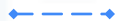




DONNA MITCHELL



TRAINING SPECIALIST

The Secrets of Mail Merge

Gift Details

Accept gifts with an online donation form! [Learn how.](#)

Gift ID #	2933	Created Date	08/12/2019
* Date of Gift	08/12/2019	Created By	dcmtrain
Type of Gift	Credit Card	Modified Date	08/13/2019
Gift Amount	\$500.00	Modified By	dcmtrain
Fair Market Value	\$0.00	Transaction ID	
Receipt Amount	\$500.00	Record Type	Gift
Reference / Check Number	98989	Batch Number	71
Campaign	2019 Capital Campaign	Pledge Payment	<input type="checkbox"/>
* General Ledger	Unrestricted	Split Gift	<input type="checkbox"/>
Solicitation	2019 Summer Appeal	Anonymous Gift?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Class			
Receipt Date	08/13/2019		
Sub Solicitation			
Gift/Pledge Solicitor			
Thank-You Letter	Summer Appeal Thank You		
Receipt Delivery Pref.	E-Mail and Letter		
Associated Address	MAIN - Marjorie and John Hopkins / 10 Belleview Dr / Severna Park, MD 21146		

Honest Politics Foundation
10147 W. Grantosa Drive
Washington, DC 20178

October 14, 2019

Marjorie and John Hopkins
10 Belleview Dr.
Severna Park, MD 21146

Dear Mrs. Hopkins,

I am writing to thank you for the generous support and assistance you have provided this year. Your donation of \$500.00 on August 12, 2019 contributed to our 2019 Summer Appeal during our 2019 Capital Campaign to help us raise the standards of political discourse in our community.

As you know, each year the HPF provides the coveted Honest Politics Ethics Award to recognize the politician who stands above the others in honesty and integrity. We are currently in the process of identifying a sponsor for the award banquet and I would like you to consider this opportunity. I will contact you shortly to discuss the banquet and the results of this year's fundraising efforts.

Sincerely Yours,

Hannah B.A. Nana,
Director, HPF



AGENDA

- ▶ What is a Mail Merge?
- ▶ Which fields can be used?
- ▶ Where can data files be created?
- ▶ Adding fields to a mail merge template
- ▶ Uploading mail merge templates
- ▶ Let's Merge! ~ Demo

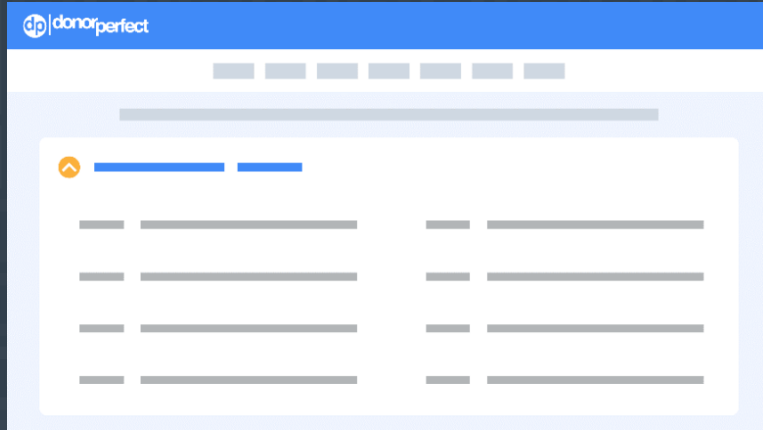


What *is* a mail merge?

What is a Mail Merge ?



Which fields can be used?



Any field that is populated
AND

Is in your Export Template
(table-specific)

AND

Is a merge field in your mail merge
letter template

Where can I find field names?

Screen Designer

Community > Knowledgebase > Field Names

Code Maintenance

Export Templates

The screenshot shows the DonorPerfect Community interface. At the top, there's a search bar and navigation links like 'Learn', 'Discuss', and 'My Account'. Below that, there's a 'Code Lookup' section with a 'Description' field and a 'Show only' dropdown set to 'General Ledger'. The main content area is titled 'Fields' and includes an 'Add New Field' button. Below this, there are dropdowns for 'Screen' (set to 'Main') and 'Section' (set to 'All Sections'), along with a 'Preview Screen' button. The primary table lists fields for 'Constituent Contact Information' with columns for 'Field Name', 'Prompt', 'Field Type', 'Position', 'Tab Order', 'Display', 'Required', 'Read Only', and 'New Line'. Below this table, a detailed view of the 'ACKNOWLEDGEPREF' field is shown, including its 'Address ID', 'Amount', and 'Anonymous Gift?' details.

