

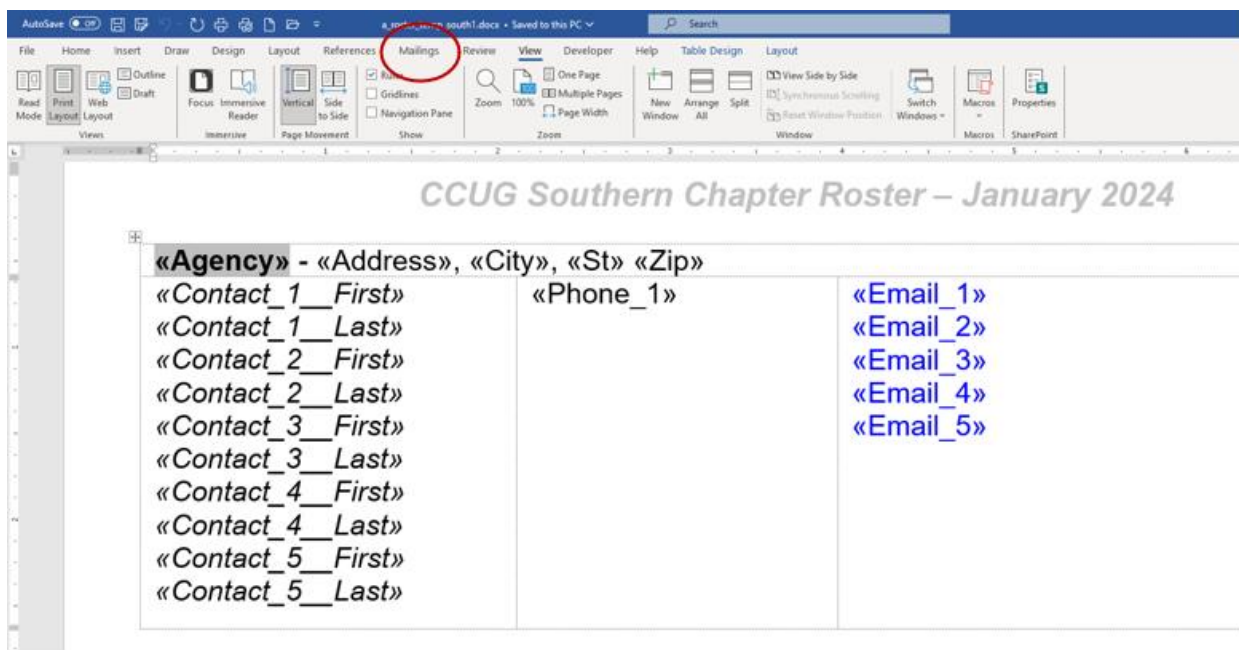
The templates I'm including are based on an Excel sheet that has the columns labeled as follows:

- Agency
- Address
- City
- St
- Zip
- Phone 1
- Contact 1 First (each additional is numbered 2,3,4,5, etc)
- Contact 1 Last (each additional is numbered 2,3,4,5, etc)
- Email 1 (each additional is numbered 2,3,4,5, etc)

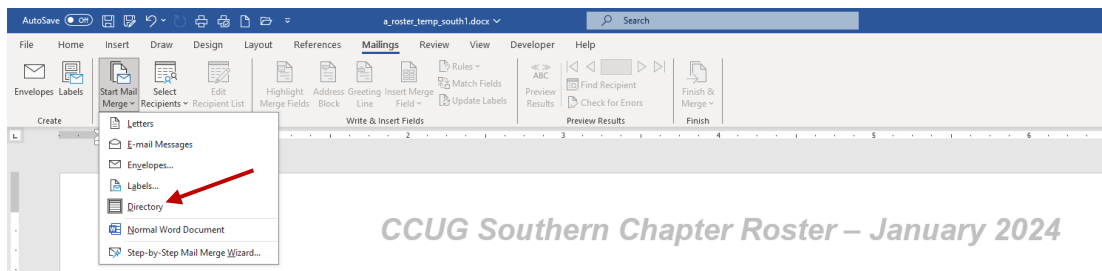
You can have additional columns labeled however you wish as they aren't included in the merge document. If you have them named differently, I can adjust this document to make it fit what your roster file looks like.

