



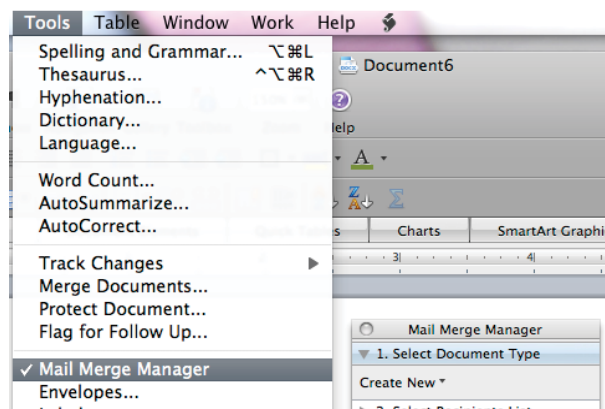
## With a Fully Formatted Invitation Document Open, Start Mail Merge

With a fully formatted, ready to print document\* open, start mail merge.

Click **Tools > Mail Merge Manager**.

The *Mail Merge Manager* opens, guiding you through the rest of the process in 6 steps.

\*This process can be used for any personalized stationery including invitations, response cards, thank you notes, etc.

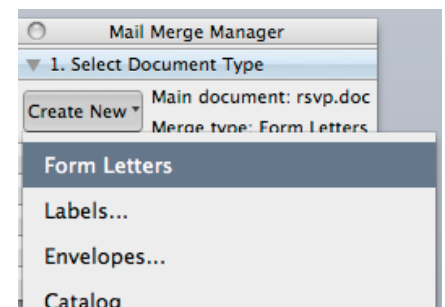


## 1. Select a Document Type

In Step 1, *Select Document Type*, you will be choosing the type of document you are working on.

Click **Create New >Form Letters**.

The name of your document will appear next to *Create New*.

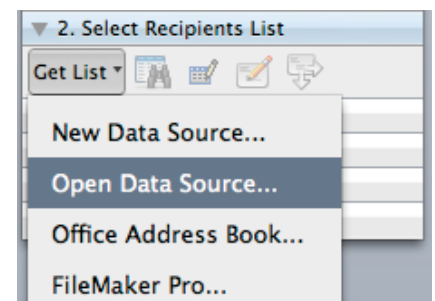


## 2. Select Recipients

Under step 2, *Select Recipients List*, click **Get List > Open Data Source**.

Navigate to the spreadsheet of names that you have previously made.

The *Header Record Delimiters* window open. Click **OK**.

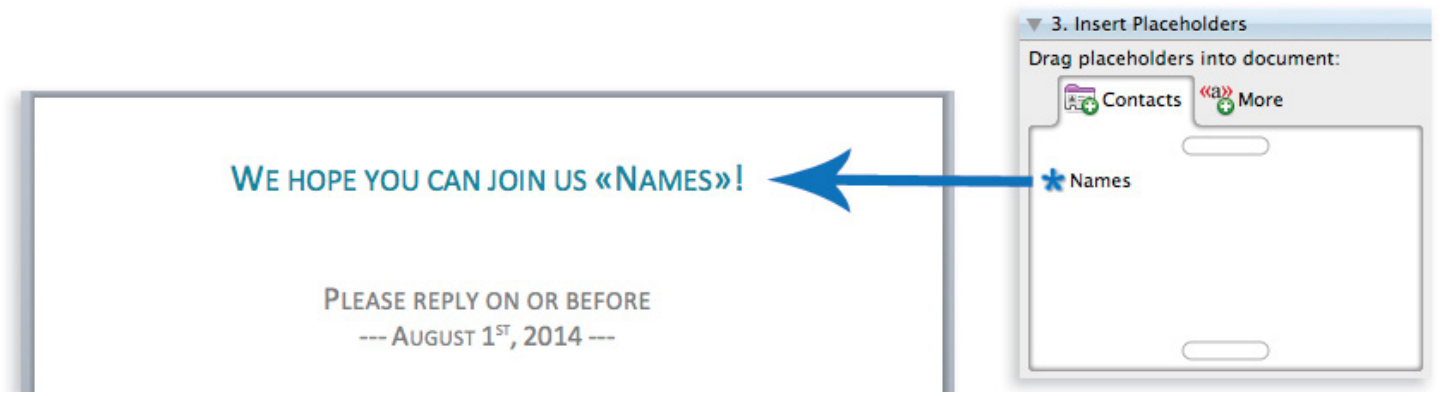


The name of the columns/placeholders from your spreadsheet appear below step 3.

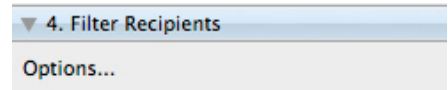
# 3. Insert Place Holders

Next, highlight the placeholder(s) and insert them where you want them to go in your document.

<< and >> marks surround your place holder, ready to be filled in with the information in your spreadsheet.



# 4. Filter Recipients

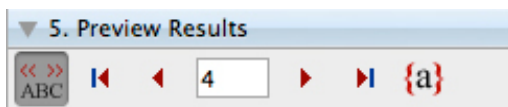


Step 4 provides options for filtering names within your list. This will only be used if you wish to omit some names that are in your database file, or if you wish to reprint a few names from your merged document later on.

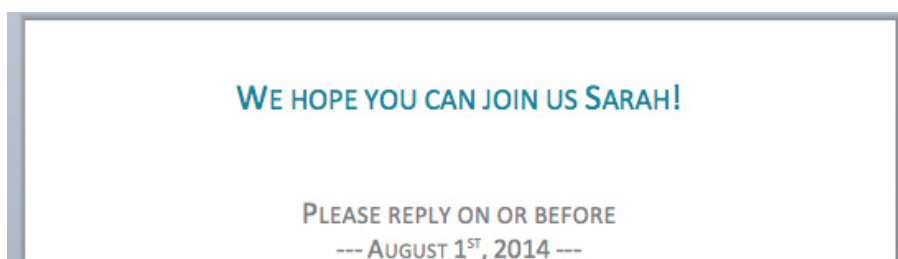
If your list is fine as is, proceed to step 5.

# 5. Preview Your Document

All of the information from your spreadsheet has now populated into the document and you can preview each card by first clicking the <<ABC>> icon, then the << and >> buttons.

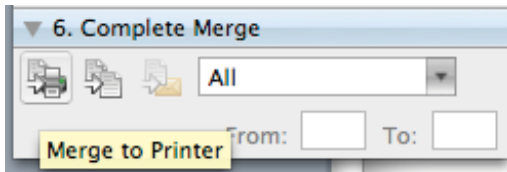


This is a good time to make sure none of the names are too large to fit on one line. When everything looks good, you're ready to complete the merge.

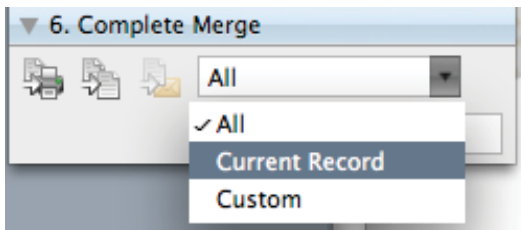


# 6. Complete the Merge & Print

This is the appropriate time to print one card as a test. In step 6, click the *Merge to Printer* icon.



Select **Current Record**. This prints just the document on the screen, not the entire collection.



A print window appears which brings up your print driver.

After printing the test, if everything is properly positioned, click **All** to print the entire list.