Do you have a report tagged as a **Favorite** for this email?
 - a. **YES:** Open the report by going to **Reports > Favorites > REPORT > Browse Data...** (Image 8.0). Then proceed to Step 8G.
 - b. **NO:** Continue to Step 8C below.
- C. Perform a member **Search** and open a member's record – this will display the **Tools** pop-down menu.
- D. **Question:** Do you already have a previously **Saved** report for this email?
 - a. **YES:** Select **Tools > User Defined Report** or **CTRL+U**, and then **Library > Open** to open a previously saved report (Image 8.1). Then proceed to Step 8F.
 - b. **NO:** Continue to Step 8E below.
- E. Select **Tools > User Defined Report** or **CTRL+U** to build a new report from scratch. (Image 8.2)

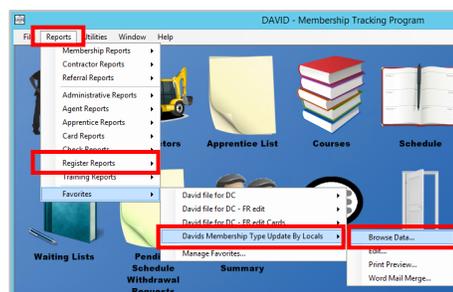


Image 8.0

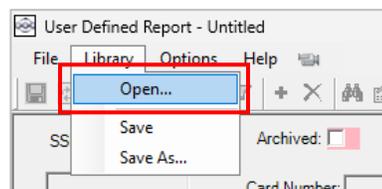


Image 8.1

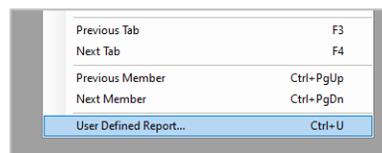


Image 8.2

F. Finalize your **User Define Report** with selected (green) and criteria (red) fields needed for your email list. (Image 8.3)

- G. **Question:** Do you need to format any field for personalization in your email, such as a First Name?
- Yes:** Change the data from **All Caps** to **Proper Case**. Continue to **Step 8H** below.
 - No:** Proceed to **Step 8O**.

FYI: By default, all fields in MTP are displayed and exported in **All Caps** (Image 8.4)

H. With your User Define Report open, go to **Option > Report Options... (F8)** (Image 8.5)

I. Click on the **Columns** tab. (Image 8.6)

J. Scroll to the right (using the horizontal scroll bar at the bottom) to view the column **Format**. (Image 8.6)

K. Change the default option for First Name from **[None]** to **Proper Case**. (Image 8.6)

L. Click **OK**

M. View your updated **Proper Case** display settings by clicking **File > Browse Data...** (Image 8.7)

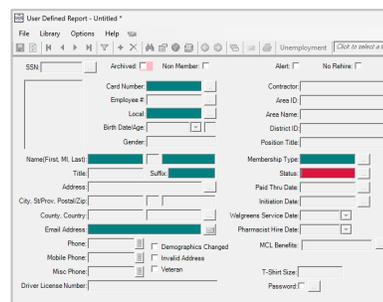


Image 8.3

	First Name	Middle Initial	Last Name
1	ALISA	T	
2	JIM	D	
3	DONATO		
4	EDWARD		

Image 8.4

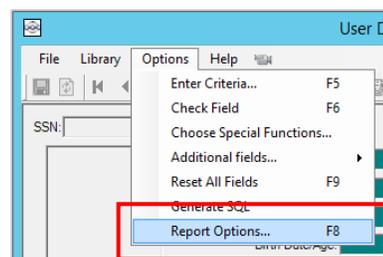


Image 8.5

Fields to display	Caption	Width (in inches)	Format
First Name	First Name	-1	Proper Case
Middle Initial	Middle Initial	-1	(None)
Last Name	Last Name	-1	Last 3 Characters
Suffix	Suffix	-1	Mask First 5 Digits
Address	Address	-1	Mask First 6 Digits
City	City	-1	(None)
State	State	-1	(None)
Postal Code	Postal Code	-1	(None)
Mobile Phone	Mobile Phone	-1	(None)
Local Name	Local Name	-1	(None)
Date	Print Thru Date	-1	17/01/2000

Image 8.6

	First Name	Middle Initial	Last Name
1	Alisa	T	
2	Jim	D	
3	Donato		
4	Edward		

Image 8.7



N. Save your **Proper Case** display setting by saving the User Define Report by clicking **Library > Save** (Image 8.8)

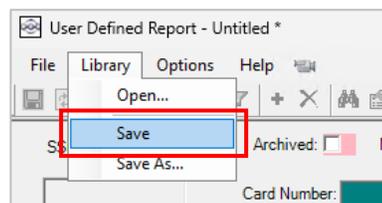


Image 8.8

NEXT: Set your User Define Report **Criteria** to only list members with an email address.

