

# YGL Mail and Email Merge-MS Office

These instructions correspond with the Microsoft Office 2007 and 2010 Mail Merge and E-mail Merge features and functionality. For other versions, please consult your IT dept.

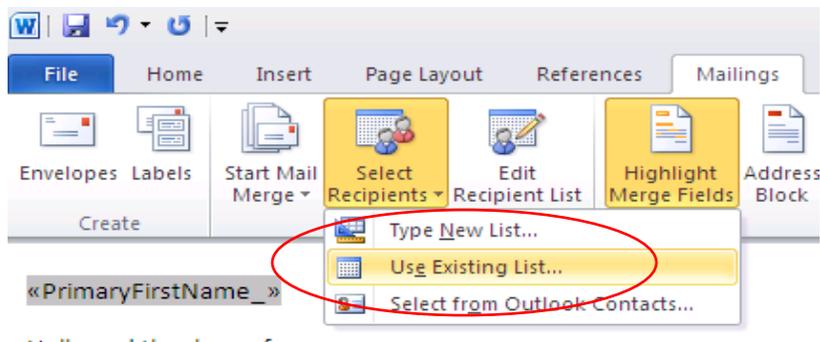
## 1.0 Mail Merge in Microsoft Word

### Part I: Saving as an Excel Sheet from You've Got Leads

1. In YGL, search in *Leads*, *Tasks*, or *Sources* for those contacts for which you wish to create letters for and click the Excel link  located at the bottom right of the page.
2. Depending upon the browser you are using, i.e. Chrome, Internet Explorer, Firefox etc., the program may prompt you to click the export tab at the bottom right, or click 'yes' or 'open' to open the Excel file.
3. Once your Excel sheet is open, Go to FILE, choose **Save As** and name your document by typing the name in the 'File name' field. In these instructions we will use the name "**YGL mailing**". *Please understand that you will want to use a unique name for each mailing. Save it in your My Documents folder (or anywhere you'd like, such as your desktop) by selecting My Documents in the left hand side of the window and clicking on Save.*
4. Close your Excel program

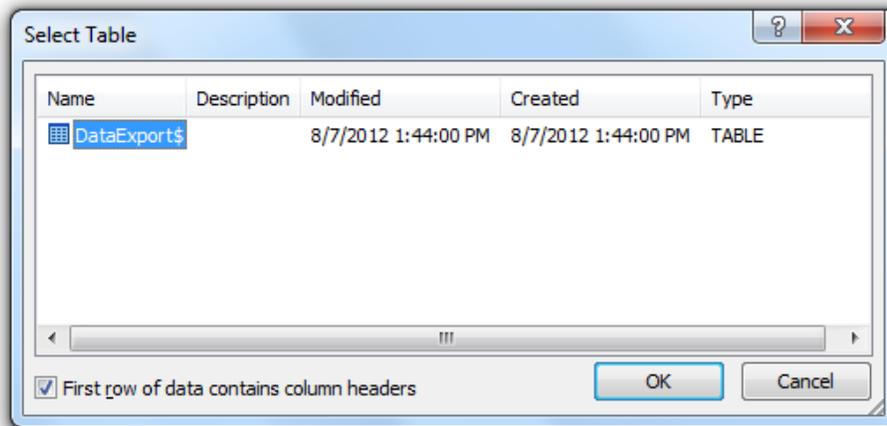
### Part II: Linking your Excel worksheet with your Word page

5. Open a new Word document
6. Under the **Mailings** tab, click on **Select Recipients** and then scroll down and click on **Use Existing List**.



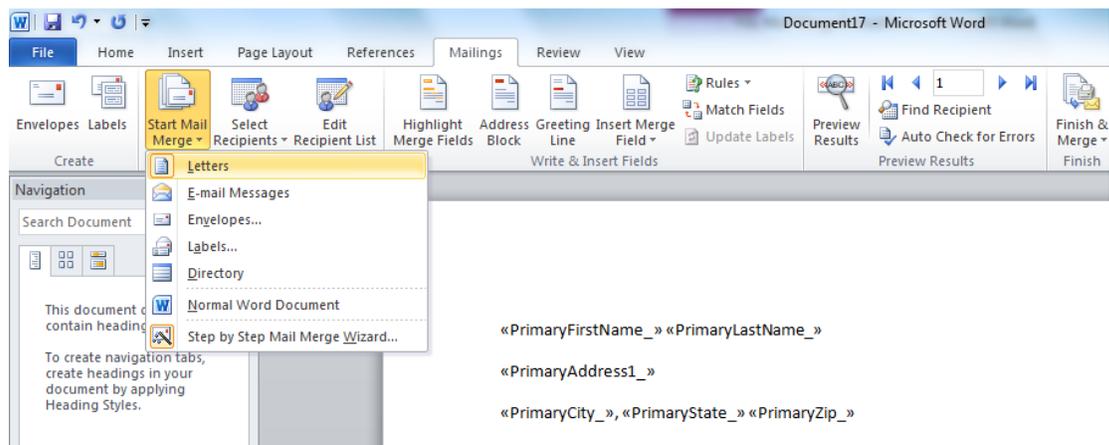
7. In the Select Source Data box, select **My Documents** in the left hand side of the window. Find and select the file labeled "**YGL mailing.**" Then click **Open**.
8. In the Select Table select(highlight) **DataExport\$** or your version of Excel may have **Sheet1\$**. Be sure that the check box option next to "**First row of data contains column headers**" is checked. Then click **OK**.

