



Mail Merge for the GAF Survey Letter

Process Overview

About Mail Merge

You have just received a MarketPulse™ form letter from GAF that is to be sent out to your customers. It's recommended that you use Microsoft® Word's mail merge to insert your customers' names and addresses into this letter.

The mail merge process will create copies of this letter, each with the name and address of a customer, ready to be printed and mailed.

What You Will Need

There are two files that you will need to accomplish this mail merge:

1. The MarketPulse™ form letter.
 2. A file that contains your customers' names and addresses. This is called the **data file**. This file can be a:
 - Microsoft® Word file created in a table format
 - Microsoft® Excel file
 - Microsoft® Access file
 - Microsoft® Outlook Contacts list
 - Table in an HTML file
 - Delimited text file. This is a plain text file in which the fields in each row are separated by a comma or tab character and each row of data is separated by a carriage return.
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Mail Merge Process

There are three basic phases to the mail merge process that are detailed in the following pages.

1. Customize the MarketPulse™ form letter with your own company name and GAF Contractor ID in the appropriate places in the letter.
 2. Create the data file, if needed. You may already have a file that contains the names and addresses of your customers. If it is in one of the formats listed above, you may use that file and select the fields that will be used in the mail merge.
 3. Perform the mail merge. Mail merge creates a third file with the merged information. Each page of this file contains the name and address of a customer in the appropriate locations; these are the letters you will mail to your customers. Print the merged file.
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Example Pictures

The example pictures used in this guide are from Microsoft Word 2003. If you are using a different version of Word, your screen may look slightly different.



Mail Merge for the GAF Survey Letter

Phase 1 - Customize the MarketPulse™ Form Letter

Insert Your Company Information

You will want to enter your own company name and GAF Contractor ID in the appropriate places in the letter and save it.

Step	Action
1	Use Microsoft® Word to open the MarketPulse™ form letter.
2	Delete the following parts of the letter. The mail merge process will replace this section with the appropriate fields from your data file. (Property Owner) (Address) (City, State Zip Code)
3	Replace [Date] with today's date.
4	Delete the (Property Owner Name) ; this will also be replaced in the mail merge process.
5	Replace (Contractor's Company Name) with your own company name.
6	Replace (Contractor's Name) with your own name.
7	Replace (Contractor ID) with your own GAF contractor ID.
8	Save the letter with the changes. This is the version of the letter that you will use in the mail merge.



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Phase 2 - Create a Data File

Create Word Table File

If you do not already have a file that contains your customers' names and addresses, use the following steps to create a table in Word that will serve as your data file.

Preliminary Step: Determine how many columns you will need and what you will name the columns. Each column will represent a field in the merged letter, such as first name, last name, etc.

Step	Action
1	Open Microsoft® Word.
2	From the menu, click on Table , rest your cursor on Insert and then click Table .
3	<p>The Insert Table dialog box displays.</p> <ul style="list-style-type: none"> • Columns – Enter the number of columns (fields) you will need. • Rows – Enter the number of customers you will want to enter, plus one more for the “header row”. This need only be an approximate number; you can add rows during entry. • Click  <div data-bbox="781 1073 1180 1539" data-label="Image"> </div> <p>Result: You now have a blank table with the designated number of rows and columns.</p>

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Phase 2 - Create a Data File, Continued

Create Word Table File (continued)

Step	Action																								
4	<p>Fill in the first row with the names of the columns. You may use spaces between the words in each box (cell). This is called the “header row”.</p> <table border="1"> <thead> <tr> <th>Title</th> <th>Last Name</th> <th>First Name</th> <th>Street Address</th> <th>Second Address Line</th> <th>City</th> <th>State</th> <th>Zip</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Title	Last Name	First Name	Street Address	Second Address Line	City	State	Zip																
Title	Last Name	First Name	Street Address	Second Address Line	City	State	Zip																		
5	<p>Starting in row 2, enter the names and addresses of your customers.</p> <ul style="list-style-type: none"> • <Tab> to advance to the next box (cell). • Word will automatically add rows, if needed. Press <Tab> in the last box of the current last row to automatically add another row. <table border="1"> <thead> <tr> <th>Title</th> <th>Last Name</th> <th>First Name</th> <th>Street Address</th> <th>Second Address Line</th> <th>City</th> <th>State</th> <th>Zip</th> </tr> </thead> <tbody> <tr> <td>Ms.</td> <td>Owens</td> <td>Dana</td> <td>35 Main Street</td> <td></td> <td>Newark</td> <td>New Jersey</td> <td>07101</td> </tr> <tr> <td>Mr.</td> <td>Bishop</td> <td>Eric</td> <td>22 Twain Avenue</td> <td>Unit 5</td> <td>Terrell</td> <td>Texas</td> <td>75160</td> </tr> </tbody> </table>	Title	Last Name	First Name	Street Address	Second Address Line	City	State	Zip	Ms.	Owens	Dana	35 Main Street		Newark	New Jersey	07101	Mr.	Bishop	Eric	22 Twain Avenue	Unit 5	Terrell	Texas	75160
Title	Last Name	First Name	Street Address	Second Address Line	City	State	Zip																		
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Mr.	Bishop	Eric	22 Twain Avenue	Unit 5	Terrell	Texas	75160																		
6	Delete any unused rows and save the file.																								

