

How to data merge Sectional Participation Certificates

This step by step tutorial will show you how to merge data (i.e.: participant names and dates) from an Excel spreadsheet onto Certificates formatted in Word.

Creating Data Files in Excel

Step 1)

Create Excel file with data you would like to include on your certificates OR use an existing data file with participants' names.

Data used on the certificates includes: first name, last name, day, month, year, and proficiency area (if using proficiency participation certificate).

Headers with title of data should run horizontally across the top (row 1) with individualized data listed in the columns below the header

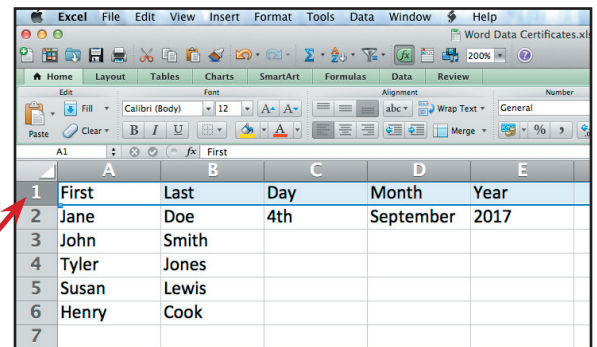
Tip: Rather than filling in consistent/repeating information for each participant (i.e.: day, month, year), use the Fill Down command.

Highlight the cells with the information you want repeated, as well as the cells you want the information copied into. Great for dates!

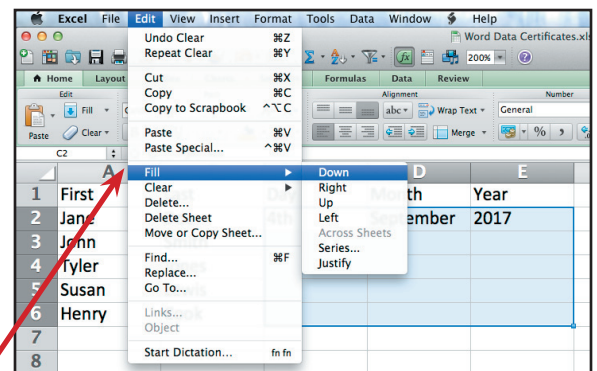
Edit > Fill > Down

If using an existing file with participants' names make sure you have a header with titles of the data in their column as well as columns with the day, month and year.

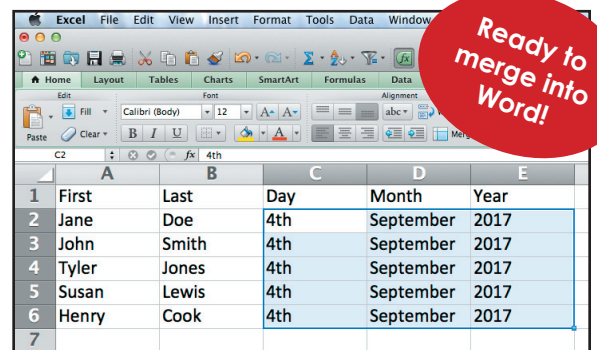
Save your file and you are ready to merge into Word



	A	B	C	D	E
1	First	Last	Day	Month	Year
2	Jane	Doe	4th	September	2017
3	John	Smith			
4	Tyler	Jones			
5	Susan	Lewis			
6	Henry	Cook			
7					



	A	B	C	D	E
1	First	Last	Day	Month	Year
2	Jane	Doe	4th	September	2017
3	John	Smith			
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	A	B	C	D	E
1	First	Last	Day	Month	Year
2	Jane	Doe	4th	September	2017
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5	Susan	Lewis	4th	September	2017
6	Henry	Cook	4th	September	2017
7					

Ready to merge into Word!

Merging Excel Data into Word Formatted Certificates

Step 2)

Open the Word document of the Certificates you would like to merge and print.

Step 3)

Launch Mail Merge Manager Toolbox

Tools > Mail Merge Manager

Mail Merge Manager window will pop-up

3a) "1. Select Document Type"

Create New > Form Letters

3b) "2. Select Recipient List"

