PA pennsylvania

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."
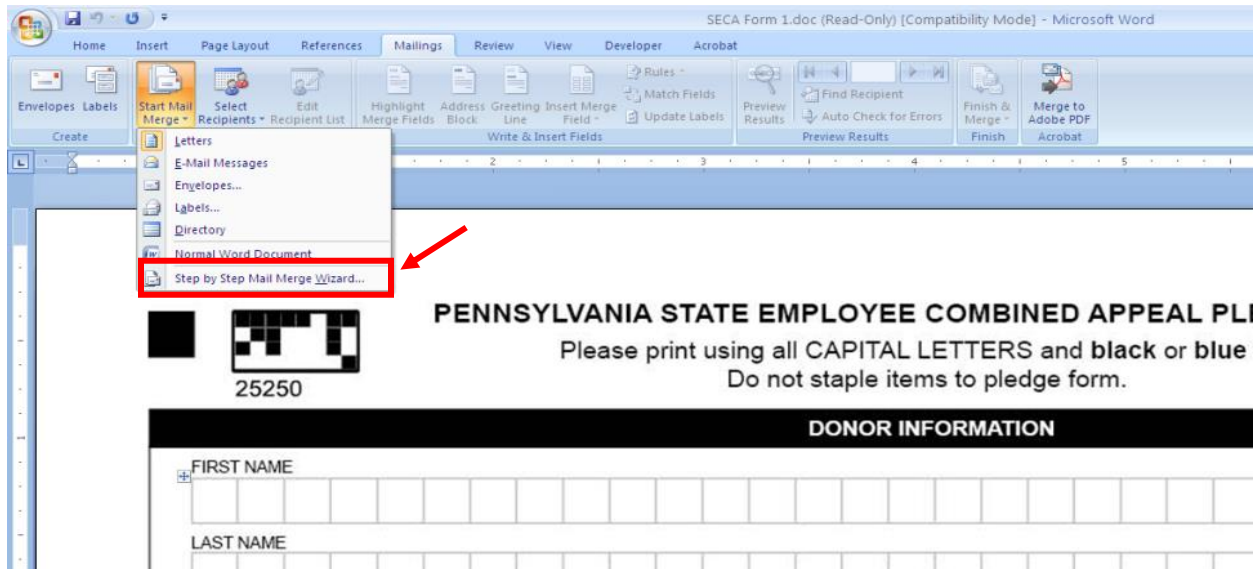

2. A drop-down menu will appear. Click on "Step by Step Mail Merge" Wizard.

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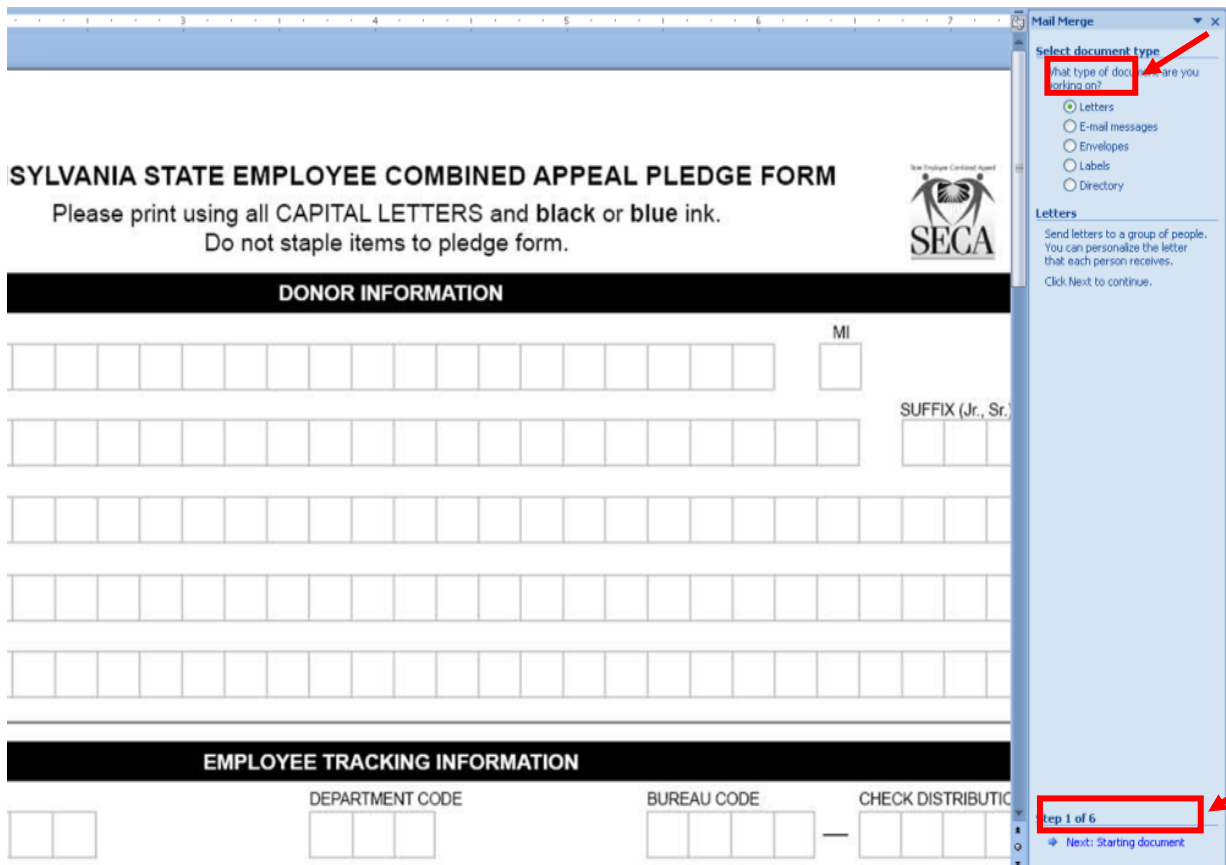
4. On the next pane, make sure that "Use current document" is selected, then click "Next: Select recipients."

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

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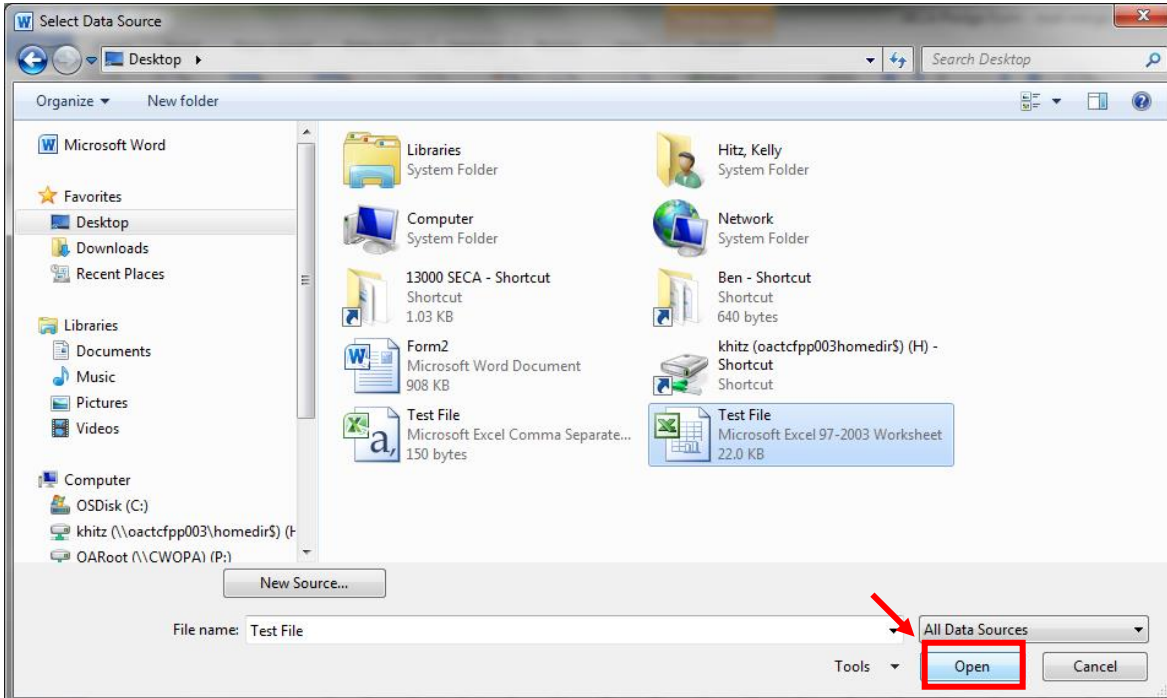
7. After the file has been selected, a pop-up will ask what sheet to select. Select Sheet 1 and click "OK."

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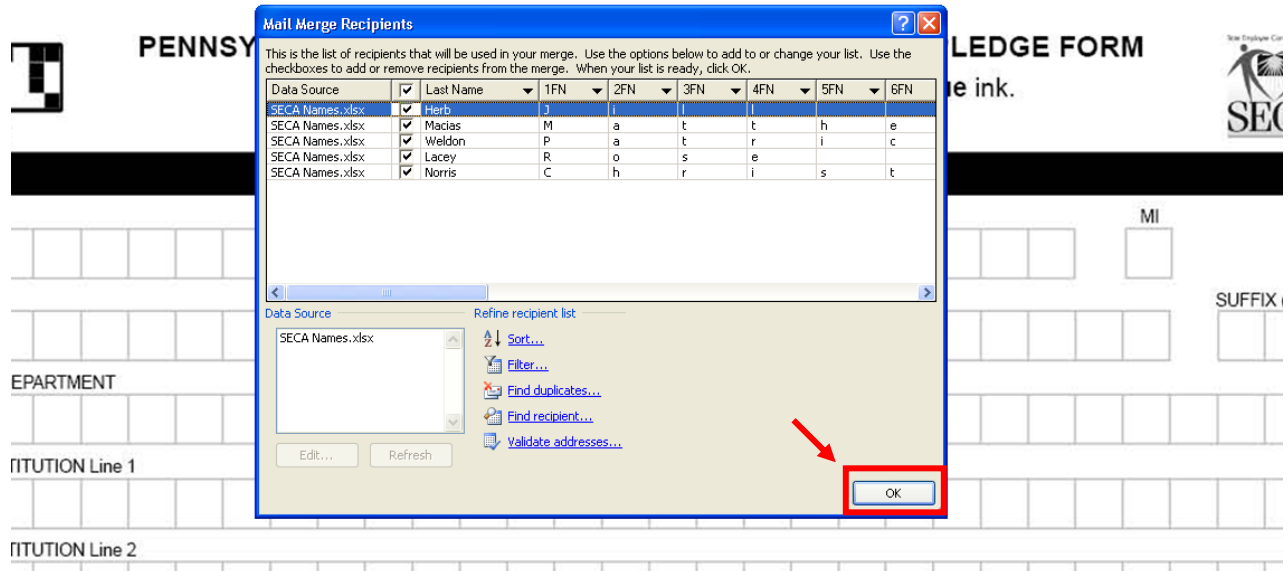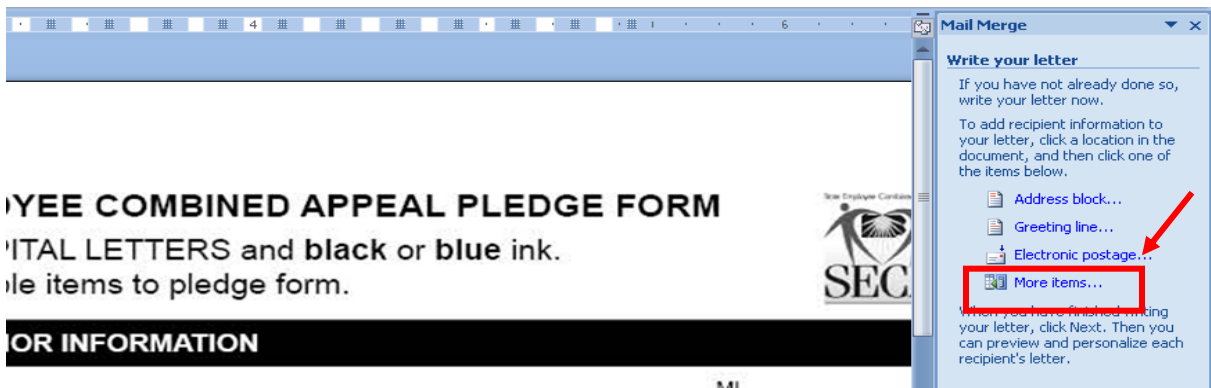

9. After you select the list, click "Next: Write your letter."
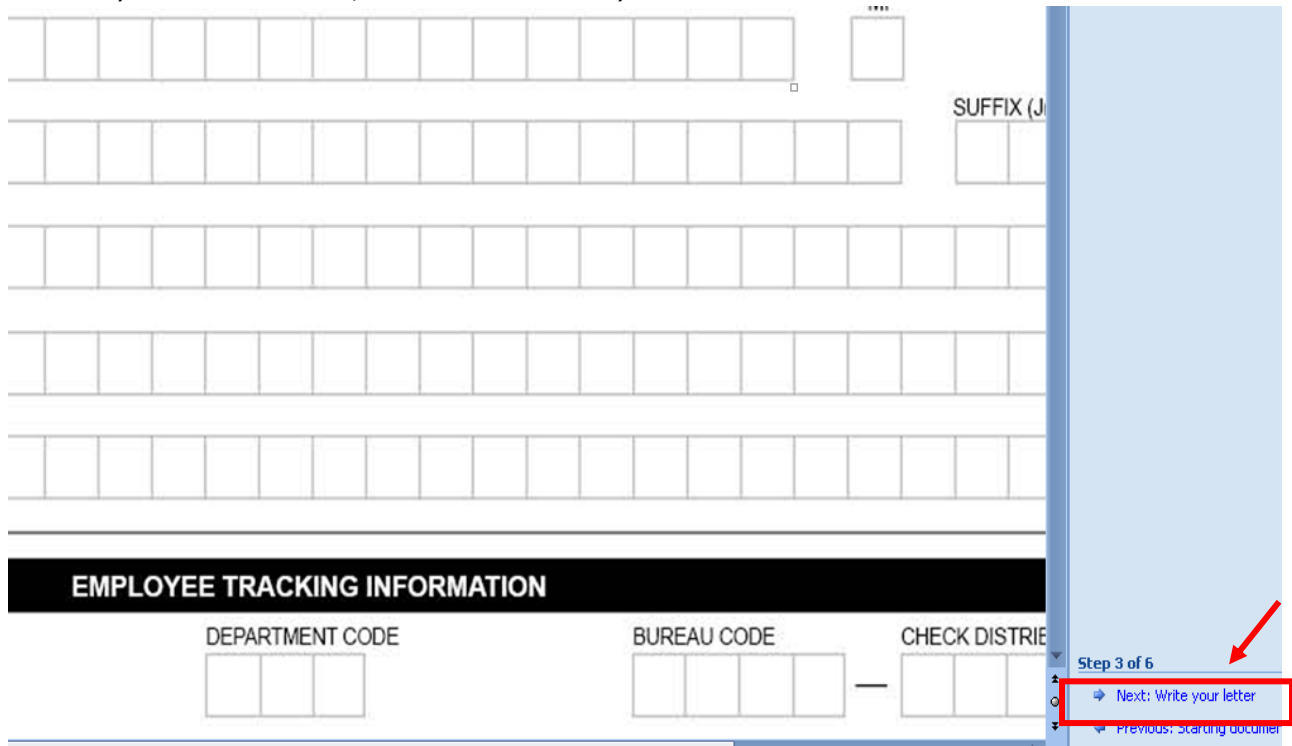
9. On the pledge form, click in the first box under "First Name" so that your cursor is in the box (a dotted text box will appear when you click). **NOTE: Do not move text boxes at any point throughout the process.**

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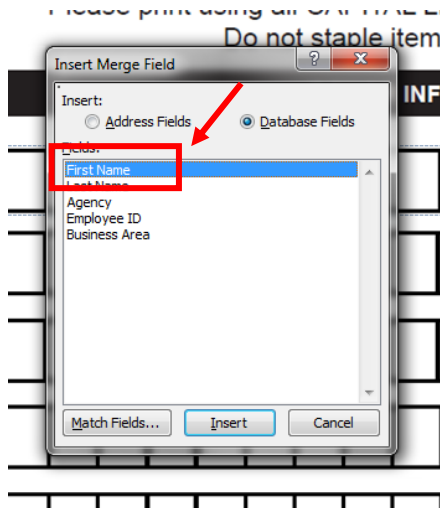
12. You will see some letters and characters on the first name field; this means the field has been inserted correctly.

