

How to create a merged file

These are the step to execute a merged file command. The goal of this procedure is to enable one to produce mass document printing by merging names from a list into a template or master document.

Microsoft documents needed:

1. A Master List from which the process can extract the names/field to input. (Word or Excel)
2. A Master Template/document, such as a certificates, letter, envelope, etc.

PROCESS:

1) Creating the Master List in WORD:

- a) Open a Word document and create the list. The items on the list should be created using this format:
 - i) Start with a header, such as “List of UTH Volunteers”
 - (1) [tab]
 - (2) [Enter] to create a end of line break
 - ii) On the next line, create the first variable (such as the name of the person – e.g. Joe Smith)
 - (1) [tab]
 - (2) [Enter] to create a end of line break
 - iii) Enter the next variable, etc
- b) Save the document

----OR----

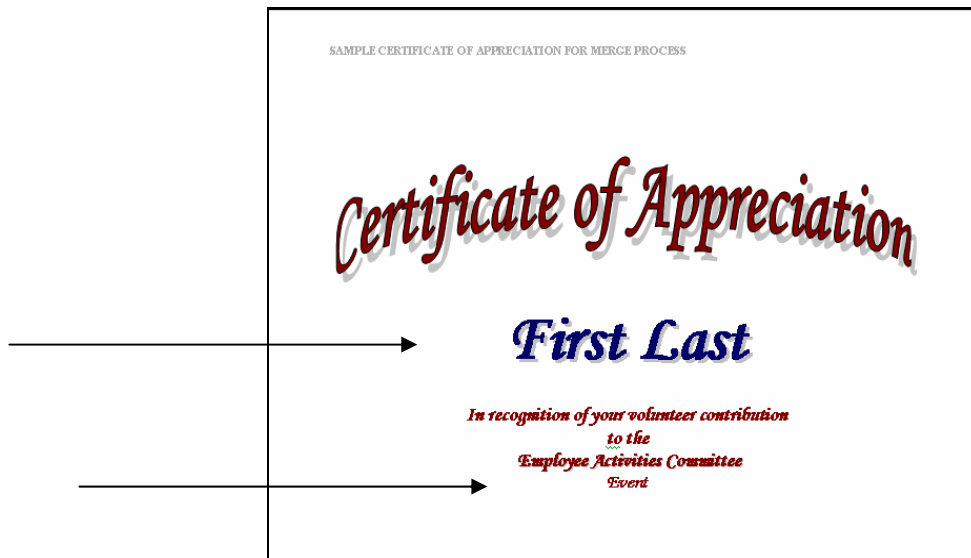
2) Creating a Master List in EXCEL

- a) First row should be Column Names/Heading to use in merge. In the case of certificate merging it should be FIRST name then LAST name and then EVENT. (Do it this way instead of just one cell for the full name in order to be able to sort by last name on the spreadsheet to search for duplicates, etc.
- b) Enter the first, last names of the volunteers and put the event name/year in the EVENT cell. No blank rows necessary
- c) Save the document.

First	Last	Event
Wendy	Abshire	Up The Hill Race 2005
David	Ahijevych	Up The Hill Race 2005

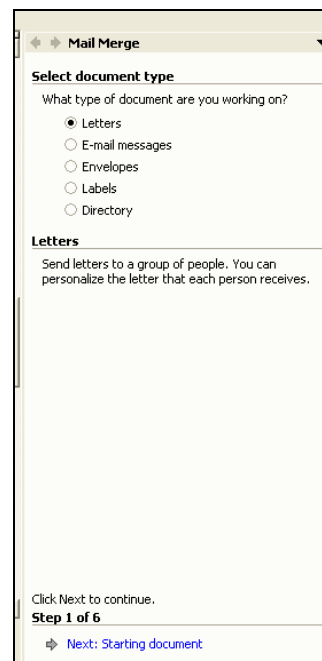
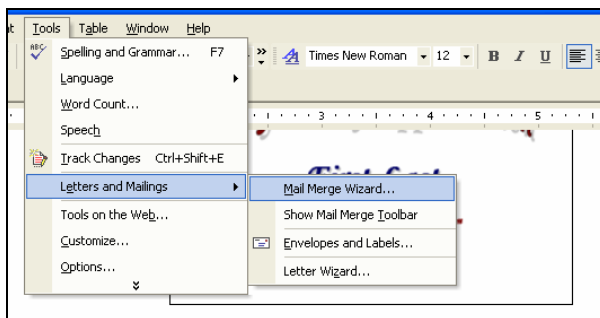
3) Open the Master Template:

- a) Place your cursor in the location where the variable (such as name) is to be inserted.
- b) Set the appropriate formatting (color, size, etc.) for the input area.



