

## 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.

	А	В	С	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.

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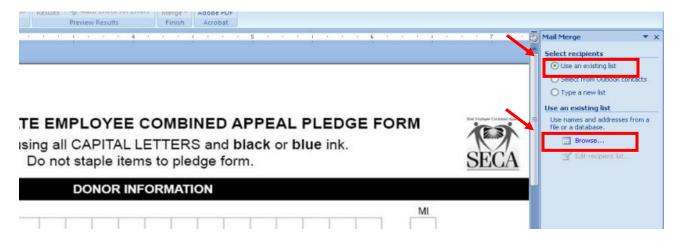
3. The "Mail Merge" pane will open on the right. Under "Select Document Type," make sure "Letters" is selected. Click "Next: Starting document" at the bottom.

Please print using	EMPLOYEE COMBINED AF g all CAPITAL LETTERS and bla p not staple items to pledge form	ck or blue ink.	SECA	E-mail messages     Ervelopes     Labes     Directory Letters Send letters to a group of people. You can personaize the letter that each person receives.
	DONOR INFORMATION			Click Next to continue.
		M		
			SUFFIX (Jr., Sr.)	
	IPLOYEE TRACKING INFORMATIO	N	_	

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

ase print using all (	PLOYEE COMBINE CAPITAL LETTERS an staple items to pledge	d black or	RM	SECA	Use the current document Start from the document shown here and use the Mail Merge wizard to add receivent information.
	DONOR INFORMATION		122.027		
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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."

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

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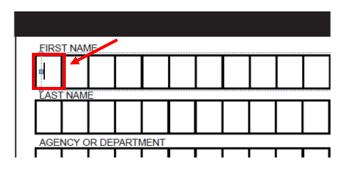
8. Another pop-up will ask you to confirm that this is the list of recipients you would like to use. Select OK.

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PENNS	This is the list of recipients checkboxes to add or rem	s that will be used in you ove recipients from the	r merge. Use merge. When	the options your list is	below to ready, clic	add to or ch k OK.	ange your list	. Use the	LEDGE FORM	(Call
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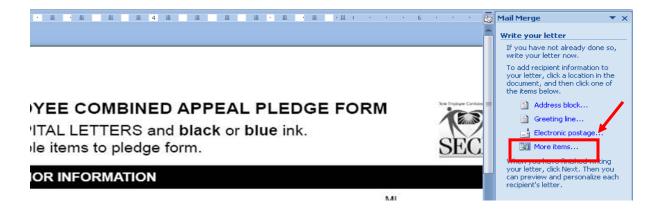
9. After you select the list, click "Next: Write your letter."

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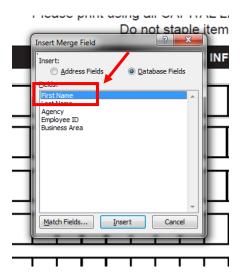
9. On the pledge form, click in the first box under "First Name" so that your cursor is in the box (a dotted text box will appear when you click). **NOTE: Do not move text boxes at any point throughout the process.** 



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.

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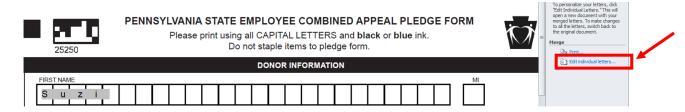
- 13. Repeat steps 9-11 in the "Last Name," "Agency," "Employee ID," and "Department Code" boxes (and "Bureau" and/or "Bureau Code" if you chose to include those fields), being sure to select the corresponding field in step 11.
- 14. When you've placed the fields in all of the boxes, click "Next: Preview your letters."

Trelds Preview Results Finish	
	Mail Merge 🔹 🗸
PENNSYLVANIA STATE EMPLOYEE COMBINED APPEAL PLEDGE FORM	Write your letter
Please print using all CAPITAL LETTERS and black or blue ink.	If you have not already done so, write your letter now.
25250 Do not staple items to pledge form.	To add recipient information to your letter, click a location in the document, and then click one of
DONOR INFORMATION	the items below.
FIRST NAME MI	Address block
	Electronic postage
«First_Name»	More items
LAST NAMESUFFIX (Jr	
«Last_Name»	your letter, dick Next. Then you can preview and personalize each recipient's letter.
AGENCY OR DEPARTMENT	-
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EMPLOYEE TRACKING INFORMATION	
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EMPLOYEE CONTRIBUTION INFORMATION	
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# of Paydates Per Year Please Make Check or Money Order Payable to SECA	•
Total Amount Per Pay Date Payment Amount	Step 4 of 6     Next: Preview your letters
	Next: Preview your letters     wext: Previous: select reaplents

25250 PENNS	<b>LVANIA STATE EMPLOYEE COMBINED APPEAL PLEDGE FORM</b> Please print using all CAPITAL LETTERS and <b>black</b> or <b>blue</b> ink. Do not staple items to pledge form.	Red Reconstruct     Red Reconstruct
	DONOR INFORMATION	Exclude this recipient
FIRST NAME  S u z i LAST NAME  J o n e s AGENCY OR DEPARTMENT  E d u c a t i o BUREAU / INSTITUTION Line 1  BUREAU / INSTITUTION Line 2		When you have finited       previewing your letters, click       Next. Then you can print the merged letters or clin invokal letters to add personal comments.
	EMPLOYEE TRACKING INFORMATION	
EMPLOYEE ID # 1 5 9 3 6 5	DEPARTMENT CODE	
PAYROLL DEDUCTION	EMPLOYEE CONTRIBUTION INFORMATION CHECK / MONEY ORDER	Step 5 of 6     Wext: Complete the merge     wrevoust write you atter

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."

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

25250	PENNSYLVANIA STATE EMPLOYEE COMBINED APPEAL PLEDGE FORM Please print using all CAPITAL LETTERS and black or blue ink. Do not staple items to pledge form.							
	DONOR INFORMATION							
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	EMPLOYEE TRACKING INFORMATION							
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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."

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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).

					DONOR INFORMATION
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LAST N	AME	-	-		Font Advanced
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EMPLO	YEE ID #	ŧ			Agriculture ODE
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21. The pledge forms are now ready to print.