



SECA Mail Merge Pledge Form Merging Instructions

1. Create an Excel spreadsheet with the employee information you wish to merge onto pledge forms. Be sure to use the column headers that appear in the image below (you may also choose to add a column for "Bureau" and "Bureau Code" if you choose). When spreadsheet is complete, save it as an Excel document in an easily accessible location.

	A	B	C	D	E	F
1	First Name	Last Name	Agency	Employee ID	Business Area	
2	Suzi	Jones	Education	159365	25	
3	Jane	Doe	Labor and Industry	585978	26	
4	John	Smith	Agriculture	156324	27	

2. Open the SECA mail merge pledge form (available on the SECA website) and go to the mailings tab and click on "Start Mail Merge."

Microsoft Word Mailings tab interface. The 'Start Mail Merge' button is highlighted with a red box and a red arrow points to it. Other buttons include 'Select Recipients', 'Edit Recipient List', 'Highlight Merge Fields', 'Address Block', 'Greeting Line', 'Insert Merge Field', 'Match Fields', 'Update Labels', 'Preview Results', 'Find Recipient', 'Auto Check for Errors', 'Finish & Merge', and 'Merge to Adobe PDF'.

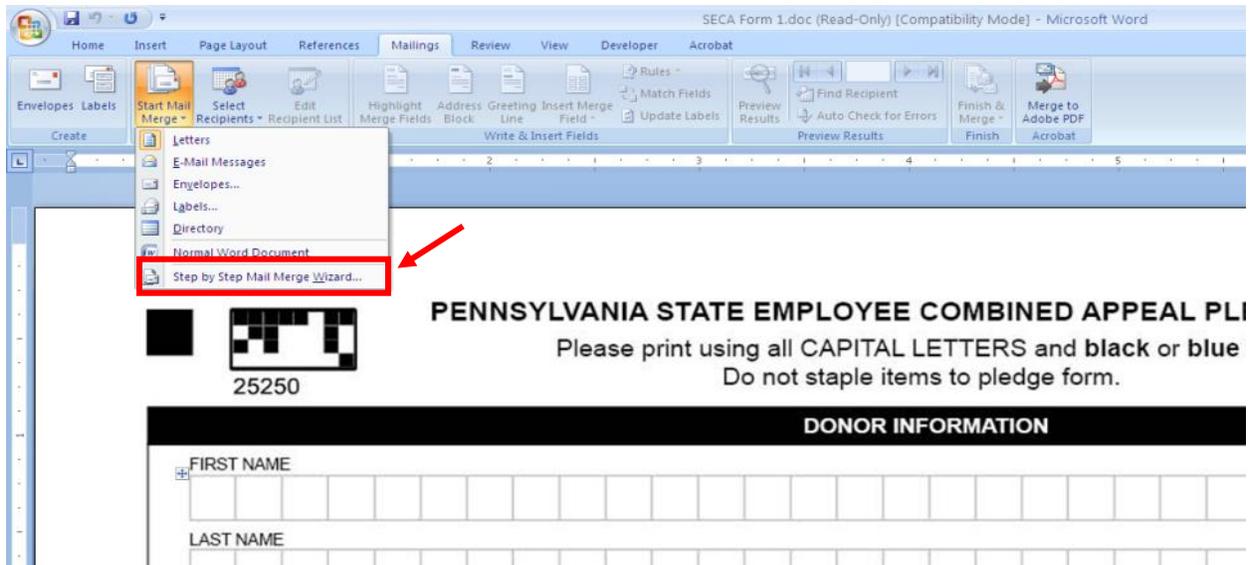
PENNSYLVANIA STATE EMPLOYEE COMBINED APPEAL PL
Please print using all CAPITAL LETTERS and black or blue
Do not staple items to pledge form.

