



# SALESFORCE BULK MAIL MERGE PROCESS

A mail merge is the process of generating form letters and other Microsoft® Word documents that are personalized for the recipient, who is often a contact or lead. The content of each document is predefined in a mail merge template. Mail merge templates include variables called merge fields where data from your Salesforce records—for example a contact's name and address—displays in the generated document.



**Note:** Salesforce offers a mass mail merge wizard as an alternative to the process described in this tip sheet. For more information, contact Salesforce and ask about Extended Mail Merge.

## Creating Mail Merge Documents

To create a single mail merge document for one contact or lead, click the **Mail Merge** button in the Activity History related list of a contact, lead, or opportunity.

To create a bulk mail merge document from Salesforce data:

1. Generate your source data by running a Salesforce report and exporting it to an Excel file:
  - a. From the Reports tab, run a report to generate all of the data that you want to merge into an external Word document. If you are doing an email merge, be sure to include the Email field in this report.
  - b. After the report displays, click **Export Details**. In the File Download dialog box, select "Save this file to disk." Then in the Save As dialog box, enter a file name, and set the default file type to .csv.
  - c. Open the newly-created .csv file in Excel. Delete any empty header rows so that the first row contains the column headers. Then choose **File > Save** to save the file as type .xls. Make sure that the Excel file includes column headers and doesn't contain blank rows.
  - d. Close the prepared Excel source file.
2. Open Microsoft Word.
3. Open or create the desired Word template document, and enter only the static text for the form letter. In a later step you will add the merge fields that will be replaced with your Salesforce data when you generate the merged document.



**Tip:** To create a form letter without a template or to create mailing labels or envelopes, click **New** to open a blank document.

### Using Older Versions of Word and Excel

These steps may reflect older versions of Excel and Word than you currently use.

4. Choose **Mail Merge** from the Tools menu in Word.
5. In the Mail Merge Helper dialog box, click **Create** and select the type of document to create.
6. Click **Active Window** to create form letters from the currently active template, or **New Main Document** to work from a blank template.
7. Back in the Mail Merge Helper dialog box, click **Get Data**, and then select **Open Data Source**.
8. In the Open Data Source dialog box, open the folder that contains the Microsoft Excel file you just saved from your Salesforce report. In the **Files of type** box, select MS Excel Worksheets (\*.xls). Then double-click the file that contains your data.

9. In the Microsoft Excel dialog box, select the named range or enter the cell references that identify the data you want to use. Then click **OK**.
10. When Microsoft Word prompts you, click **Edit Main Document** or **Set Up Main Document**. Word then adds the Mail Merge toolbar to the screen.
11. Use the **Insert Merge Field** drop-down list on the Mail Merge toolbar to insert merge fields within the template's static text.



**Note:** If you're printing address labels or envelopes, select the printer and the size of address labels or envelopes. Then insert the merge fields in the Create Labels or Envelope Address dialog box.

12. After inserting all of your merge fields, click the Mail Merge Helper icon on the Mail Merge toolbar.
13. In the Mail Merge Helper dialog box, click **Merge**.
14. From **Merge To** menu on the Merge dialog box, select one of the following options to merge to a new document, printer or email:
  - New document—Creates a single Word file with multiple sections, each containing a different iteration of the template with merged data.
  - Printer—Sends the merged file directly to the default printer and prints a new document for each iteration of the template with merged data.
  - Electronic mail—Merges to Microsoft Outlook and sends a separate email for each iteration of the template with merged data.

If you are merging to email, you must click **Setup** prior to clicking **Merge**. Clicking Setup opens the Merge To Setup dialog box. From this dialog, first select the field (for example, the Excel column) in the drop-down list that contains your email addresses. Then enter the subject line that you want to appear on your outgoing email. You can also select the checkbox if you want your document sent as an attachment rather than as body text.

15. Click **Merge** to complete the process.

For more information about creating merged documents in Word, use the Office Assistant or Help index in Word to search for "mail merge."



**Tip:** To display only the rows of data you want to merge before you select the list in Word, you can first filter the list in Microsoft Excel. When you select a filtered list as a data source in Word, select `_FilterDatabase` in the Microsoft Excel dialog box.