

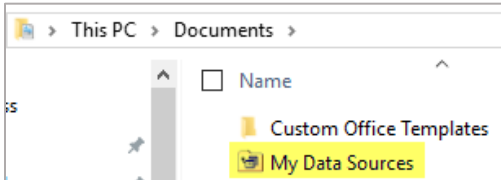
## Document Merge Instructions

for Microsoft Word Documents

This document explains how to create word merge documents using Microsoft Word on a PC not a MAC.

**Step 1:** Save the RM Merge Data Source (excel files) on your computer or server to access later.

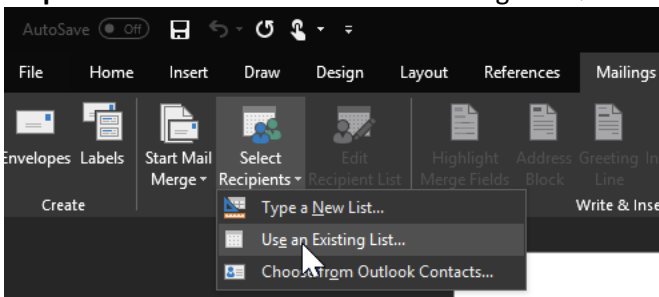
**Recommendation:** The best location to save the RM Merge Data Source is in the My Data Sources folder. This folder is typically located within your Documents Folder. The word merge feature opens the My Data Sources folder by default.



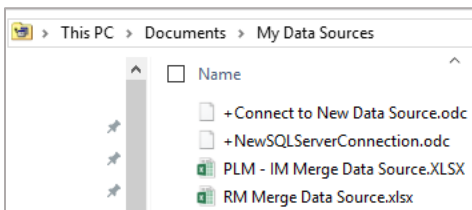
**Step 2:** Choose the word document that you would like to add merge fields to.

**Step 3:** Open the document.

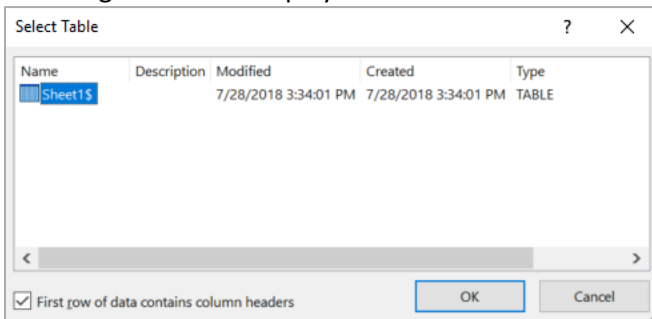
**Step 4:** In Microsoft Word click the Mailings tab → Select Recipients → Use an Existing List



**Note:** The following screen may display by default; if the RM Merge Data Source is not displayed within this screen you will need to browse to the location where the Data Source has been saved to make the connection.



**Step 5:** After selecting the Merge Data Source needed to add the word merge fields into your word document the following screen will display → Click **OK**



**Step 6:** After clicking **OK** the merge fields will be available to insert into the word document.

**Note:** The online mail merge is case sensitive so if you are typing in the merge field, please make sure you use exact spelling and upper/lower case.

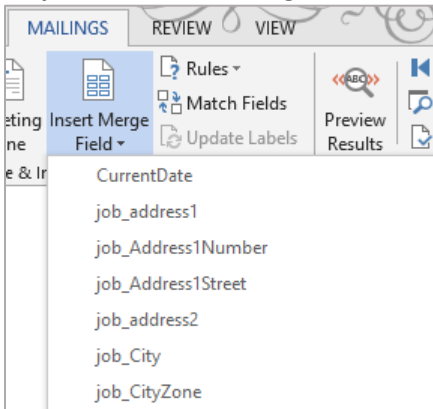


## Document Merge Instructions for Microsoft Word Documents

### How to add merge fields

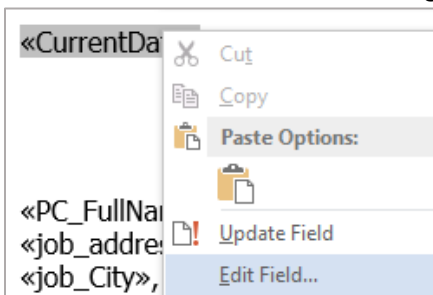
For a description of the merge fields please refer to the following reference document; **Merge Data Source – Fields and Descriptions** available on the University under Training Documents → Administrator → Document Merge Resources

