



## 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."

ENVELOPES Labels **Start Mail Merge** Select Recipients Edit Recipient List Highlight Merge Fields Address Block Greeting Line Insert Merge Field Match Fields Update Labels Preview Results Find Recipient Auto Check for Errors Finish & Merge Merge to Adobe PDF Acrobat

25250

**PENNSYLVANIA STATE EMPLOYEE COMBINED APPEAL PL**

Please print using all CAPITAL LETTERS and black or blue  
Do not staple items to pledge form.

**DONOR INFORMATION**

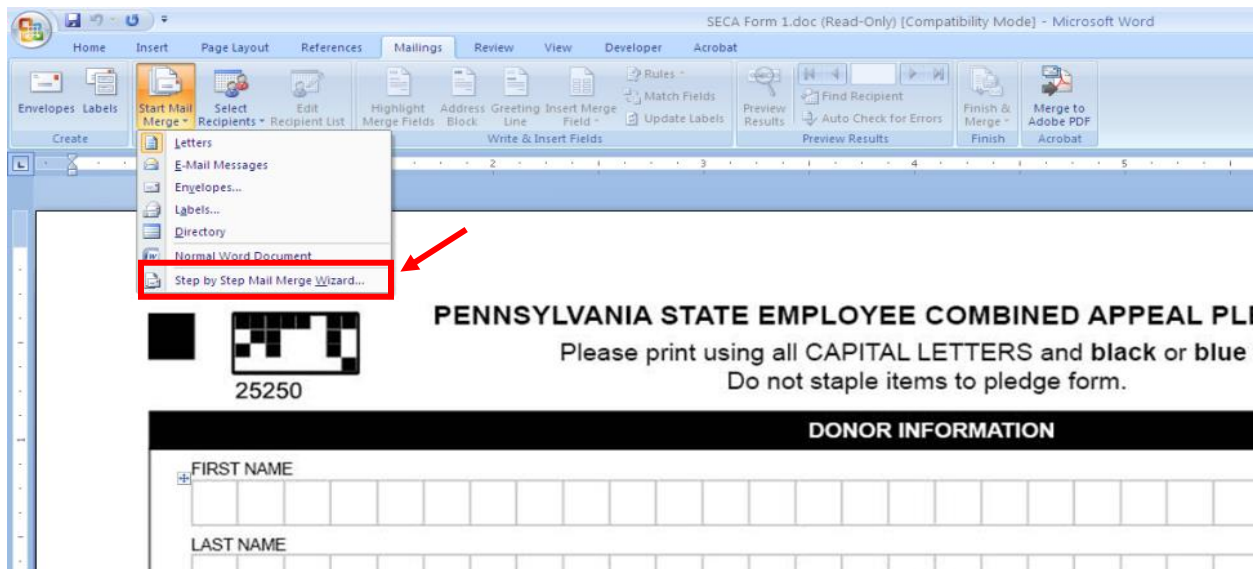
FIRST NAME

LAST NAME

AGENCY OR DEPARTMENT

BUREAU / INSTITUTION Line 1

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.

**PENNSYLVANIA STATE EMPLOYEE COMBINED APPEAL PLEDGE FORM**  
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**DONOR INFORMATION**

MI

SUFFIX (Jr., Sr.)

**EMPLOYEE TRACKING INFORMATION**

DEPARTMENT CODE

BUREAU CODE

CHECK DISTRIBUTION

**Mail Merge**

Select document type  
What type of document are you working on?

☒ Letters  
☐ E-mail messages  
☐ Envelopes  
☐ Labels  
☐ Directory

**Letters**  
Send letters to a group of people. You can personalize the letter that each person receives.  
Click Next to continue.

Step 1 of 6  
Next: Starting document

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

**LVANIA STATE EMPLOYEE COMBINED APPEAL PLEDGE FORM**  
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**DONOR INFORMATION**

MI

SUFFIX (Jr., Sr.)

**EMPLOYEE TRACKING INFORMATION**

DEPARTMENT CODE BUREAU CODE CHECK DISTRIBUTION

**Mail Merge**

Select starting document

How do you want to set up your document?

☒ Use the current document

☐ Start from a template

☐ Start from existing document

Use the current document

Start from the document shown here and use the Mail Merge wizard to add recipient information.