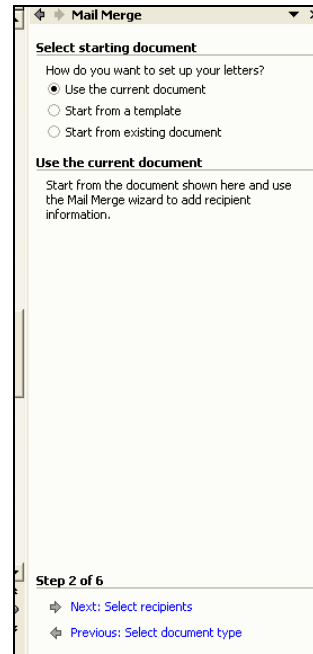
- 4) On the **Tools** menu, point to **Letters and Mailings**, and then click **Mail Merge Wizard**.
- a) Under **Select document type**, click **Letters**.

The active document becomes the main document.



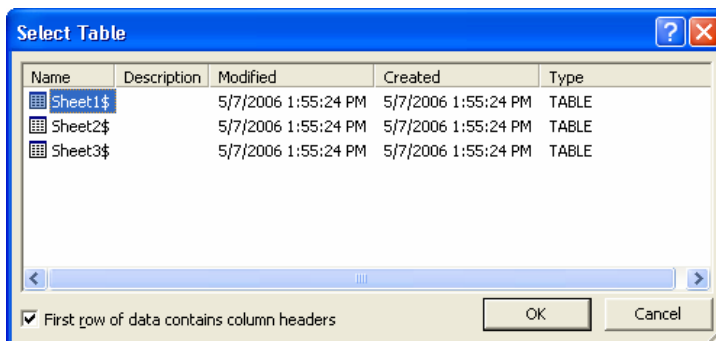
- b) Click **Next: Starting document**.
- c) Click **Use the current document**.

- d) Click **Next: Select recipients.**
- e) Under **Select recipients**, click **Use an existing list.**

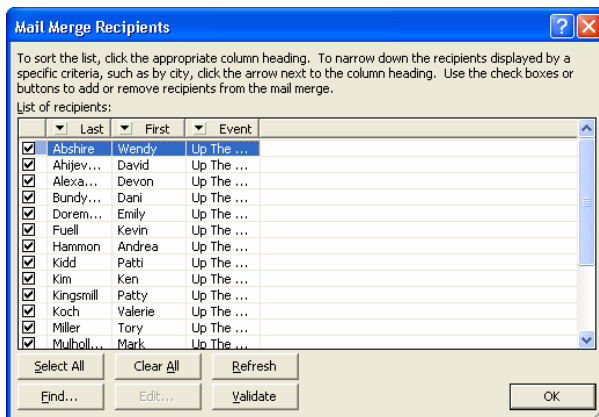
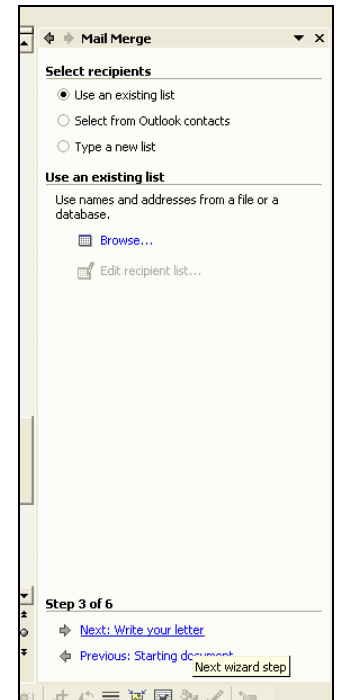


- f) Click **Browse.**
- i) In the **Select Data Source** dialog box, locate and click the file with names you want to use.

By default, Microsoft Word opens the **My Data Sources** folder.