Excel Data File If you choose to create your data file in Excel, follow the same format as above.

- Row 1 must contain the name of the column.
- Row 2 will contain the name and address of your first customer.



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Phase 3 - Merge the Letter and the Data File

Mail Merge

Once you have customized the MarketPulse™ form letter and created your data file, you are now ready to perform the mail merge.

Note that there are several different ways you may execute the mail merge steps. For example, Word 2003 has a Mail Merge wizard that guides you through the merge process.

We have selected to demonstrate the merge using the Mail Merge toolbar, which has been available for several years with the last few versions of Microsoft® Word.

Step	Action
1	Open your customized version of the MarketPulse™ form letter.
2	Place your cursor in the letter where you would like to insert the name of the customer (below the header and above the date).
3	<u>Display the mail merge toolbar (if it is not already displayed):</u> From the menu, click on View , then click Toolbars and then click Mail Merge .
4	On the Mail Merge toolbar, click the Open Data Source button, second from left: 
5	On the Select Data Source dialog box: <ol style="list-style-type: none">1. Browse to find your data file2. Click on the file name to select it3. Click  Note: You will not actually see your data file display.

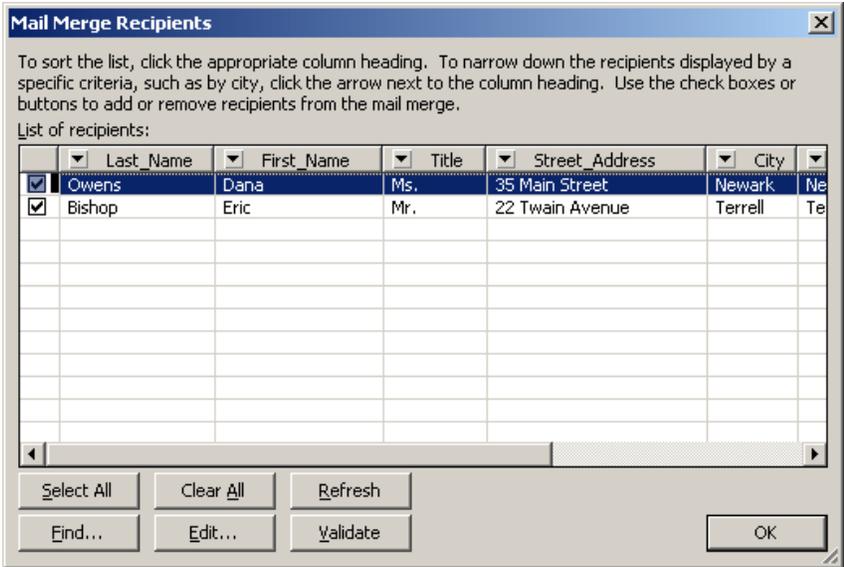
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Mail Merge for the GAF Survey Letter

Phase 3 - Merge the Letter and the Data File, Continued

Mail Merge (continued)

Step	Action
6	<p>If you are not sending the letter to all the customers in your data file, you will need to select the recipients.</p> <p>On the Mail Merge toolbar, click on the Mail Merge Recipients button, third from left.</p>  <p>The Mail Merge Recipients dialog box displays.</p> <ol style="list-style-type: none">1. Check the box next to each customer who should receive this letter.2. If your customer file is large, you may want to filter the list using the arrow buttons next to column headings.3. Click . 
7	<p>On the Mail Merge toolbar, click on the Insert Merge Field button, sixth from left:</p> 

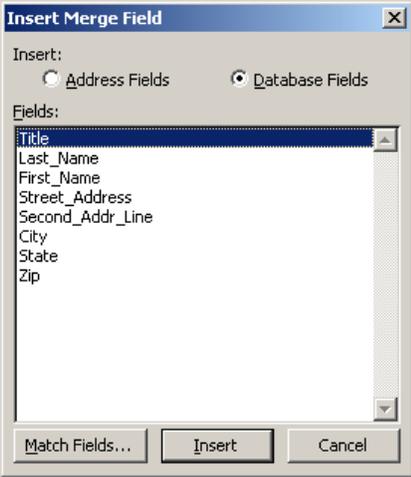
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Mail Merge for the GAF Survey Letter

Phase 3 - Merge the Letter and the Data File, Continued

Mail Merge (continued)