25250

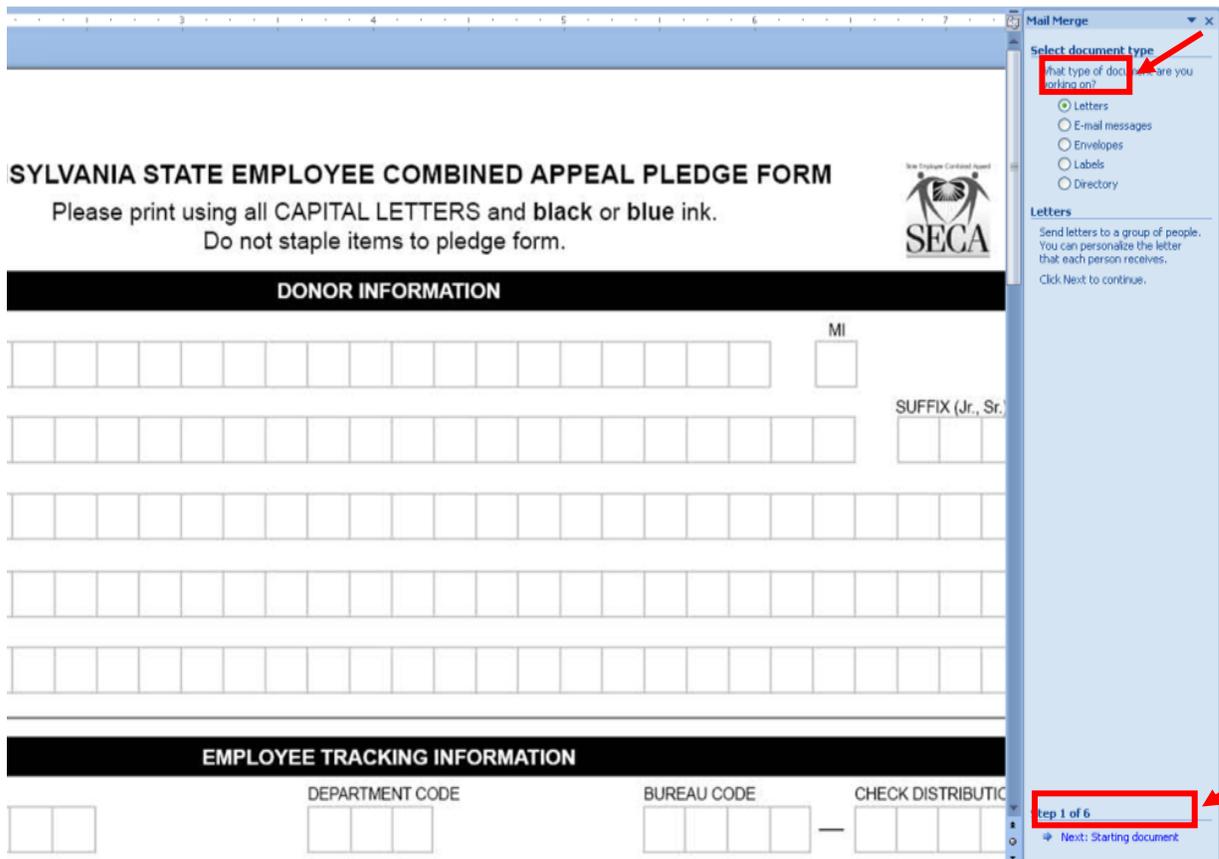
DONOR INFORMATION

FIRST NAME
LAST NAME
AGENCY OR DEPARTMENT
BUREAU / INSTITUTION Line 1

2. A drop-down menu will appear. Click on "Step by Step Mail Merge" Wizard.



3. The "Mail Merge" pane will open on the right. Under "Select Document Type," make sure "Letters" is selected. Click "Next: Starting document" at the bottom.



- On the next pane, make sure that "Use current document" is selected, then click "Next: Select recipients."

MICHIGAN STATE EMPLOYEE COMBINED APPEAL PLEDGE FORM

Please print using all CAPITAL LETTERS and black or blue ink.
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DONOR INFORMATION

MI

SUFFIX (Jr., Sr.)

EMPLOYEE TRACKING INFORMATION

DEPARTMENT CODE BUREAU CODE CHECK DISTRIBUTION

Mail Merge

Select starting document

How do you want to set up your document?

