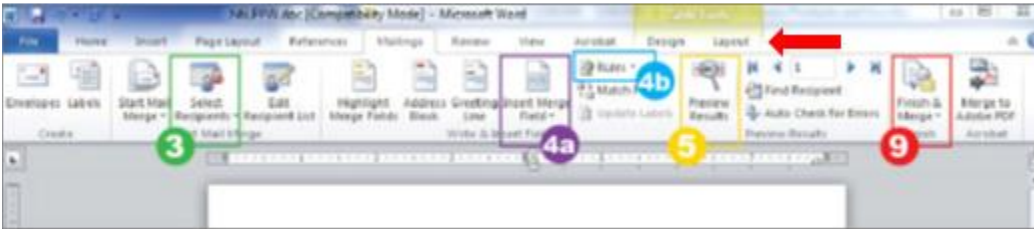



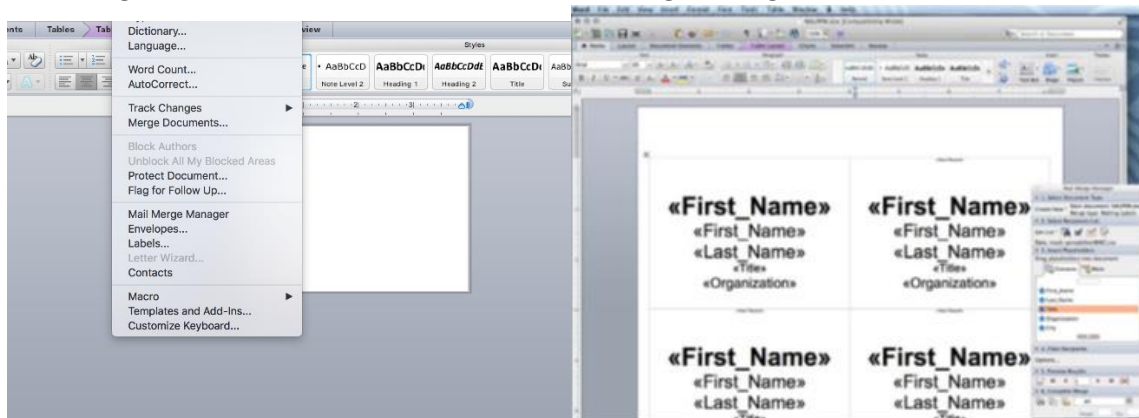
Mail Merge Instructions for Windows Computers



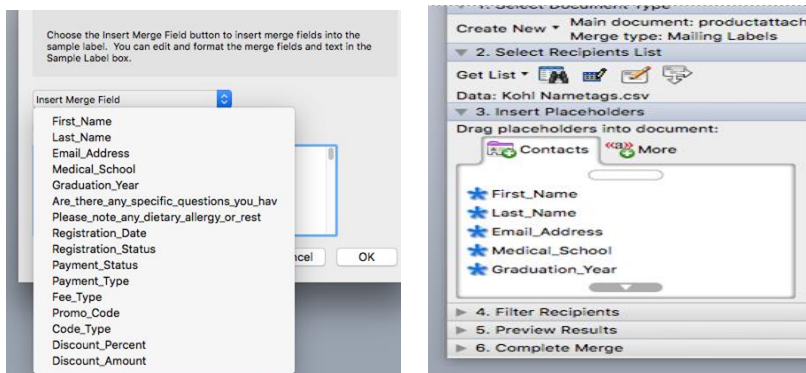
1. Open the Word template. If it opens blank, then click on the page and go to the 'Layout' tab under 'Table Tools' (indicated above with ) then press the 'View Gridlines' button.
NOTE: This is different than the "Gridlines" check box under the "View" tab.
2. Finalize the Excel spreadsheet with a title for each column in the top row. Close the file when finished.
3. In Word, select the 'Mailings' tab on the top menu bar and press the **Select Recipients** button.
NOTE: Do not select "Start Mail Merge". This is only necessary when starting a template from scratch.
 - a. Choose 'Use Existing List', Under 'Files of Type' choose 'All Files'. Find the Excel list and press 'Open'. If prompted, select which tab in the spreadsheet to pull the data from.
4. Click on the blank badge on the top left. (**NOTE: If you received a Word template from pc/nametag that already has your badge -fields entered and positioned**) Highlight the fields to assign, and then follow step (a) below. This way, the position and style of the text will remain the same.)
 - a. Select the button **Insert Merge Field**. The titles from the Excel list should show up in the drop-down menu, select each to place them into the top left badge.
 - b. After placing all the Merge Fields, select **Rules** and choose 'Next Record'. Be sure to the 'Next Record' appears below all fields that you have inserted. **If using a 1-up template, the 'Next Record' rule is not needed.**
5. To customize the look of the text now, select **Preview Results** to see how the fields will print. If needed, change font, size, color, alignment, and other font features in the 'Home' tab.
6. To include an image, go to the 'Insert' tab and select 'Picture'. Browse to find the image and press 'OK'.
 - a. With the image still selected, go to the 'Format' tab, choose 'Wrap Text' and place 'Behind Text'. Now the picture is highlighted, and the keypad arrows can nudge the picture into place on the 1st badge. Press control-A and then click on the graphic to select it again (or click and hold to move the graphic).
7. Once the 1st badge is formatted, go back to the 'Mailings' tab and select 'Preview Results' to show the Merge fields again. Copy all the text (and logo if used), as well as all the space above the Merge fields, and paste into the rest of the badges to duplicate the tag on each insert.
8. **IMPORTANT:** Remove the rule 'Next Record' from the bottom right badge on the page. If this rule is not deleted, a merge field may be skipped. Every other badge should have the 'Next Record' rule.
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 print-ready document will appear with the data from the Excel sheet.