Get List > Open Data Source

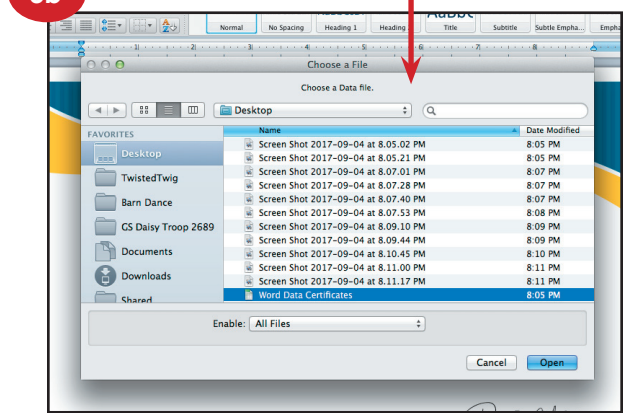
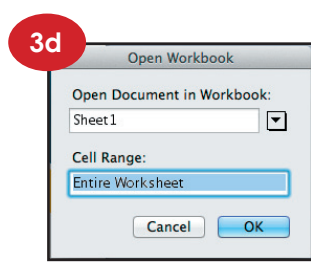
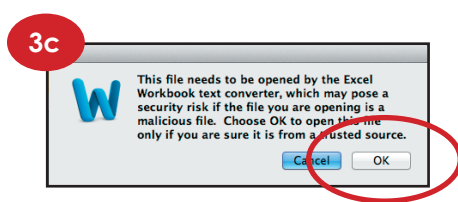
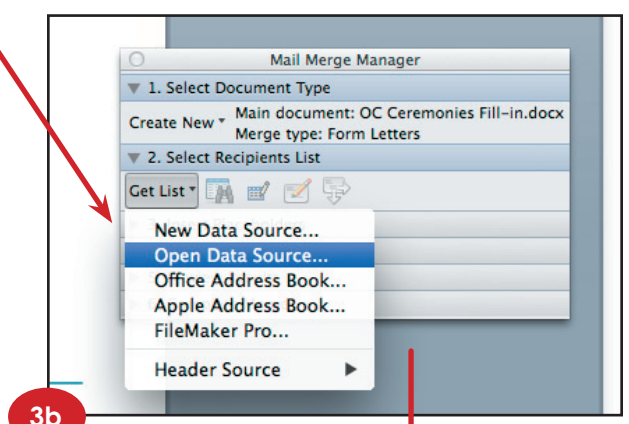
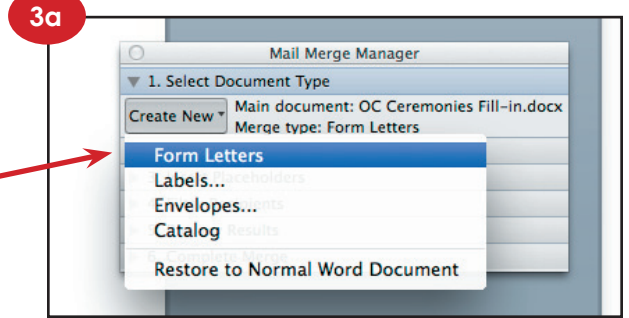
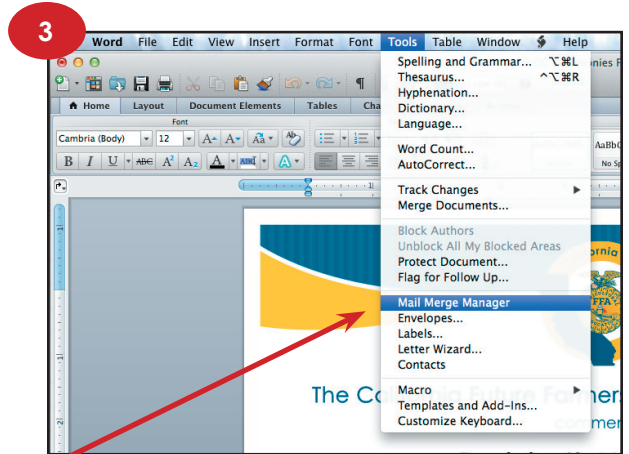
Select your Excel file you created and saved from step 1 > Open

3c) Once you select your Excel data file a security warning dialog box may pop up.

Select "OK" to trust the security of the source

3d) "Open Workbook" dialog box

Select "OK" to pull data from Sheet 1 (by default).

