

User Guide of Mail-Merge with RightFax

Version 1.01 Prepared by ITO/UCU



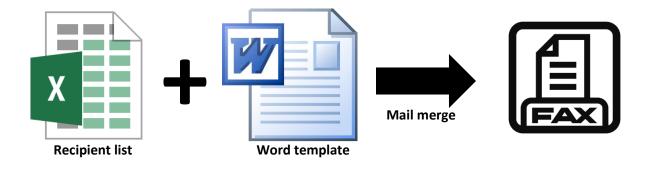
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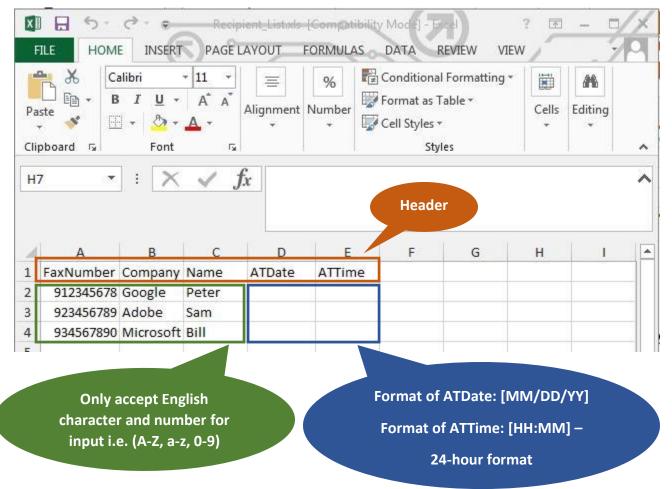
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I. Overview of Mail-merge function

Mail-merge allows you to produce multiple faxes from a single template form and a structured data source. When performing mail-merge, you will need a Word document and a recipient list, which is typically an Excel workbook.

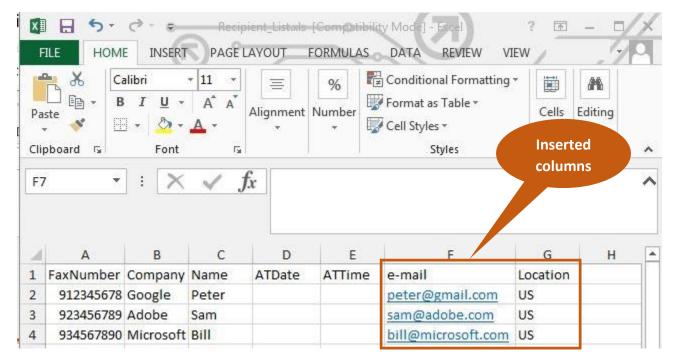


- II. Prepare recipient list
 - 1. A recipient list template (Recipient_List.xls) will be provided as follow. The header of first five columns should not be changed and they represent the recipient fax number, recipient company name, recipient name, scheduled fax date and scheduled fax time respectively.

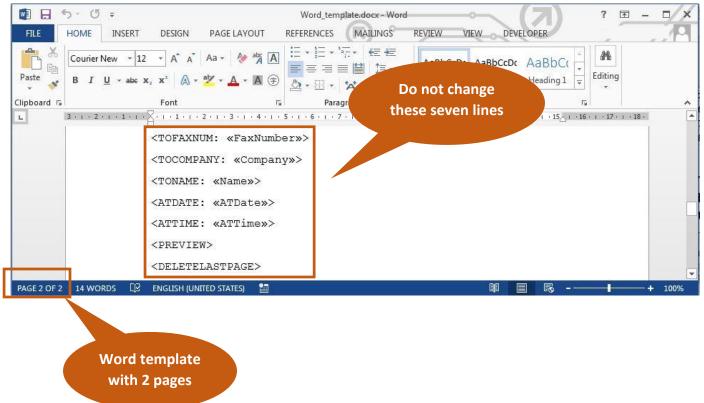


Schedule the fax to send on specific date by entering date and time under "ATDate" and "ATTime" column. If you want to send faxes right now, leave these two columns blank.

2. You can insert any data field behind the first five columns.



- III. Prepare Word template
- 1. A Word template (Word_template.docx) will be provided as follow. This Word template contains two pages. Do not change any content on the second page.



2. Click "MAILINGS".

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3. Click "Start Mail Merge" and select "Letters".

