

## HOW TO USE MAIL MERGE

Mail merge is a useful feature in Microsoft Word that allows you to generate personalized documents, such as contracts or forms, by merging a Word template with data from an external source, such as Excel. This guide explains how to set up a mail merge and integrates a VBA automation program to streamline the process by splitting the merged output into individual files.

**NOTE:** The VBA code must be run as the **final** step to both mail merge and split the documents. Do not manually perform the mail merge, as the VBA code is designed to handle **both** processes in a single step.

### Part 1: Setting Up a Mail Merge

#### **Step 1: Prepare Your Data Source (Excel Workbook)**

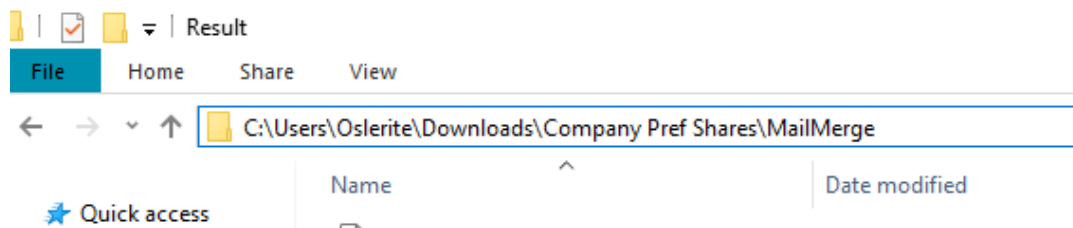
- a) Open Microsoft Excel and create a workbook with the data you want to use for the mail merge. Ensure the first row contains column headers (e.g., "Entity," "Authorized Signatory," "Address," etc.). Add the data for each recipient in the rows below the headers ("Variables"). Save the Excel workbook in a location you can easily access (either local or iManage).

	B	C	D	E	F	G
1	Authorized_Signatory	Title	Num_Pref_Shares	Address	DocFolder	FileName
2	Alex Johnson	Chief Executive Officer	499,401	123 Maple Syrup Lane, Mooseville, ON A1A 1A1	C:\Users\Oslertie\Downloads\Company Pref Shares\MailMerge	ThisContract (Company_1)
3	Serena Williams	President	760,657	456 Dragonfly Crescent, Fogtown, NL B2B 2B2	C:\Users\Oslertie\Downloads\Company Pref Shares\MailMerge	ThisContract (Company_2)
4	Jordan Brown	Chief Revenue Officer	631,990	789 Gopher Trail, Dusty Plains, AB T3T 3T3	C:\Users\Oslertie\Downloads\Company Pref Shares\MailMerge	ThisContract (Company_3)
5	Casey Miller	Chief Marketing Officer	621,193	42 Pancake Avenue, Breakfastburg, MB R4R 4R4	C:\Users\Oslertie\Downloads\Company Pref Shares\MailMerge	ThisContract (Company_4)

**Figure 1: Excel Workbook Set-up**

- b) For this process, you will need to include two additional columns in your Excel workbook. Name the columns **DocFolder** and **FileName** and place them beside your Variables, as shown in Figure 1.

**DocFolder:** Specify the local folder where the split files will be saved.



**Figure 2: Copy and paste the path to your destination local folder, where the documents will be saved, into your Excel workbook.**

	A	G	H	I
1	Entity	FileName		
2	Company_1	ThisContract (Company_1)		
3	Company_2	ThisContract (Company_2)		

Figure 3: Document naming formula

**FileName:** Specify the naming convention to be used for the split files.

Example formula for **FileName**:

=\"ThisContract (\" & A2 & \") \"

This dynamically generates file names based on data in column A (the entities).

- c) Save the updated Excel workbook.

## Step 2: Create the Mail Merge Template (Word Document)

- a) Open Word document that you wish to use as the template to your mailmerge (“Template Doc”)
- b) Go to the **Mailings** tab in the Word ribbon and select **Select from iManage > Select recipients from iManage**

(you can also run this using an Excel workbook saved your desktop by clicking **Select Recipient > Use an existing list**).