# YGL Mail and Email Merge-MS Office



## Part III: Creating the letter

9. You're drop down menu to choose from 'Letters', 'E-mail Messages, Labels etc.' is located by clicking on the **Start Mail Merge** quick access tab. (creating an email merge is address in section 2.0 of this document). Note: there is handy, step by step Mail Merge Wizard at the bottom of this drop down list.



10. Write a letter as you would like it. For any section that would be dependent on the information from your linked Excel sheet, follow these steps...

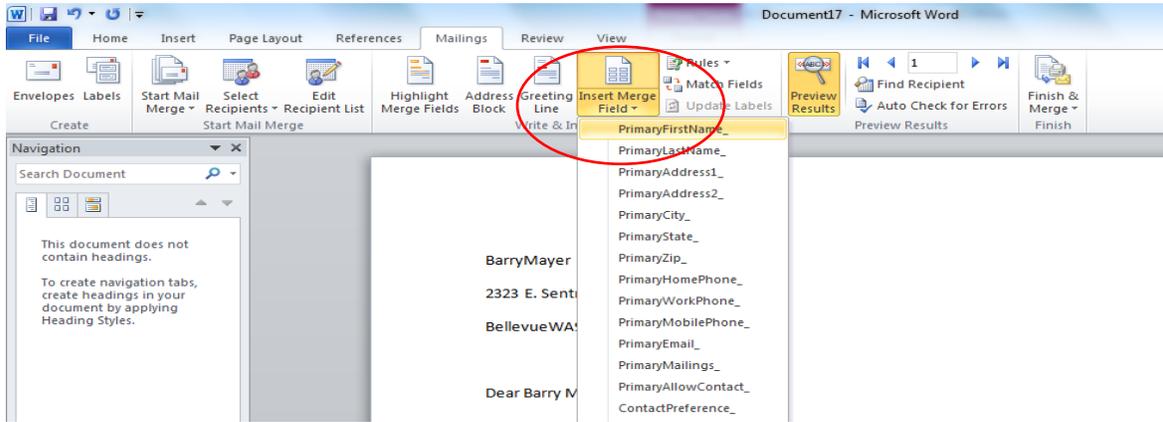
**This is the part where some people get confused. Don't worry, these steps are simple and easy to follow!**

