Mail Merges Business Process

*File Naming structure*

A common file naming structure for all pairs of Excel/Word Mail merges will be that the file names will match and will have the EXACT creation date on them. Test pairs will have TEST as the first word of the name and final files will have FINAL as part of the file name. Creation dates for test pairs will be included. Final merge dates will be in the FINAL files.

*Examples*:

TEST-Recertification-Maillist-4-6-11.xlsx

TEST-Recertification-Maillist-Letter-4-6-11.docx

TEST-Recertification-Maillist-Labels-4-6-11.docx

The two Word files will also be saved as:

FINAL-Recertification-Maillist-Letter-4-6-11.pdf

FINAL-Recertification-Mailist-Labels-4-6-11.pdf

*All projects raw data Excel & Word documents never to be moved*

This will be a single project folder strictly for raw data files of final merges. There may be a subfolder used to save practice or test pairs to ensure the final works as expected

*Procedure*

A test Word and Excel doc will be created to ensure that the links between the files will work as expected. The merge fields will be determined and placements will be determined. These files will also have TEST in their file name

Final files will have FINAL in their name along with the date of the merge. ALL merges will be saved as a PDF for portability and moved to appropriate locations based on the project. This will include ALL Recertification Letter Invitations, labels used for mail outs and any other mass provider communications with the same letter going to more than 1 provider.