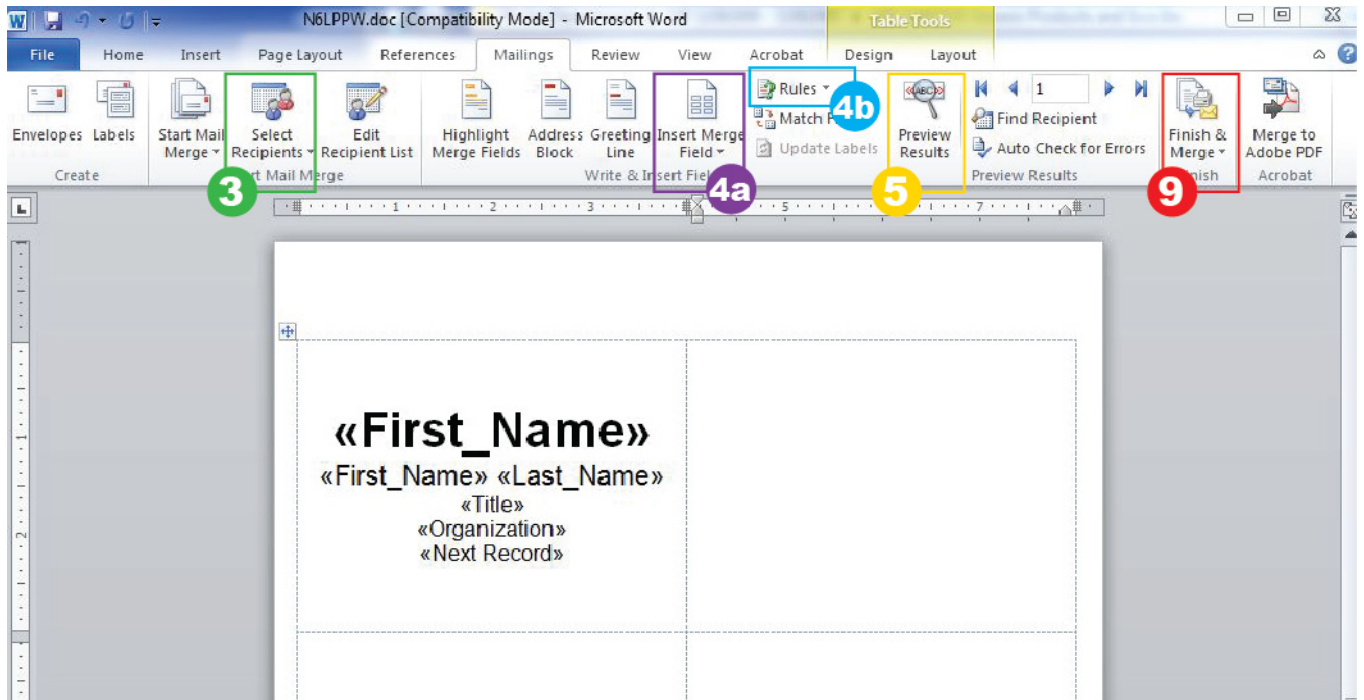# MAIL MERGE INSTRUCTIONS

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2007/2010/2013 Microsoft Word Mail Merge Instructions

1) Open the Word template, if it opens blank then click on the page and go to 'Layout' then 'View Gridlines'
2) Finalize your Excel spreadsheet with a title for each column in the top row. Close the Excel file when finished

