香港浸會大學
HONG KONG BAPTIST UNIVERSITY

User Guide of
Mail-Merge with RightFax

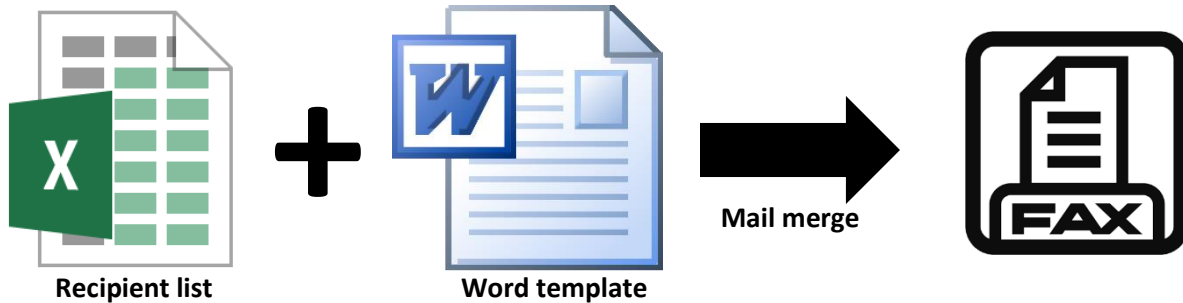**Version 1.01**

Prepared by ITO/UCU

Table of Content

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.

Recipient list + Word template → Mail merge → FAX

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.

Only accept English character and number for input i.e. (A-Z, a-z, 0-9)

Format of ATDate: [MM/DD/YY]