Step 2 of 6

Next: Select recipients

Previous: Select document type

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

**TE EMPLOYEE COMBINED APPEAL PLEDGE FORM**  
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**DONOR INFORMATION**

MI

**Mail Merge**

Select recipients

☒ Use an existing list

☐ Select from Outlook contacts

☐ Type a new list

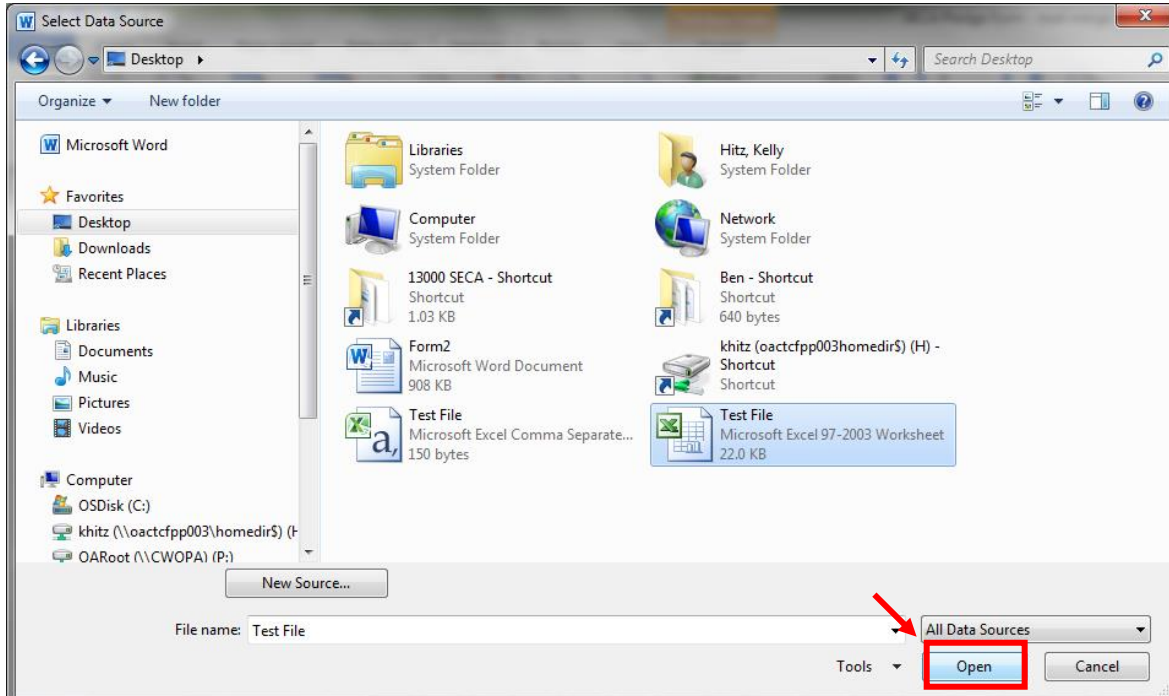
Use an existing list

Use names and addresses from a file or a database.

Browse...

Edit recipient list...

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."



**PENNSYLVANIA STATE EMPLOYEE COMBINED APPEAL PLEDGE FORM**

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T NAME

NAME

VCY OR DEPARTMENT

EAU / INSTITUTION Line 1

EAU / INSTITUTION Line 2

MI

SUFFIX (J)

