Suggestion for data management:

The Merge feature in MS Word offers one-time data entry that can be used to generate standardized letters, envelopes, and certificate lettering. The exact titles of menu selections named below may vary depending upon the version of your software; listed first are titles for Word 97-2003, those in Green correspond to Word 2007+. Complete information may be found in the MS Word "Help" menu. Printers vary and the "Feed" orientation may need to be adjusted.

1. Save the MS Exel file "InitiateRegistrationFile.xls" to your computer from the link on the Advisor's Resources page at www.phisigmaiota.org.
2. Enter the information for each new member and save the file again to use in the following steps, and as a record for your Chapter files. When placing an initiation packet order, email this file to the international headquarters to register new members.
3. Save to your computer the MS Word document desired (InvitationLetterSample.doc, Envelope.doc, LetterCertificate.doc, etc.) from the Advisor's Resources page.
4. Open the document in MS Word. From the main menu, choose View/Toolbars, make sure the "Mail Merge" option is selected. Skip this step.
5. From the main menu, choose Tools/Letters&Mailings/MailMerge Mailings.
6. In the document options Start Mail Merge menu, select the document type desired - letters, envelopes, labels, etc.
7. Select the "Current" document as the starting document.
8. Choose "Select Recipients." Choose "Use an "Existing List" and "Browse" to the file named in Step 2 above. Make sure that "All files" is listed in the "Files of Type" drop-down list at the bottom of the window.
9. Select the appropriate Table Name. Make sure "First Row of data contains column headers" is checked. Click OK.
10. Choose the selected recipients from the list. Click OK.
11. Now begin to build the standardized form. Place the cursor at the point in the document where the required data should appear. From the Mail Merge Toolbar, choose "Insert Merge Field." Select the appropriate data category. Click "Insert." Continue positioning the cursor and inserting fields as necessary.
12. Choose "Preview" Finish & Merge/Edit Individual Documents to be sure the output is correct. Return to the starting document screen to make any necessary changes.
13. When you are satisfied of the results, choose "Complete the Merge" and "Print." Finish & Merge/Print **When using this feature for certificate lettering, it is highly recommended that several test prints be conducted before printing the official certificates.** Printers vary and the "feed" orientation may need to be adjusted.