Format of ATTime: [HH:MM] – 24-hour format

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.
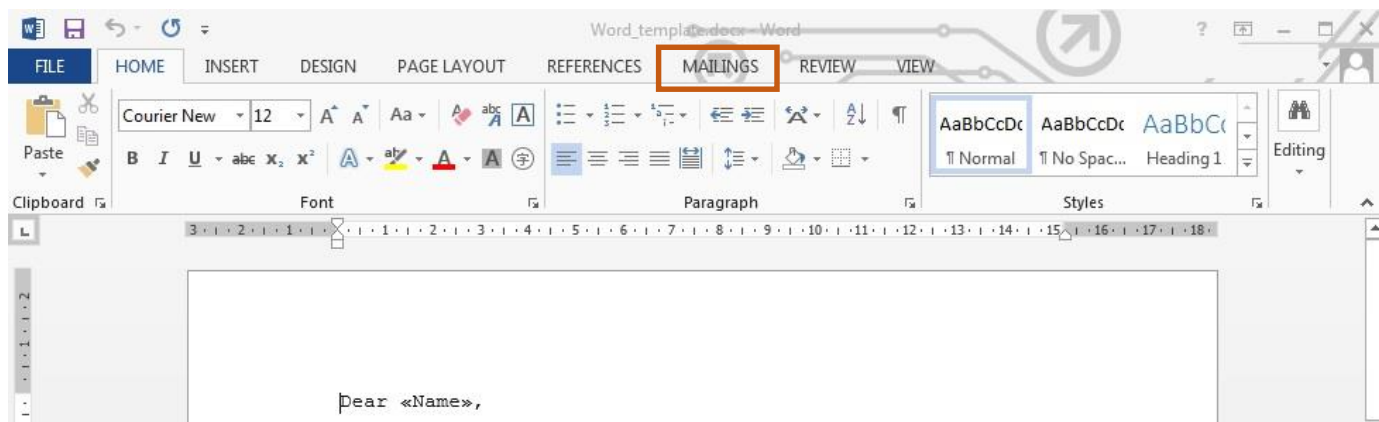