3) In Word, select the 'Mailings' tab on the top menu bar and press the **'Select Recipients'** button
   a. Choose 'Use Existing List', Under 'Files of Type' choose 'All Files'. Find your Excel list and press 'Open'
4) Click on the top left insert you would like to personalize and the select the button **'Insert Merge Field'**
   a. Your titles from the Excel list should show up in here, select each to place them into the 1st insert
   b. When you have placed all of the Merge Fields, select **'Rules'** and choose 'Next Record'
5) To customize the look of the text you can now select **'Preview Results'** and the fields change into the data from your list
   a. You can change: Font, size, color, alignment, and other font features in the 'Home' tab on the top left menu bar.
6) If you would like an art file/logo included, go to the 'Insert' tab and select 'Picture'. Find your file to insert and press 'OK'
   a. With your picture still selected, go to the 'Format' tab, choose 'Wrap Text' and place 'Behind Text'. Now your picture is highlighted and you can use the keypad arrows to nudge the picture into place on your 1st tag.
      Once you no longer have the art selected it is very hard to select the picture again (press control-A, then click on the graphic)
7) Once your 1st tag is formatted, go back to the 'Mailings' tab and select 'Preview Results' to show the Merge fields again
   a. Copy all the text (and logo if used) and paste into the rest of the inserts to duplicate the tag on each insert
   b. Remove the rule 'Next Record' from the last tag on the page
      Next Record moves Merge Field to the next person on your list, if your merge will go more than one page, then the 'Next Record' function will automatically occur after the last insert. If this rule is not deleted, a merge field may be skipped.
      If you are using NTEBA stock, only have your next records on the right column if printing 2 duplicate names
8) Double check that all of the inserts are representing the data correctly by selecting **'Preview Results'**
9) To merge all the data to your document select **'Finish & Merge'** and choose 'Edit Individual Documents'
   a. Select 'All' and press 'OK', a new document will appear with all of the data from the excel file

2003 Microsoft Word Mail Merge Instructions

1) Open the template, if the template opens blank, click on the page and go to 'Layout' then 'View Gridlines'
2) Finalize your Excel spreadsheet with a title for each column in the top row. Close the Excel file when finished In Word open the
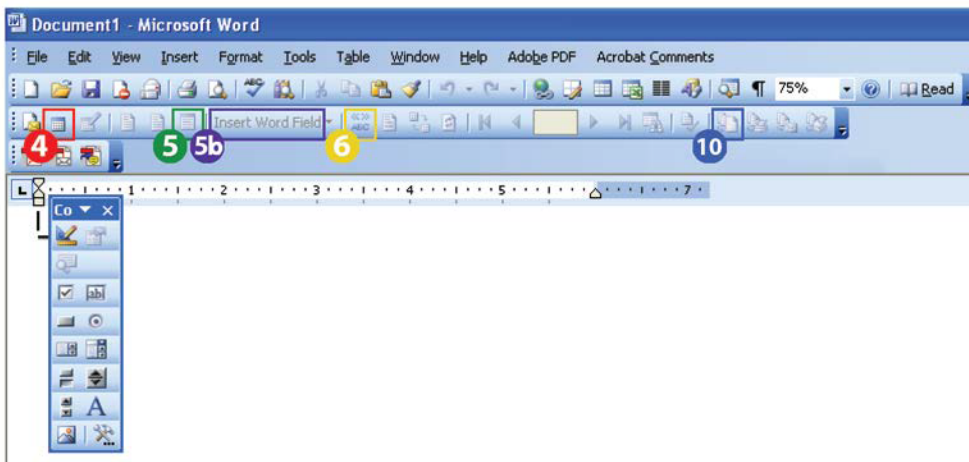
3) Mail Merge Tools can be accessed by right clicking on an open area near the tools and selecting 'Mail Merge'
4) Select the **'Open Data Source'** button
    a. Find the Excel list on your computer that you want to merge and press 'Open' and then 'OK'
5) Click on the top left insert and the select the button **'Insert Merge Field'**
    a. Your titles from the Excel list should show up in here, select each to place them into the nametag by highlighting and pressing 'Insert'
    b. Select **'Insert Word Field'** then choose 'Next Record' (Only on the right column of names for the NTEBA stock type if printing 2 duplicate names)
6) To customize the look of the merged fields you can now select the **'View Merged Data'**
7) If you would like an art file/logo included, go to the 'Insert' tab and select 'Picture'. Find your file to insert and press 'OK'
    a. With your picture still selected, go to the 'Format' choose 'Picture' and place 'Behind Text'. Now your picture is highlighted and you can use the keypad arrows to nudge the picture into place on your 1st tag.
8) Once you have the text/logo formatted, select **'View Merged Data'** to show the Merge fields again.
    a. Copy all the text and paste into the rest of the inserts to duplicate the Merge Fields on each insert.
    b. Remove the rule 'Next Record' from the bottom right insert when applicable.
        i. Next Record moves Merge Field to the next person on your list, if your merge will go more than one page, then the 'Next Record' function will automatically occur after the last insert. If this rule is not deleted, a merge field may be skipped.
9) Double check that all of the inserts that have Merge Fields are representing the data correctly by selecting **'View Merged Data'**
10) To merge all the data from your Excel list to your Word document select the **'Merge to New Document'**
    a. Select 'All' and press 'OK', a new document should appear with all of the data from the excel file displayed on multiple pages if applicable.