11. In the quick access tabs, select **Mailings**. Then select **Insert Merge fields**.

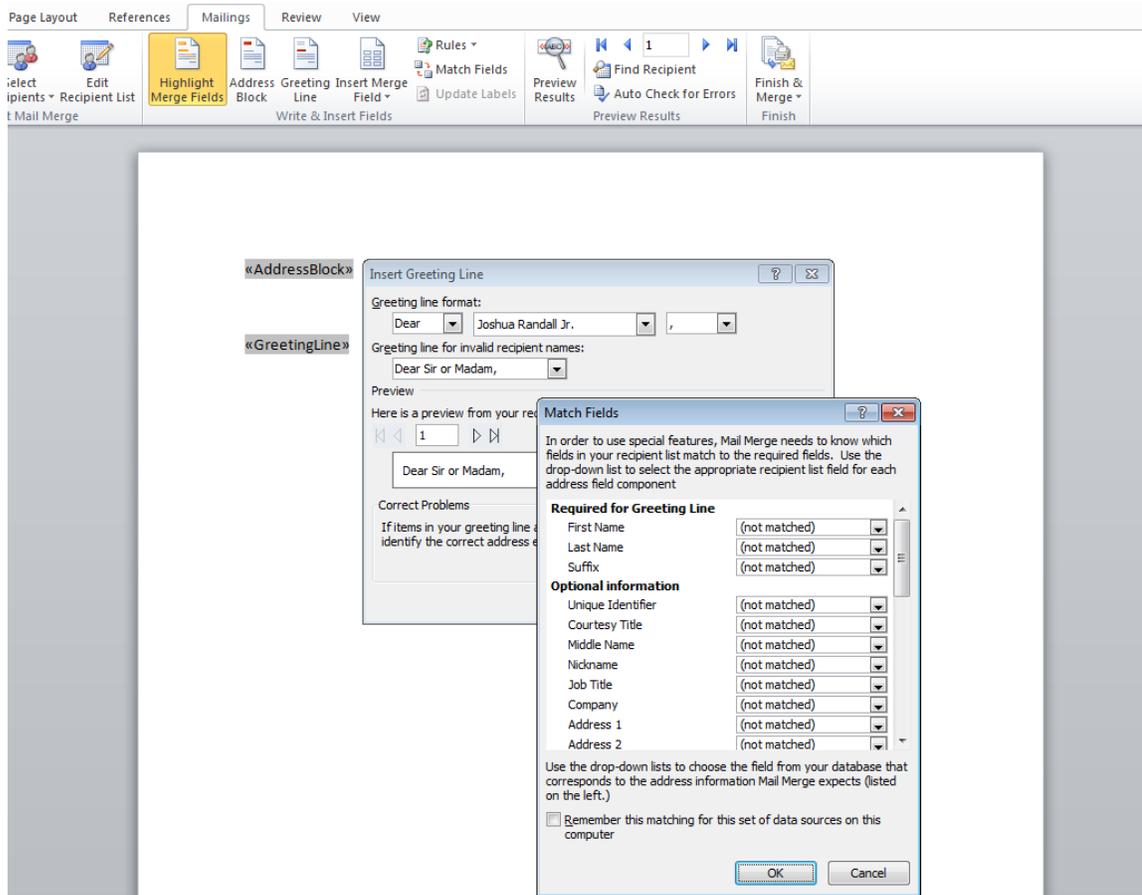
12. From the **Insert Merge Field** drop down, select the options that you would like to include in your letter. For the most part these are the options that you would most likely choose:

# YGL Mail and Email Merge-MS Office

**PrimaryFirstName, PrimaryLastName, PrimaryAddress1, PrimaryCity, Primary State, and Primary Zip.** Once you've made those selections click ok. (see screen shot directly below).

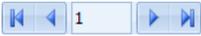


13. Please note, you may use the **Address Block** and **Greeting Line** quick access tabs as well. If you decide to use these tabs, remember you must Match the Fields by clicking upon the 'Match Fields' button once you've chosen either Address Block or Greeting Line.



# YGL Mail and Email Merge-MS Office

Note: The **Insert Mail Merge** tab is often times preferred, simply because it is a bit faster and somewhat of a 'shortcut'. Clicking on the **Highlight Merge Fields** quick access tab simply highlights the parts of your letter, i.e. primary first name, address etc., that you have merged.

14. Once you've finished creating the letter, preview the letter by clicking on the **Preview Results** in the Mailings tab. Make any format changes necessary. Clicking on the arrows in the  section allows you to preview the next letter.
15. Click on **Preview Results** to return to the template view.

## Part V: Printing Letters

16. In the Mailings tab under the Finish group, click on **Finish & Merge**
17. Click on **Print Document**
18. In the Merge to Printer box, select **All** and then click **OK**.
19. In the Print box, click on the printer you would like to print your letters to and then click **OK**.  
Your letters will now print.

## 2.0 Email Merge in Microsoft Word

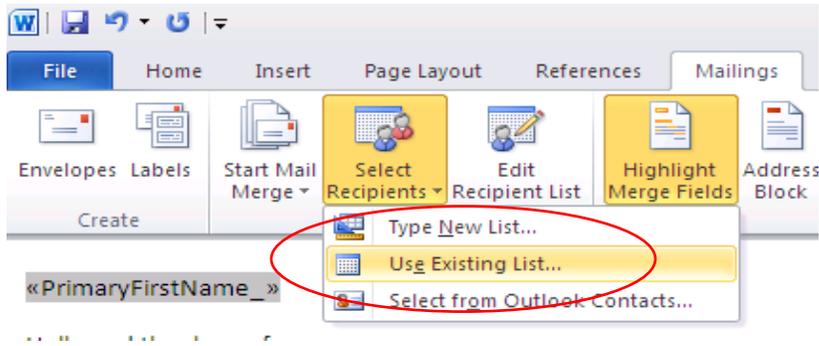
### Part I: Saving as an Excel Sheet from You've Got Leads