Step	Action
8	<p>The Insert Merge Field dialog box displays. The Fields box contains the names that you defined in row 1 of your data file. If you had spaces between the words, Word has automatically inserted an underscore line between each word.</p> 
9	<p>In the Insert Merge Field dialog box, click on the first field that you would like to insert into the letter and click .</p>
10	<p>Continue to insert fields into the letter. When you are done, click .</p> <p>Result: The customer's name and address fields are now placed in a row across the letter.</p> <div style="border: 1px solid black; padding: 10px; text-align: center;"> <p>Your Opinion Is Important – Please Help <i>“How Satisfied Were You With Your Roofing Decisions?”</i> <small>(less than 3 minutes required)</small></p> <p>«Title»«First_Name»«Last_Name»«Street_Address»«Second_Addr_Line»«City»«State»«Zip»</p> </div>

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Mail Merge for the GAF Survey Letter

Phase 3 - Merge the Letter and the Data File, Continued

Mail Merge (continued)

Step	Action
11	<p>Arrange the fields in the appropriate locations within the letter.</p> <ul style="list-style-type: none">Place your cursor between fields and press the <spacebar> to insert a space between fields.Press <Enter> between fields to place the field on the right of the cursor on the next line.Type a comma after the City field. <div style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;"><p>«Title» «First_Name» «Last_Name» «Street_Address» «Second_Addr_Line» «City», «State» «Zip»</p></div>
12	<p>In the greeting section of the letter, place your cursor between Dear and the colon.</p>
13	<p>Click on the Insert Merge Fields button and select the appropriate name field for the greeting (repeat steps 7-9 for the greeting). Insert a space between Dear and the field, if necessary.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;"><p>Dear «Title» «Last_Name»:</p></div>

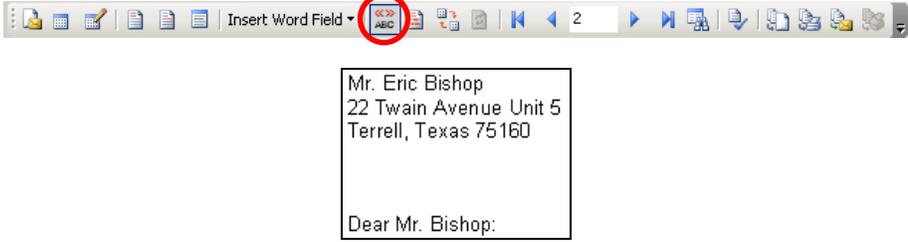
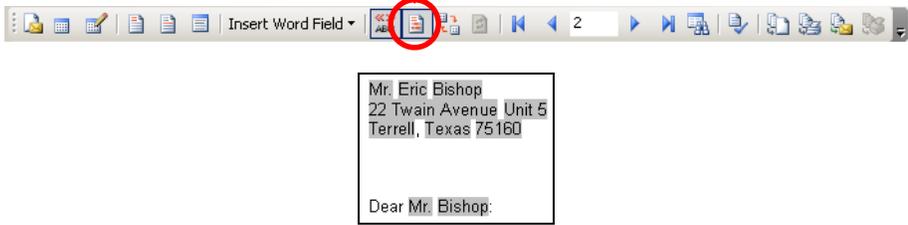
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Mail Merge for the GAF Survey Letter

Phase 3 - Merge the Letter and the Data File, Continued

Mail Merge (continued)

Step	Action
14	<p><u>Optional Step: View Merged Data</u></p> <p>You may preview the merge by clicking the View Merged Data button on the Mail Merge toolbar.</p>  <p>If you determine that changes are necessary you may make changes here. However, please note:</p> <ul style="list-style-type: none">• Changes inside the field will not be effective. This is just a preview; the actual mail merge process will fill the fields from the data file.• Changes outside the field will display on every customer letter in this merge, not just the current customer.• Changes will be effective for only this mail merge. If you think you may want to print these letters again in the future, please make the change on the appropriate original data or letter file.
15	<p><u>Optional Step: Highlight Merge Fields</u></p> <p>Click the Highlight Merge Fields button on the Mail Merge toolbar to see all the fields in your letter. This helps you check spacing between the fields and can adjust the placement of the fields in the letter at this point <u>for this mail merge only</u>.</p>  <p>Click the button again to remove the highlight.</p>

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Mail Merge for the GAF Survey Letter

Phase 3 - Merge the Letter and the Data File, Continued

Mail Merge (continued)

Step	Action
16	Click the Merge to New Document button on the Mail Merge toolbar to execute the merge. 
17	Click the All button to merge all your selected customers, then click  
18	You may browse through the merged document to do a final check before sending it to the printer. <u>Changes made at this point are effective for this mail merge only.</u>
19	If you are satisfied with the look of the letters, click the printer button on your Standard toolbar  and print the letters.

Saving the Merged Letter

You may either save or discard the merged letters file. When you close this file, Word displays the standard save dialog box:

