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 <u>OR</u> use an existing data file with participants' names.

Data used on the certificates includes: fist 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

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Mail Merge Manager, continued

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Font Tools Table Window

OC Ceremonies

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.

- "4. Filter Recipients" 3f) N/A
- "5. Preview Results" 3g) 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.

3h

Last t Date Month * Year

Options...

4. Filter Recipients

Preview Results

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6. Complete Merge

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Tip: If you have placed

the data correctly on

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