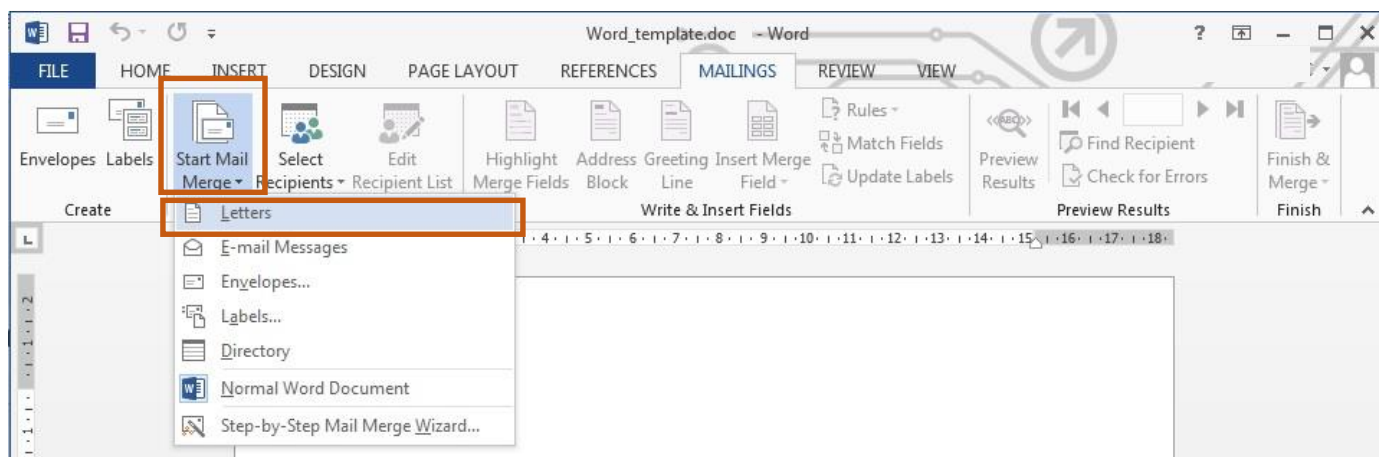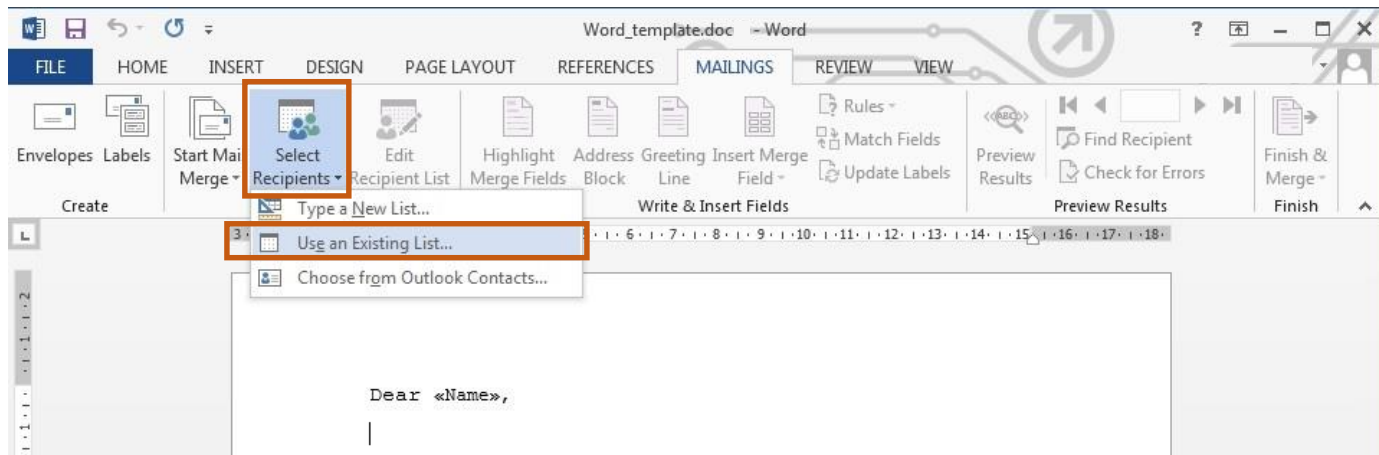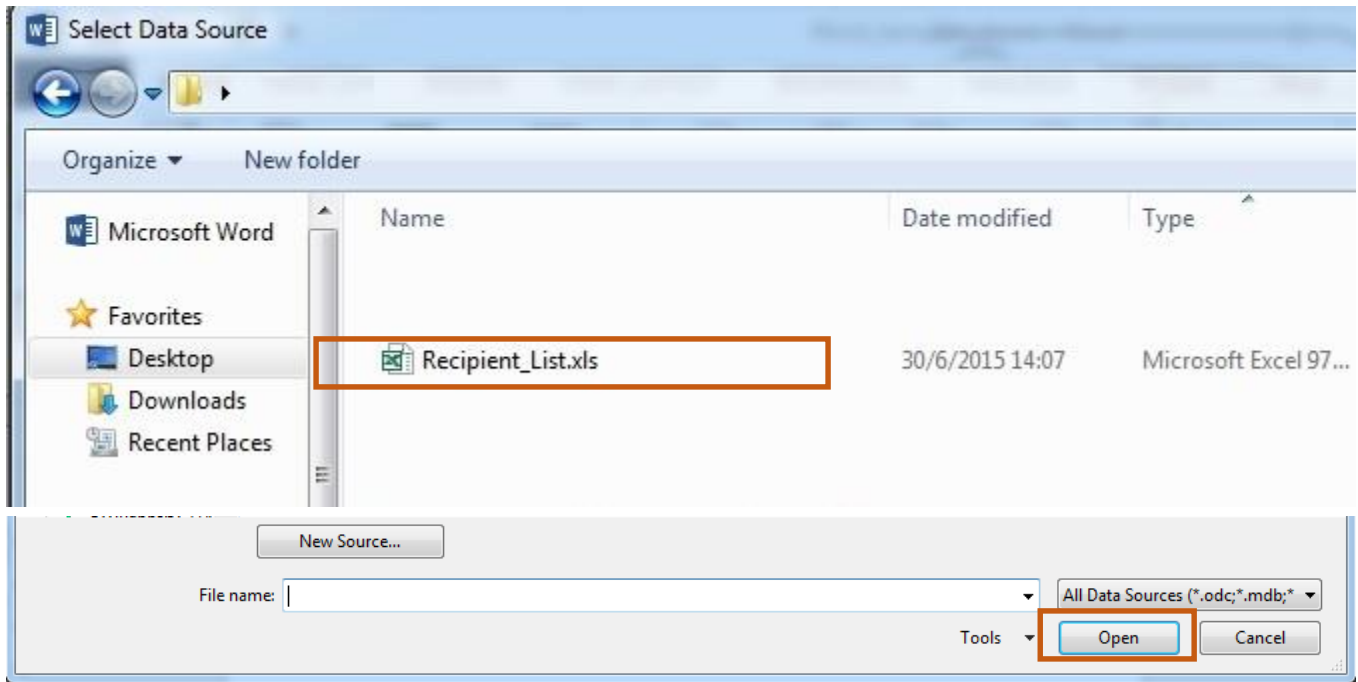
2. Click "**MAILINGS**".