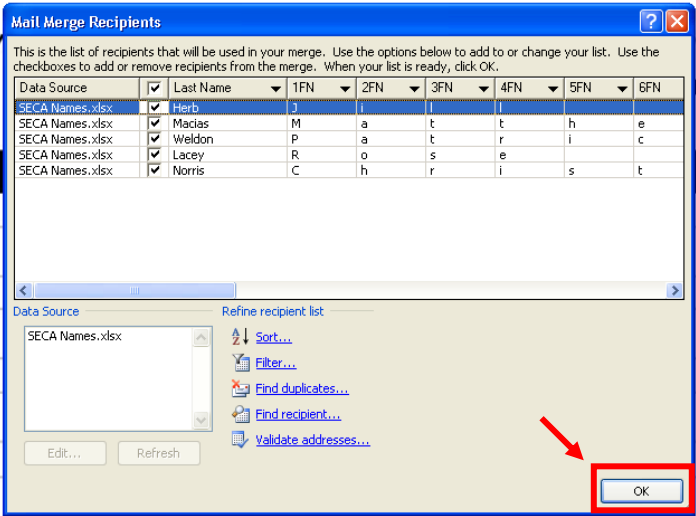
**Select Table**

Name	Description	Modified	Created	Type
Sheet1\$		7/19/2011 11:10:19 AM	7/19/2011 11:10:19 AM	TABLE
Sheet2\$		7/19/2011 11:10:19 AM	7/19/2011 11:10:19 AM	TABLE
Sheet3\$		7/19/2011 11:10:19 AM	7/19/2011 11:10:19 AM	TABLE

☒ First row of data contains column headers

OK Cancel

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



The "Mail Merge Recipients" dialog box is displayed over a background form. The dialog box contains a table of recipients and a "Refine recipient list" section. A red arrow points to the "OK" button at the bottom right of the dialog box.

Data Source	Last Name	1FN	2FN	3FN	4FN	5FN	6FN
SECA Names.xlsx	Herb	J					
SECA Names.xlsx	Macias	M	a	t	t	h	e
SECA Names.xlsx	Weldon	P	a	t	r	i	c
SECA Names.xlsx	Lacey	R	o	s	e		
SECA Names.xlsx	Norris	C	h	r	i	s	t

Refine recipient list

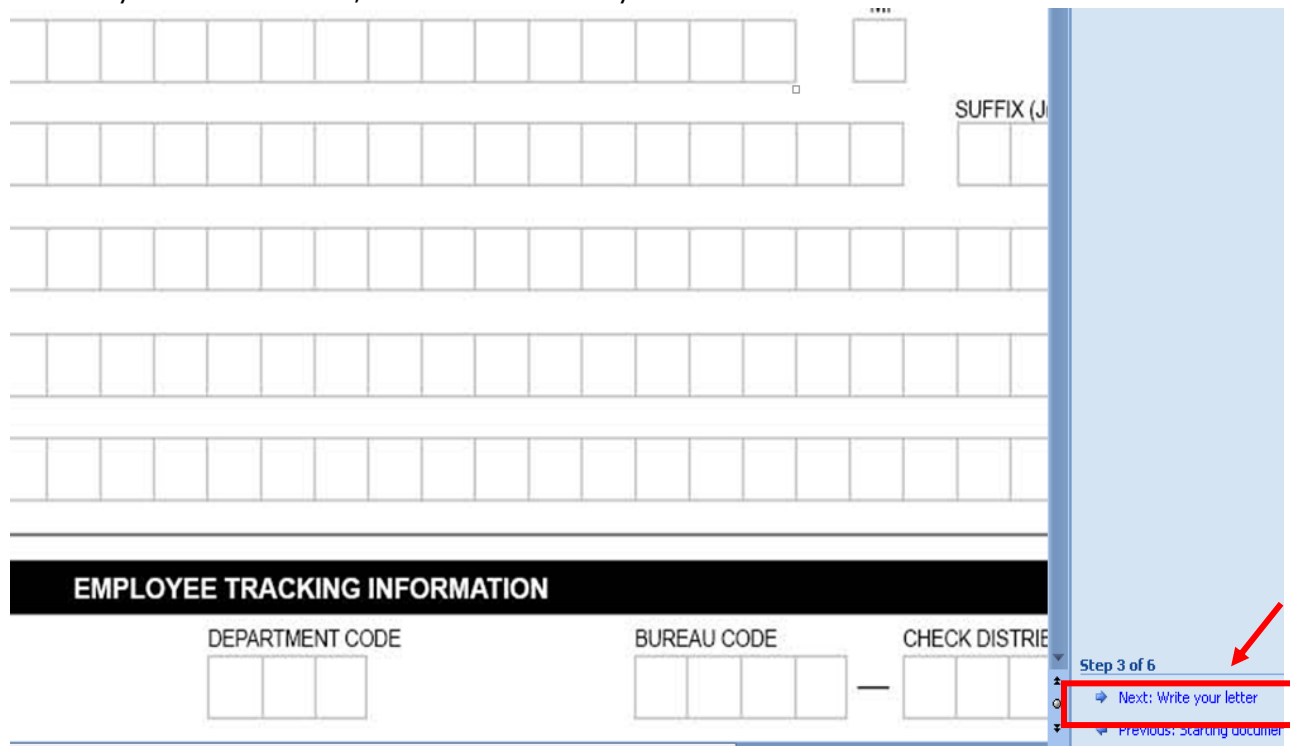
SECA Names.xlsx

Sort...  
Filter...  
Find duplicates...  
Find recipient...  
Validate addresses...

