

Product description

FaxMail merge is an option, developed by Popfax.com, that allows users to send **personalized faxes** to multiple recipients at once, without changing the actual body of the fax, but making a few changes for personalization purposes.

The documents can contain **as many merge-fields of information as you want**, allowing you to create individually personalized faxes, and to automate repetitive document production tasks.

In order to use FaxMail merge, you create one “master” document containing the information that is the same in each copy, and then add placeholders for the information that will be uniquely personalized on each copy. You then send this master document to Popfax via email, together with the database file containing the custom information.

Popfax takes care of the rest.

The FaxMail merge option is included in the Option pack, and the rate per minute is the same as for standard faxes sent with Popfax.

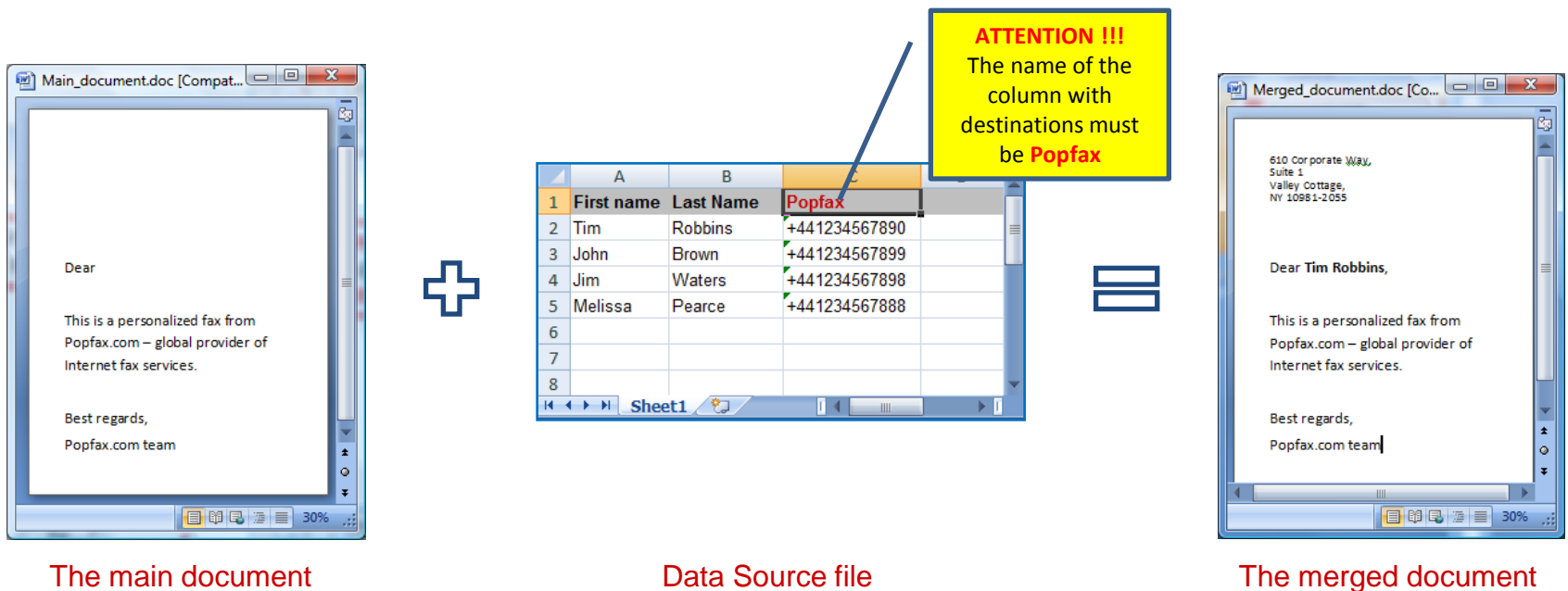
For volumes larger than 1000 personalized faxes at once, do not hesitate to contact the Popfax Customer Care service (see online contact form or call me back button)



How it works

In any mail merge, there are three different elements:

- 1) **Main Document** - This is the document (**MS Word**) that contains the text and graphics that are the same for each version of the merged document.
- 2) **The Data source file** - contains the information to be merged in the main document: list of names, addresses, fax numbers, etc. It must be an **MS Excel** file (**XLS**) format with a **single sheet**. The column with destination fax numbers must be named **Popfax**.
- 3) **The merged document** - includes the information from the main document, plus placeholders with each recipient's unique information.