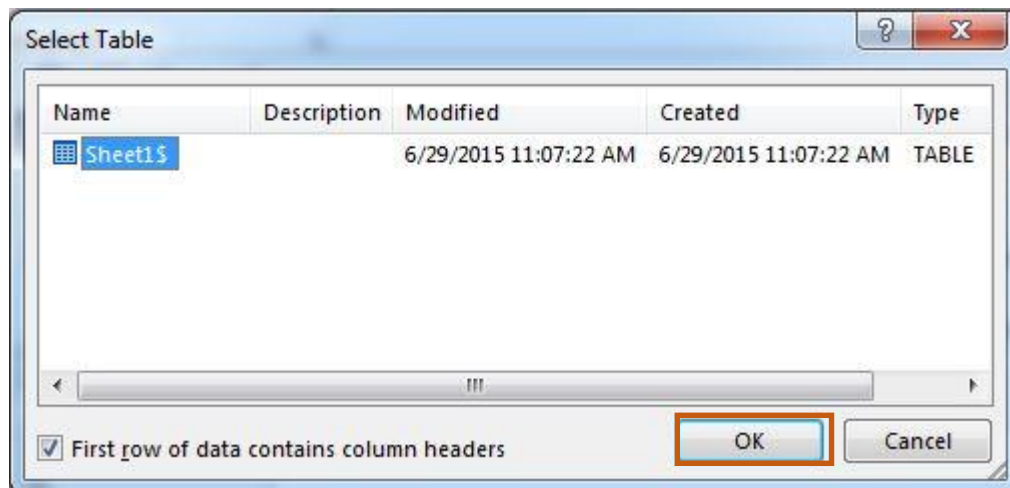3. Click "**Start Mail Merge**" and select "**Letters**".

