

Chapter 15 Mail Merge

This section enables users to merge the document with the file details that are filled by users. Users must insert all the file details that will be used in mail merge. **(For the guideline can refer Chapter 03 File)**

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15.1 Mail Merge

Step 1 : Open Word and on the navigation bar click the **Merge Expert**.

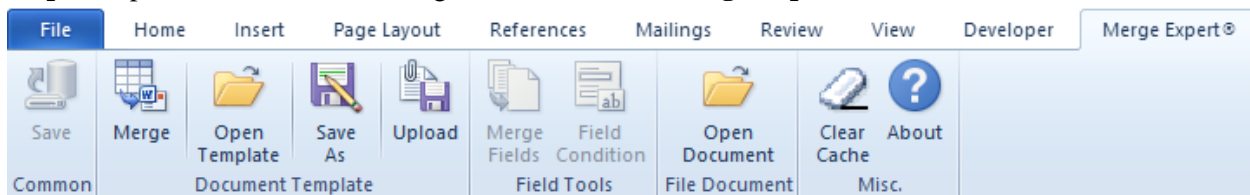


Figure 1

Step 2 : Click the **Merge** icon on the top left corner.

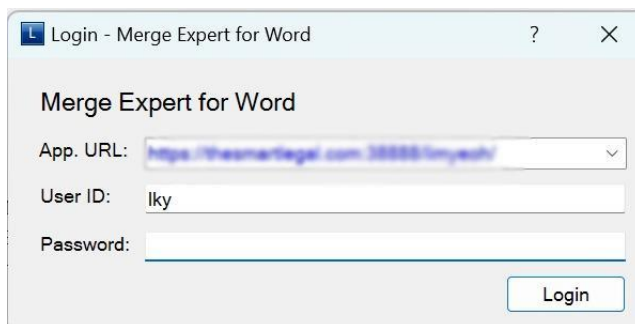


Figure 2

Step 3 : A login box as **Figure 2** will pop out. Users need to fill in the App. URL field with XXX. Then users are required to key in their user ID and password accordingly.

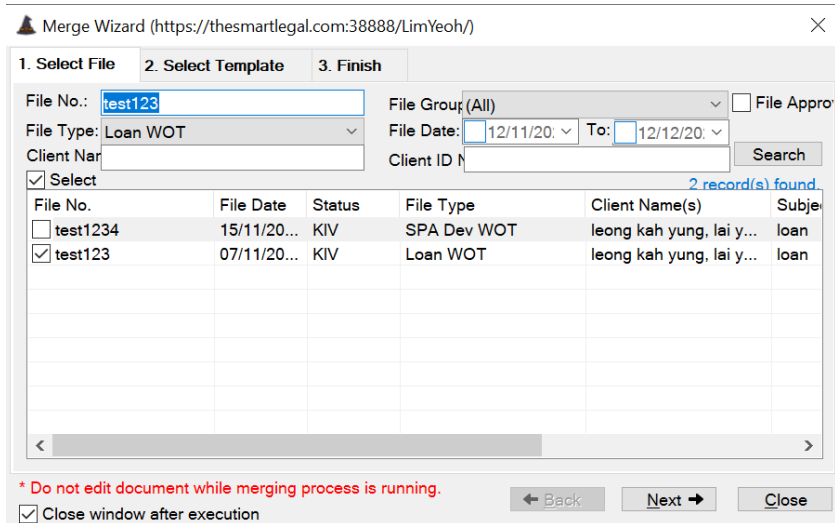


Figure 3

Step 4 : After successfully logged in, **Figure 3** will pop up. Users are required to enter the **File No** which contains the file details that want to merge in templates. After selecting the File(s) that users want, they can click “**Next →**” to proceed to the next steps . (By default, all the related files will be selected.)

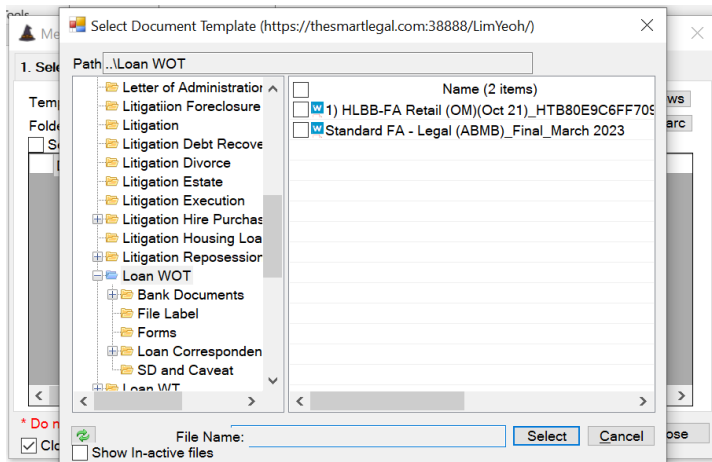


Figure 4

Step 5 : Users can select the template where its document(s) will be merged later in **Figure 4**.