Select All	Screen	Section	Field Name	Prompt	Field Type	Position	Tab Order	Display	Required	Read Only	New Line
<input type="checkbox"/>	Main	Constituent Contact Information	DONOR_ID	Donor ID	Textbox	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A
<input type="checkbox"/>	Main	Constituent Contact Information	CREATED_DATE	Created Date	Textbox	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A
<input type="checkbox"/>	Main	Constituent Contact Information	DONOR_TYPE	Donor Type	Drop-Down	3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A
<input type="checkbox"/>	Main	Constituent Contact Information	CREATED_BY	Created By	Textbox	4	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A
<input type="checkbox"/>	Main	Constituent Contact Information	ORG_REC	Organization?	Yes/No	5	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A
<input type="checkbox"/>	Main	Constituent Contact Information	MODIFIED_DATE	Modified Date	Textbox	6	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A
<input type="checkbox"/>	Main	Constituent Contact Information	TITLE	Title (M/Ms)	Textbox	7	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A

ACKNOWLEDGEPREF	Acknowledgement Preference	Drop Down		Standard	Receipt Information	e.g., Acknowledge/Do Not Receipt, Acknowledge/Receipt, Do Not Acknowledge/Do Not Receipts, etc.
ADDRESS_ID	Address ID	Textbox	Number	Standard	Gift Details	The unique number that represents the associated address (primary or alternate address) for the transaction. A value = 0 means the primary address is the associated address.
AMOUNT	Gift Amount	Textbox	Currency	Standard	Gift Details	
ANONGIFT	Anonymous Gift?	Yes/No		UDF	Gift Details	Indicates whether or not the gift should be noted as "Anonymous" in certain reports.

July 26,

«title»
 «prof_t
 Option
 «adre
 «adre
 «city»,

Dear «S

I am wri
 donatio
 discours

Selected Fields

<input type="checkbox"/>	Screen	Prompt	Field Name
<input type="checkbox"/>	Main/Bio	Donor ID	DONOR_ID
<input type="checkbox"/>	Main/Bio	Title (Mr/Mrs)	TITLE
<input type="checkbox"/>	Main/Bio	First Name	FIRST_NAME
<input type="checkbox"/>	Main/Bio	Last Name	LAST_NAME
<input type="checkbox"/>	Main/Bio	Suffix	SUFFIX
<input type="checkbox"/>	Main/Bio	Professional Title	PROF_TITLE
<input type="checkbox"/>	Main/Bio	Salutation	SALUTATION
<input type="checkbox"/>	Main/Bio	Optional Line	OPT_LINE
<input type="checkbox"/>	Main/Bio	Address	ADDRESS
<input type="checkbox"/>	Main/Bio	Address 2	ADDRESS2
<input type="checkbox"/>	Main/Bio	City	CITY
<input type="checkbox"/>	Main/Bio	State	STATE
<input type="checkbox"/>	Main/Bio	Zip/Postal	ZIP
<input type="checkbox"/>	Main/Bio	Organization	ORG_REC
<input type="checkbox"/>	Gift/Pledge	Date	GIFT_DATE
<input type="checkbox"/>	Gift/Pledge	Gift Amount	AMOUNT
<input type="checkbox"/>	Gift/Pledge	General Ledger	GL_CODE
<input type="checkbox"/>	Gift/Pledge	Solicitation	SOLICIT_CODE
<input type="checkbox"/>	Gift/Pledge	Sub Solicitation	SUB_SOLICIT_CODE

's Name
 's Address

year. Your
 rds of political

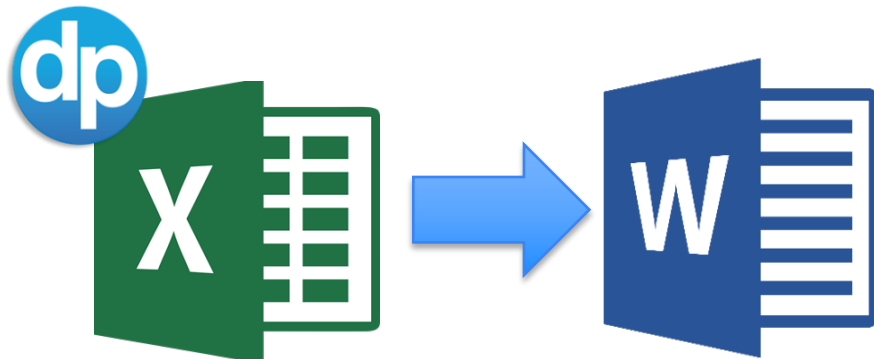


Create a Data File (CSV)