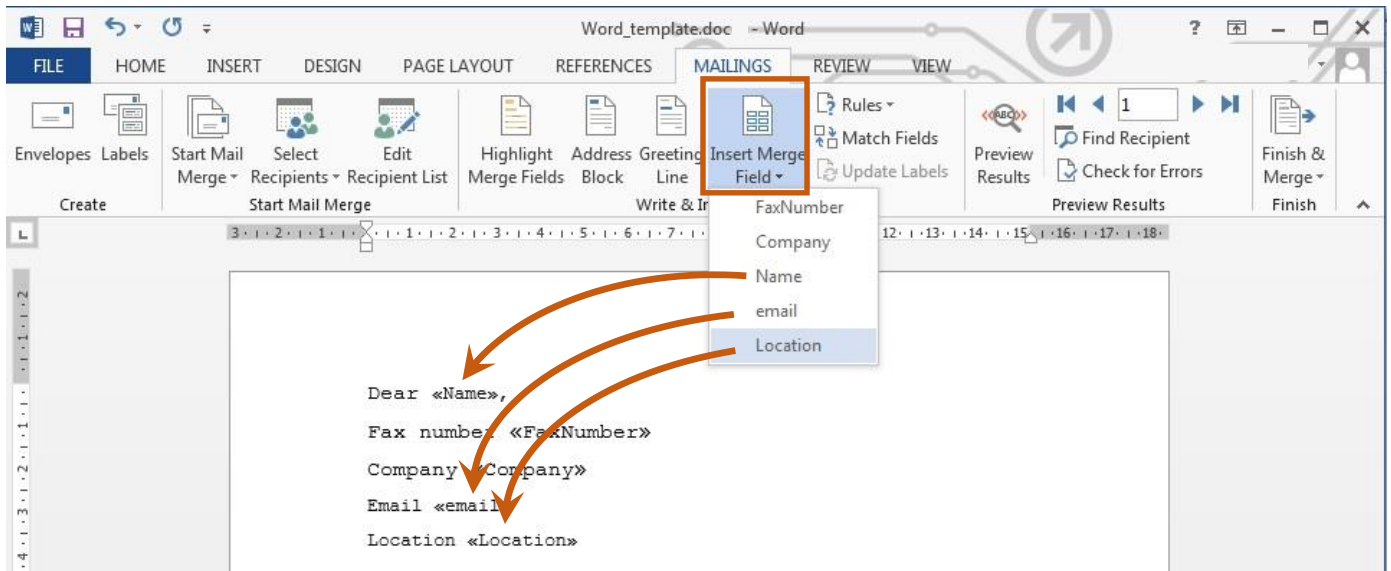4. Click "**Select Recipients**" and select "**Using Existing List…**".

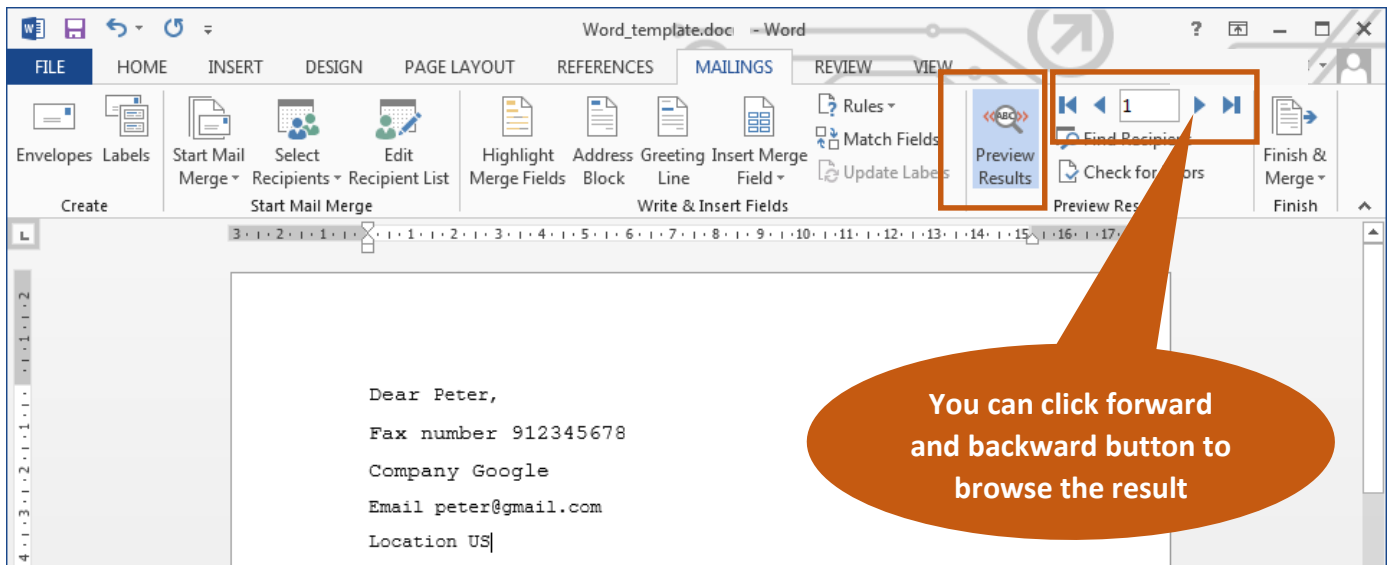5. Select "**Recipient_List.xls**" and click "**Open**".
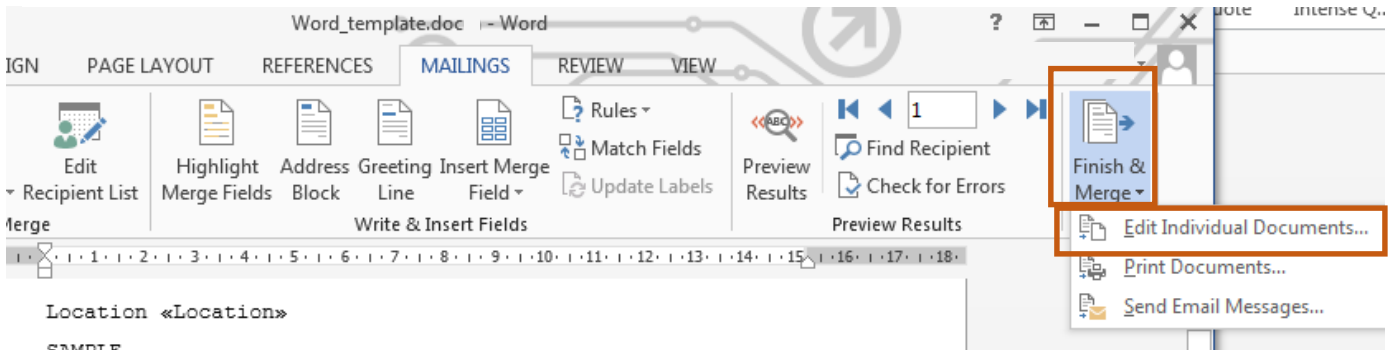