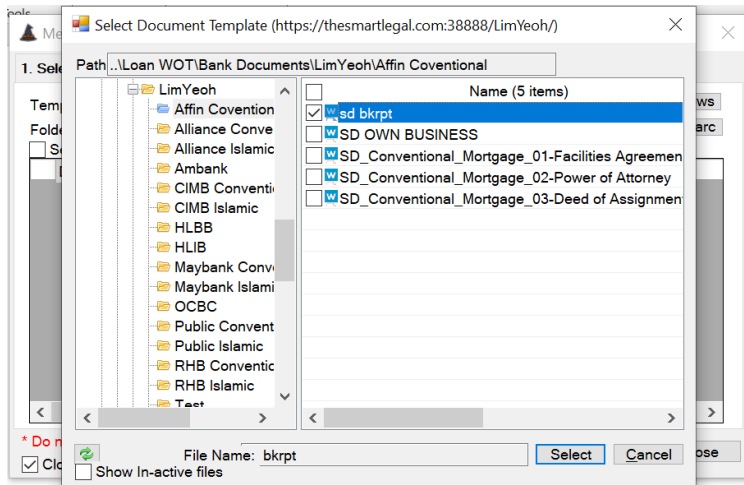


Figure 5

Step 6 : After selecting the template, users can tick the checkbox (support multiple ticks) and click the “Select” button to merge the document(s).

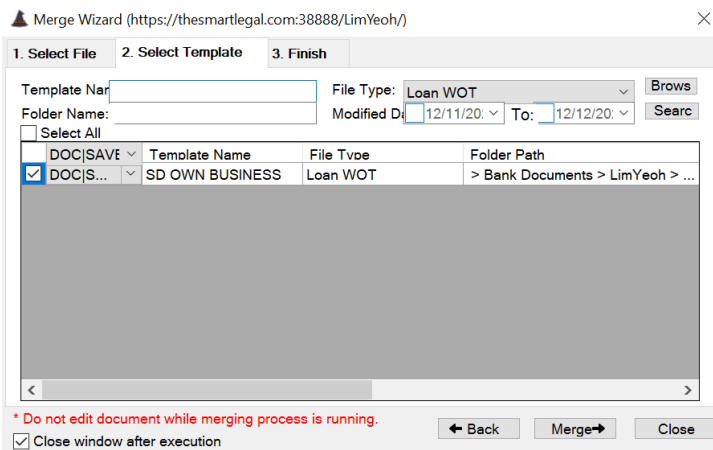


Figure 6

Step 7 : Last but not least, users have to click on the “Merge →” button to undergo the merging process using the data filled in the system.

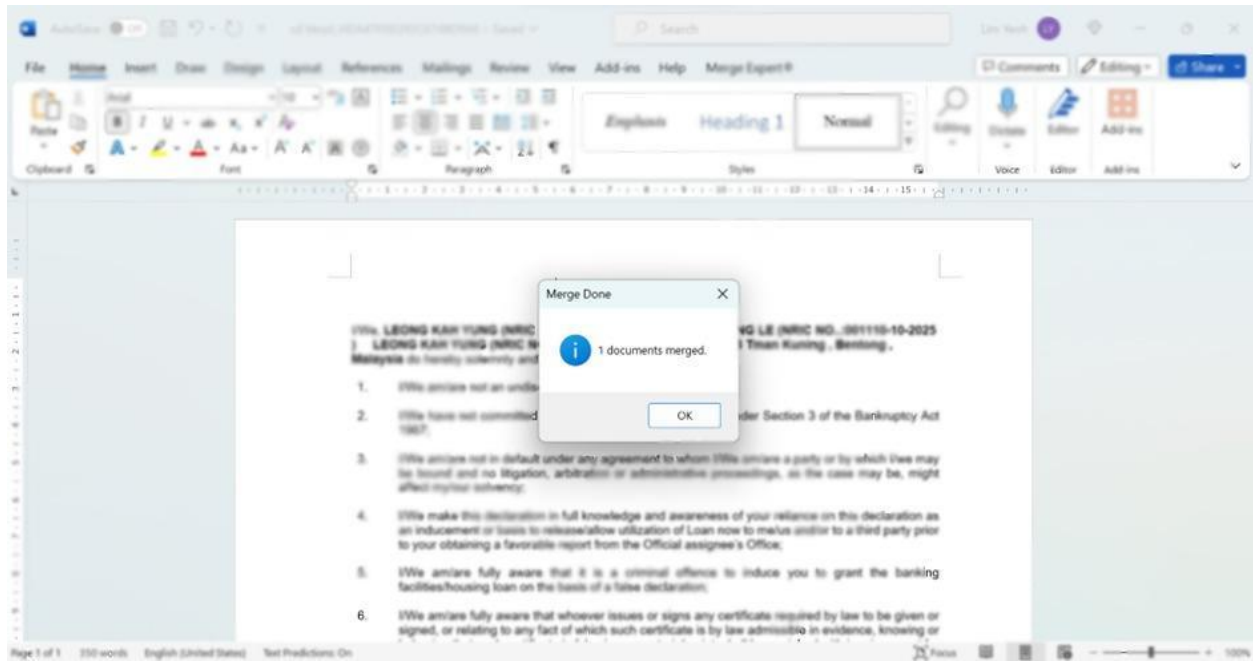


Figure 7

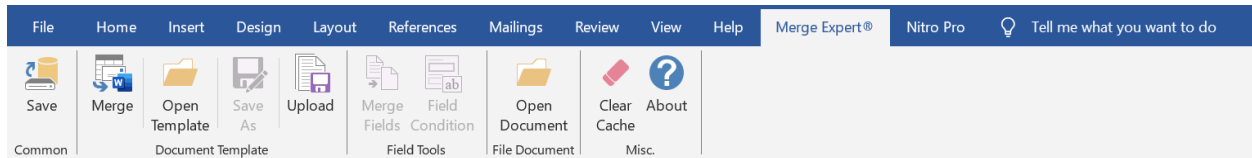
Step 8 : When the merging process is fully done, an alert box named “**Merge Done**” will pop out.