**Step 7:** Click **Insert Merge Field** the merge fields will be available from the drop down.

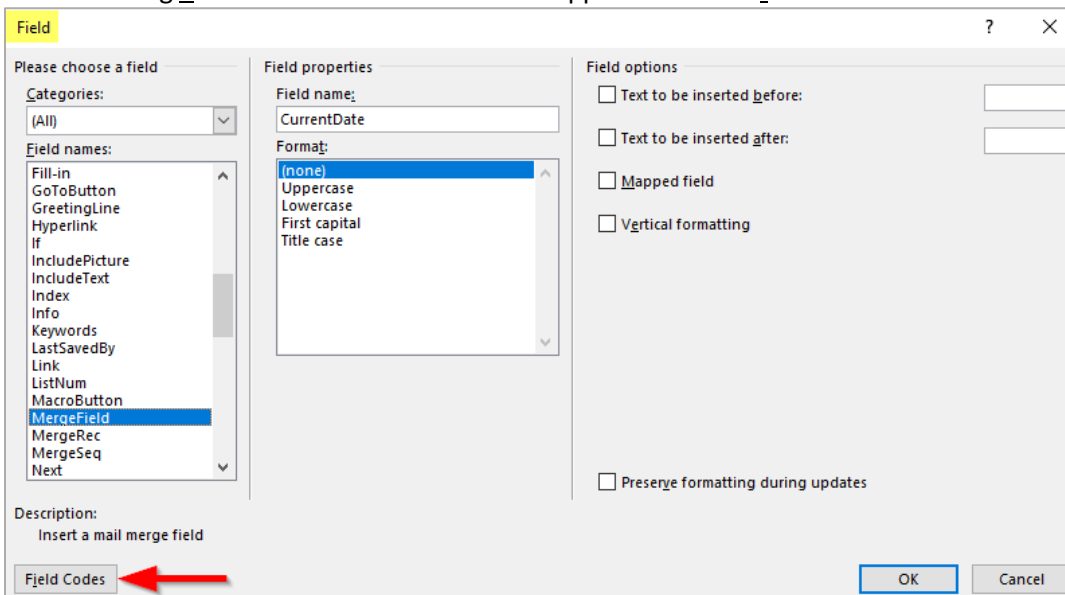


**Important:** When using the CurrentDate merge field formatting will need to be completed for the dates to appear properly. **Date Formats:** October 26, 2019 or 10/26/2019

To format the <<CurrentDate>> merge field right click on the merge field and select **Edit Field...**



After selecting **Edit Field...** the field screen will appear click the **Field Codes** button.



## Document Merge Instructions

*for Microsoft Word Documents*

Within the **Advanced field properties** → **Field codes:** line add the format of how you would like the date to appear within your word document.