6. Click "**Ok**".

7. 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.
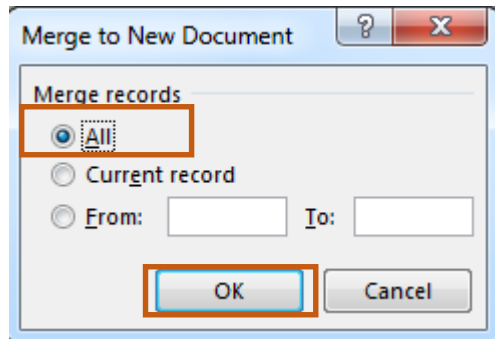

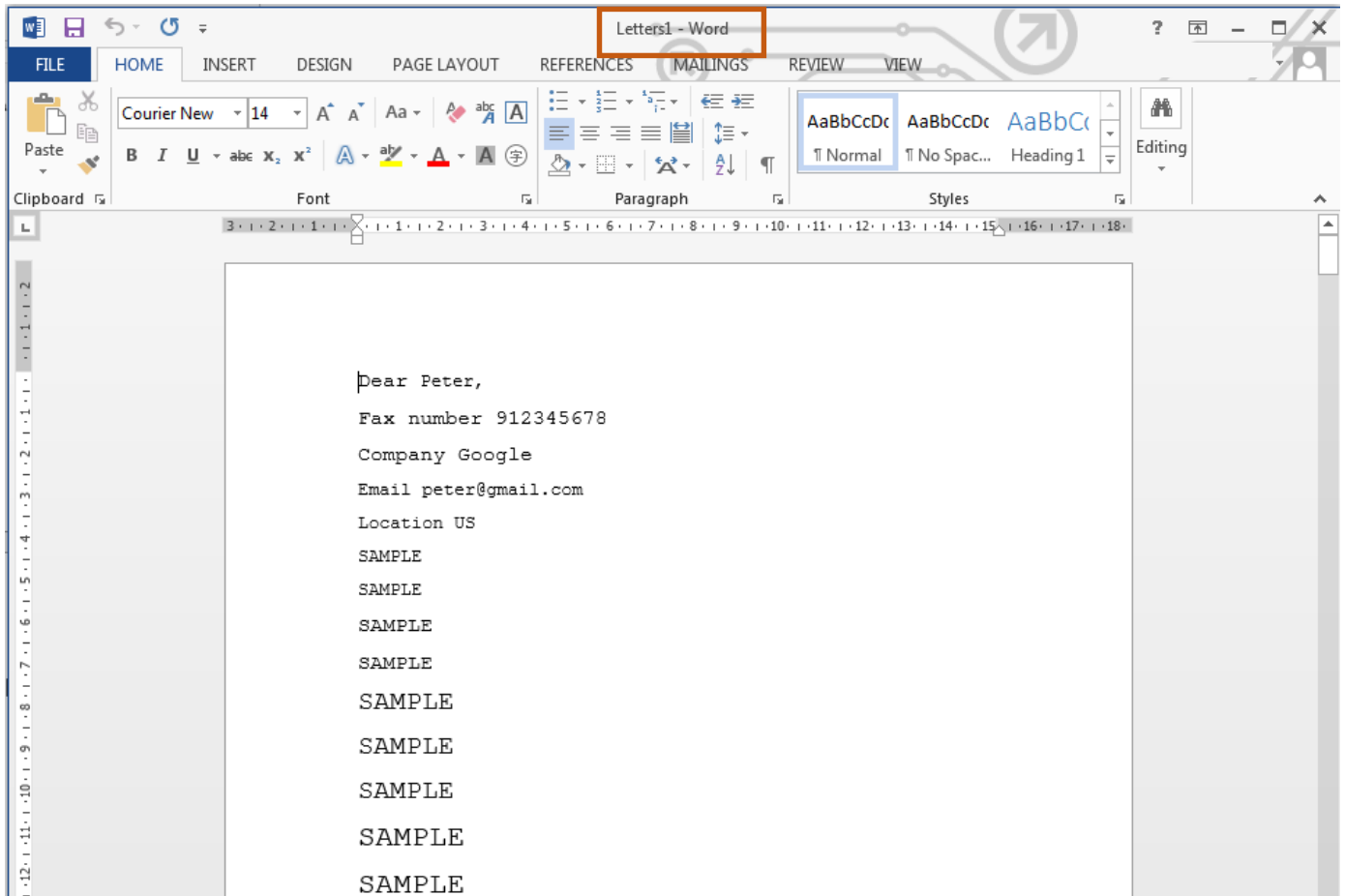8. To get a preview of faxes. Click "**Preview Results**".

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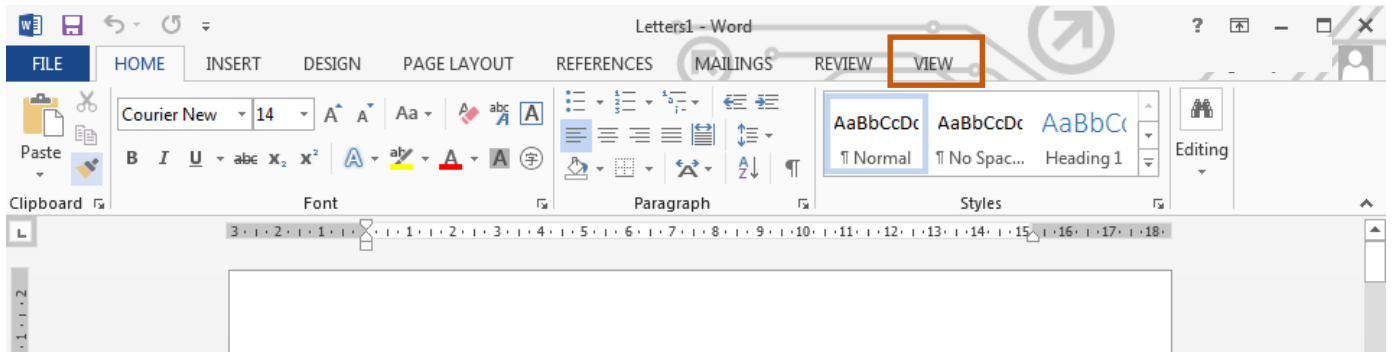