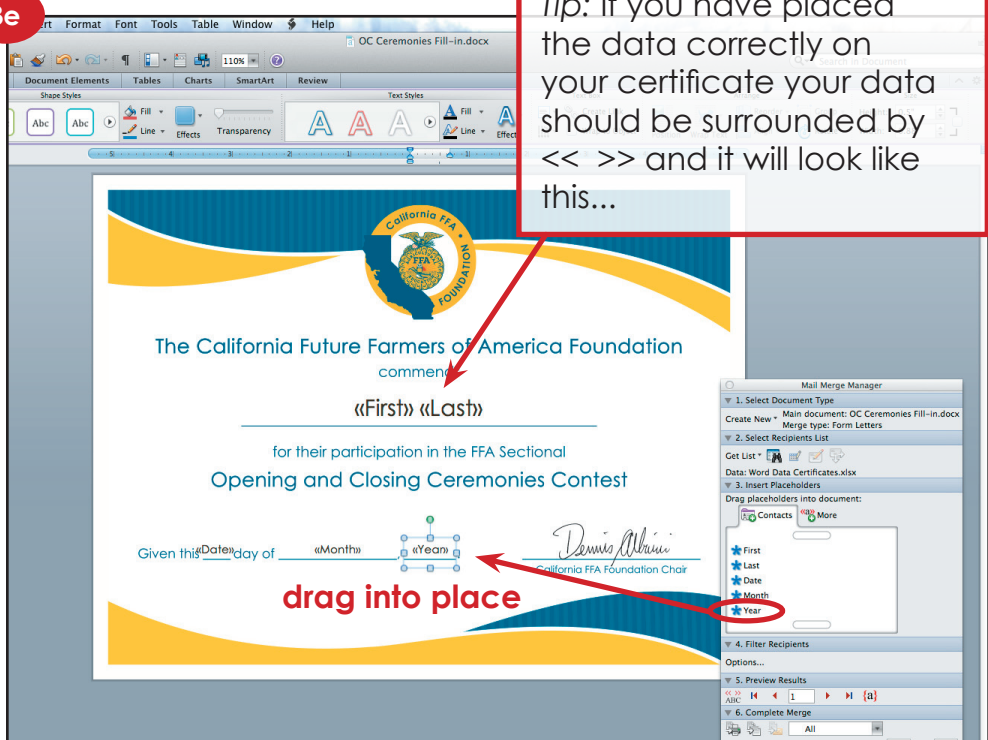


Mail Merge Manager, continued

3e) "3. Insert Placeholders"

You should see the headers of your data under "contacts". Select a piece of data, by clicking on the title and dragging it into the placed text boxes on the certificate. You may need to delete the existing placeholder text within the text frames.

3e



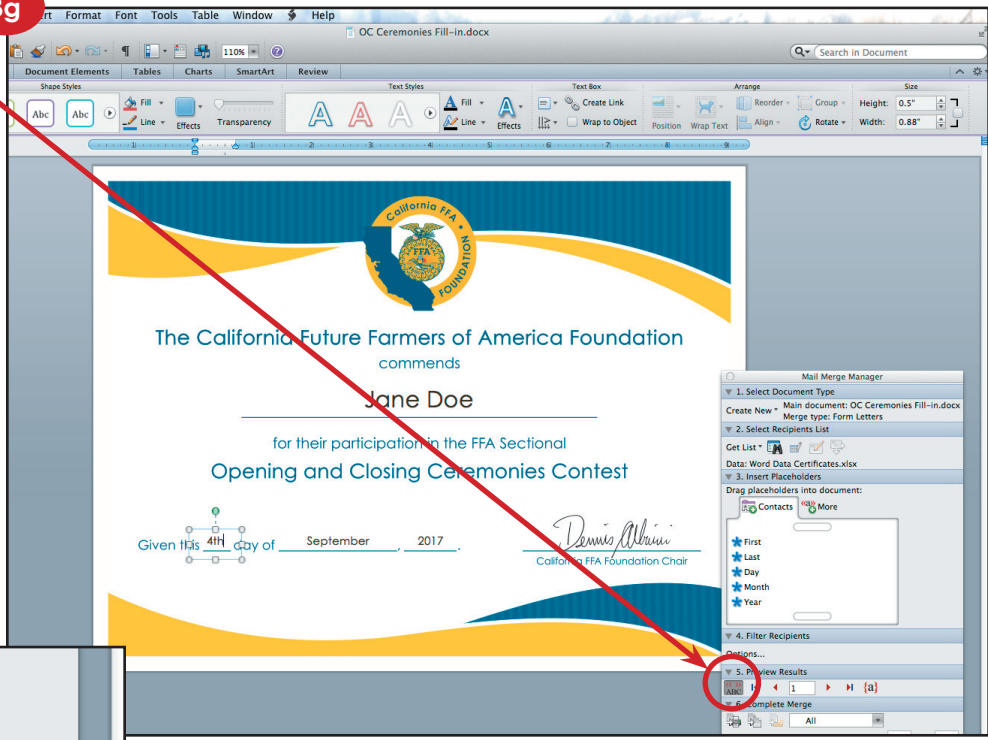
3f) "4. Filter Recipients"
N/A

3g) "5. Preview Results"
Click [here](#) to preview

3h) "6. Complete Merge"

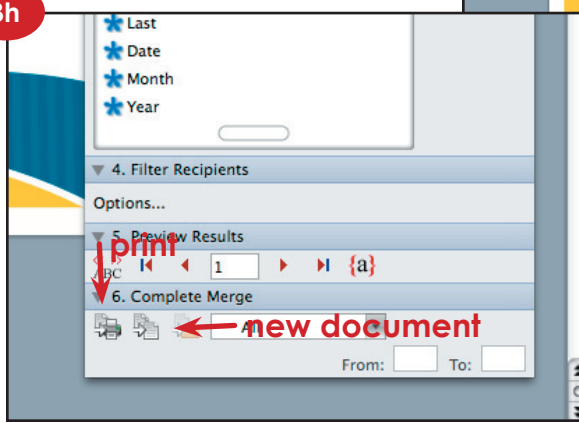
From here you can either create another multiple page Word document with all of the data from your Excel file **OR** you can directly print the certificates with the merged data.

3g



All Done!

3h



Tip: If you had nine participant entries of data on your Excel file, you will create a nine page document or print nine pages