O. Ensure that the **Email Address** field is highlighted in green. If not, double-click on the field to turn it green. (Image 8.3)

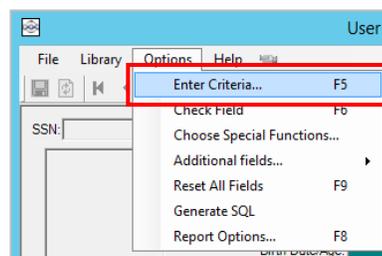


Image 8.9

P. Click the email address field once so your mouse cursor is visible within it (this means the field is ready to be modified), and then click **Options > Enter Criteria... (F5)**. (Image 8.9)

Q. Click the **Compare** column pop-down menu, scroll down, and select the option, **Is Not Blank**. (Image 8.10)

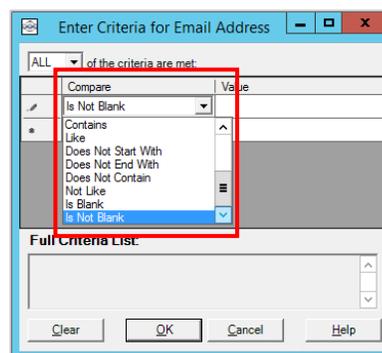


Image 8.10

R. Click **OK**.

S. Notice that the **Email Address** field is highlighted in red. (Image 8.11)

T. Save your email address **Is Not Blank** criteria by saving the User Define Report by clicking **Library > Save**. (Image 8.8)

U. Click **File > Browse Data** to check your email list based on your saved criteria. If needed, go back and adjust your criteria. (Image 8.12)

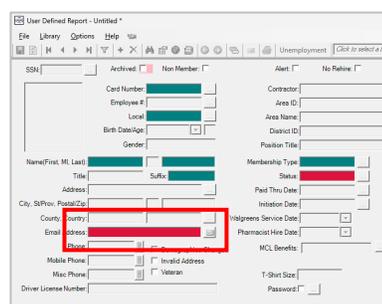


Image 8.11

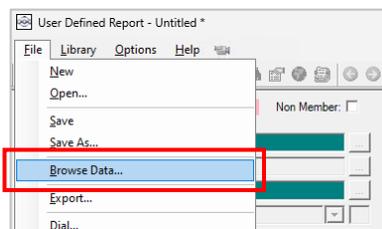


Image 8.12

As fields are selected or deselected, their colors will change depending on the **field's Selection, Criteria, and Special Functions** (Image 8.13).

Color	Selected	Has Criteria	Has Special Function
Green	✓	✗	✗
Red	✗	✓	✗
Yellow	✗	✗	✓
Blue	✓	✓	✗
Orange	✓	✓	✓

Image 8.13

TIP: Once you have completed building your **User Defined Report**, flag it as a **Favorite** report for quick and easy access from the MTP Dashboard.

Follow the steps below to tag your report as a **Favorite**:

V. Click **Reports > Favorites > Manage Favorites...** (Image 8.14).



Image 8.14

W. Under the **User Define Report Library** section at the bottom, scroll (using the horizontal scroll bar at the bottom) and find your saved User Defined Report (Image 8.15).

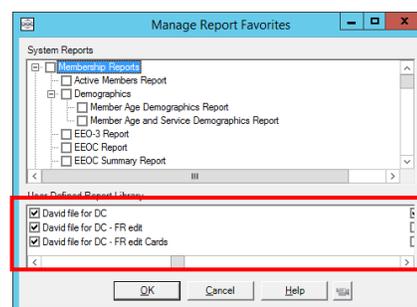


Image 8.15

X. Check the box next to the User Defined Report you want to favorite (Image 8.15)

Y. Click **OK** (Image 8.15)

9) Load your Outlook Mail Format file into MTP

Once you have defined your email list of recipients in MTP using a User Define Report (Step 8)...