15.2 Exercise

By following the above tutorial in trying to merge a template with the new file detail and use the templates that existed.

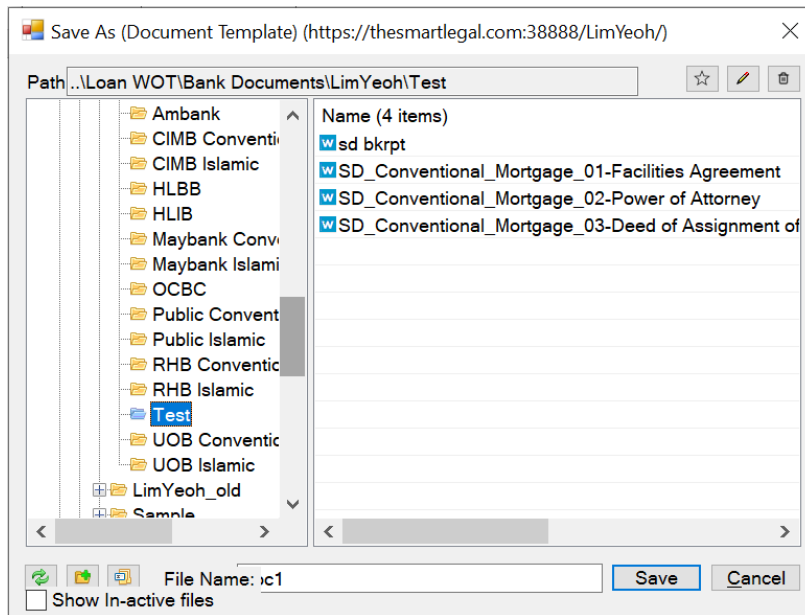
15.3 Create Templates

15.3.1.1 Upload New Templates (Uploading one document)



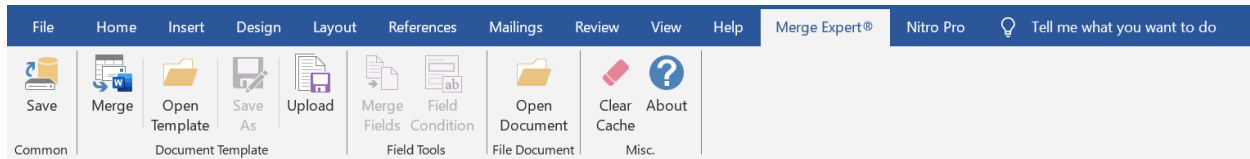
Step 1 : Save your Word Document first before uploading the document.

Step 2 : Click “**Upload**” in **Merge Expert** and click on “**Save as**” on the navigation bar to upload the document that will be adding fields to the template.

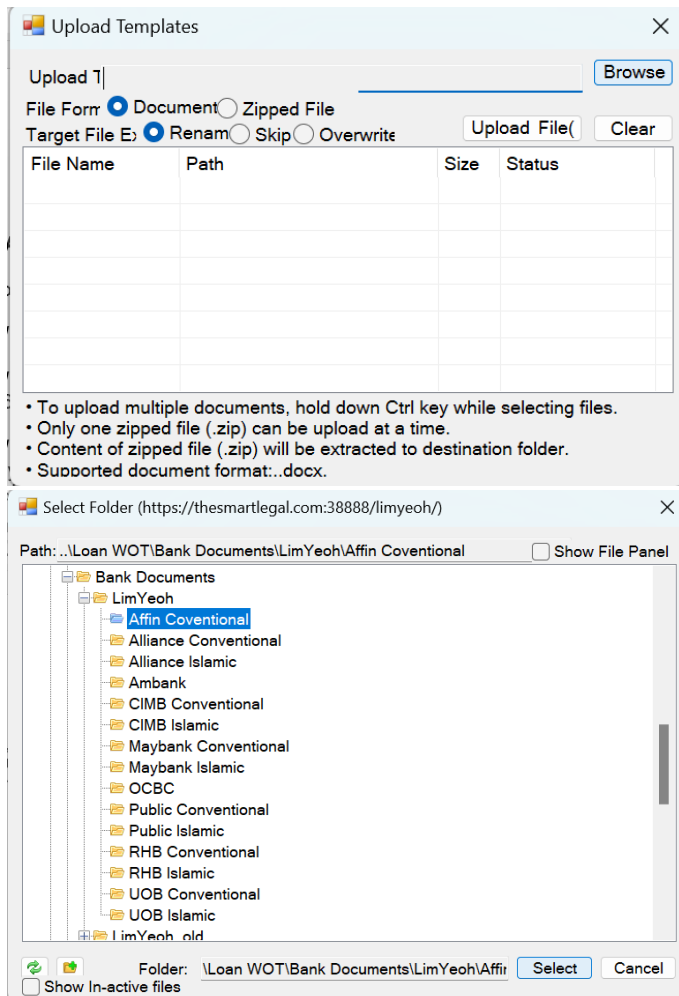



Step 3 : Find the template that you wish to upload/save your document to the system. Click on the “**Save**” button then.