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."

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.

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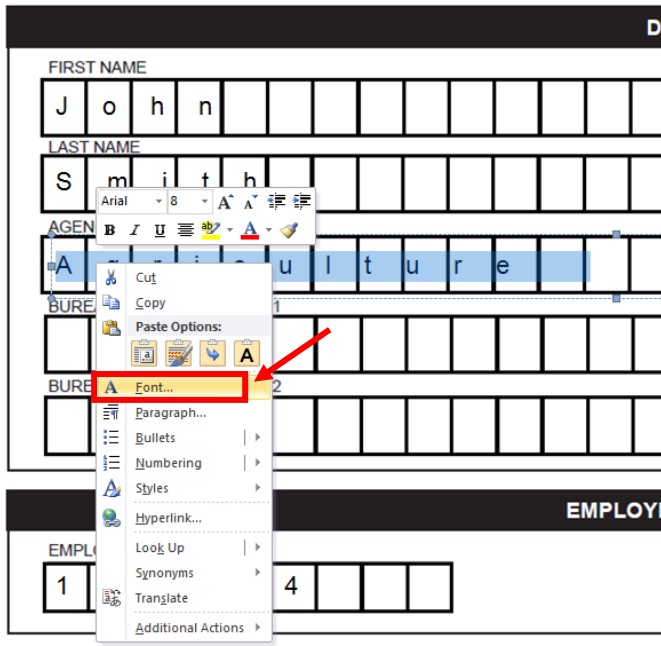
20. Under the "Advanced" tab, in the "Spacing" drop down menu, choose "Expanded" or "Condensed" (based on your needs) and then adjust the figure in the "By" field (adjust by tenths of a point at a time).
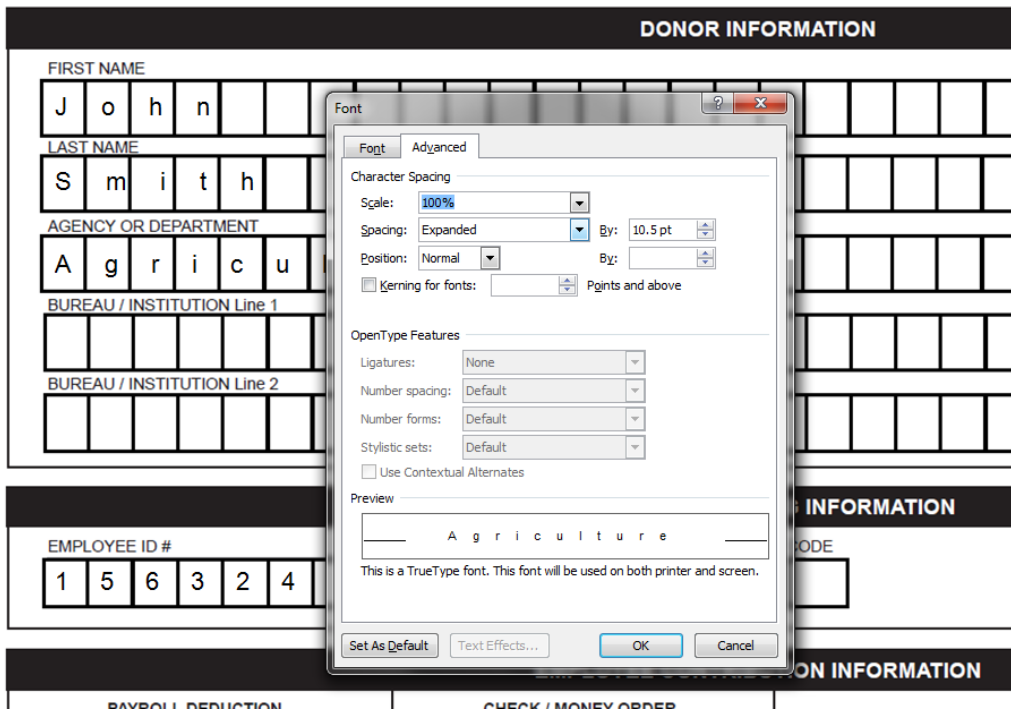
21. The pledge forms are now ready to print.