



Mastering Mail Merge

2014 DDI User Group Meeting
April 22-23, 2014



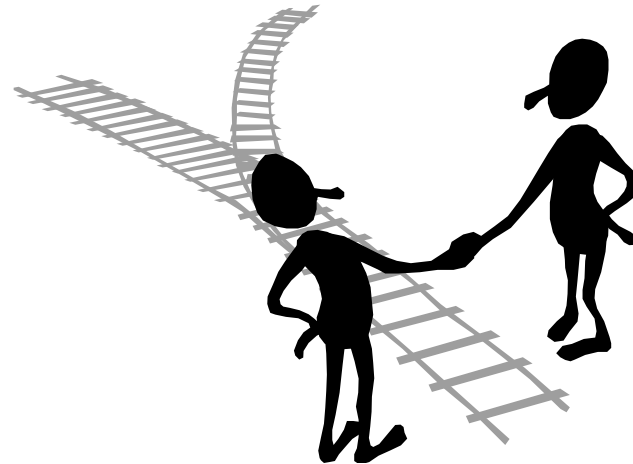
Serving those who serve others





Overview

- ❑ How to Create/Edit Your Template
- ❑ Regenerating Merged Documents
- ❑ Manual Remerge
- ❑ PDF Generation





What Do You Use Mail Merge For?



Investment Statements?

Maturity Notices?

Demand Statements?



How to Create Templates

- ❑ Create the letter in Microsoft Word
- ❑ Include the fields that you would like to be merged into the letter.



****DDI Staff will verify that the fields that you want to merge are named correctly.**



Create Templates - cont.

- ❑ Send the form to DDI Support
 - As with any request, be sure to include the Priority and when you would like for the work to be completed.

- ❑ DDI Staff will load the new form into DDI Connect.



How to Edit Templates

- Two Ways to Edit Templates
 - DDI can make the change for you (best for quick changes like changing a phone number on the form).
 - Make the changes to the Word form and send the form to DDI. DDI will then go through the same process to load the updated form to DDI Connect.



Questions?





Reprint Merged Documents

- ❑ Merge Forms System → Reprint Merge Requests
→ fill out the Start and End Dates → Search

Remerge?	Batch	Date	Time	Document Description	
<input checked="" type="checkbox"/>	All	31556	03/14/2014	2:43PM	Ln Ins Exp Notice: 03/14/14
<input type="checkbox"/>	None	31555	03/14/2014	2:55PM	Withdrawals for 03/14/2014
<input type="checkbox"/>	None	31554	03/14/2014	2:53PM	Deposit Rcpt 03/14/2014
<input type="checkbox"/>	None	31553	03/14/2014	2:53PM	Deposit Rcpt 03/14/2014
<input type="checkbox"/>	None	31552	03/14/2014	2:53PM	Deposit Rcpt 03/14/2014
<input type="checkbox"/>	None	31551	03/14/2014	2:57PM	Inv Notes: 03/14/14
<input type="checkbox"/>	None	31550	03/14/2014	2:53PM	Loan Payment Rcpt: 03/14/2014 - 03/14/2014



Reprint Merged Documents

- ❑ Click on the batch that you would like to reprint and select Remerge

Remerge?	Batch	Date	Time	Document Description
<input checked="" type="checkbox"/>	All	31213	01/02/2014 4:59PM	Maturity Notice: 01/02/14
<input type="checkbox"/>	None	31212	01/02/2014 1:58PM	Withdrawals for 01/02/2014
<input type="checkbox"/>	None	31211	01/02/2014 8:28AM	Deposit Rcpt 01/02/2014
<input type="checkbox"/>	None	31210	01/02/2014 8:27AM	Deposit Rcpt 01/02/2014



Reprint Merged Documents

- ❑ The batch is already selected → Merge

Batch	Print #	Total #	File Description	User ID	Load Date	Form Code	Stock Code
<input checked="" type="checkbox"/>	31213	43	44 Maturity Notice: 01/02/14	dbruner	01/02/2014	MTU	LTRHEAD
<input type="checkbox"/>	31270	1,420	1099 Stmts: 2013 Taxabl...	pmchugh	01/15/2014	I92T	LETTER

- ❑ There are additional options on this screen:
 - Select all – selects all batches on the screen
 - Send merge files to PC?
 - Print all (including Electronic Only)
 - Render as: Output file will be .pdf, .doc or .docx



Questions?





Manual Remerge

- Name/Address Inquiry → Search → Double-click on the Constituent → View – Mailmerge History → Fill in information or leave blank → Search → Select a batch to merge → Merge

Batch	Date	Print?	Form Code	Form Name	Key Information
3115	11/05/1996	Yes	RGI	Regular Investment Note	inv-num: inv-num3
3354	07/25/2005	Yes	I91	1099 - 1 page - single inv.	Registration: Registration5632
4887	01/27/1998	Yes	I91	1099 - 1 page - single inv.	Registration: Registration5171



PDF Doc/Regenerate PDF

- ❑ The PDF Doc is what the Client sees online. If necessary, some documents can be regenerated if there are changes that have been made. This will update the information online.

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Questions?



Courtenay Milliken
Product Support Specialist
cmilliken@ddi.org
317-713-2481