10. Select "**All**" and click "**Ok**".
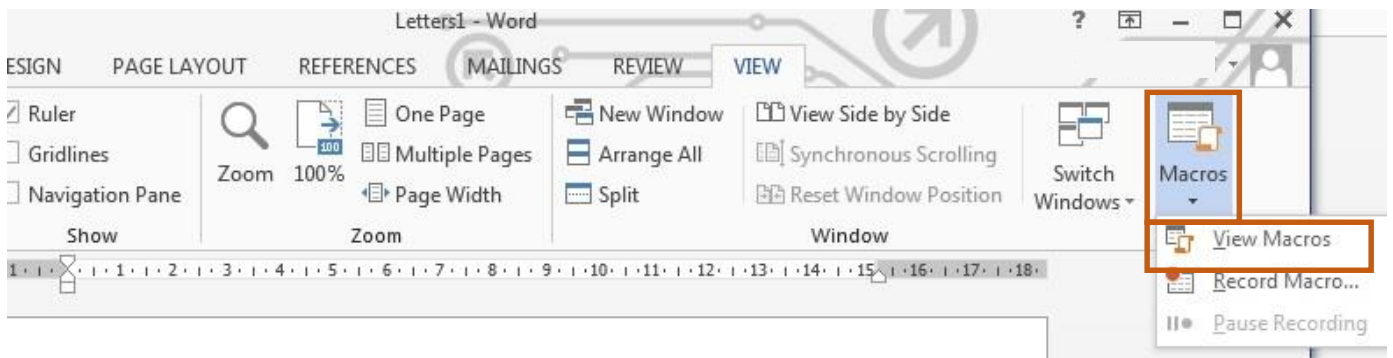

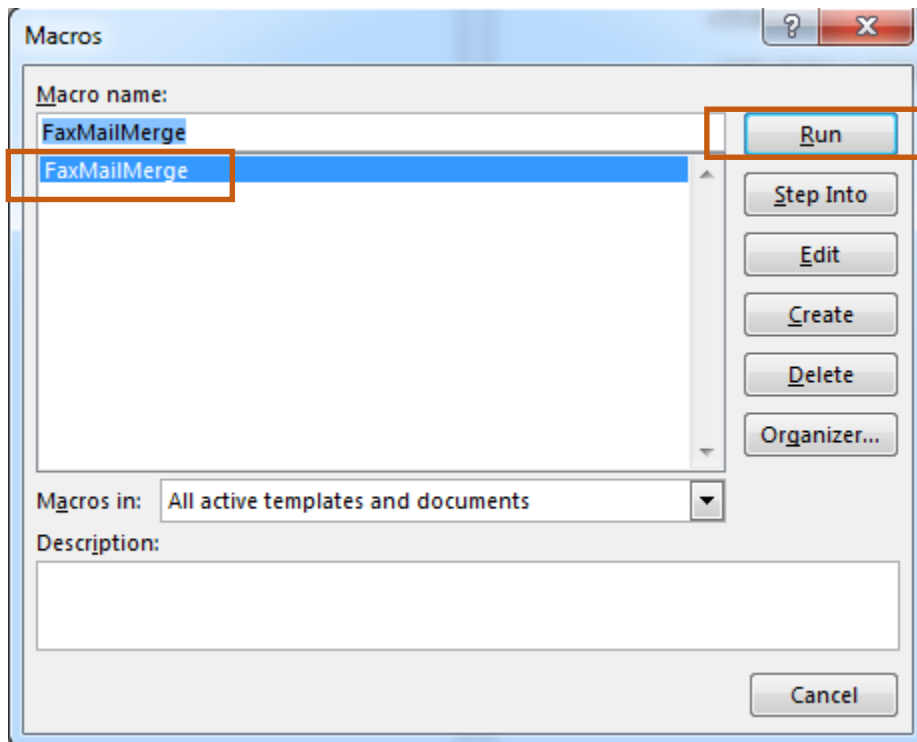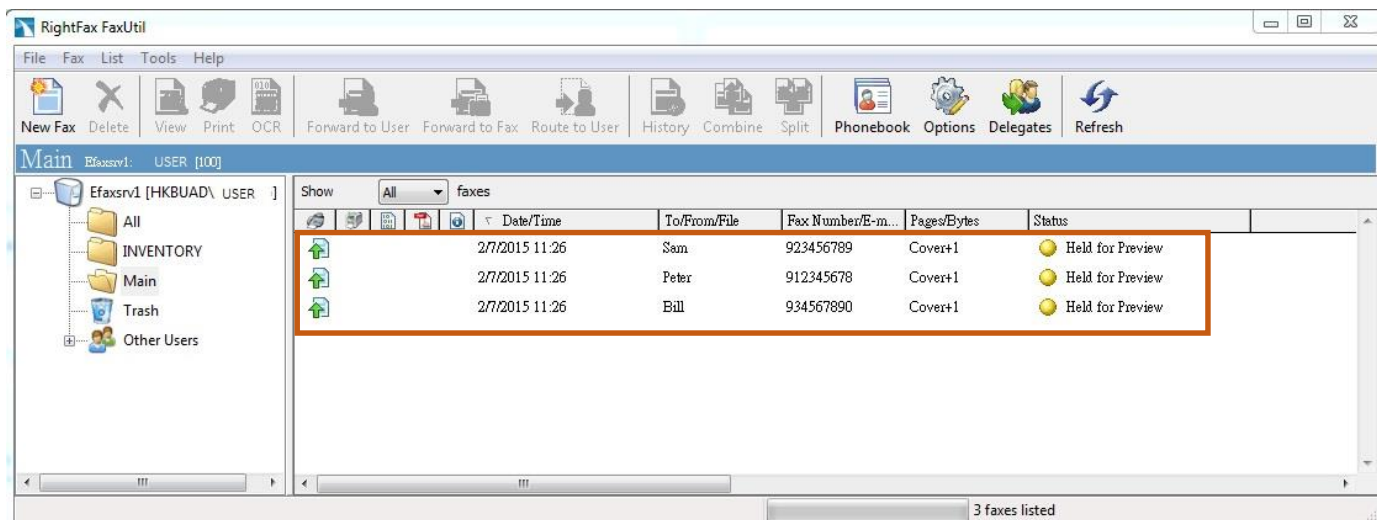11. A new Word Document "Letters1" will be created.

