
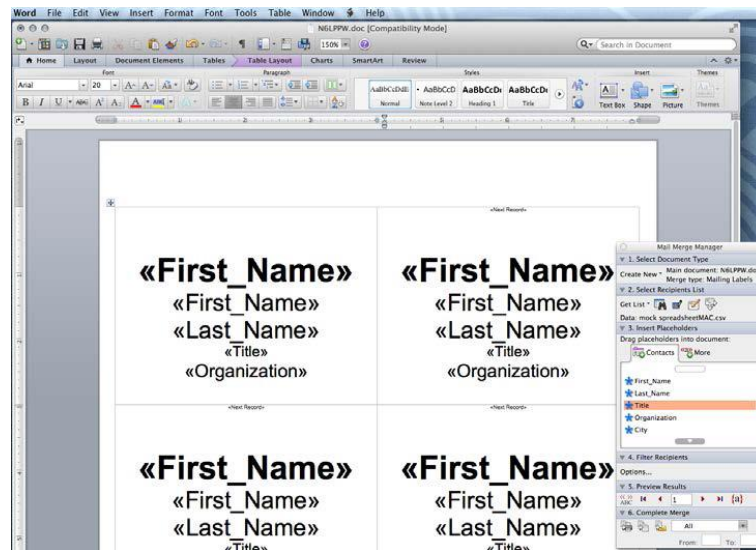


1. Open the Word template. If it opens blank then click on the page and go to the 'Layout' tab under 'Table Tools' (indicated above with ) then press the 'View Gridlines' button.  
**NOTE: This is different than the "Gridlines" check box under the "View" tab.**
2. Finalize your Excel spreadsheet with a title for each column in the top row. Close the file when finished.
3. In Word, select the 'Mailings' tab on the top menu bar and press the 'Select Recipients' button.  
**NOTE: Do not select "Start Mail Merge".** This is only necessary if you don't already have a template.
  - a. Choose 'Use Existing List', Under 'Files of Type' choose 'All Files'. Find your Excel list and press 'Open'. If prompted, select which tab in the spreadsheet you'd like the data to pull from.
4. Click on the blank badge on the top left. (**NOTE: If you received a Word template from pc/nametag that already has your badge fields entered and positioned**, highlight whichever field you'd like to assign, and then follow step (a) below. This way, the position and style of the text will remain the same.)
  - a. Select the button 'Insert Merge Field'. Your titles from the Excel list should show up in the drop-down menu, select each to place them into the top left badge.
  - b. When you have placed all of the Merge Fields, select 'Rules' and choose 'Next Record'. Be sure to the 'Next Record' appears below all of the other fields you have inserted. **If you are using a 1-up template, the 'Next Record' rule is not needed.**
5. To customize the look of the text you can now select 'Preview Results' to see how the fields will print.
  - a. You can change: Font, size, color, alignment, and other font features in the 'Home' tab.
6. If you would like an image included, go to the 'Insert' tab and select 'Picture'. Find your file and press 'OK'.
  - a. With your image still selected, go to the 'Format' tab, choose 'Wrap Text' and place 'Behind Text'. Now your picture is highlighted and you can use the keypad arrows to nudge the picture into place on your 1<sup>st</sup> badge. If you need to select the graphic again, press control-A, then click on the graphic (or click and hold to move the graphic).
7. Once your 1<sup>st</sup> badge is formatted, go back to the 'Mailings' tab and select 'Preview Results' to show the Merge fields again.
  - a. Copy all the text (and logo if used), as well as all of the space above the Merge fields, and paste into the rest of the badges to duplicate the tag on each insert
8. **IMPORTANT:** Remove the rule 'Next Record' from the bottom right badge on the page. If this rule is not deleted, a merge field may be skipped. Every other badge should have the 'Next Record' rule.
9. To merge all the data to your document select 'Finish & Merge' and choose 'Edit Individual Documents'
  - a. Select 'All' and press 'OK', a new print-ready document will appear with the data from your Excel sheet.

1. Open the Word template, if the template opens blank, click on the page and go to 'Table Layout' then select 'Gridlines'
2. Finalize your Excel spreadsheet with a title for each column in the top row. Close the Excel file when finished
3. In Word, go to the Tools Menu and select the Mail Merge Manager



4. Mail Merge Manager Steps:
  - a. Select Document Type
  - b. Choose 'Create New' then Label. Then press cancel since the template needed should already be open in Word. Your File should show up after Main Document: \_\_\_\_\_
5. Get List
  - a. Choose Open Data Source and locate the name list by browsing to the location saved on your computer.
6. Insert Placeholders
  - a. Enter the fields you will be using from the column headers on your list of names. Format the data fields with font styles/sizing/colors. Insert any logos or color bars if needed.
7. Filter Recipients
8. Preview Results
  - a. Preview the tags and make final alterations to layout and formatting. Click on View Merged Data
9. Complete Merge
  - a. Press the button 'Merge to a New Document'.
10. Review the final merge to ensure names and titles do not wrap incorrectly or any personalization has been removed from the tags.