Edit... Refresh

OK

9. After you select the list, click "Next: Write your letter."



The background form is visible, showing the "EMPLOYEE TRACKING INFORMATION" section. A red arrow points to the "Next: Write your letter" button in the bottom right corner of the form.

EMPLOYEE TRACKING INFORMATION

DEPARTMENT CODE: [ ] [ ] [ ]

BUREAU CODE: [ ] [ ] [ ] [ ]

CHECK DISTRI: [ ] [ ] [ ]

Step 3 of 6

Next: Write your letter

Previous: Starting document

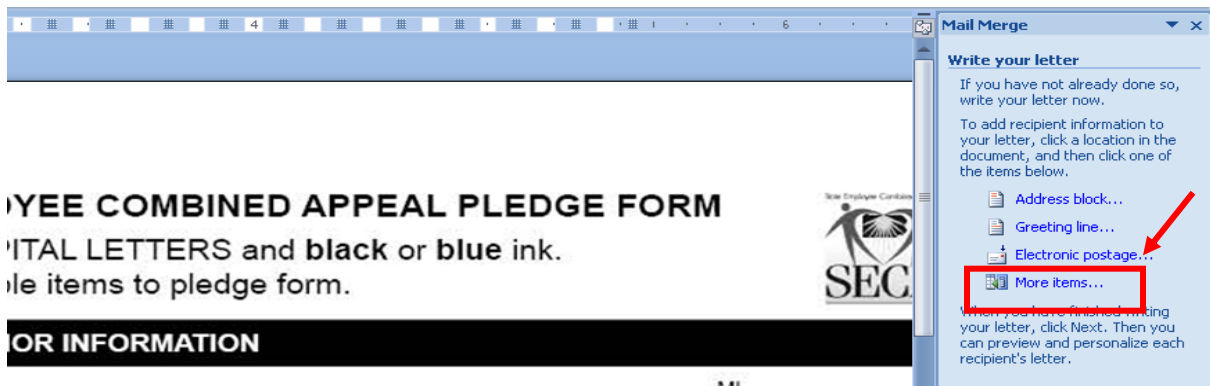
9. On the pledge form, click in the first box under "First Name" so that your cursor is in the box (a dotted text box will appear when you click). **NOTE: Do not move text boxes at any point throughout the process.**

FIRST NAME

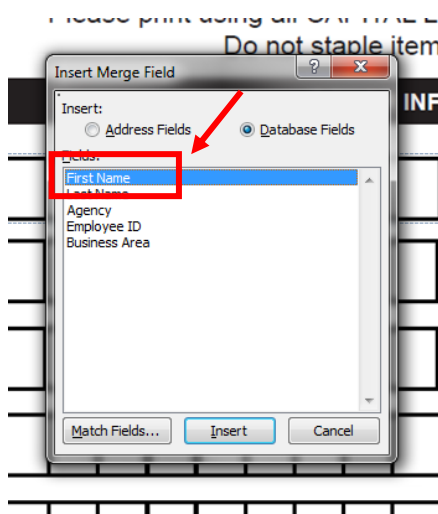
LAST NAME

AGENCY OR DEPARTMENT

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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**DONOR INFORMATION**

FIRST NAME  
« F i r s t \_ N a m e »

MI

LAST NAME  
« L a s t \_ N a m e »

SUFI

AGENCY OR DEPARTMENT  
« A g e n c y »

BUREAU / INSTITUTION Line 1  
« B u »

BUREAU / INSTITUTION Line 2  
« »

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."

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**DONOR INFORMATION**

FIRST NAME  
« F i r s t \_ N a m e »

MI

LAST NAME  
« L a s t \_ N a m e »

SUFFIX (Jr., Sr., etc.)