To start the process for the first time, open one of the three templates (the one I'm using for examples is the south file).

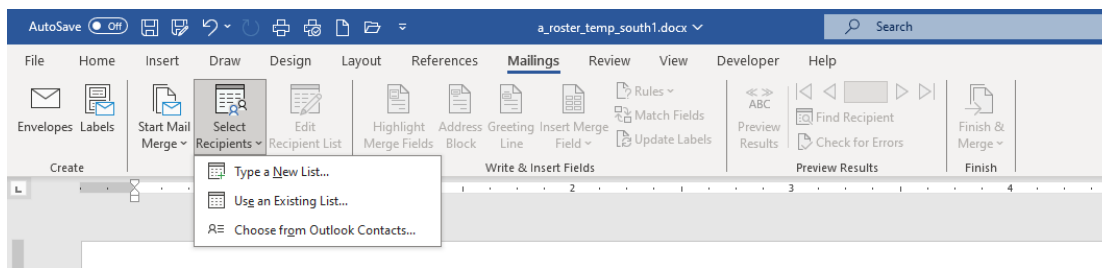
Once it's open, click on "Mailings" in the menu row



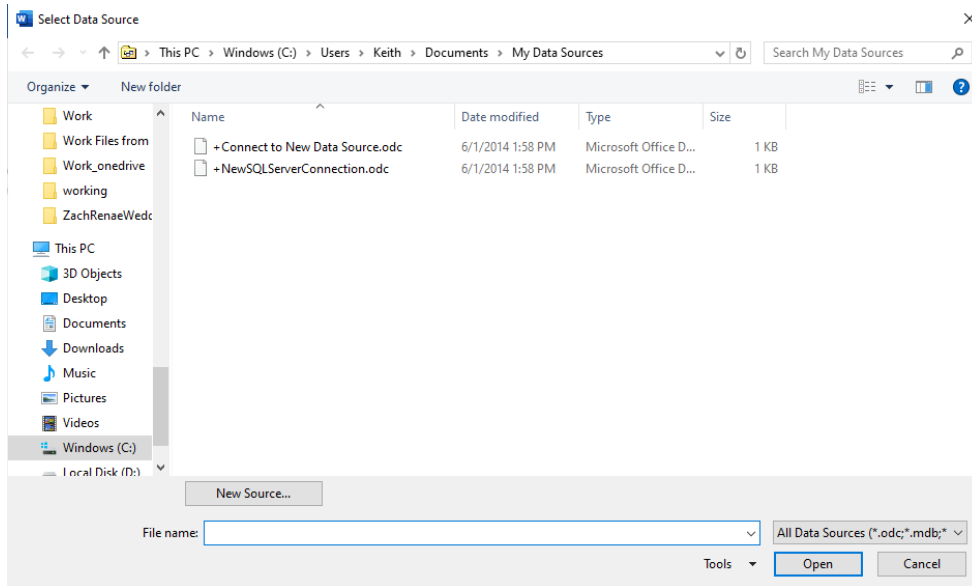
In the Mailings menu, select "Start Mail Merge" and then "Directory"



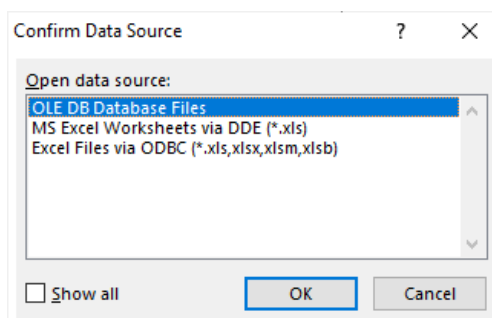
From there go to “Select Recipients” and then “Use an Existing List...”