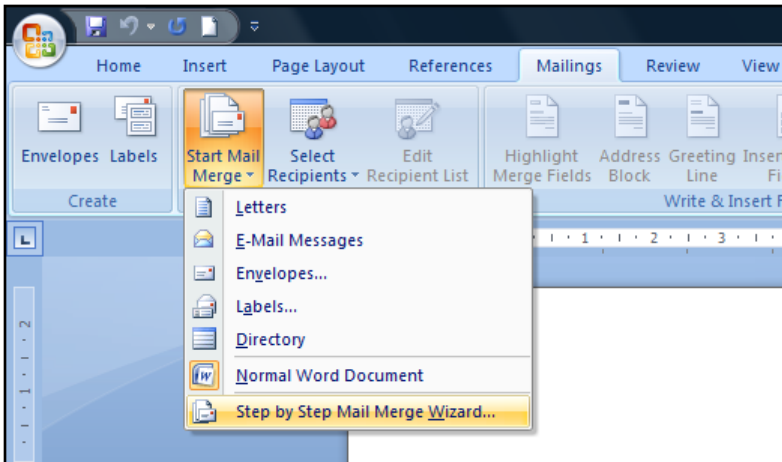
The main document

Data Source file

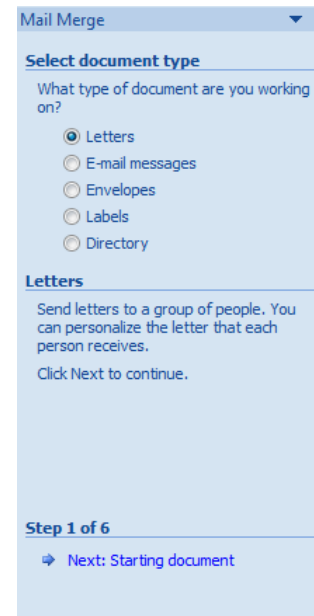
The merged document

Start merging the document

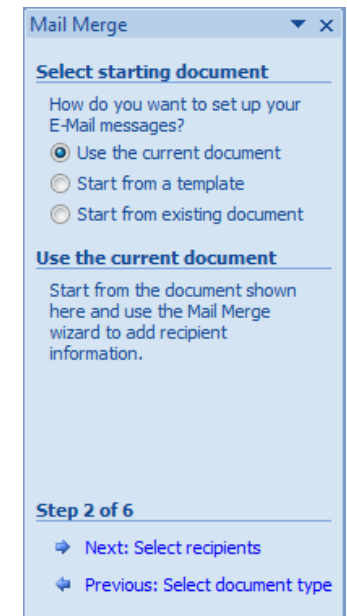
1. Click **Start Mail Merge** on the Mailings tab and choose **Step by Step Mail Merge Wizard**.



2. Select **Letters** as the document type and click **Next: Starting document**.



3. Select **Use the current document** and click **Next: Select recipients**.



Connect to a recipients' list

4. Select **Use an existing list** and **browse** to locate the file. Then choose the worksheet within the file.

Mail Merge

Select recipients

- Use an existing list
- Select from Outlook contacts
- Type a new list

Use an existing list

Use names and addresses from a file or a database.

[Browse...](#)

[Edit recipient list...](#)

Step 3 of 6

- [Next: Write your letter](#)
- [Previous: Starting document](#)

Select Table

Name	Description	Modified	Created	Type
Sheet1\$		7/3/2009 12:57:08 PM	7/3/2009 12:57:08 PM	TABLE

First row of data contains column headers

OK Cancel

Mail Merge Recipients

This is the list of recipients that will be used in your merge. Use the options below to add to or change your list. Use the checkboxes to add or remove recipients from the merge. When your list is ready, click OK.

Data Source	<input checked="" type="checkbox"/>	Last Name	First Name	Gender	Personal address	Popfax
Mail_merge.xls	<input checked="" type="checkbox"/>	Robin	Dawson	Miss	Great Britain	+44123456789
Mail_merge.xls	<input checked="" type="checkbox"/>	Steve	Norris	Mr	United States	+12345678899
Mail_merge.xls	<input checked="" type="checkbox"/>	Nicolas	Derouet	Mr	France	+33170247001

Data Source: Mail_merge.xls

Refine recipient list

- [Sort...](#)
- [Filter...](#)
- [Find duplicates...](#)
- [Find recipient...](#)
- [Validate addresses...](#)