- Mailings > Mail Merge
- Report Center
- Receipts

Adding Fields to a Mail Merge Template

Insert from a *data source* via Mail Merge in Word



Edit an existing mail merge field in a mail merge template

Dear «salutation»

Dear { MERGEFIELD salutation },

{ MERGEFIELD first_name }

Adding/Editing a Merge Field

Field

Please choose a field

Categories: (All)

Field names:

- Fill-in
- GoToButton
- GreetingLine
- Hyperlink
- If
- IncludePicture
- IncludeText
- Index
- Info
- Keywords
- LastSavedBy
- Link
- ListNum
- MacroButton
- MergeField**
- MergeRec
- MergeSeq
- Next

Field properties

Field name: INCR_AMT_CY19

Format: (none)

- Uppercase
- Lowercase
- First capital
- Title case

Field options

- Text to be inserted before:
- Text to be inserted after:
- Mapped field
- Vertical formatting
- Preserve formatting during updates

OK Cancel


CY2019 Total: \$«CY19_GIFT_TOT»

5% Increase over CY2019: \$«INCR_AMT_CY19»

Suggested Total Giving for 2020: \$«INCR_TOT_2020»

Right-Click > Edit Field

Settings > Mail Merge Templates

Looking for premade templates?
We've got you covered in the Knowledgebase! 

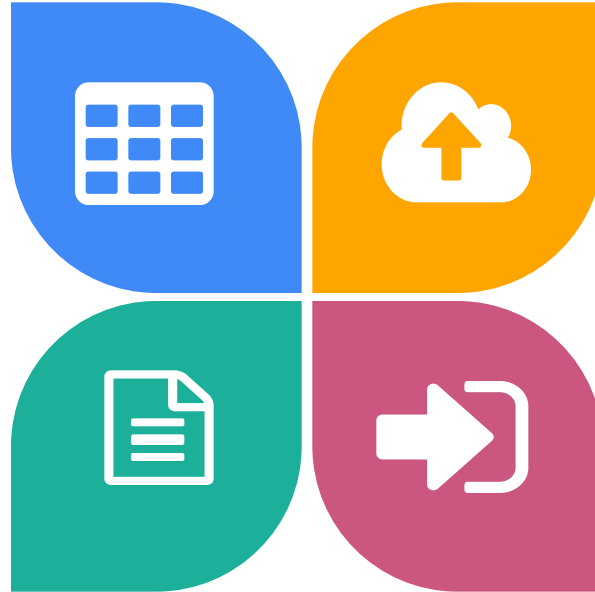


Mail Merge Templates

Mail Merge Steps

Prepare Data File

Mail Merge/Reports/Receipting



Upload Mail Merge Template

Settings>Mail Merge Templates>Upload New

Prepare Mail Merge Template

Be sure all mail merge fields are correct and properly labeled

Perform Instant Merge

From DonorPerfect or Upload file

Step 1: Preparing the Mail Merge Template



Poodle Rescue Shelter
895 Standard Way
Blue Bell, PA 19422

October 14, 2019

«title» «first_name» «last_name»
«prof_title»
«address»
«address2»
«city», «state» «zip»

Dear «salutation»,

I am writing to thank you for the generous support and assistance you have provided this year. Your donations, time, and talent have helped our sweet fur babies find forever home and stay healthy. Comfortable and loved while they wait for their forever home.

The need to house animals that arrive for myriad reasons is critical. We urgently request your help by considering increasing your donation a small 5% over what you have given last year. Below, you will see your generous gift total for this calendar year and what we have calculated as 5% more. Please feel free to give the increase amount as a one-time gift, or turn your giving into a recurring gift that will automatically be charged at the frequency you desire, i.e. monthly, quarterly, annually, etc.