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Create	E Letters	Write & Insert Fields	Preview Results	Finish 🔺
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	Normal Word Document Step-by-Step Mail Merge Wizard			

4. Click "Select Recipients" and select "Using Existing List...".



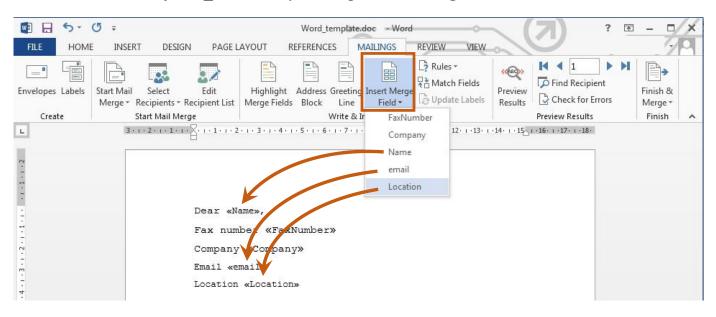
5. Select "Recipient_List.xls" and click "Open".

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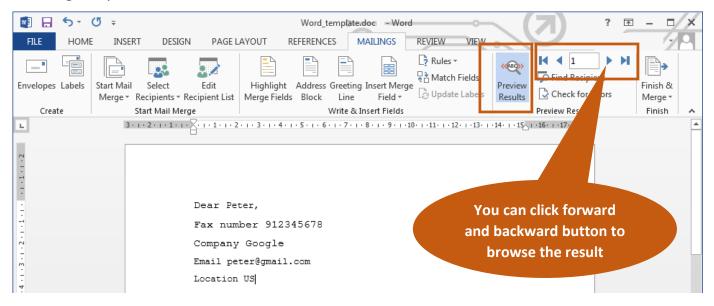
6. Click "**Ok**".

Name	Description	Modified	Created	Туре
III Sheet1\$		6/29/2015 11:07:22 AM	6/29/2015 11:07:22 AM	TABLE

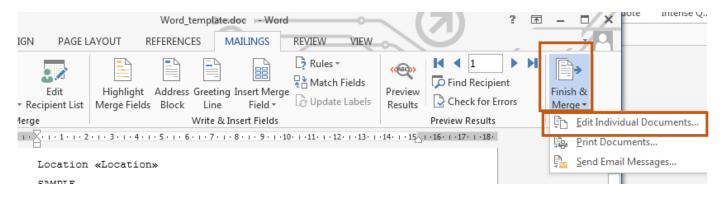
 Now you can write content to this fax template and you can insert specific field defined in "Recipient_List.xls" by clicking "Insert Merge Field" and select from menu.



8. To get a preview of faxes. Click "Preview Results".



9. Now you can select "Finish & Merge" and click "Edit Individual Documents...".



10. Select "All" and click "Ok".

Merge to New Document
Merge records
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OK Cancel

11. A new Word Document "Letters1" will be created.

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12. Click "VIEW".

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13. Click "Macros" and click "View Macros".

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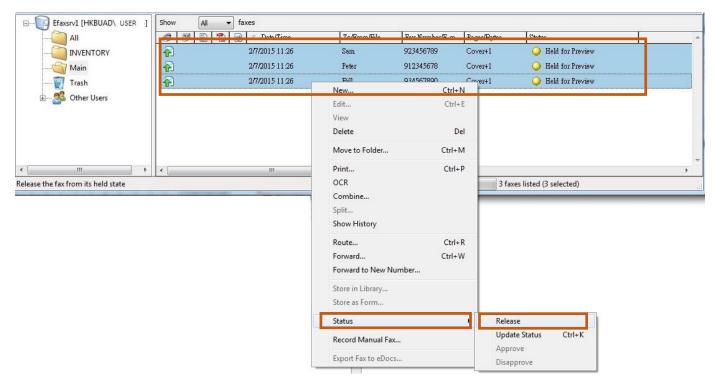
14. Click "FaxMailMerge" and click "Run".

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Description:			
			Cancel

15. Open "RightFax FaxUtil" and you should get your faxes with status "Hold for Preview".

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File Fax List Tools Help									
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					31	faxes listed			

16. Select multiple faxes and right click. Select "Status" and select "Release".



17. Scheduled fax will have a status "Delay Until <scheduled time and date>".

Non-scheduled fax (i.e. leaving "ATDate" and "ATTime" blank in "**Recipient_List.xls**") have a status "**Delay Until <the current time of processing >**".

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File Fax List Tools Help									
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	A	6/10/2015 17:45	Bill	934567890	1 pgs	Delayed Until 11:15 8/10/2015			
🗄 🔜 Other Users		6/10/2015 17:45	Sam	923456789	1 pgs	Oelayed Until 11:15 8/10/2015			
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