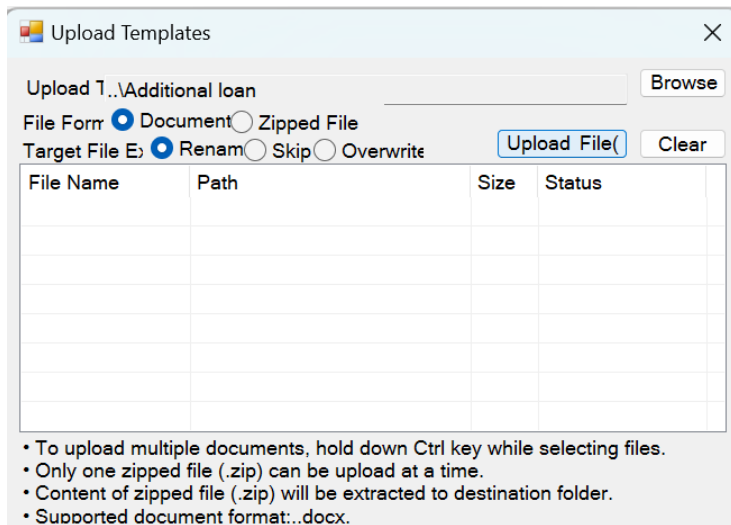
15.3.1.2 Upload New Templates (Uploading multiple documents)



Step 1 : Open Word and click Upload in **Merge Expert** to upload the document that wants to be edited to the template.



Step 2 : Users need to click **Browse** to select the template's store location/Folder. If users need to create new folder can click the left down corner icon  to add a new folder.



Upload Templates

Upload To: Additional loan Browse

File Form ☒ Document ☐ Zipped File

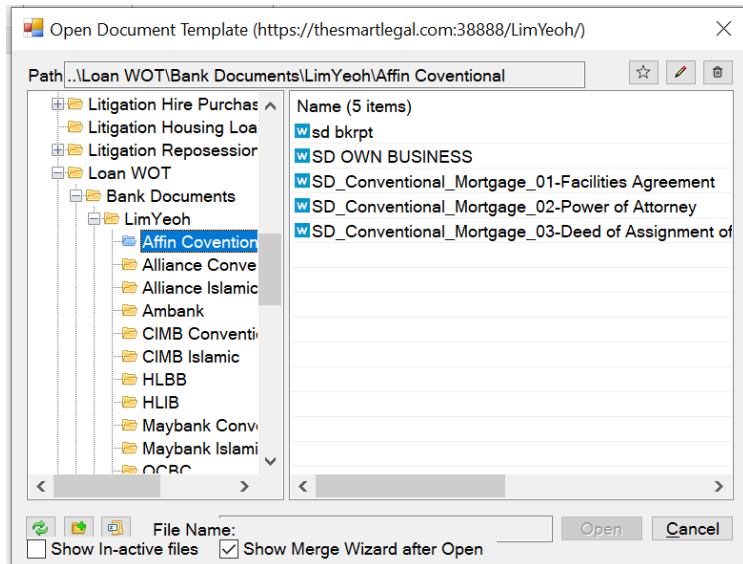
Target File E: ☒ Renam ☐ Skip ☐ Overwrite Upload File() Clear

File Name	Path	Size	Status

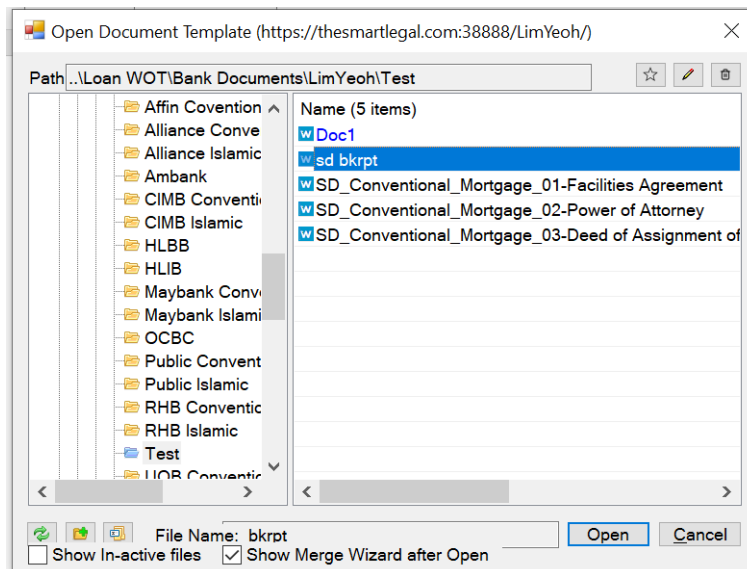
- To upload multiple documents, hold down Ctrl key while selecting files.
- Only one zipped file (.zip) can be upload at a time.
- Content of zipped file (.zip) will be extracted to destination folder.
- Supported document format:...docx.

Step 3 : After selecting where to upload, users can click the **Upload File** to choose the documents they want to upload as the templates. (**Note: Users can upload more than one document at the same time.**)

