Instructions for mail merge use:

1. This mail merge will use a database (Excel Spreadsheet, Word Table, or Access Database) that has at least the following two column headings (fields), which must be named exactly (including underscore characters):

    a. Member_First_Name

    b. Member_Last_Name

2. Note: If your Database has only a single column (field) that contains both first and last name, change the heading of that column to Member_First_Name and add another column for Member_Last_Name and leave the newly created column blank. (You can delete the extra column and change the name back after printing the cards.)

3. connect to Open the Word File. It will indicate that it wants to a database. Reply NO.

4. Click on the mailings tab, then indicate you want to Select Recipients Using an Existing Database.

5. Browse to the source document (database) for your membership information, then click OK.

6. Check that font is Verdana and font size is 8.

7. Replace "local unit number" with your school's unit number.

8. Replace "local unit name" with your PTA name.

9. Click on the mailings tab, Preview Results. A single page of cards will show up.

10. CAUTION: Check alignment with your printer by making a photocopy of a sheet of cards and loading it into your printer's paper bin. Note whether the photocopy needs to be face up or face down (so that when you load your cards you don't print on the wrong side). Print the preview sheet on the photocopy and see if everything aligns before moving to the next step. You can make slight adjustments by changing the font size or adding or removing a paragraph return character. Call Sue Budak (847-891-6080) if you are having too many problems.

11. After all is aligned OK, on the mailings tab, click Finish and Merge, Edit Individual Documents.

12. Check the resulting document that pops up to see if it has all the cards you need. For example, if your database has 252 members, then the document should be 26 pages long—25 of the pages will have a member name on each card, the final page will have names on only two cards. (The number of pages should be number of members divided by 10, plus one page. The number of cards on the final sheet is the remainder from dividing by 10.) If you don't see that, check for problems such as blank lines in your database or a bad title on your last name, first name columns (fields).

13. Load your cards into the printer. Set your printer to Manual Feed so that you can watch the cards print and fix problems if they occur. The heavier cardstock might cause a printer jam and you don't want to spoil all your cards.