A. Click **File > Email...** (Image 9.0)

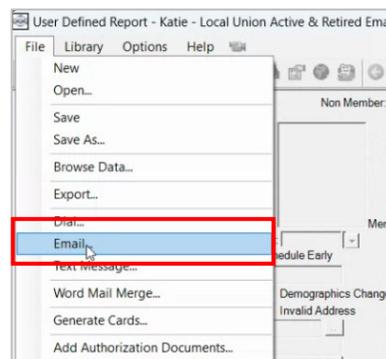


Image 9.0

B. Log in with your **Username** and **Password**. The log-in step provides permission to email the respondents.

C. Edit/check the sender's **Email Address** field. The email address that the recipients will see when they receive the email (Image 9.1)

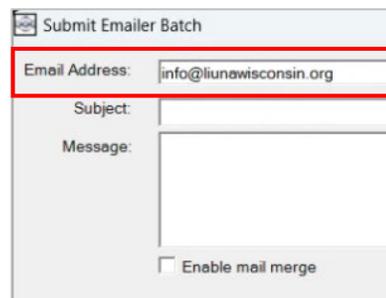


Image 9.1

- D. Edit/check the **Sender Name** field. The name that the recipients will see when they receive the email (Image 9.2)
- E. Click the **three-dot button** under the Sender Name field and select **Load** (Image 9.3)
- F. Find your saved **Outlook Mail Format** (.msg or .eml) file and click **Open** to load it into MTP
- G. A **Preview Email** of your HTML email will be displayed (Image 9.4). Please check the following fields at this point:
 - I. Subject
 - II. Email Address
 - III. Sender Name
 - IV. Attachments (if they have been added)
- H. If your **Preview Email** looks good, click the **X** in the upper right-hand corner to close the preview window.

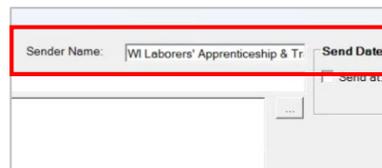


Image 9.2

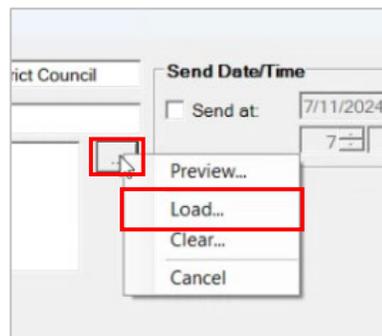


Image 9.3

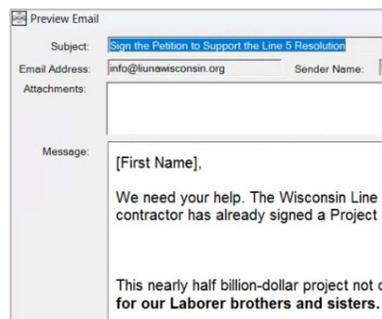


Image 9.4

FYI: If anything in the Preview Email (your email copy, formatting, or attachments) is incorrect, go back to **Step 6**, modify your **Outlook Mail Format** (.msg or .eml) file in Outlook, perform a **Save As**, and append the file name with version number, e.g., V2.

10) Review your HTML email and personalization, if added, in MTP

- A. Check the **Enable mail merge** box (Image 10.0)
- B. Check the **Email Address** box on the email address column (Image 10.1)

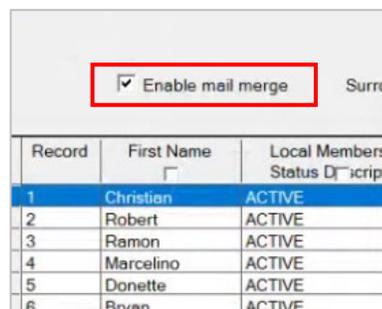


Image 10.0

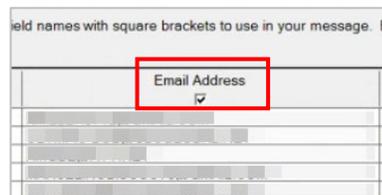


Image 10.1

- C. Click any of the **three-dot buttons** on a recipient row to view that recipient's email (Image 10.2)
- D. Preview and review the recipient's email. Check the personalization **Mail Merge Fields** to ensure they are correct, such as [First Name] (Image 10.3)
- E. Click the **X** in the upper right-hand corner to close the preview window.