- Use the current document
- Start from a template
- Start from existing document

Use the current document

Start from the document shown here and use the Mail Merge wizard to add recipient information.

Step 2 of 6

- Next: Select recipients
- Previous: Select document type

- On the next pane, make sure that "Use an existing list" is selected, then click "Browse."

MICHIGAN STATE EMPLOYEE COMBINED APPEAL PLEDGE FORM

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DONOR INFORMATION

MI

Mail Merge

Select recipients

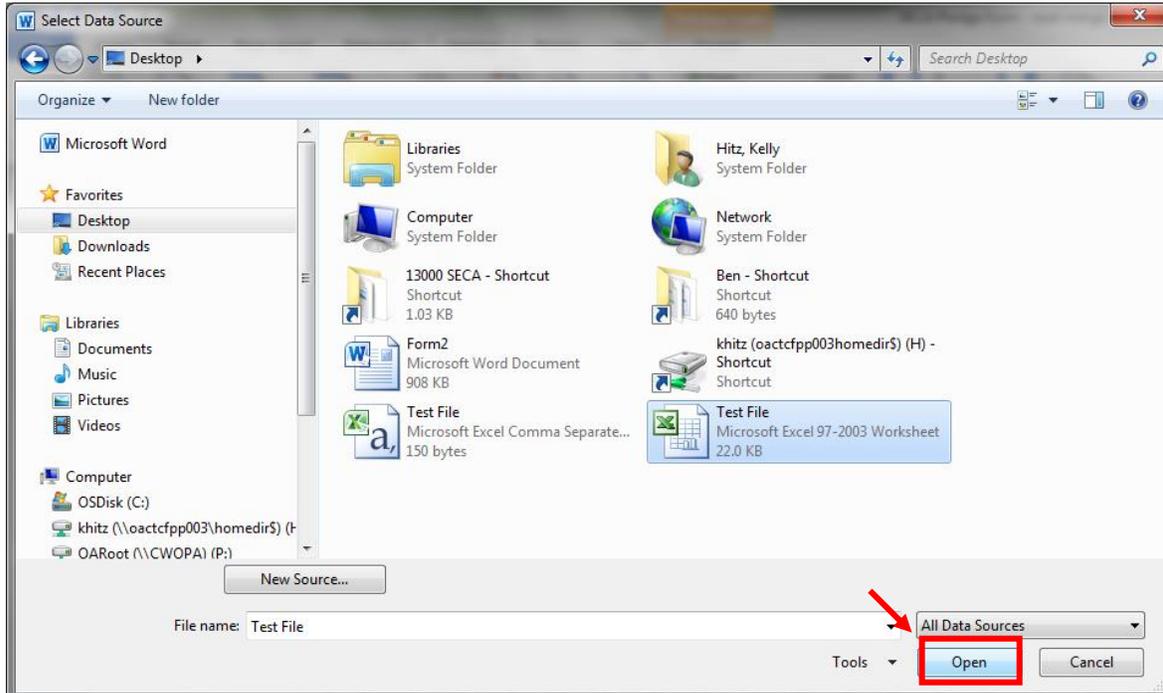
- Use an existing list
- Select from Outlook contacts
- Type a new list