Sincerely Yours,

Caroline Sweet,
Director, Poodle Rescue Shelter

CY2019 Total \$«CY19_GIFT_TOT»

5% Increase over CY2019 \$«INCR_AMT_CY19»

Suggested Total Giving for 2020 \$«INCR_TOT_2020»

Step 1: Create the Data File

Selected Fields

<input type="checkbox"/>	Screen	Prompt	Field Name
<input type="checkbox"/>	Main/Bio	Donor ID	DONOR_ID
<input type="checkbox"/>	Main/Bio	Title (Mr/Ms)	TITLE
<input type="checkbox"/>	Main/Bio	First Name	FIRST_NAME
<input type="checkbox"/>	Main/Bio	Last Name	LAST_NAME
<input type="checkbox"/>	Main/Bio	Suffix	SUFFIX
<input type="checkbox"/>	Main/Bio	Professional Title	PROF_TITLE
<input type="checkbox"/>	Main/Bio	Salutation	SALUTATION
<input type="checkbox"/>	Main/Bio	Optional Line	OPT_LINE
<input type="checkbox"/>	Main/Bio	Address	ADDRESS
<input type="checkbox"/>	Main/Bio	Address 2	ADDRESS2
<input type="checkbox"/>	Main/Bio	City	CITY
<input type="checkbox"/>	Main/Bio	State	STATE
<input type="checkbox"/>	Main/Bio	Zip	ZIP
<input type="checkbox"/>	Main/Bio	EEmail	EMAIL
<input type="checkbox"/>	Main/Bio	Mobile Phone	MOBILE_PHONE
<input type="checkbox"/>	Main/Bio	Home Phone	HOME_PHONE
<input type="checkbox"/>	Main/Bio	Business Phone	BUSINESS_PHONE
<input type="checkbox"/>	Main/Bio	Organization?	ORG_REC
<input type="checkbox"/>	Main/Bio	2019 Gift Total	CY19_GIFT_TOT
<input type="checkbox"/>	Main/Bio	Increase Amount over CY2019	INCR_AMT_CY19
<input type="checkbox"/>	Main/Bio	2020 Increased Gift Total	INCR_TOT_2020

Settings>Export Templates

Created By	Created Date	Modified By	Modified Date
Donna Mitchell	10/15/2019	Donna Mitchell	10/15/2019

Step 2: Prepare the Mail Merge Template



Poodle Rescue Shelter
895 Standard Way
Blue Bell, PA 19422

October 14, 2019

«title» «first_name» «last_name»
«prof_title»
«address»
«address2»
«city», «state» «zip»

Dear «salutation»,

I am writing to thank you for the generous support and assistance you have provided this year. Your donations, time, and talent have helped our sweet fur babies find forever home and stay healthy. Comfortable and loved while they wait for their forever home.

The need to house animals that arrive for myriad reasons is critical. We urgently request your help by considering increasing your donation a small 5% over what you have given last year. Below, you will see your generous gift total for this calendar year and what we have calculated as 5% more. Please feel free to give the increase amount as a one-time gift, or turn your giving into a recurring gift that will automatically be charged at the frequency you desire, i.e. monthly, quarterly, annually, etc.

Sincerely Yours,

Caroline Sweet,
Director, Poodle Rescue Shelter

CY2019 Total \$«CY19_GIFT_TOT»

5% Increase over CY2019 \$«INCR_AMT_CY19»

Suggested Total Giving for 2020 \$«INCR_TOT_2020»

Step 3: Upload the Mail Merge Template

Upload New Template

My Templates

Default Templates

+ Add New Folder

Upload New Template

✓ 5 Percent Increase Appeal Letter.docx [Change](#)

Template Name: *

Save file in folder:

Template type:

✓ Share with everyone

Upload

Added By

6	System	
6	System	
6	System	

Page 1 of 1

Upload New

Step 3: Access the Data File

MAILINGS

Set

- Basic Email
- Constant Contact Email
- Direct Mail Plans
- Email Templates
- Mail Merge**

Set

Show More Options

Export Mail Merge File

Donor Names, Addresses, and Phone Numbers

Name/Address	Business Phone	Mobile Phone	Home Phone	Fax	Email
Mr. Floyd Taggart (20) PO Box 136 Hallstead, TX 78822			(713)615-2266		
Mr. & Mrs. Henry Taggart (19) 10 S. 951 Lorraine Drive Hinsdale, WA 80521			(509)323-6310		htaggart@softerware.com
Mr. & Mrs. Tim Tarkonston D.D.S. (18) 5092 Laurelwood Drive Hudsonville, WI 53688	(414)669-3433		(414)669-3433		
Ms. Jeanella Teniewe (17) 2474 Riley Jamestown, MI 49427			(313)896-9604		
The SnowMaking Company (16) Kelly Ramage 452 Oak Street Horsham, PA 19431					
Tony Thoman (15) 123 Main Street Philly, PA 18914	(215)593-7219				