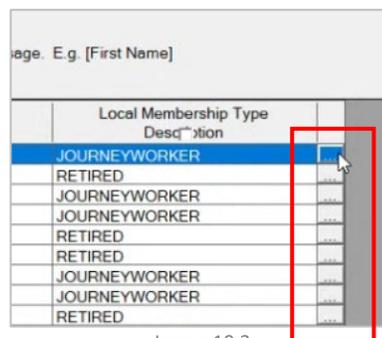


Image 10.2

FYI: If your email copy, formatting, or attachments are incorrect in the preview email, go back to **Step 6**, modify your **Outlook Mail Format** (.msg or .eml) file in Outlook, perform a **Save As**, and append the file name with version number, e.g., V2.



Image 10.3

11) Send or Schedule your HTML email in MTP

You have two options for sending your HTML email:

- A. Option 1: Send Immediately (Image 11.0)
 - I. Click **OK**
- B. Option 2: Select a Specific Date & Time (Image 11.1)
 - I. Check **Send at:**
 - II. Select the date
 - III. Select the time
 - IV. Click **OK**

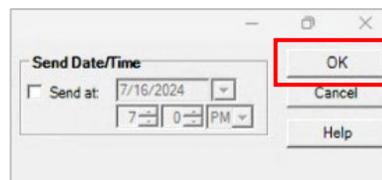


Image 11.0

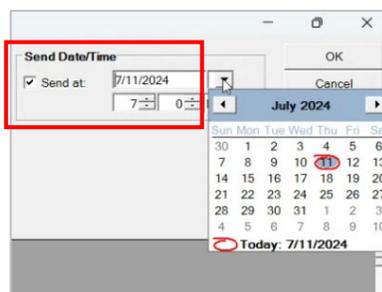


Image 11.1

12) Submit Your Email

- A. Click **Yes** in the **Submit Emler Batch** window. This window informs you how many credits your email will require (Image 12.0).
- B. Click **Yes** in the **Continue?** window. This window informs you that when using MTP to email your members, you must follow all the rules and laws associated with email marketing and telemarketing services (Image 12.1).
- C. Click **OK** in the Submit Emler Batch window (Image 12.2).

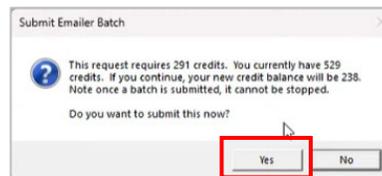


Image 12.0

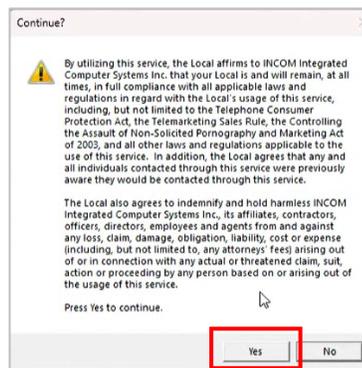


Image 12.1

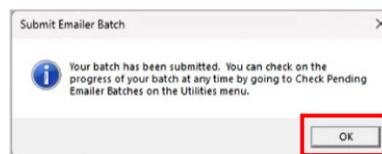


Image 12.2

13) Track your Email(s) in MTP

After you submit your email to be sent or scheduled, you can check its status and track it in MTP.

- A. Go to **Utilities > Check Pending Emler Batches...** (Image 13.0).
- B. In the **Emler Batches** window, check the status of all your batch emails sent or scheduled.
- C. Double-click on the desired batch row to display a report of all the emails made in the selected batch. MTP will notify you if the batch is still running (Imaged 13.1).

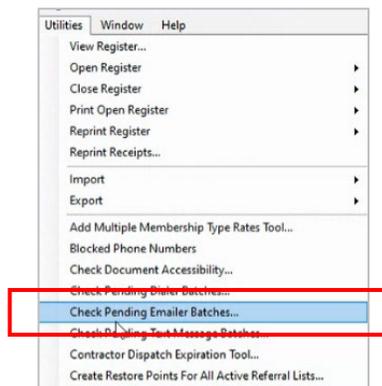


Image 13.0

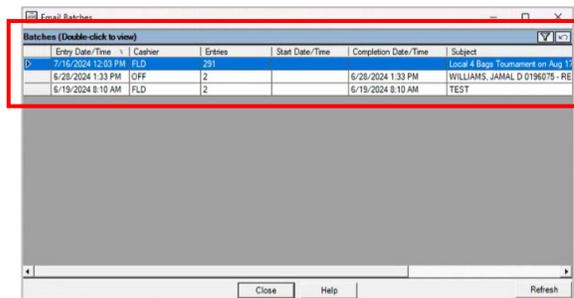


Image 13.1

How to Convert an Existing Outlook Email or Word Document into an MTP Batch Email

