

Mail Merge Instructions for Word 2004 for Mac OSX

Part 1: ADDRESS LIST

1. Export your address list as a .csv file (Comma Delimited) from Excel or from your database program.
2. Open the .csv file in Microsoft Word. Highlight only the text to be converted – **do not** highlight the field headers (e.g. Title, First Name, Address Line 1, etc.).
3. Open the vLetter Handwriter, choose the handwriting font you want to use, and set Word as the Source application. Then click "Convert to Handwriting" to convert the text to the handwriting font. The vLetter software can convert only 8000 characters at a time, so if you have several pages of addresses, you will need to highlight and convert the addresses a couple of pages at a time, until all the text is converted.
4. Save this file as a Word document, with a .doc extension. You can change the filename if needed. Close this document.

Part 2: LETTERS

5. Open an existing letter to be merged, or create a new letter. Convert any plain text to handwriting that you want to appear handwritten (see Steps 2 and 3 above). Use the same font used to convert the list of names and addresses. **IMPORTANT:** Do not highlight and convert any merge fields already in the document – they will no longer work correctly.
6. Go to the Tools menu, then select "Data Merge Manager" from the menu. This opens the Data Merge Manager task panel.
7. In the Data Merge Manager, go to "Data Source," then click "Get Data," then select "Open Data Source." Choose the .doc file you just saved. This will list the field headers under "Merge Field" in the Data Merge Manager.
8. Drag and drop field header names from the Data Merge Manager to your letter, where you want them to appear. Make sure the merge fields appear in the same handwritten font. If they do not, simply highlight the fields and select the handwritten font from the Font menu – **DO NOT CONVERT** merge fields to handwriting, or they will not function.
9. **Line Spacing:** To adjust the line spacing in your letter, highlight the lines of handwriting, then go to the Format menu, then select "Paragraph." Under "Spacing," change from "Single" to "Exactly," then enter a point size in the box to the right (usually 12 pt is shown by default). If your font size is 16 pt, try a line spacing of 19 pt. This will force the lines to move closer together, and even overlap some characters. The tails of some characters may appear cut off on screen, but they print out completely. Do a test print if you aren't sure. You can adjust the line

spacing one point at a time until it looks good. You can also adjust the line spacing of address blocks in letters and envelopes.

10. Once all merge fields are added, and the letter is finalized, go to the Data Merge Manager, then under "Merge" click the "Merge to New Document" button.

11. If you get any error messages, such as "Word could not finish merging these documents or inserting this database," just click OK on each one. The letters usually merge just fine, but check through the letters and make sure things look okay and that the total number of pages matches the total number of addresses merged.

12. If everything looks good, print these out. If you see any errors, or want to make changes, close the merged documents (don't save), then go back to your letter and make the necessary changes, then click Merge to New Document again.

Part 3: ENVELOPES

1. Create a New Blank Document.

2. In the Data Merge Manager, under "Main Document," click "Create," then select "Envelopes...."

3. Leave the Delivery Address blank, then fill in your Return Address. Click OK when finished.

4. Once the envelope layout appears, highlight the text in the Return Address, then use the vLetter Handwriter to convert it to handwriting. Adjust the bounding box for the Return Address if needed, to make sure the entire address shows correctly. You can also adjust the line spacing of the Return Address (see "Line Spacing" on the previous page).

5. Click in the Delivery Address box and delete any text that is there. Then, from the Data Merge Manager, drag and drop merge fields into the Delivery Address box, adding character spaces and line returns as needed between fields, until the layout is correct. You will need to add a comma between the City and State fields, if they are separate.

6. Next, highlight all the text in the Delivery Address, and select the same handwriting font from the Font menu in Word that you used to convert the text in the address list. Adjust the bounding box and line spacing as needed. Again, DO NOT USE the vLetter Handwriter to convert merge fields to handwriting. The fields will not work.

7. Save your envelope document, then go to the Data Merge Manager, then under "Merge" click the "Merge to New Document" button.

8. If everything looks good, print these out. If you see any errors, or want to make changes, close the merged envelopes (don't save), then go back to your envelope and make the necessary changes, then click Merge to New Document again.