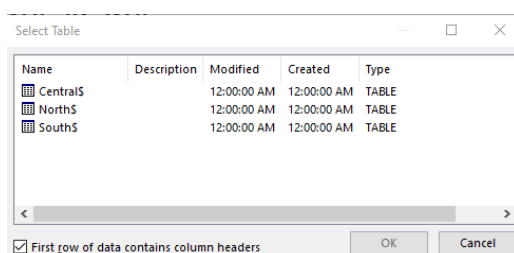
You’ll get the oh so familiar “Select Data Source” box, where you can just navigate to where you save your Excel file, select it, and click “Open”



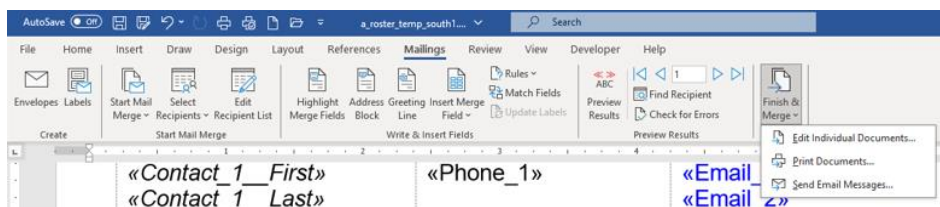
When you get the confirm Data Source box, OLE DB Database Files should be selected by default. Click “OK” because that’s what you want.



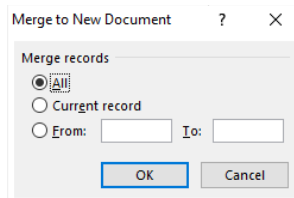
In the Select Table box, select the tab for the chapter you’re working on and click “OK”



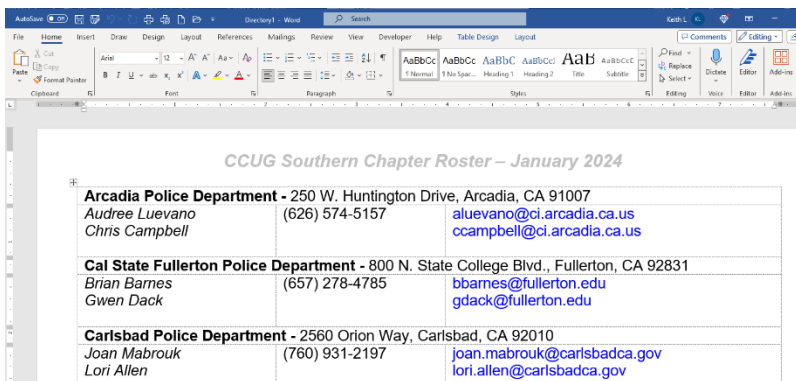
Go to “Finish & Merge” and select “Edit Individual Documents”



In the Merge to New Document box select “All” and click “OK”.



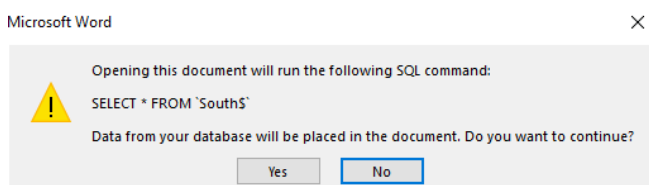
The result will be the Word version of your roster, opened in a new document.



After you’ve taken these steps, save the final roster with whatever name you want to use so you know what roster it is. Be sure to save the original file separately (you can name it whatever you want if you want something different than I named it).

Once you’ve gone through these steps for each roster template, when you open them again you will get a dialog box that you just have to click “Yes” and your file will open. From there you can go to the “Finish & Merge” step.

The dialog box you’ll see will look something like below.



The only thing you have to do on the final document is change the dates on the header and footer. You may also find you have Enter key some of the entries at the bottom of the pages to keep agencies from being split between pages.