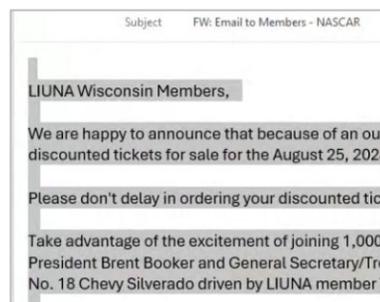
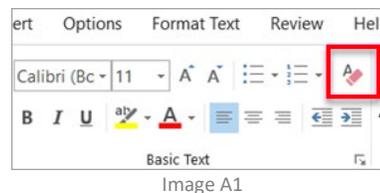
Clean your email copy using Microsoft Outlook or Notepad to clear all text formatting (i.e., remove hidden formatting code).

To ensure 100% that the formatting of your MTP Batch Email is sent and viewed precisely how you want it to look, it is a best practice to clean the email copy (i.e., text) in Outlook, especially if you pasted copy from a Word document or any other application.

FYI: This step is standard best practice with any email marketing program or system, not just MTP, to create a clean and properly formatted email.

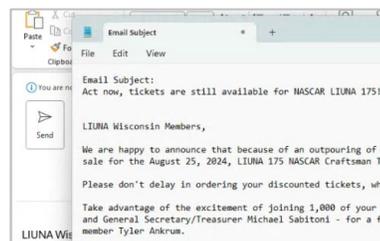
Steps in Outlook

- A. On the **Message** tab, in the **Basic Text** group, click **Clear All Formatting** (Image A1). [Learn more from Microsoft Support.](#)



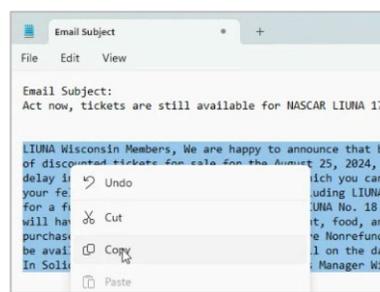
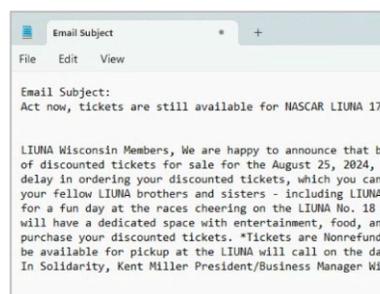
Steps in Notepad

- A. Select and copy the email copy from Outlook, Word, Google Docs, or any other application (Image A2).
- B. Open **Microsoft Notepad** on your computer (Image A3).
- C. Paste your email copy into **Notepad** (Image A3).
- D. In **Notepad**, remove all paragraphs and returns so you are left with only one single paragraph of copy (Image A4).



FYI: This critical step removes any hidden formatting rules inherited from the previous application.

- E. In **Notepad**, select and copy the entire paragraph (Image A5).
- F. Open **Microsoft Outlook** and start a New Email
- G. Paste the copy into a new HTML Outlook email.
- H. Go to Step 2, "Write Your Email Copy," from the "Using Microsoft Outlook to Create an MTP Batch Email" section and follow the step-by-step guide to create a clean MTP Batch Email.



Example Templates (Email or Text)

Meeting Notice

Good afternoon, [First Name]. This is a reminder that the December membership meeting will be IN PERSON ONLY. It will be this Saturday, 12/17/2023, at 10 a.m. in Local 4.

Good afternoon, [First Name]. This is a reminder that our meetings will be on the first Thursday of every month. Food and beverages will be provided. Attendance is important. See you there.

Suspension Notice

Hi, [First Name].

Good morning.

Your dues of [Net Due] are due by the end of the month to avoid SUSPENSION.

If your dues are unpaid by the 1st, you will be suspended per Article VIII, Section 4 of the Local Union Constitution.

Please log into the membership portal with your computer or mobile device and pay your dues online: <https://mtpweb.your-local-membership-portal-url>.

Autopay failure notice

Good morning, [First Name].

Your dues of [Amount] were declined on autopay for your monthly dues.

Please log into the membership portal with your computer or mobile device by the end of the month to update your payment method and pay your dues online: <https://mtpweb.your-local-membership-portal-url>.