

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

<u>Steps</u>

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

€ B		Search	-	Search	į	
Home	Individuals	Accounts	Donations	Staff Reports	Dashboards	Cam
Rep	orts & D	ashboa	rds New R	port. New Dashbo	pard	

b. Accounts Type Report > Click Create Button

		Account Report		
Counts & Individuals	<u> </u>	Account Owner	Account Name	Account Site
Accounts	_	Joe Johnson	Acme Inc	Headquarters
Accounts and Batch		Chally Swith	Convert Inc	Headquarters
Accounts and Batch		Snelly Smith	Geriwali, inc	Heauquarters
Individuals & Accounts		Tom Thompson	Gene Points	Headquarters
Individuals & Accounts and Batch				
Individuals & Accounts and Batch				
Individuals & Accounts and Household				
Individuals & Accounts and Batch				
Individuals & Accounts and Current Address				
Individuals & Accounts and Batch				
Accounts with Partners				
Accounts with Partners and Batch				
Accounts with Partners and Batch				
Account with Account Teams				
Account with Account Teams and Batch				
Account with Account Teams and Batch	¥			

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

Show	All accounts			•					
Date Field	Created Date	•	Range	All Time	*	From	(1)	То	
	Total Gifts Last Year		-	not equal to	-	ol		OK Can	cel

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

Preview Tabular Format • Sho	w V Remove All Columns							
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	Account Name - Click to sort ascending.	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

Save Report	Help for this Page 🍕)
Report Name	Year End Receipts	ñ
Report Unique Name	Year_End_Receipts	i
Report Description		
Report Folder	YFC Data Processing	
Save	ve and Run Report Cancel	

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

캳 Year End Receipt			
Jy- Show Feed			
Report Generation Status: Complete			
Report Options:			
	Time Fr.	ame	
Summarize information by: Sho	W Date Fie	Id Range	
None V All	ccounts •	From To	
Filtered By: Edit Total Gifts Last Year not equal to 0 Clear Account Name	Formal Greeting	Informal Greeting	Billing Street
LD Restaurant, Inc.	2	-	1510 N US Highway 1
VisionLaunch Ministries Inc.	-	-	8885 Woodgrove Rid
Barbara Ringeman Household	Barbara Ringeman	Barb	1420 Fairway Cir
Brittany Dyer Household	Ms. Brittany Dyer	Brittany	529 N H St
Lori laccarino Household	Lori laccarino	Lori	153 Sevilla Ave
Moises and Carol Virelles Household	Moises and Carol Vi	relles Moises and Carol	15710 Cedar Grove L
Charles and Sonya Jones Household	Charles and Sonva	Iones Mom and Dad	9873 Baywinds Dr An

- 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: <u>http://salesforce.yfc.net/training_page/yfc_salesforce_support_form/</u>

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

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