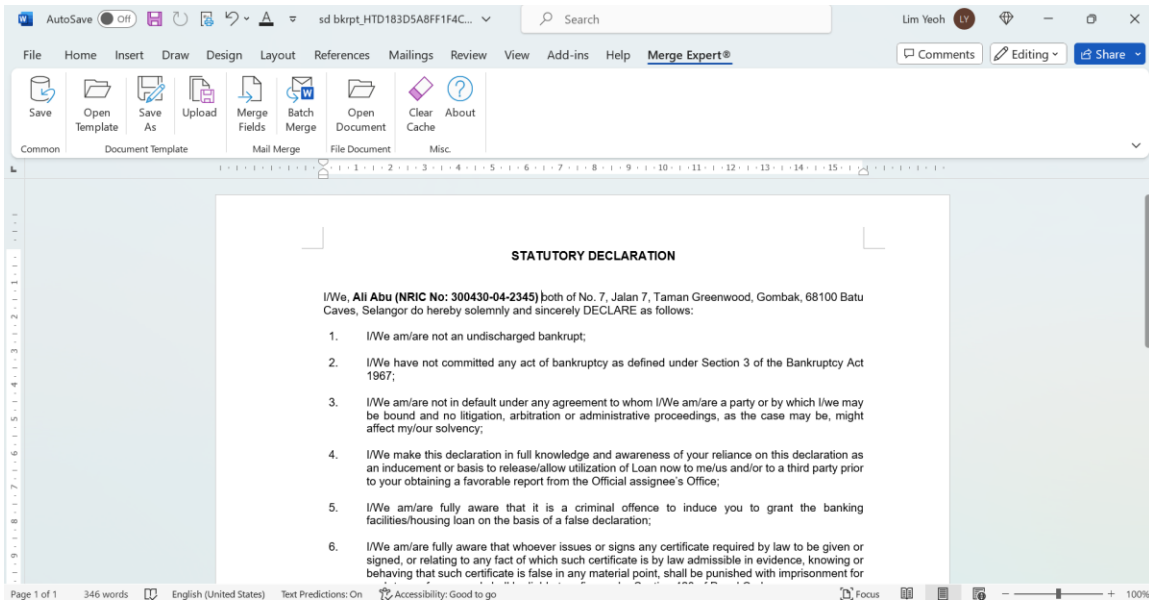
15.3.2 Create New Template



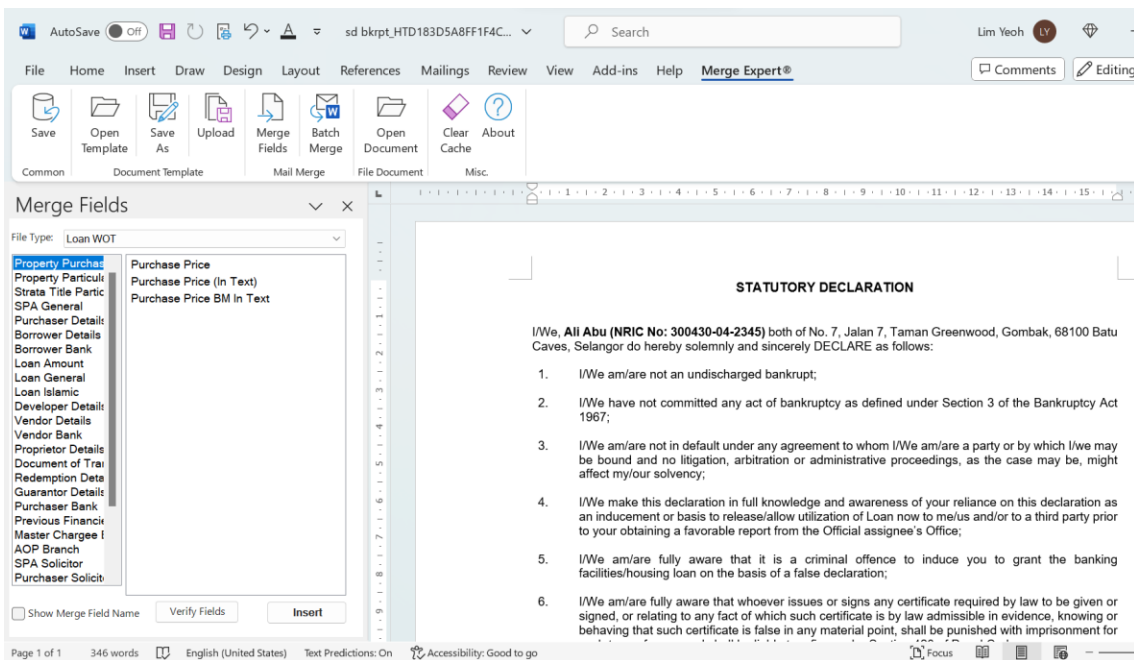
Step 1 : Select the document inside the folder that you uploaded and want to add a new template into.



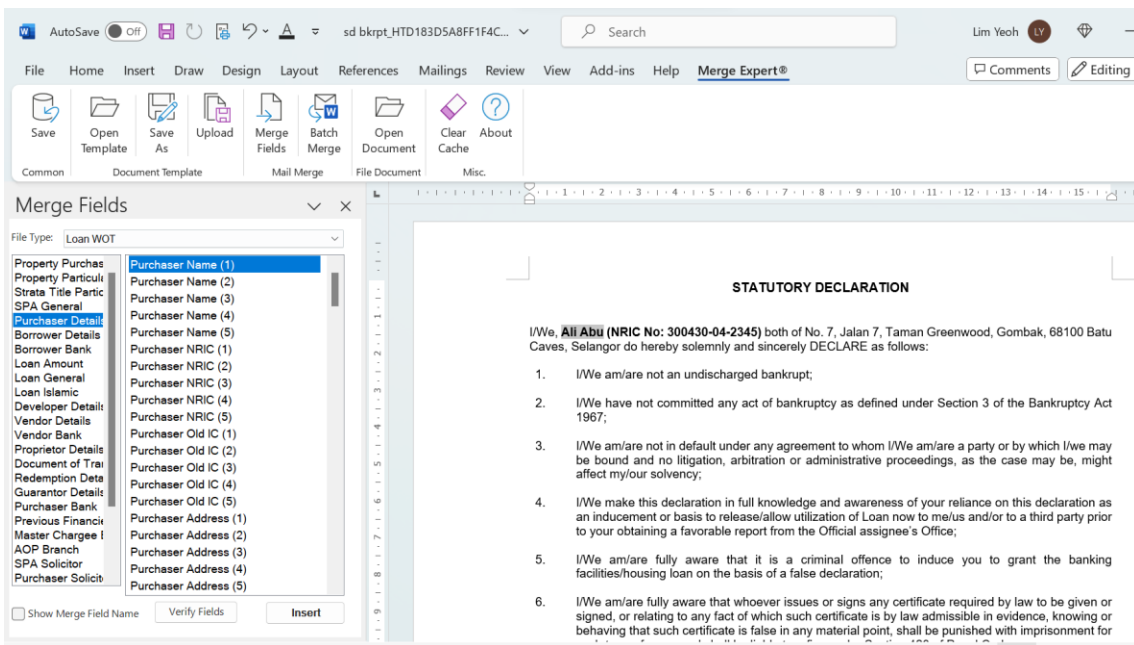
Step 2 : Users can open the template to start to insert the merge field. (**Merge field is the field will auto insert the data when merge the templates**)