**Format Options:**

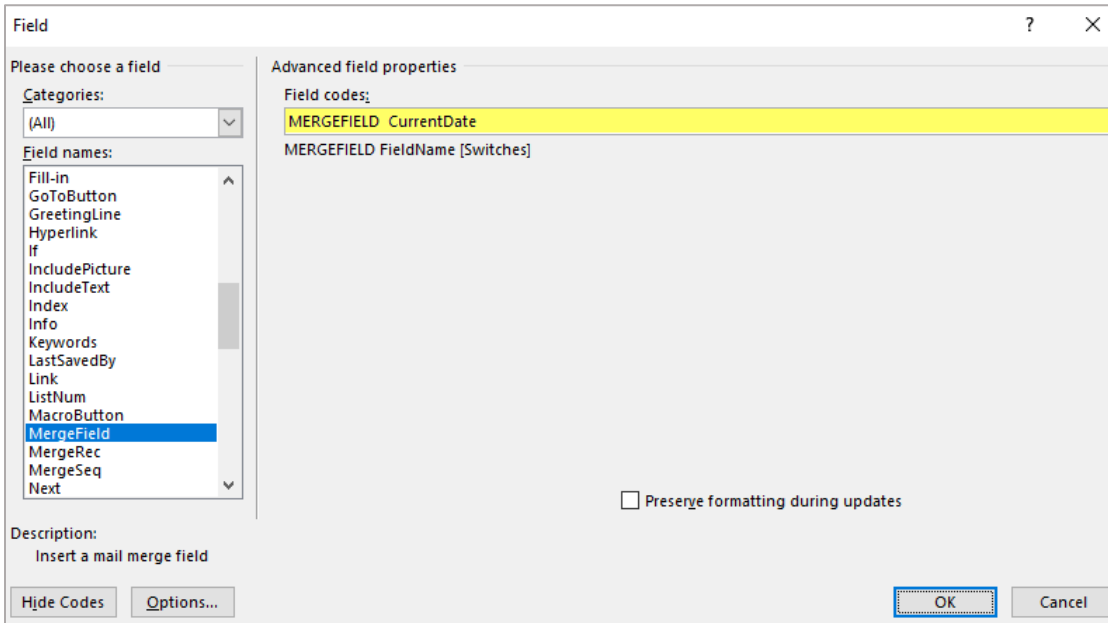
For **October 26, 2019** use:

MERGEFIELD CurrentDate \@ "MMMM d, yyyy"

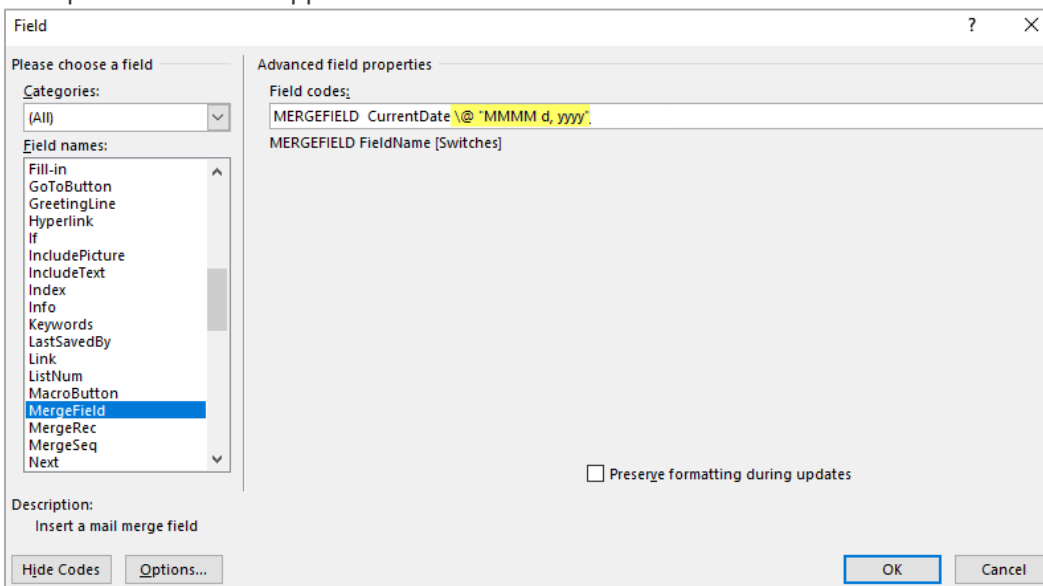
For **10/26/2019** use:

MERGEFIELD CurrentDate \@ "M/d/yyyy"

**Important:** The quotation marks around the format string **MUST** be used.



Example of the format applied within the Field codes line.



Once the date format has been added into Field codes line, click OK.

**IMPORTANT:** Ensure the "Preserve formatting during updates" is not checked.

When using **Cost\_Estimate & Costs\_Actual** merge fields: Please follow the instructions above to input the proper format string so the dollar amount appears properly. \# "\$#,###.00"

For the next step please refer to the following reference document; **Document Templates – How to Add** available on the University under Training Documents → Administrator.