1. In YGL, search in Leads, Tasks, or Sources for those contacts for which you wish to create letters for and click the Excel link    located at the bottom right of the page.
2. Depending upon the browser you are using, i.e. Chrome, Internet Explorer, Firefox etc., the program may prompt you to click the export tab at the bottom right, or click 'yes' or 'open' to open the Excel file.
3. Go to FILE, choose **Save As** and name your document by typing the name in the 'File name' field. In these instructions we will use the name "**YGL mailing**". *Please understand that you will want to use a unique name for each mailing.* Save it in your **My Documents** folder (or wherever you'd like, maybe on your desktop) by selecting **My Documents** in the left hand side of the window and clicking on **Save**.
4. Close your Excel program

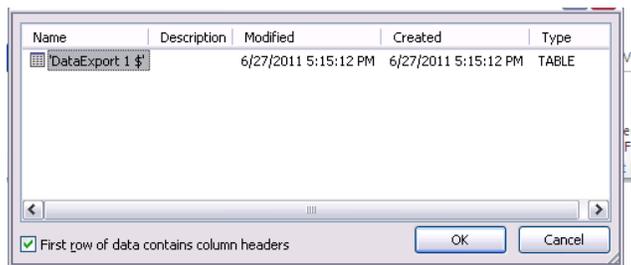
### Part II: Linking your Excel worksheet with your Word page

5. Open a new Word document
6. Under the **Mailings** tab, click on **Select Recipients** and then scroll down and click on **Use Existing List**.

# YGL Mail and Email Merge-MS Office

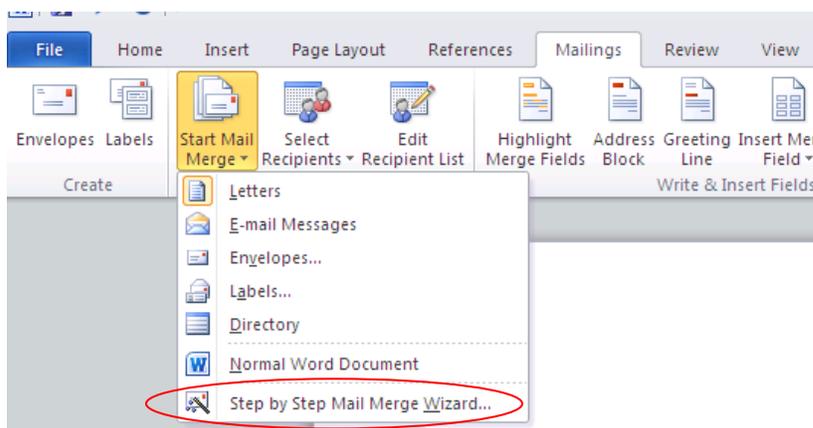


7. In the Select Source Data box, select **My Documents (or wherever you saved your Excel file)** in the left hand side of the window. Find and select your Excel document and then click **Open**.
8. In the Select Table select (highlight) **DataExport\$** or your version of Excel may have **Sheet1\$**. Be sure that the check box option next to "**First row of data contains column headers**" is checked. Then click **OK**.



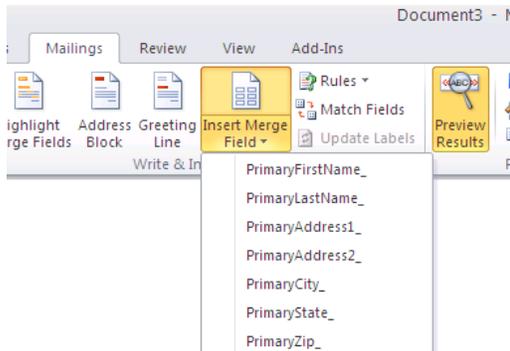
## Part III: Creating your E-mail

1. Find the quick access button **Start Mail Merge**, and click on E-mail Messages. You will notice there is a handy Step by Step Mail Merge Wizard you can choose to walk you through the steps. (Note: it is not mandatory to use this help wizard)



# YGL Mail and Email Merge-MS Office

2. Write an email as you would like it. For any section that would be dependent on the information from your linked Excel sheet, follow these steps...
3. From the **Insert Merge Field** drop down, select the options that you would like to include as part of your email. For the most part these are the options that you would most likely choose: **PrimaryFirstName**, **PrimaryLastName**, **PrimaryAddress1**, **PrimaryCity**, **Primary State**, and **Primary Zip**. Once you've made those selections click ok. (see screen shot directly below).



4. Once you have completed your email, and preview results, you then click on the quick access button Finish & Merge. This provides a drop down where you can edit the documents, print documents, or Send E-mail Message. Choose Send E-Mail Messages to complete your Email Merge. **Remember, when you click Send E-mail Messages, this will actually begin to transmit the emails to the recipients you've specified.**