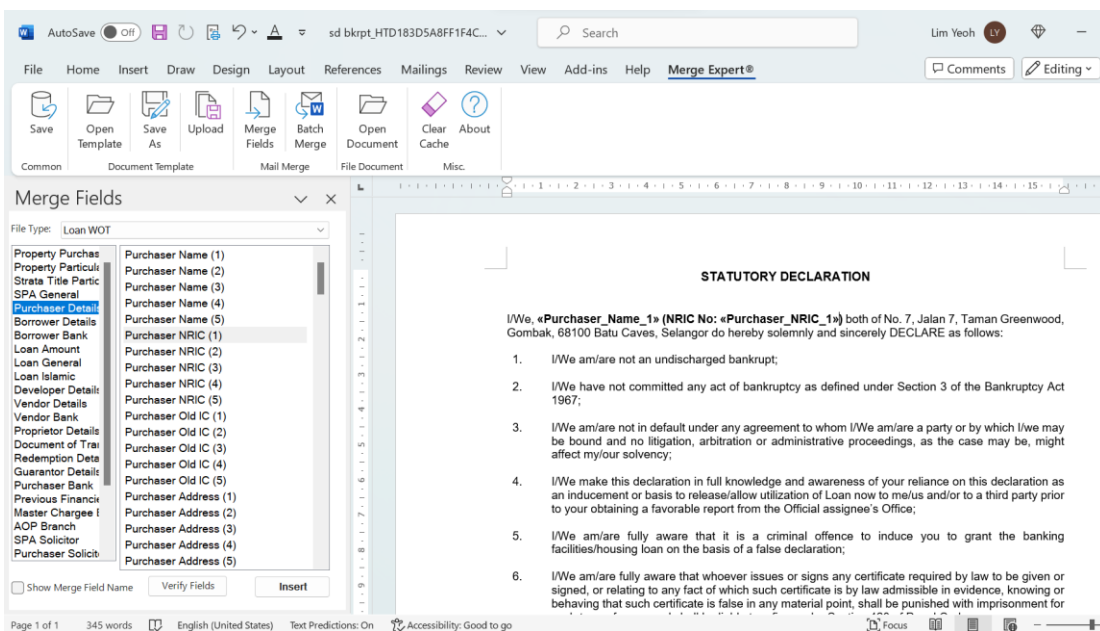
Step 3 : After clicking **Open Template** , the selected template will be opened .




Step 4 : Click on the **“Merge Fields”** on top(navigation bar). Then, choose the category that is related to the field you want to insert.

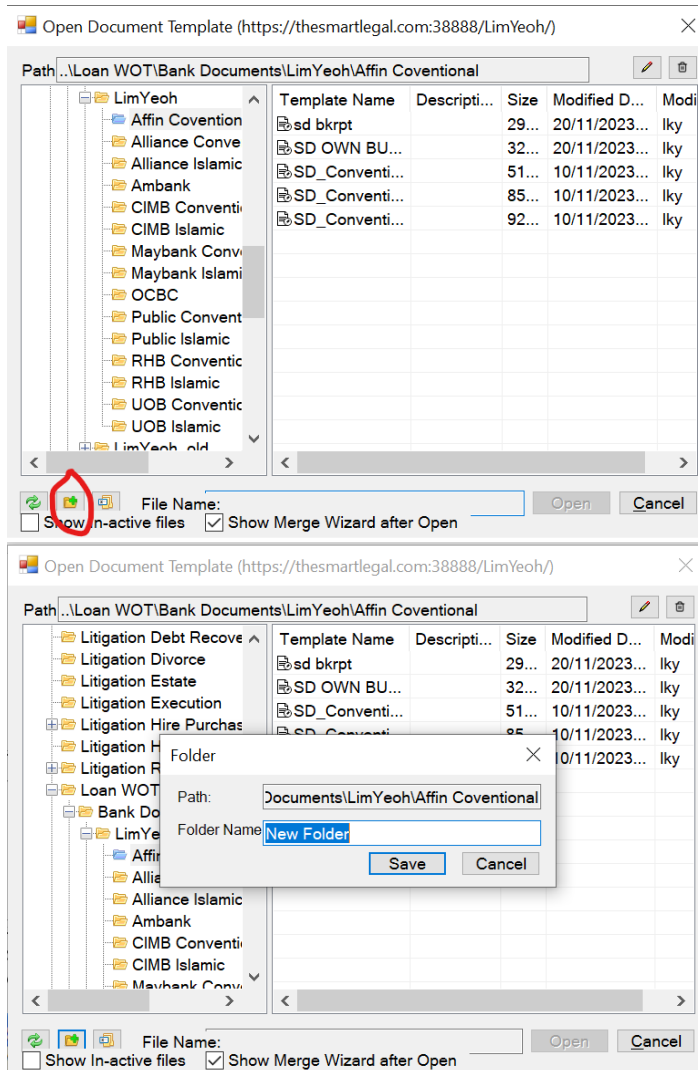


Step 5 : Users need to replace the data with the related **Merge Fields** by double clicking on the specific **Merge Field** or click **Insert**. Users can adjust the alignment for the Merge Field as you want.