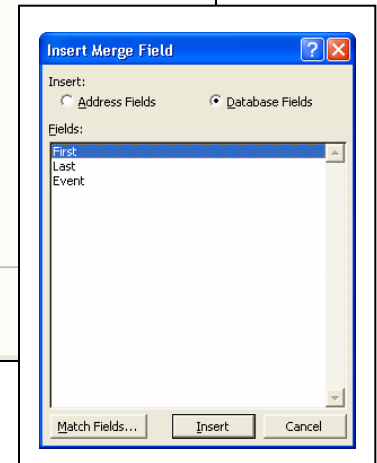
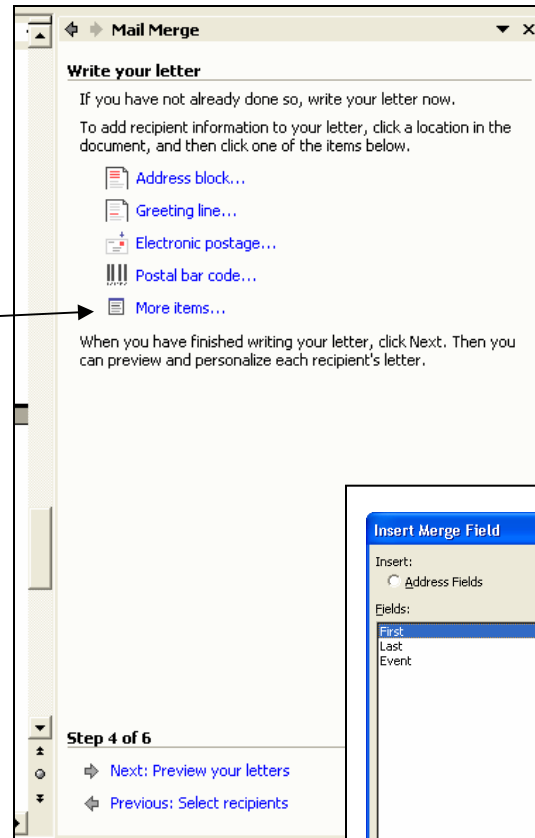


Ignore the items listed in the Select Table. Click OK on both these screens unless need to alter who certificates will be printed for.

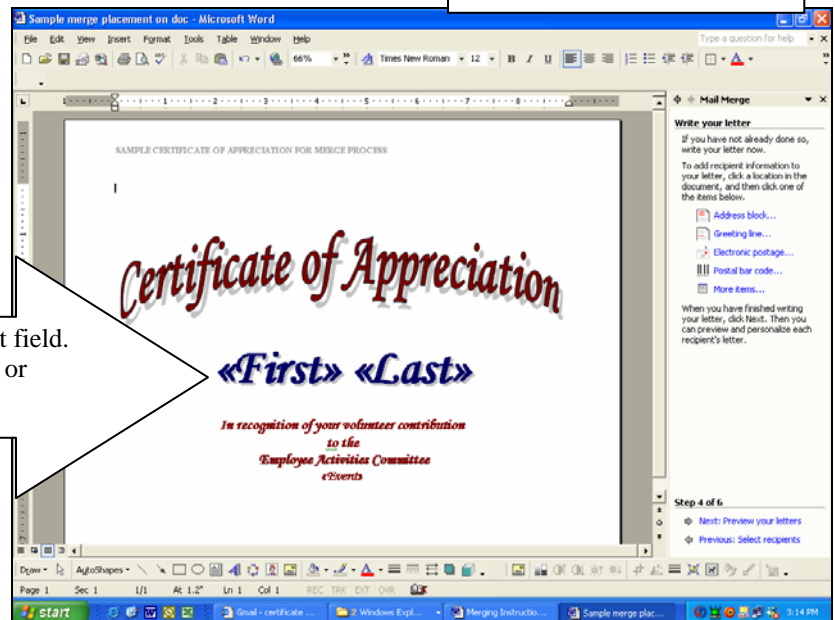


Click on **NEXT: Write your letter** and this box comes up. →

- g) Click on **MORE ITEMS** to open **Insert Merge Field** dialog box.
- i) Have the cursor in the document right where the first name goes and click **INSERT**. Do for each field to click and **INSERT** (or double click.).



Have cursor in correct position to **INSERT** the first field. Highlight any words there to be replaced like First or Event. Do this for all the fields inserting info into.



- h) Click **next: Preview your letter**.
- i) Click **next: Complete your merge**
- j) Click **Print**. Click: **All**
- i) Saved the whole merged documents until ready to print. After printing no need to have all the documents saved – just the master document and master list.