

MAIL MERGE INSTRUCTIONS

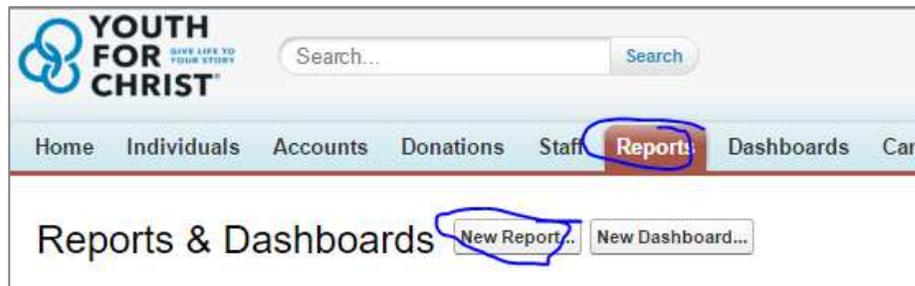
Year End Receipt Mail Merge for Paper Receipts

Note: Once this report and template is set up you can use it year after year without changes.

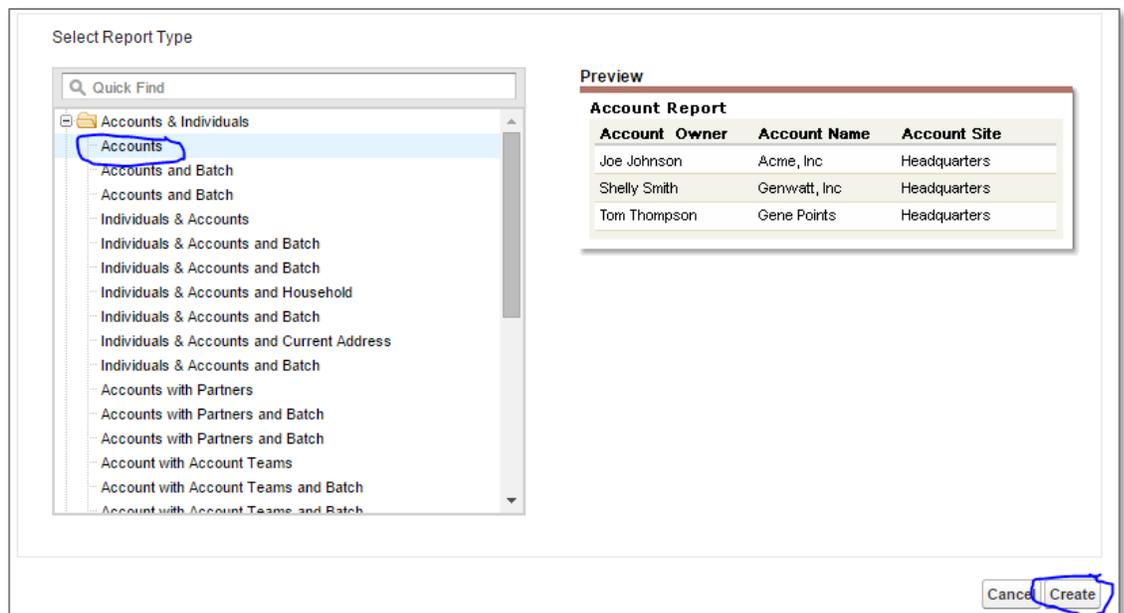
Difficulty Level: Easy to Moderate – Reporting knowledge in Salesforce and mail merge experience with Microsoft Word and Excel.
Time to complete: 1-2 hours

Steps

1. Log in to Salesforce login.salesforce.com
2. Create a new report
 - a. Report Tab . >New Report



- b. Accounts Type Report > Click Create Button



- c. Set filer criteria: All Accounts, Created Date = All Time and Add Filer, Total Gifts Last Year, not equal to, 0(zero)

- d. Remove all columns then add these fields
 Account Name | Formal Greeting | Informal Greeting | Billing Street | Billing City | Billing State | Billing Zip/Postal Code | Total Gifts Last Year | Number of Gifts Last Year

Account Name	Formal Greeting	Informal Greeting	Billing Street	Billing City	Billing State/Province	Billing Zip/Postal Code	Total Gifts Last Year	Number of Gifts Last Year
Sylvia Scarola Household	Sylvia	Sylvia	126 Sparrow Dr Apt 12B	Royal Palm Beach	FL	33411-1626	\$10.00	1
Scott and Vickie Herwig Household	Scott and Vickie Herwig	Scott and Vickie	7124 W Lake Dr	West Palm Beach	FL	33406-6718	\$400.00	2
Susan and Thomas Nero Household	Ms. Susan Nero	Susan	4821 Gun Club Rd	West Palm Beach	FL	33415-2813	\$125.00	2
Linda Barnaby Household	Ms. Linda Barnaby	Linda	3959 Via Poinciana Apt 305	Lake Worth	FL	33467-2938	\$235.00	1
Jenna Martin Household	Ms. Jenna Martin	Jenna	900 S Olive Ave	West Palm Beach	FL	33401-6514	\$100.00	1
Jacquelyn Anderson Household	Ms. Jacquelyn Anderson	Jacquelyn	5922 NW Bendla St	Port St Lucie	FL	34986-4226	\$150.00	1
Cynthia Whitson Household	Ms. Cynthia Whitson	Cynthia	2428 Blossom Lake Dr	Holiday	FL	34691-6766	\$25.00	1
Christy Fazio Household	Ms. Christy Fazio	Christy	333 E 55th St	New York	NY	10022-8316	\$50.00	1
Brittany Dyer Household	Ms. Brittany Dyer	Brittany	529 N H St	Lake Worth	FL	33460-2943	\$25.00	1

- e. Save & Run the Report

- f. Verify your results are correct
 g. Export Details to Microsoft Excel

Account Name	Formal Greeting	Informal Greeting	Billing Street
LD Restaurant, Inc.	-	-	1510 N US Highway 1
Vision Launch Ministries, Inc.	-	-	8885 Woodgrove Ride
Barbara Ringeman Household	Barbara Ringeman	Barb	1420 Fairway Cir
Brittany Dyer Household	Ms. Brittany Dyer	Brittany	529 N H St
Lori Iaccarino Household	Lori Iaccarino	Lori	153 Sevilla Ave
Moises and Carol Virelles Household	Moises and Carol Virelles	Moises and Carol	15710 Cedar Grove Ln
Charles and Sonya Jones Household	Charles and Sonya Jones	Mom and Dad	9873 Baywinds Dr Apt

3. Save your excel file some place you can reference it again.
4. Customize your Year End Receipt Template in Microsoft Word
5. Follow the steps outlined in this training video on how to mail merge:
<https://vimeo.com/139511818>
6. Finish the merge and print, stuff and send your letters.

Note: You can request a line by line detailed merged receipt to be made. We do this by adding a second or back page to your Word template.

Please submit a support request here:

http://salesforce.yfc.net/training_page/yfc_salesforce_support_form/

Note there is a 1 week turn around for this merge to be completed. Please also email your chapters customized template to matt@fosteringllc.com