GUIDELINES FOR UPLOADING MAIL MERGE TEMPLATES

This document provides guidelines you should read before uploading a mail merge template to Salesforce. If you encounter any errors or problems, check these guidelines again to make sure your template meets all requirements.

About Mail Merge Templates

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.

Use Only Valid Merge Fields

Your mail merge template must contain only valid mail merge fields. If any of the following guidelines are not met, you may not be able to upload your template.

- Although Salesforce works with templates that do not have any merge fields, make sure the template contains at least one valid mail merge field.
- The mail merge fields can contain only letters, numbers, and the underscore (_) character.
- The mail merge field name cannot be blank.
- The mail merge field name should not exceed 40 characters.
- When creating mail merge fields for your custom fields:
  - Prefix the field label with the type of record. For example, `Account_MarketCap` for an account field named `MarketCap`.
  - Convert all spaces to underscores. For example, a custom opportunity field named `Product ID` becomes `Opportunity_Product_ID`.

Examples of valid merge fields include:

- `Account_Name`
- `Case_Description`
- `Lead_Company`
- `Opportunity_My_Custom_Field`

Examples of invalid merge fields include:

- `Opportunity Custom Field` (Uses spaces.)
- `Lead_Product_Interest_#` (Uses characters other than letters, numbers, and underscores.)
- `<Case_Number>` (Uses characters other than letters, numbers, and underscores.)
- `Account_Date_` (Ends in an underscore.)

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Microsoft Word Documents You Can Use

The mail merge document you use as a template should be a Microsoft Word document (`.doc` or `.docx`) and it should not refer to an outside data source. For instructions on how to verify that you're using a Word document, refer to your Microsoft Word documentation.

Remove Document Security Features

If your mail merge document is protected or requires a password for users to open it, we recommend removing these security features before uploading the document to Salesforce.

Protecting a Word document limits the changes other users can make to the document until you *unprotect* it. Depending on the type of protection enabled on your document, other users may only be able to change text with revision marks, insert comments only, or insert specific form fields. For example, if you use a mail merge template and all the merged fields display in a different color or underlined text, you may be using a mail merge template protected to track changes.

You can upload and use your password-protected Microsoft Word documents and templates for mail merge, but users must have the password to be able to open them. For this reason, we recommend removing document passwords.

To unprotect your document and remove passwords from it, refer to your Microsoft Word documentation.

Remove VBA Code

Your mail merge template can contain Visual Basic for Application (VBA) code modules, but for best results, remove VBA code from your mail merge templates. Also, make sure you do not have a protected code module attached to your template. To remove VBA code and verify that you don't have a protected code module attached, refer to your Microsoft Word documentation.