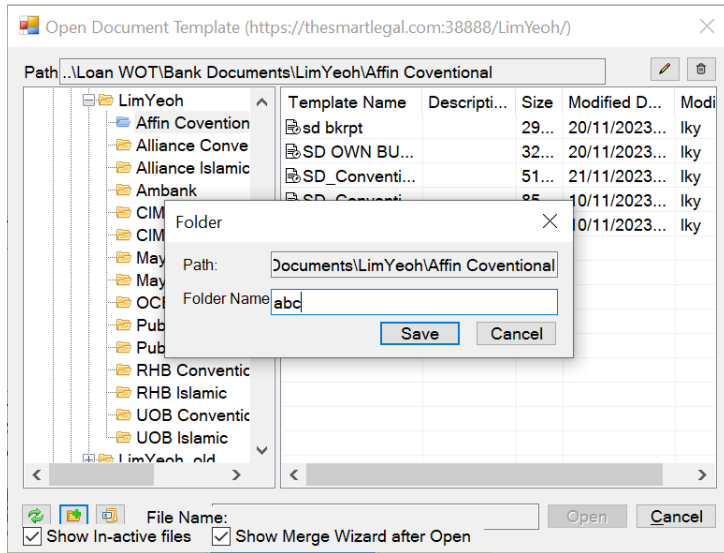


Step 6 : After insert all the **Merge Field** users need can **CTRL+S** or click on **Save**  on the navigation bar . By this when the users merge the templates with the **File Details** that contains these data the system will automatically insert the data to the position of **Merge Field**.

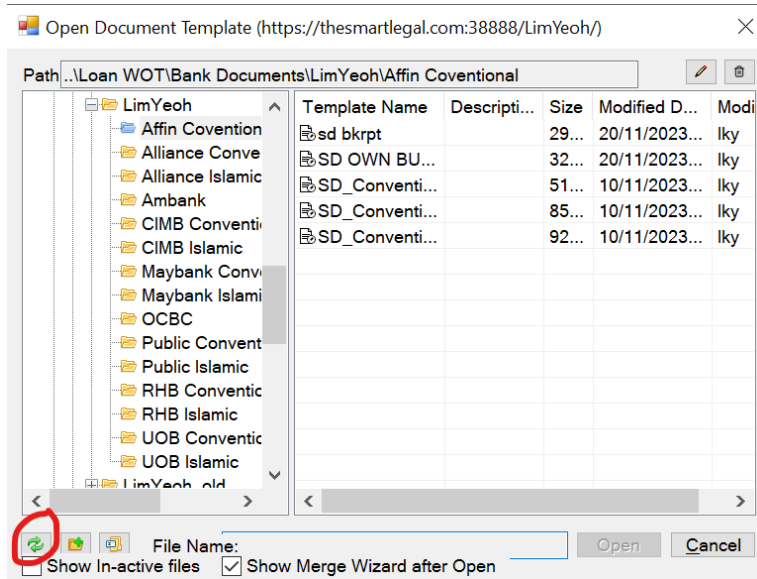
15.3.3 Extra Information




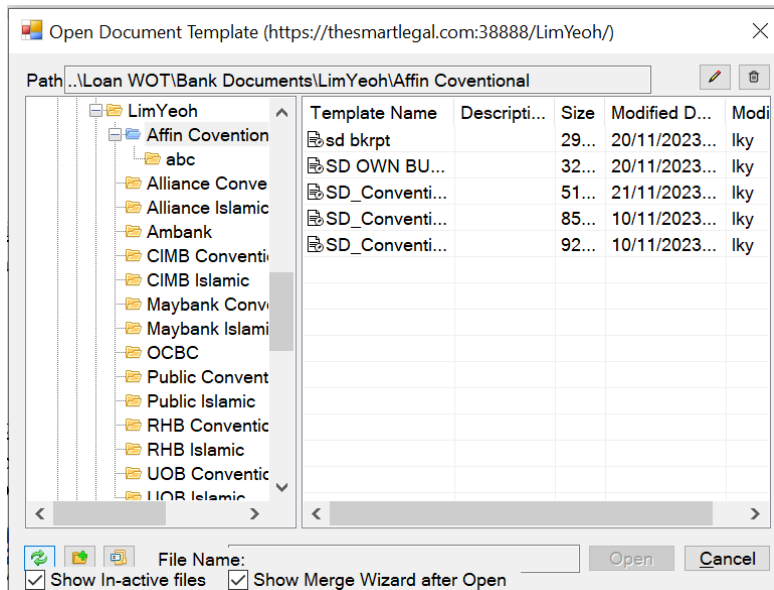
- Click on the  icon on the bottom left to add a new folder.



