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Supporter Donation System Quick Tips
Mail Merge Letters, Envelopes, Labels

1. Click on the Supporters button on the Main Menu
2. Use the Open SSE to select the supporters that you would like to have in the mail merge
3. Click on the Mail merge button on the bottom of the Supporter Search screen
4. Find your MS Word document in the Choose a Word Document screen
5. Click on the Open button
6. Put your cursor where you want to insert your merge fields
7. Click on the Insert Merge Field tool on the Mail Merge Tool bar (it looks like a plain sheet of paper)
8. Click on the Merge Fields to be inserted and click on the Insert button
9. Insert all the fields you will need on the letter
10. Click the Cancel button on the Insert Merge Field screen
11. Move your merge fields into the correct positions, adding spaces and punctuation as needed
12. Click on save to save the letter
13. Click on the <<ABC>> View Merged Data tool on the Mail Merge Tool bar to view your letter and your data
14. Use the right and left record scroll tools on the Mail Merge Tool bar to view each of your merged letters
15. Click the:
    a. Merge to New Document (creates a new document that can be saved and edited) or
    b. Merge to Printer (sends the data directly to the printer) or
    c. Merge to Email (prompts you for email field to continue) to perform the actual merge
NOTE: You can turn on the Mail Merge Wizard and use it to walk you through the mail merge process.

Merge Envelopes
1. Click on the Supporters button on the Main Menu
2. Use the Open SSE to select the supporters that you would like to have in the mail merge
3. Click on the Mail merge button on the bottom of the Supporter Search screen
4. Find your MS Word document in the Choose a Word Document screen or
5. Right click on the blank white area, click New, click New Microsoft Word Document, rename the document to Merge Envelope
6. Click on the Open button
7. Click on File, Page Setup
8. Change Margins to 0 all the way around, make the Orientation Landscape, click on Paper tab change Paper size to Envelope #10, Click OK
9. Click Fix when notified of margins being outside of printable area, click OK
10. Type a return address if needed in the top left corner
11. Put your cursor where you want to insert your merge fields
12. Click on the Insert Merge Field tool on the Mail Merge Tool bar (it looks like a plain sheet of paper)
13. Click on the Merge Fields to be inserted and click on the Insert button

14. Insert all the fields you will need on the Envelope: AddressName, PrimaryAddressLine1, PrimaryAddressLine2, PrimaryCity, PrimaryState, PrimaryZip
15. Click the Cancel button on the Insert Merge Field screen
16. Move your merge fields into the correct positions, adding spaces and punctuation as needed
17. Click on save to save the envelope
18. Click on the <<ABC>> View Merged Data tool on the Mail Merge Tool bar to view your envelope and your data
19. Use the right and left record scroll tools on the Mail Merge Tool bar to view each of your merged letters
20. Click the:
    a. Merge to New Document (creates a new document that can be saved and edited) or
    b. Merge to Printer (sends the data directly to the printer)

Merge Labels

1. Click on the Supporters button on the Main Menu
2. Use the Open SSE to select the supporters that you would like to have in the mail merge
3. Click on the Mail merge button on the bottom of the Supporter Search screen
4. Find your MS Word document in the Choose a Word Document screen or
5. Right click on the blank white area, click New, click New Microsoft Word Document, rename the document to Merge Label
6. Click on the Open button
7. Click Tools, click Letters and Mailings, click Mail Merge… this will open the Mail Merge wizard on the right of the screen
8. Click Previous in the bottom right corner until you get to Step 1
9. On the Select document type screen choose Labels, click Next: Starting document
10. Click on Label Options and choose the label you are going to use, click OK,
11. Click Next: Select Recipients
12. Click Next: Arrange your labels
13. Click on the Insert Merge Field tool on the Mail Merge Tool bar (it looks like a plain sheet of paper)
14. Click on the Merge Fields to be inserted and click on the Insert button
15. Insert all the fields you will need on the Label: AddressName, PrimaryAddressLine1, PrimaryAddressLine2, PrimaryCity, PrimaryState, PrimaryZip
16. Click the Cancel button on the Insert Merge Field screen
17. Move your merge fields into the correct positions, adding spaces and punctuation as needed
18. On the Mail Merge wizard panel click Update all labels
19. Click Next: Preview your labels
20. Use the scroll bar to view each of your merged labels
21. Click Next: Complete the Merge
22. Choose Merge:
    a. Print (sends the data directly to the printer) or
    b. Edit individual labels (creates a new document that can be saved and edited) – click OK on the Merge to New Document screen, edit and then print the labels