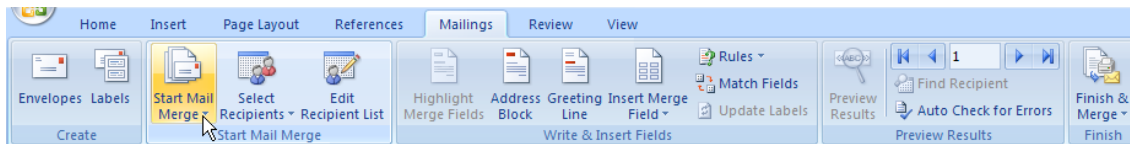


General Merge Instructions

1. Set up your Main Document

The Main Document is the generic Word document that will serve as a template for your customized merged documents. It contains everything that will stay the same for each instance of the merge.

- In Word, open the file you are using for your merge, or create a new, blank document if you are starting from scratch.
- On the Mailings tab in the Start Mail Merge group click Start Mail Merge.

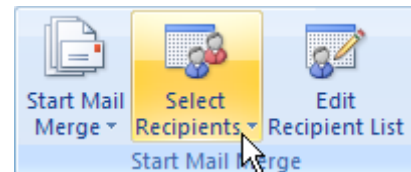


- Choose the type of document you are merging (letter, directory, etc.).

2. Open your Data Source

Your data source is the table of individual records that will be used to customize your merge. Your data source could be an Excel spreadsheet, a table in Word or Access, or even a comma separated text list.

- On the Mailings tab in the Start Mail Merge group, click Select Recipients > Use Existing List.
- Browse to your data source.
- If necessary, select the specific spreadsheet or table that contains your data.



3. Organize your Data

In this step, sort your data and if necessary filter out unwanted data.

- On the Mailings tab in the Start Mail Merge group click Edit Recipient List.
- Sort data by clicking on the name of the column you would like to sort by. If you would like to sort by last name, click on LastName.



4. Insert Merge Fields

- Place the cursor in the document where you would like the data to appear.
- On the Mailings tab in the Write & Insert Fields group click the bottom half of the Insert Merge Field button.

A menu based on the fields in your data source appears.

- Choose the correct field from the drop-down menu.
- Repeat until all desired fields are entered.

5. Use Rules if Desired

- Rules are located on the Mailings tab in the Write & Insert Fields group.
- If you would like to customize the content of your merge for certain groups, use the If...Then...Else... rule.
- If you would like to exclude an entire group, use the Skip Record If... rule.

6. Finish your merge and create your Merged Document

- On the Mailings tab in the Finish group click Finish & Merge > Edit Individual Documents...

Look over your merged document carefully, and if adjustment is necessary, close it without saving and return to your Main Document. If your merged document is beautiful, save and print as desired.



Reusing Main Documents

Main Documents can be saved to use for future merges. Just make sure everything is set up properly – your records are sorted correctly, and the correct recipients are selected – before performing a new merge.

Turn on Field Code Highlighting (do this once)

When you are merging, you use fields to specify the spots in a document where customized information will occur. It can be confusing to see these fields mixed in with normal text. It is a good idea to turn on field shading. To do this, go to the Office Button, click Word Options, then click Advanced. Scroll to the Show document content section, and from the Field shading: drop-down menu choose Always. Click OK.