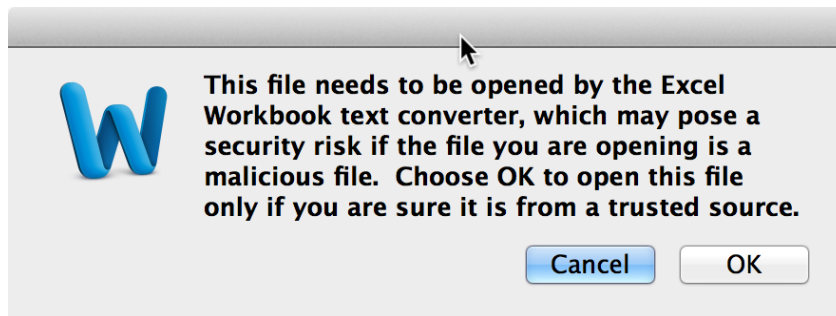


USING THE MICROSOFT WORD TEMPLATE TO PERFORM A MAIL MERGE

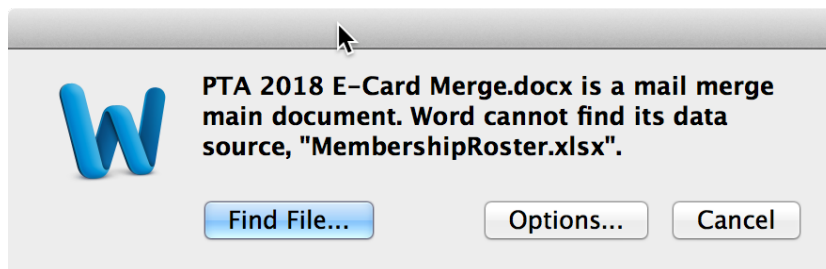
NOTE: The following steps are for use with Microsoft Outlook email only. If you are using Gmail, the mail merge function is available in Google Docs as an Add-On.

1. Save the Excel file named "MembershipRoster.xls" to your desktop
2. Save the Word file named "PTA 2017-18 E-Card Merge.doc" to your desktop
3. Open the Excel file and add your members' names and email addresses in the columns provided, then save your changes
4. Open the Word file. A pop up will display saying:



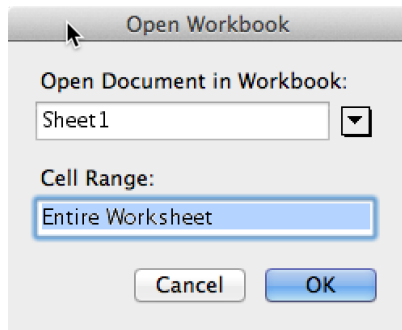
Click "Cancel"

5. A pop menu will then appear asking for the location of the data source (the Excel file necessary to complete the merge "MembershipRoster.xlsx):



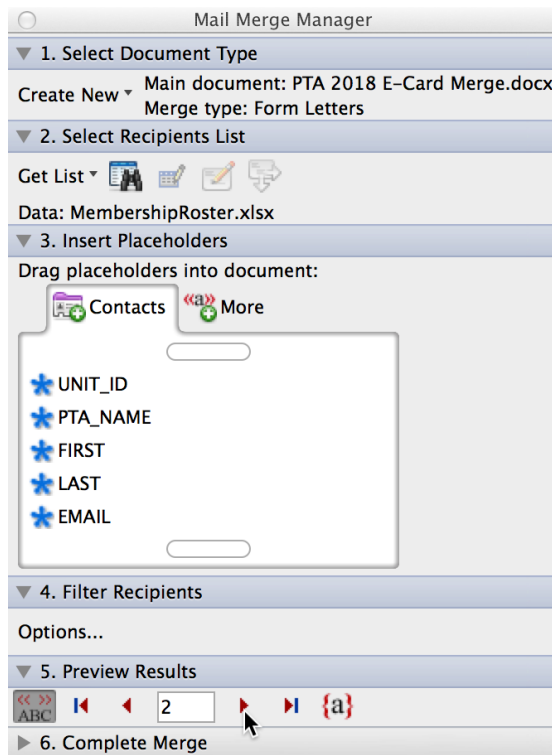
Click "Find File" and locate "MembershipRoster.xlsx."

6. The first pop up window will appear again. Click "OK" this time. This will be followed by:



Click “OK.”

7. “PTA 2017-18 E-Card Merge” will open displaying the merge fields at the beginning and end of the document. To preview the merge go to Tools and open the Merge Manager window. Under the 5th step “Preview Results” click on the “ABC” icon and use the arrows to view the individual entries.



8. Under “6. Complete Merge” click on the second “Merge to New Document” icon to open each merged version of the form letter. Save each form letter as a pdf to send to each member via email.