Export Options

Include Flags in Export

Increased Giving Appeal Export Template (mailmerge) (shared) ▼ Add New Template Edit Template

Export to Excel

Instant Merge

[Learn More](#)

Step 4: Perform the Merge

✉ Mail Merge

Set Address Options

▾ Selection Filter

(Donors Last Three CYs) ✎ ✕

✓ Show More Options

1

Set Mail Merge Options

Choose an Export Template

Increased Giving Appeal Export Template (mailmerge) (shared) ▾

+ Add New Template ✎ Edit Template

✓ Show More Options

Export Mail Merge File

Instant Merge

📖 Learn More

3

Completed Merged Letter



Poodle Rescue Shelter
895 Standard Way
Blue Bell, PA 19422

October 16, 2019

Marjorie and John Hopkins
10 Belleview Dr
Severna Park, MD 21146

Dear Mrs. Hopkins,

I am writing to thank you for the generous support and assistance you have provided this year. Your donations, time, and talent have helped our sweet fur babies find forever home and stay healthy. Comfortable and loved while they wait for their forever home.

The need to house animals that arrive for myriad reasons is critical. We urgently request your help by considering increasing your donation a small 5% over what you have given last year. Below, you will see your generous gift total for this calendar year and what we have calculated as 5% more. Please feel free to give the increase amount as a one-time gift, or turn your giving into a recurring gift that will automatically be charged at the frequency you desire, i.e. monthly, quarterly, annually, etc.

Sincerely Yours,

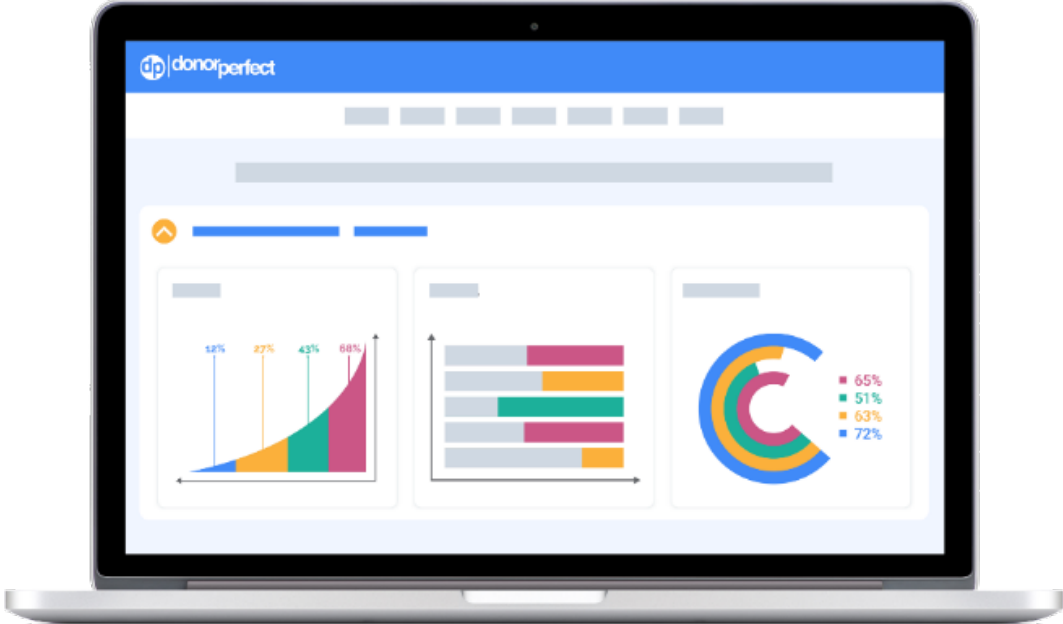
Caroline Sweet,
Director, Poodle Rescue Shelter

CY2019 Total: \$2,300.00

5% Increase: \$115.00

Suggested Total Giving for 2020: \$2,415.00

Mail Merge Demonstration



REVIEW

Prepare Data File

Create Export Template with fields you want pulled from DP Mail Merge/Reports/Receipting



Prepare Mail Merge Template

Be sure all mail merge fields are correct and properly labeled

Upload Mail Merge Template

Settings>Mail Merge Templates>Upload New

Perform Instant Merge

From DonorPerfect or Upload file

Come Together

You've got mail merge letters that you need to send out
Filled with gifts and data from your donors' records
Make it as easy as 1– 2 – 3
Got to do a mail merge function quick as can be
Come together, right now, with DP!