12. Click "**VIEW**".
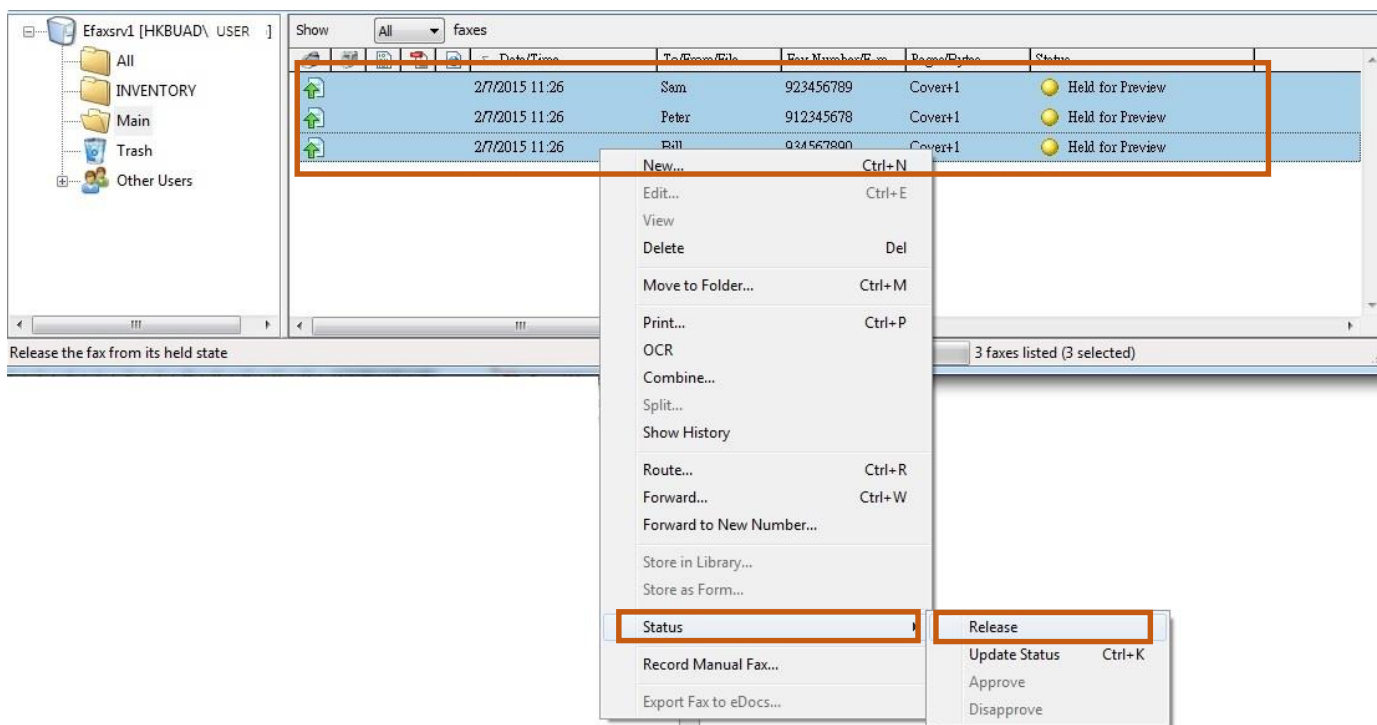

13. Click "**Macros**" and click "**View Macros**".

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

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

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 >**".