The Secrets of Mail Merge

DONNA MITCHELL

TRAINING SPECIALIST

DPC3
DONORPERFECT CANADIAN CLIENT CONFERENCE

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			
Receipt Amount	$500.00			
Reference / Check Number	98989		Transaction ID	
Campaign	2019 Capital Campaign ▾ ➕		Record Type	Gift
* General Ledger	Unrestricted ▾ ➕			
Solicitation	2019 Summer Appeal ▾ ➕			
Class	▾ ➕		Batch Number	71
Receipt Date	08/13/2019			
Sub Solicitation	▾ ➕		Pledge Payment ☐	
Gift/Pledge Solicitor	▾ ➕		Split Gift ☐	
Thank-You Letter	Summer Appeal Thank You ▾ ➕			
Receipt Delivery Pref.	E-Mail and Letter ▾		Anonymous Gift? ○ Yes ◉ No	
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
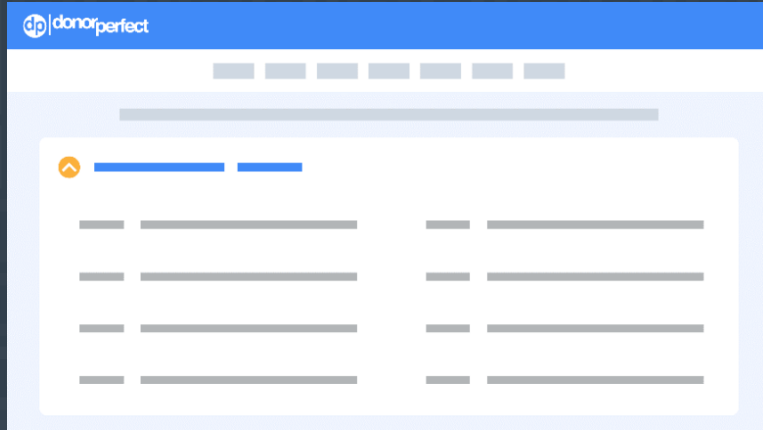
- Uploading mail merge templates

- 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

Review

July 26,

«title»
«prof_t
Optiona
«addre
«addre
«city»,

Dear «s

I am wri
donatio
discours

Selected Fields

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

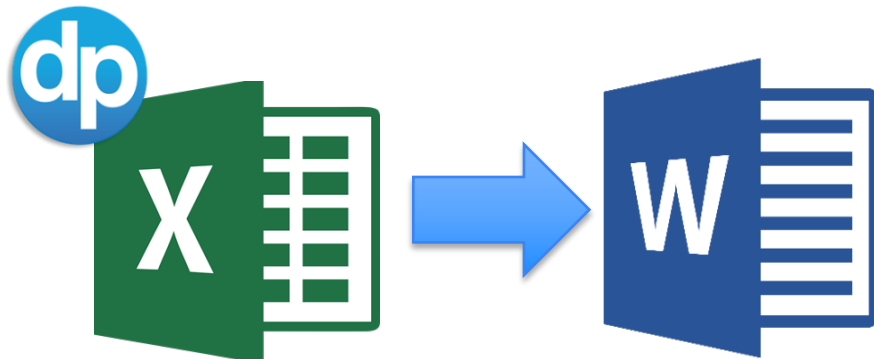's Name
's Address

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

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
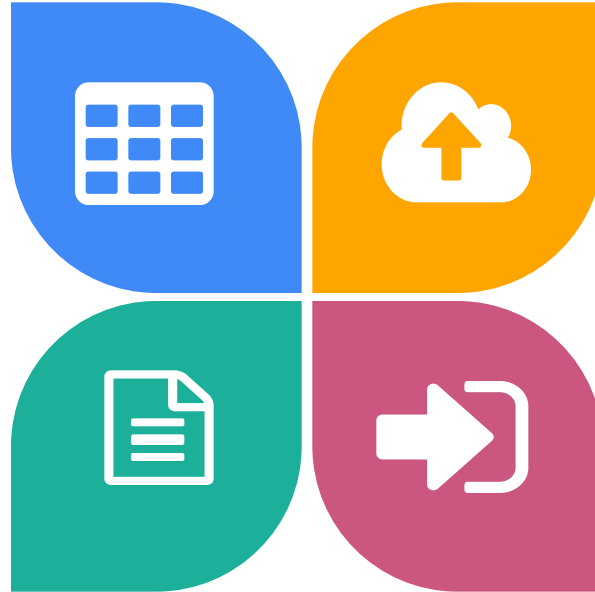
Step 1: Create the Data File

Selected Fields

Settings>Export Templates

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

	Created By	Created Date	Modified By	Modified Date
	a 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

Step 3: Access the Data File

Step 4: Perform the Merge

✉ **Mail Merge**

Set Address Options

▼ **Selection Filter**
(Donors Last Three CYs) ✏ ✖

1

🔽 Show More Options

Set Mail Merge Options

2
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**   **3**

Learn More

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.

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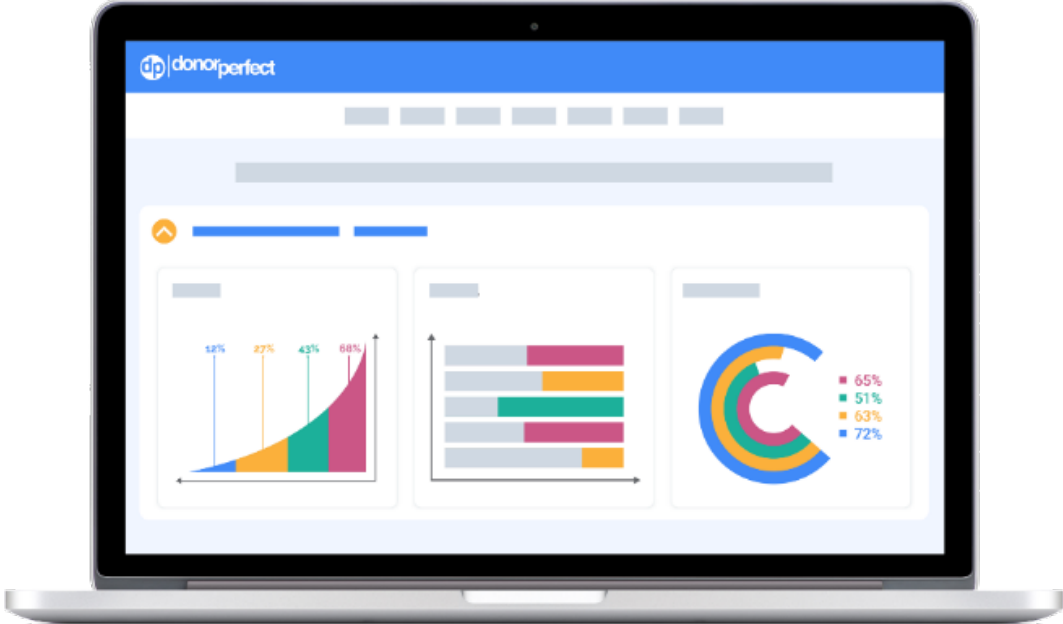
Sincerely Yours,

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

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

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!