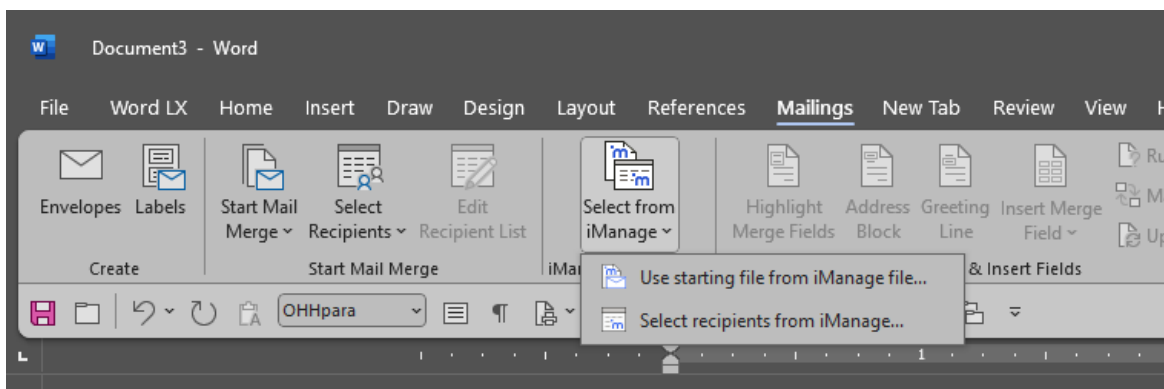


Figure 4: Setting up mailmerge connection

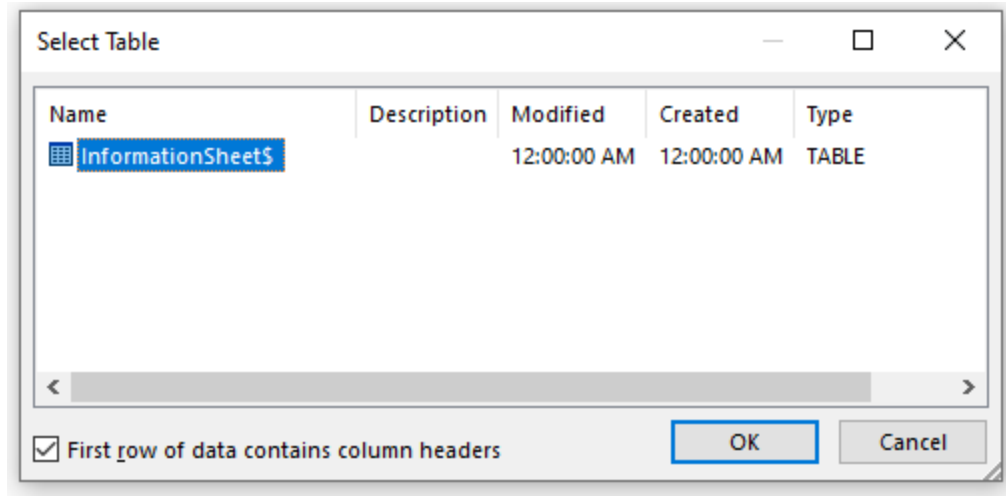


Figure 5: Select the sheet containing your variables

- c) A pop-up will allow you to select the specific Excel Sheet containing your variables – select the sheet that contains the information you wish to insert into your merged document
- d) Merge fields are the placeholders that will be replaced by your Variables once the mail merge is complete. Insert merge fields into the document in the locations you wish by selecting **Insert Merge Field** from the **Mailings** tab and choosing the appropriate column headers from your Excel workbook.

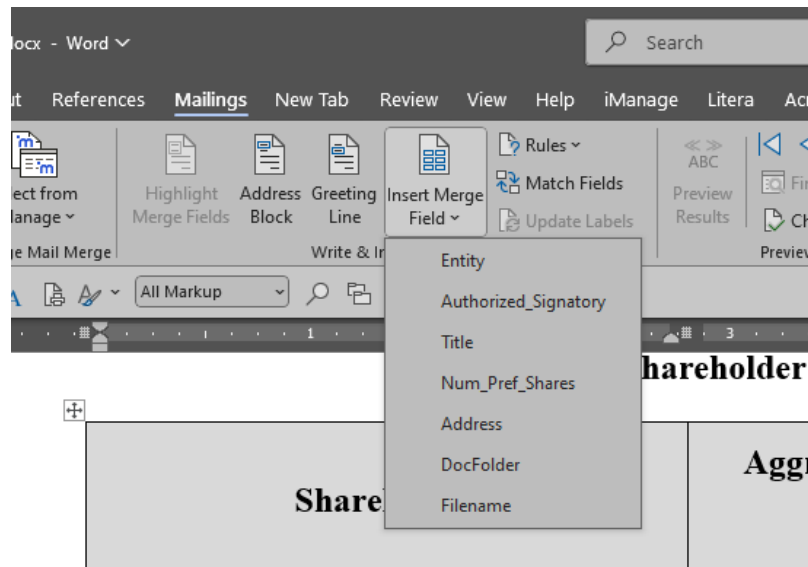


Figure 6: Insert Merge Fields

**Schedule A**  
**Shareholder Escrowed Shares**

Shareholder	Aggregate Escrowed Shares of Shareholder	Certificate/DRS
«Entity»	«Num_Pref_Shares»	

Figure 7: Example of mergefields

- e) If you wish to specify the format your inserted Variables (e.g., thousand separator), press **Alt + F9** and copy in "**\# #,##0**" (Note: Formatting can also be applied in the linked Excel workbook)
- f) Exit from formatting by pressing **Alt + F9**

**Schedule A**  
**Shareholder Escrowed Shares**

Shareholder	Aggregate Escrowed Shares of Shareholder	Certificate/DRS
{ MERGEFIELD Entity }	{ MERGEFIELD Num_Pref_Shares }	

Figure 8: Mergefield Formatting

**Schedule A**  
**Shareholder Escrowed Shares**

Shareholder	Aggregate Escrowed Shares of Shareholder	Certificate/DRS
{ MERGEFIELD Entity }	{ MERGEFIELD Num_Pref_Shares \# #,##0 }	

Figure 9: Example Mergefield format with thousand separator

- g) Click **Preview Results** in the **Mailings** tab to see how the merged document will look for each recipient.

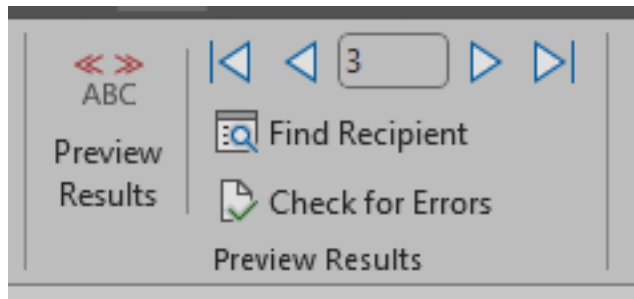


Figure 10: Preview merged docs

- h) Save the document

## **Part 2: Automating the Process with VBA**

### **Step 1: Save the Mail Merge Document as a Macro-Enabled File**

- a) Open your mail merge Word document with inserted mergefields in the correct locations.
- b) Save it as a macro-enabled file (.docm) by selecting **File** > **Save As** and choosing the .docm format. **This is necessary to enable the VBA macro functionality.**