Mail Merge Instructions for Mac Computers

1. Open the Word template. If the template opens blank, go to 'Table Layout' then select 'Gridlines'.
2. Finalize the Excel spreadsheet with a title for each column in the top row. Close the Excel le when finished.
3. In Word, go to the Tools Menu and select the Mail Merge Manager.

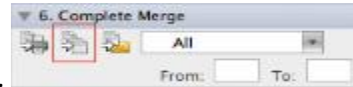


4. Mail Merge Manager Steps:
 - a. Select Document Type
 - b. Choose 'Create New' then Label. Then press cancel since the template needed should already be open in Word. The file should show up after Main Document:_____
5. Get List
 - a. Choose Open Data Source and locate the name list by browsing to the location saved on the computer.
 - b. If necessary, the Merge Manager will need to convert the file. Depending how the Data Source was created, it may need to be resaved to a different format. The .csv (Comma Separated Values) is usually successful.
6. Insert Placeholders
 - a. Enter the fields that will be used from the column headers on the list of names. Format the data fields with font styles/sizing/colors. Insert any logos or color bars if needed.



7. Filter Recipients, if necessary. Otherwise, leave the entire list for this part.
8. Preview Results
 - a. Preview the tags and make final alterations to layout and formatting. Click on View Merged Data. After that, you can cycle through the list to confirm that the setup is progressing through the list properly.

- b. Remember that the preview will cycle through one record at a time, instead of a whole page. Also, remember that any adjustments made on the preview will apply to each page of the final merged list.
9. Complete Merge



- a. Press the button 'Merge to a New Document'.
10. Review the final merge to ensure names and titles do not wrap incorrectly or any personalization has been removed from the tags. Any adjustments made here will only apply to each individual badge.

Mail Merge Troubleshooting Tips

Some of the records are being skipped when I try to merge the full list.

Please double check that the last record on the page does not have the 'Next Record' rule added. The end of the page will automatically go to the next record on the spreadsheet as it is. Using 'Next Record' at the end can cause for the template to skip entries on the list. If this is still occurring, double check the spreadsheet just to make sure it is loading in the order that you are expecting.

My template will not load the values from my Excel spreadsheet.

Option 1:

First, double check the Excel spreadsheet being loaded. Sometimes, when the spreadsheet file is moved or resaved, the word template no longer knows where to look for the values that will be used for the badges. Confirm the location of the file, as well as the name.

Option 2:

If the Excel spreadsheet is where it's expected to be, retry opening the template. When opened, an alert should come up that says "Opening this document will run the following SQL command" Using the prompts, select your merged document. If this is successful, you should be able to go to the Mailings tab in Word and select 'Preview Results' to see if the right data is populating into the template file. If it is not, you may need to select your spreadsheet again, so the template knows what to connect to.

My background image is throwing off the alignment of the template.

Use these steps to properly align a background image on your template:

Select the image in the Word file, then going to the 'Layout' tab, click on 'Wrap Text', and select "Behind Text". Doing so will lock the image in place, so it is best to set the image where it should stay before making selection in the Word document.

Feel free to give Tech Support a call with any other issues that you may face. You can reach us at 608-497-8287.