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MAC Microsoft Word Mail Merge Instructions

1) Open the Word template, if the template opens blank, click on the page and go to 'Table Layout' then 'Gridlines'
2) Finalize your Excel spreadsheet with a title for each column in the top row. Close the Excel file when finished
3) In Word go to the Tools Menu and select the Mail Merge Manager
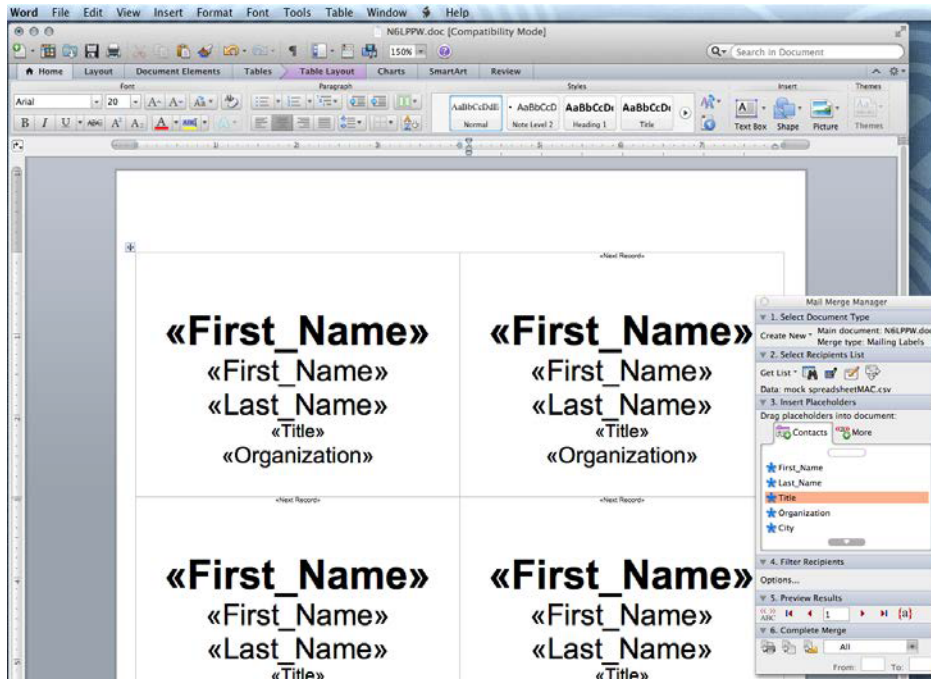
4) **Mail Merge Manager Steps:**

   1. Select Document Type

   1) Choose 'Create New' then Label. Then press cancel since the template needed should already be open in Word. Your File should show up after Main Document:_____

   2. Get List

   2) Choose Open Data Source and locate the name list by browsing to the location saved on your computer.

   3. Insert Placeholders

   3) Enter the fields you will be using from the column headers on your list of names. Format the data fields with font styles/sizing/colors. Insert any logos or colorbars if needed.
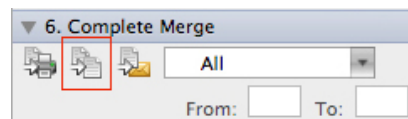
   4. Filter Recipients

   5. Preview Results

   4) Preview the tags and make final alterations to layout and formatting. Click on View Merged Data

   6. Complete Merge

   5) Press the button 'Merge to a New Document'.
   Review the final merge to ensure names and titles do not wrapping incorrectly or any personalization has fallen off the tags.