Use an existing list

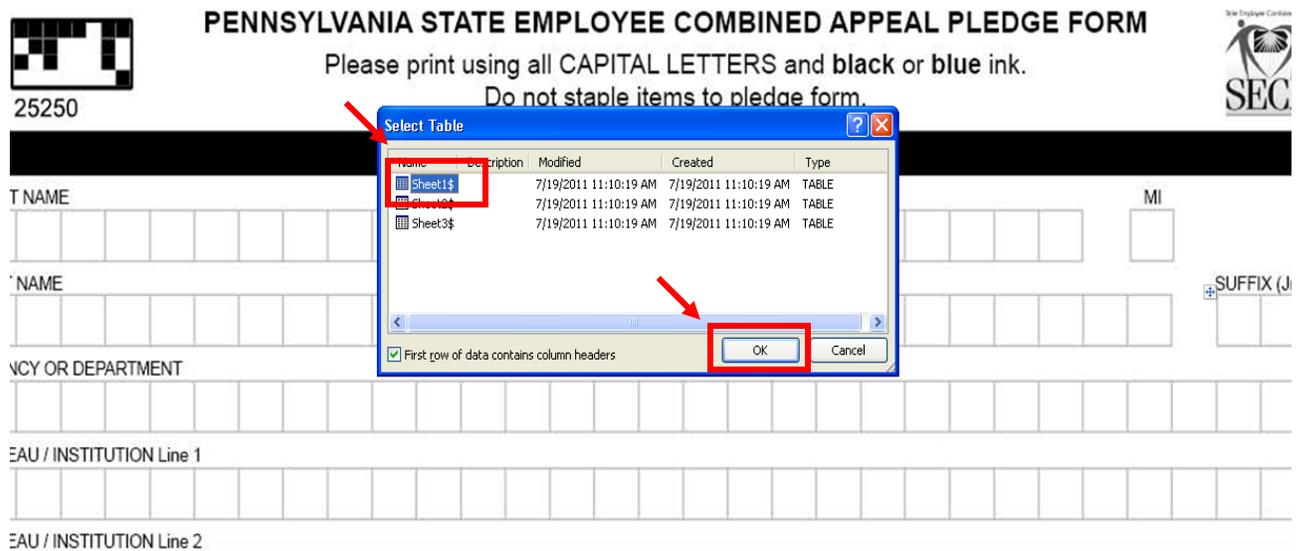
Use names and addresses from a file or a database.

- Browse...
- Edit recipient list...

6. In the window that appears, browse to the Excel file with the list of information you want to mail merge. Select it, then click "Open."



7. After the file has been selected, a pop-up will ask what sheet to select. Select Sheet 1 and click "OK."



8. Another pop-up will ask you to confirm that this is the list of recipients you would like to use. Select OK.

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	Last Name	1FN	2FN	3FN	4FN	5FN	6FN
SECA Names.xlsx	Herb	J	i	l	l		
SECA Names.xlsx	Maclas	M	a	t	t	h	e
SECA Names.xlsx	Weldon	P	a	t	r	i	c
SECA Names.xlsx	Lacey	R	o	s	e		
SECA Names.xlsx	Norris	C	h	r	i	s	t

Data Source: SECA Names.xlsx

Refine recipient list

- Sort...
- Filter...
- Find duplicates...
- Find recipient...
- Validate addresses...

Edit... Refresh

OK

9. After you select the list, click "Next: Write your letter."

DEPARTMENT

EDUCATION Line 1

EDUCATION Line 2

EMPLOYEE TRACKING INFORMATION

DEPARTMENT CODE

BUREAU CODE

CHECK DISTRI

SUFFIX (J)

Step 3 of 6

Next: Write your letter

Previous: Starting document

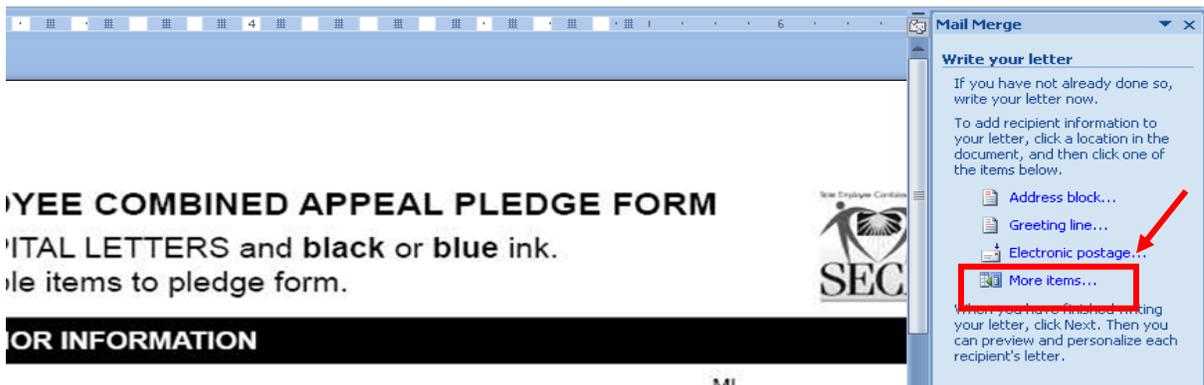
9. On the pledge form, click in the first box under "First Name" so that your cursor is in the box (a dotted text box will appear when you click). **NOTE: Do not move text boxes at any point throughout the process.**