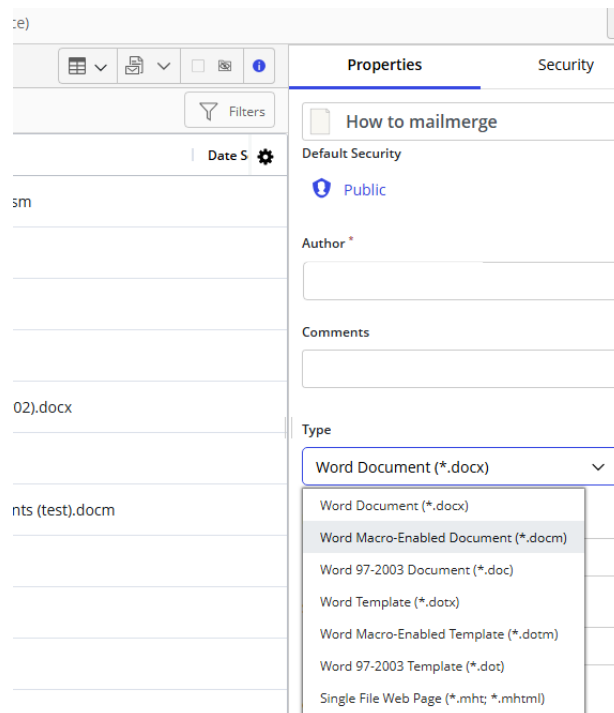
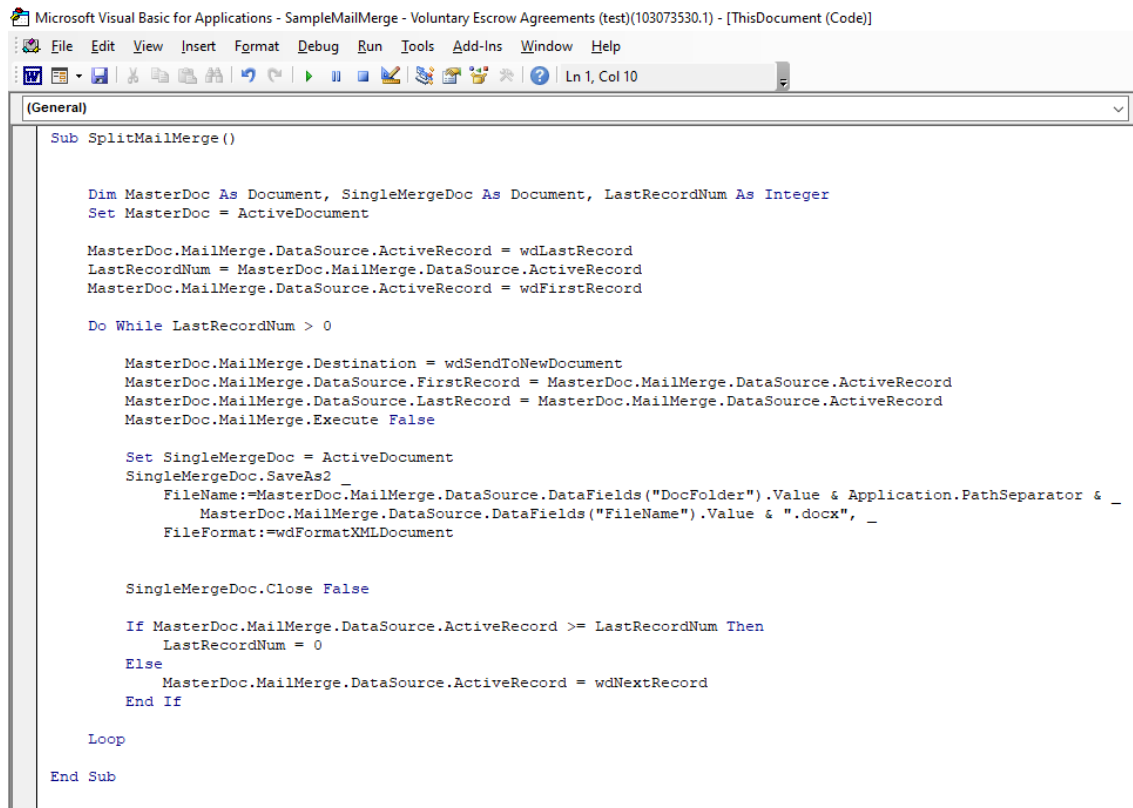


Figure 11: Saving Mailmerge doc as macro enable document (.docm)

## Step 2: Insert the VBA Code

- a) Press **Alt + F11** in Word to open the Visual Basic for Applications (VBA) editor.
- b) In the VBA editor, select **Insert > Module** to create a new module.
- c) Copy and paste the VBA code into the module:

**COPY AND PASTE FROM 'MailMergeModule.txt'**



```
Sub SplitMailMerge ()

    Dim MasterDoc As Document, SingleMergeDoc As Document, LastRecordNum As Integer
    Set MasterDoc = ActiveDocument

    MasterDoc.MailMerge.DataSource.ActiveRecord = wdLastRecord
    LastRecordNum = MasterDoc.MailMerge.DataSource.ActiveRecord
    MasterDoc.MailMerge.DataSource.ActiveRecord = wdFirstRecord

    Do While LastRecordNum > 0

        MasterDoc.MailMerge.Destination = wdSendToNewDocument
        MasterDoc.MailMerge.DataSource.FirstRecord = MasterDoc.MailMerge.DataSource.ActiveRecord
        MasterDoc.MailMerge.DataSource.LastRecord = MasterDoc.MailMerge.DataSource.ActiveRecord
        MasterDoc.MailMerge.Execute False

        Set SingleMergeDoc = ActiveDocument
        SingleMergeDoc.SaveAs2 _
            FileName:=MasterDoc.MailMerge.DataSource.DataFields("DocFolder").Value & Application.PathSeparator & _
                MasterDoc.MailMerge.DataSource.DataFields("FileName").Value & ".docx", _
            FileFormat:=wdFormatXMLDocument

        SingleMergeDoc.Close False

        If MasterDoc.MailMerge.DataSource.ActiveRecord >= LastRecordNum Then
            LastRecordNum = 0
        Else
            MasterDoc.MailMerge.DataSource.ActiveRecord = wdNextRecord
        End If

    Loop

End Sub
```

Figure 12 VBA Macro for Mailmerge

## Step 3: Run the VBA Macro

- a) Running the Macro (1) runs the mailmerge and (2) splits up the documents into the specified folder

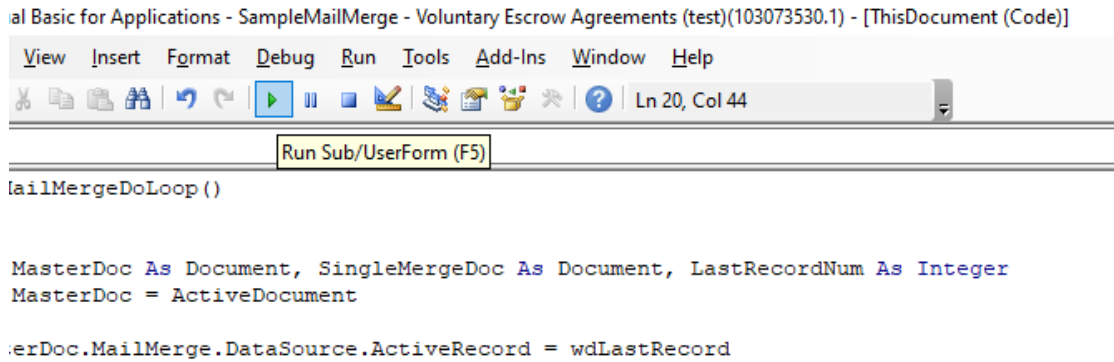


Figure 13: Running Mailmerge

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View

ers\Oslerite\Downloads\Compay Pref Shares\MailMarge

Name	Date modified	Type	Size
ThisContract (Company_1).docx	7/21/2025 6:02 PM	Microsoft Word D...	19 KB
ThisContract (Company_2).docx	7/21/2025 6:02 PM	Microsoft Word D...	19 KB
ThisContract (Company_3).docx	7/21/2025 6:02 PM	Microsoft Word D...	19 KB
ThisContract (Company_4).docx	7/21/2025 6:02 PM	Microsoft Word D...	19 KB
ThisContract (Company_5).docx	7/21/2025 6:02 PM	Microsoft Word D...	19 KB
ThisContract (Company_6).docx	7/21/2025 6:02 PM	Microsoft Word D...	19 KB
ThisContract (Company_7).docx	7/21/2025 6:02 PM	Microsoft Word D...	19 KB
ThisContract (Company_8).docx	7/21/2025 6:02 PM	Microsoft Word D...	19 KB
ThisContract (Company_9).docx	7/21/2025 6:02 PM	Microsoft Word D...	19 KB
ThisContract (Company_10).docx	7/21/2025 6:02 PM	Microsoft Word D...	19 KB
ThisContract (Company_11).docx	7/21/2025 6:02 PM	Microsoft Word D...	19 KB

Figure 14: Split up documents named according to **FileName** in the **DocFolder** location

#### NOTES:

- This VBA program copies and applies the DocID from the main document to all the split documents. If you iManage, you may need to:
  - Delete the DocID field before running the macro, or
  - Update the DocID for each doc after running the macro.
- ➔ This ensures that each document has a unique DocID when uploaded to iManage or similar systems.
- When you re-run your mailmerge, relink your document - Do not press the default “yes” when prompted when opening your doc