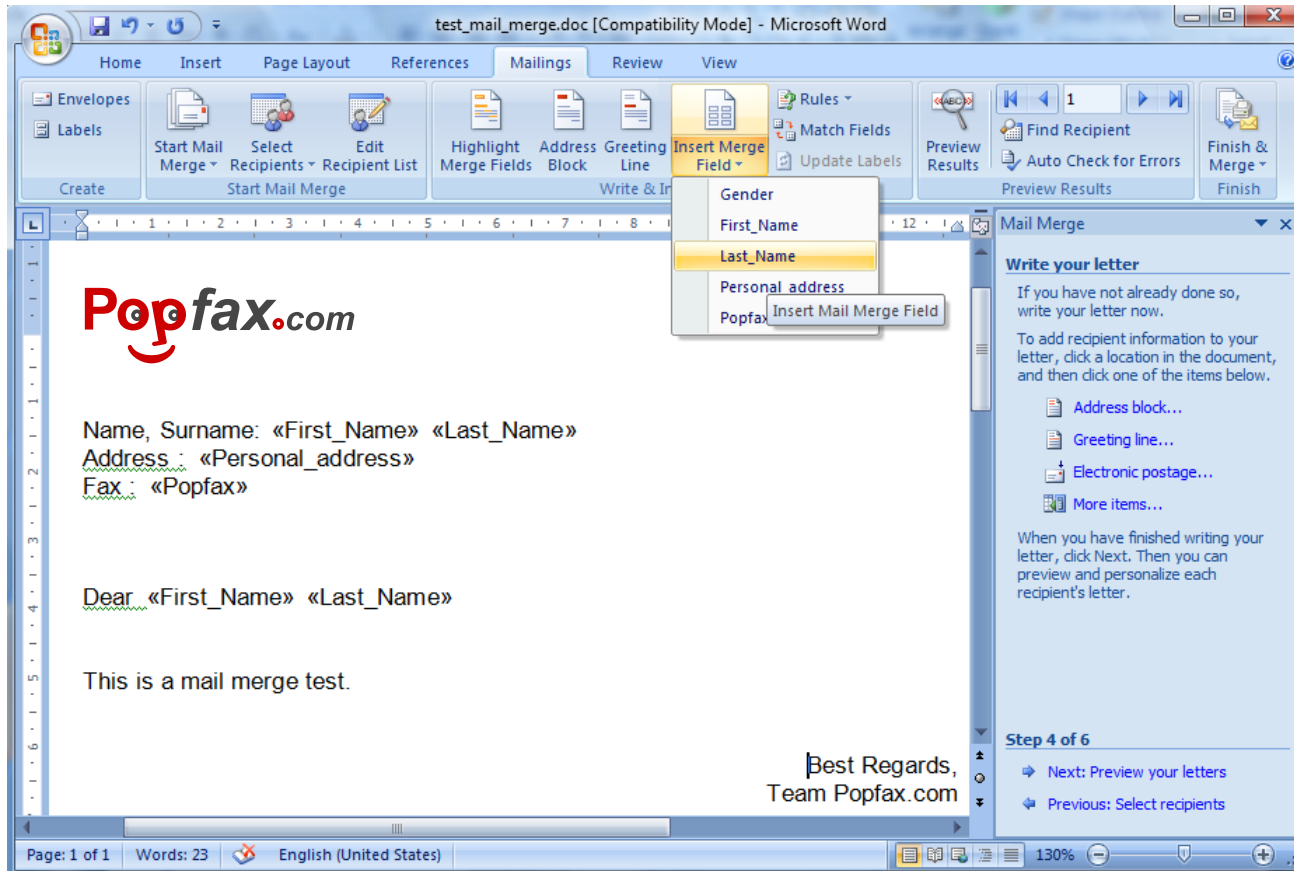
Edit... Refresh

OK

5. Click on **Next: Write your letter**.

Insert Merge fields, preview your letters and save the merged file

6. Place the cursor where you want to insert a field and click **Insert Merge Field** on the **Mailings** tab and select the required field from the list.



7. Click on **Next: Preview your letters** from the right side menu.

8. If everything is ok, click on **Next: Complete the merge** from the right side menu.

9. Save the merged document on your computer.

Send data to Popfax to be faxed



Create a new email message

Send

From... popfax_login_email@domain.com

To... mailmerge@popfax.com

Subject: SID87k6y7utxzb5n25

Enter **mailmerge@popfax.com** as destination and the **security code** in the subject



Send

From... popfax_login_email@domain.com

To... mailmerge@popfax.com

Subject: SID87k6y7utxzb5n25

Attached: Merged document.doc (26 KB); Data source.xls (17 KB)

Attach the **Merged document** and the **Data source** file



Send

From... popfax_login_email@domain.com

To... mailmerge@popfax.com

Subject: SID87k6y7utxzb5n25

Attached: Merged document.doc (26 KB); Data source.xls (17 KB)

Click to **send** data to Popfax to be faxed

Download the FaxMail merge report

In order to download the report, go to Outbox in your Popfax account and click on the “Mailmerge” link.

The screenshot shows the 'Popfax Box Outbox' interface. At the top, there are tabs for 'Inbox' and 'Outbox', with 'Outbox' selected. To the right, it says 'Records per page : 5'. Below this is a table with the following data:

	To	Days	Status	Date
<input type="checkbox"/>	+33170240000 Validate	37	OK	9 Dec 2009 16:06:44
<input type="checkbox"/>	Mailmerge	37	OK	9 Dec 2009 13:26:52
<input type="checkbox"/>	Mailmerge	39	OK	7 Dec 2009 11:16:26

Below the table are buttons for 'Back', 'Download', and 'Delete'. A Firefox dialog box is open in the foreground, titled 'Opening Mailmerge_report_19837163.xls'. The dialog contains the following text:

You have chosen to open
Mailmerge_report_19837163.xls
which is a: Feuille de calcul Microsoft Excel
from: <https://www.popfax.com>

What should Firefox do with this file?

- Open with **Microsoft Office Excel (default)**
- Save File
- Do this automatically for files like this from now on.

Buttons for 'OK' and 'Cancel' are at the bottom of the dialog.