FIRST NAME

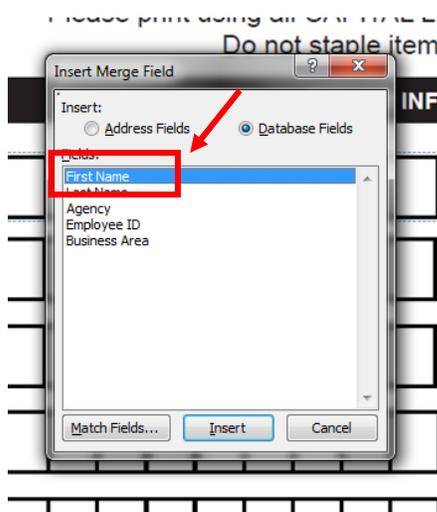
LAST NAME

AGENCY OR DEPARTMENT

10. Next, in the "Mail Merge" pane, choose "More items..."



11. Next, a pop-up will ask which fields need to be inserted. Select the "First Name" field and click "Insert" then "Close."



12. You will see some letters and characters on the first name field; this means the field has been inserted correctly.

PENNSYLVANIA STATE EMPLOYEE COMBINED APPEAL PLEDGE FORM
Please print using all CAPITAL LETTERS and black or blue ink.
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DONOR INFORMATION

FIRST NAME: « F i r s t _ N a m e » MI

LAST NAME: « L a s t _ N a m e » SUFI

AGENCY OR DEPARTMENT

BUREAU / INSTITUTION Line 1

BUREAU / INSTITUTION Line 2

13. Repeat steps 9-11 in the "Last Name," "Agency," "Employee ID," and "Department Code" boxes (and "Bureau" and/or "Bureau Code" if you chose to include those fields), being sure to select the corresponding field in step 11.

14. When you've placed the fields in all of the boxes, click "Next: Preview your letters."

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DONOR INFORMATION

FIRST NAME: « F i r s t _ N a m e » MI

LAST NAME: « L a s t _ N a m e » SUFI (Jr., Sr.)

AGENCY OR DEPARTMENT: « A g e n c y »

BUREAU / INSTITUTION Line 1

BUREAU / INSTITUTION Line 2

EMPLOYEE TRACKING INFORMATION

EMPLOYEE ID #: « E m p l o y e e »

DEPARTMENT CODE: « B u »

BUREAU CODE: [] - []

CHECK DISTRIBUTION: []

EMPLOYEE CONTRIBUTION INFORMATION

PAYROLL DEDUCTION: # of Paydates Per Year []

CHECK / MONEY ORDER: Payment Amount []

Total Amount Per Pay Date: \$ []

Next: Preview your letters

15. The first employee entry will appear. Click "Next: Complete the Merge."

16. Click "Edit individual letters."

17. On window that appears, make sure "All" is selected, then click "OK."

18. Each employee from your original spreadsheet will now be merged onto individual pledge forms.

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DONOR INFORMATION

FIRST NAME: S u z i MI

LAST NAME: J o n e s SUFFIX (Jr., Sr.)