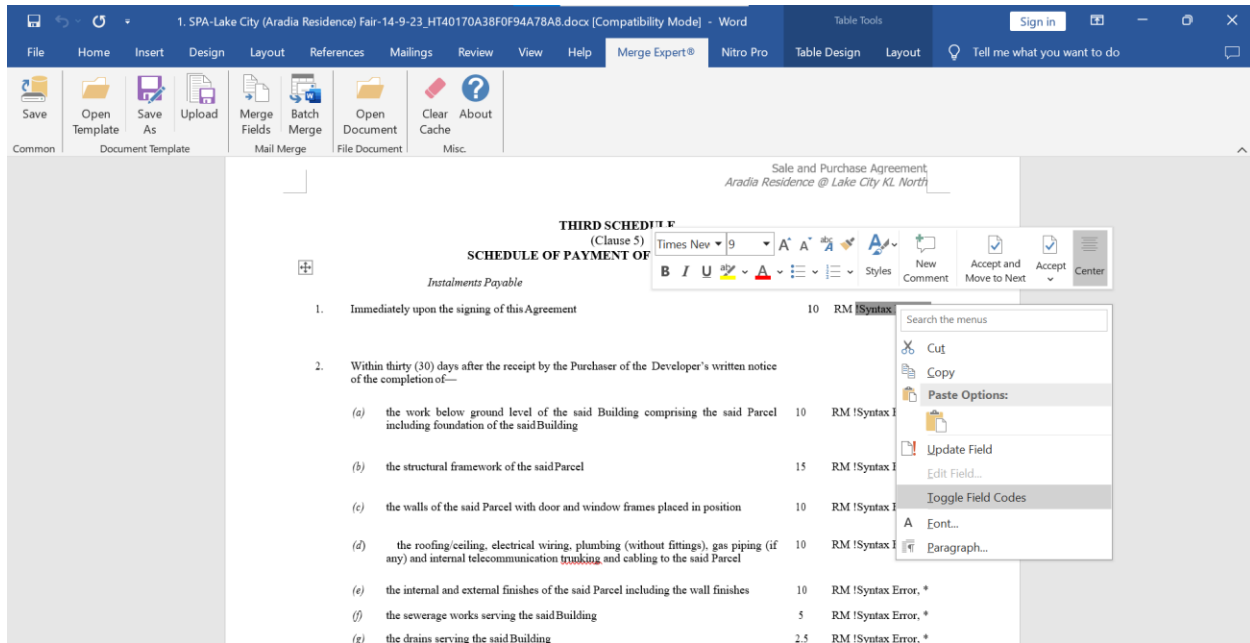
- A folder box will pop up after selecting the particular template that users want to amend the folder inside. Enter the folder name in the box given and press the **“Save”** button.



- Click on the icon on the bottom left  to refresh/reload the page to get the latest templates/folders.



- As you can see, a “**abc**” folder is now created under the Affin Conventional template.



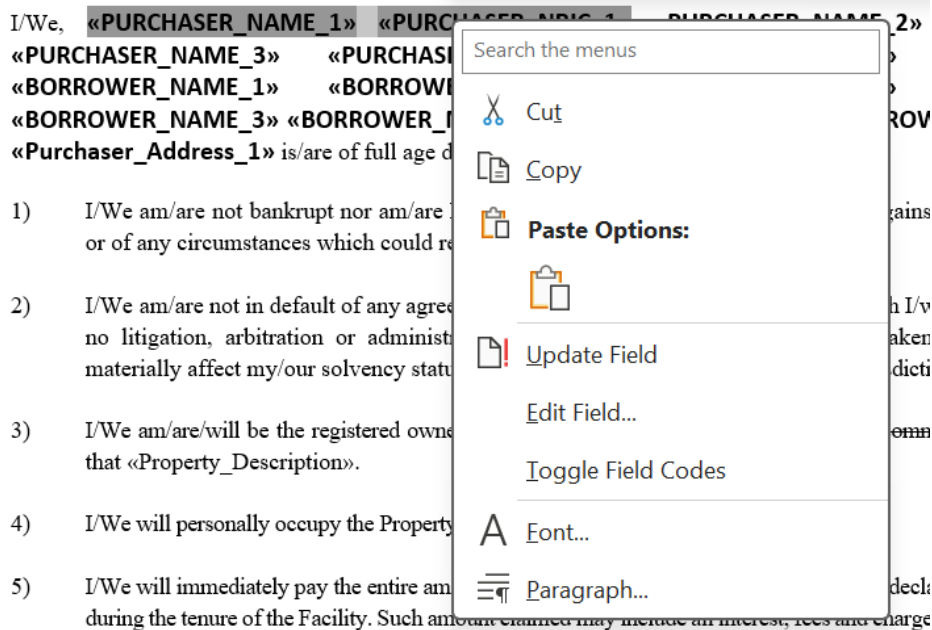
- Users can drag the mouse to select the Merge Field to right click to open the code details by clicking the **Toggle Field Codes**.

After Toggle File Codes:

% Amount

10 RM {={
MERGEFIELD
Purchase_Price
}*0.10\# "###0.00 }

- Users can modify the percentage by editing the formula inside the Merge Field . For the above sample, **0.10** means 10%.



- Users can drag the mouse to select the Merge Field to right click for open the code details by clicking the **Toggle Field Codes**.

After Toggle File Codes

```
I/We, { MERGEFIELD "PURCHASER_NAME_1" \* MERGEFORMAT } { IF { MERGEFIELD PURCHASER_NAME_1 }
<> "" "(NRIC NO.." "" ){ MERGEFIELD "PURCHASER_NRIC_1" \* MERGEFORMAT } «PURCHASER_NAME_2»
```

- Users with some programming experience or knowledge can also edit the Merge Field to gain the result you want more easily. For example, the above example shows if the purchaser name appears the (NRIC NO.. format will come with the NRIC.