AGENCY OR DEPARTMENT  
« A g e n c y »

BUREAU / INSTITUTION Line 1  
« B u »

BUREAU / INSTITUTION Line 2  
« »

**EMPLOYEE TRACKING INFORMATION**

EMPLOYEE ID #  
« E m p l o y e e »

DEPARTMENT CODE  
« B u »

BUREAU CODE  
« »

CHECK DISTRIBUTION  
« »

**EMPLOYEE CONTRIBUTION INFORMATION**

PAYROLL DEDUCTION  
# of Paydates Per Year  
Total Amount Per Pay Date

CHECK / MONEY ORDER  
Please Make Check or Money Order Payable to SECA  
Payment Amount

**Mail Merge**

Write your letter  
If you have not already done so, write your letter now.  
To add recipient information to your letter, click a location in the document, and then click one of the items below.  
Address block...  
Greeting line...  
Electronic postage...  
More items...  
When you have finished writing your letter, click Next. Then you can preview and personalize each recipient's letter.

Step 4 of 6  
Next: Preview your letters

15. The first employee entry will appear. Click "Next: Complete the Merge."

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**DONOR INFORMATION**

FIRST NAME: S u z i MI: ☐  
LAST NAME: J o n e s SUFFIX (Jr., Sr.): ☐  
AGENCY OR DEPARTMENT: E d u c a t i o n  
BUREAU / INSTITUTION Line 1:   
BUREAU / INSTITUTION Line 2:

**EMPLOYEE TRACKING INFORMATION**

EMPLOYEE ID #: 1 5 9 3 6 5 DEPARTMENT CODE: 2 5 BUREAU CODE:  CHECK DISTRIBUTION:

**EMPLOYEE CONTRIBUTION INFORMATION**

PAYROLL DEDUCTION:  CHECK / MONEY ORDER:

Step 5 of 6  
Next: Complete the merge

16. Click "Edit individual letters."

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**DONOR INFORMATION**

FIRST NAME: S u z i MI: ☐

To personalize your letters, click "Edit Individual Letters." This will open a new document with your merged letters. To make changes to all the letters, switch back to the original document.

Merge:  
Edit individual letters...

17. On window that appears, make sure "All" is selected, then click "OK."

Merge to New Document

Merge records

☒ All  
☐ Current record  
☐ From:  To:

OK Cancel



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

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**DONOR INFORMATION**

FIRST NAME  
S u z i

MI

LAST NAME  
J o n e s

SUFFIX (Jr., Sr.)

AGENCY OR DEPARTMENT  
E d u c a t i o n

BUREAU / INSTITUTION Line 1

BUREAU / INSTITUTION Line 2

**EMPLOYEE TRACKING INFORMATION**

EMPLOYEE ID #  
1 5 9 3 6 5

DEPARTMENT CODE  
2 5

BUREAU CODE

CHECK DISTRIBUTION CODE

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."

**D**

FIRST NAME  
J o h n

LAST NAME  
S m i t h

AGENCY OR DEPARTMENT  
A u l t u r e

BUREAU / INSTITUTION Line 1

BUREAU / INSTITUTION Line 2

**EMPLOYEE TRACKING INFORMATION**

EMPLOYEE ID #  
1

DEPARTMENT CODE  
4

BUREAU CODE

CHECK DISTRIBUTION CODE

Font... (highlighted in red box)

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).

The image shows a 'DONOR INFORMATION' form with several fields: FIRST NAME (J o h n), LAST NAME (S m i t h), AGENCY OR DEPARTMENT (A g r i c u), BUREAU / INSTITUTION Line 1, BUREAU / INSTITUTION Line 2, EMPLOYEE ID # (1 5 6 3 2 4), and a CODE field. A 'Font' dialog box is open, showing the 'Advanced' tab. The 'Character Spacing' section has 'Scale' set to 100%, 'Spacing' set to 'Expanded', and 'By' set to 10.5 pt. The 'OpenType Features' section has 'Ligatures' set to 'None', 'Number spacing' set to 'Default', 'Number forms' set to 'Default', and 'Stylistic sets' set to 'Default'. The 'Preview' section shows the text 'A g r i c u l t u r e' and a note: 'This is a TrueType font. This font will be used on both printer and screen.' The dialog box has buttons for 'Set As Default', 'Text Effects...', 'OK', and 'Cancel'.

21. The pledge forms are now ready to print.