AGENCY OR DEPARTMENT: E d u c a t i o n

BUREAU / INSTITUTION Line 1

BUREAU / INSTITUTION Line 2

EMPLOYEE TRACKING INFORMATION

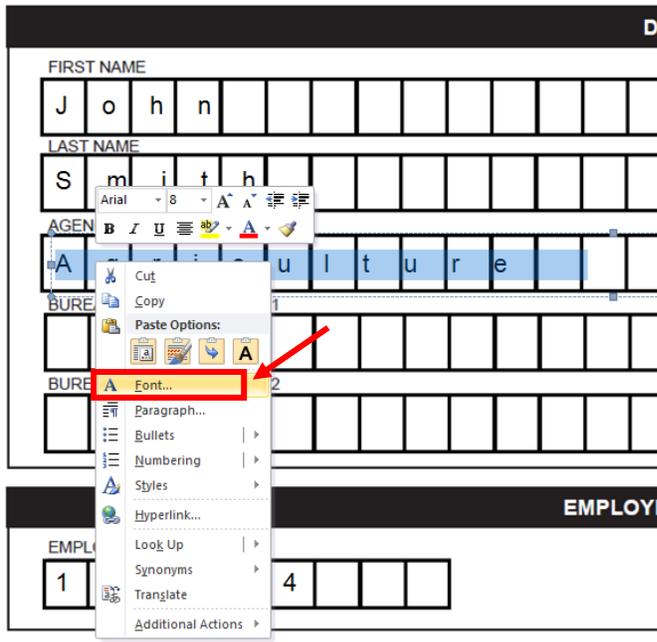
EMPLOYEE ID #: 1 5 9 3 6 5

DEPARTMENT CODE: 2 5

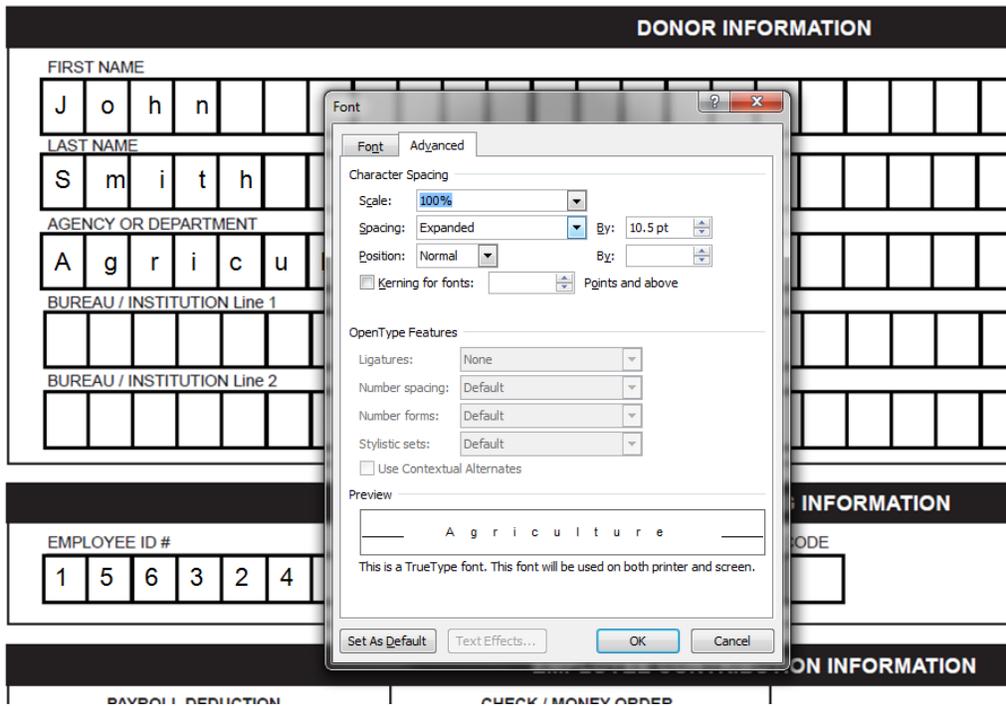
BUREAU CODE: -

CHECK DISTRIBUTION CODE: -

19. Scroll through each pledge form to ensure that there is one letter in each box. If the character spacing on any forms needs to be adjusted, highlight the letters in need of adjustment. Then, right click on the letters and select "Font."



20. Under the "Advanced" tab, in the "Spacing" drop down menu, choose "Expanded" or "Condensed" (based on your needs) and then adjust the figure in the "By" field (adjust by tenths of a point at a time).



21. The pledge forms are now ready to print.