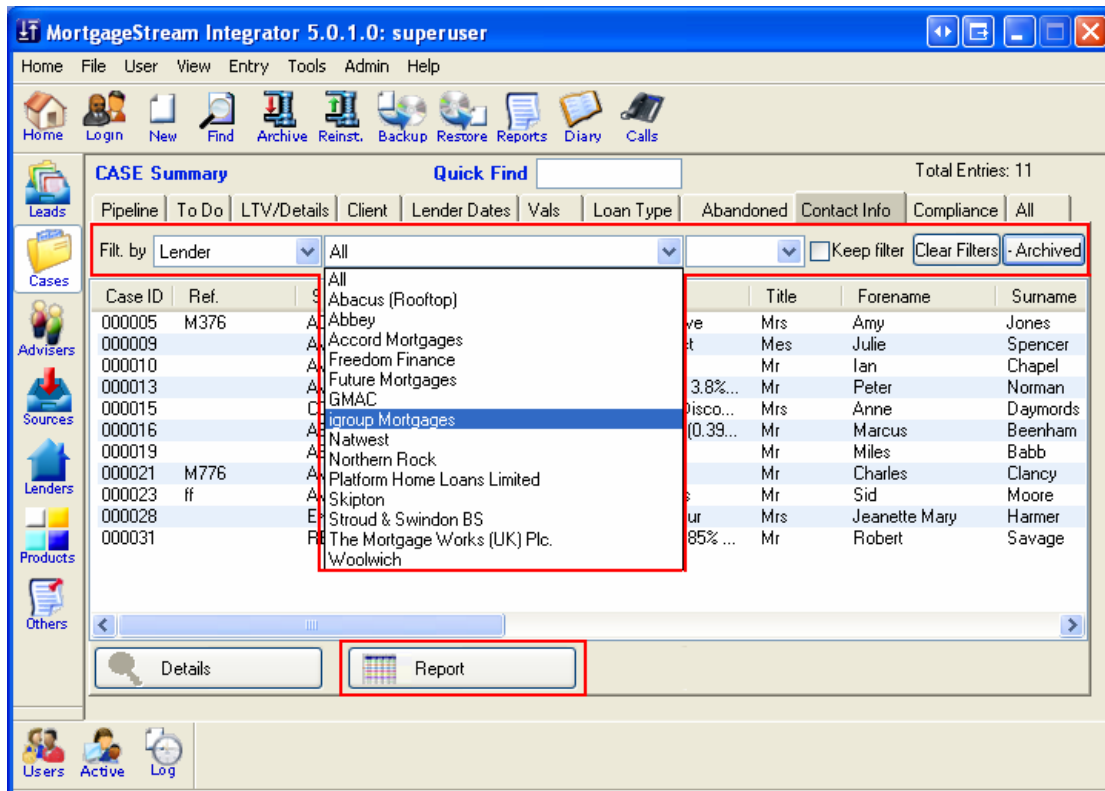
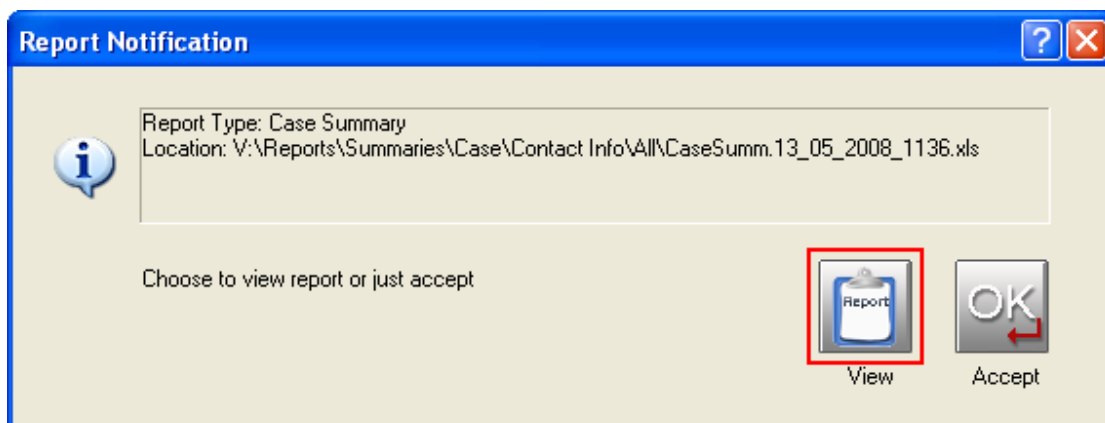


1 Creating Microsoft Word Mail Merge Labels from Client Contact Details in Microsoft Word 2002 onwards

1. Enter the **Lead** or **Case** Summary in MortgageStream™
2. Click the **Contact Info** tab across the top.
3. By using the filters, you can specify which clients you wish to use.

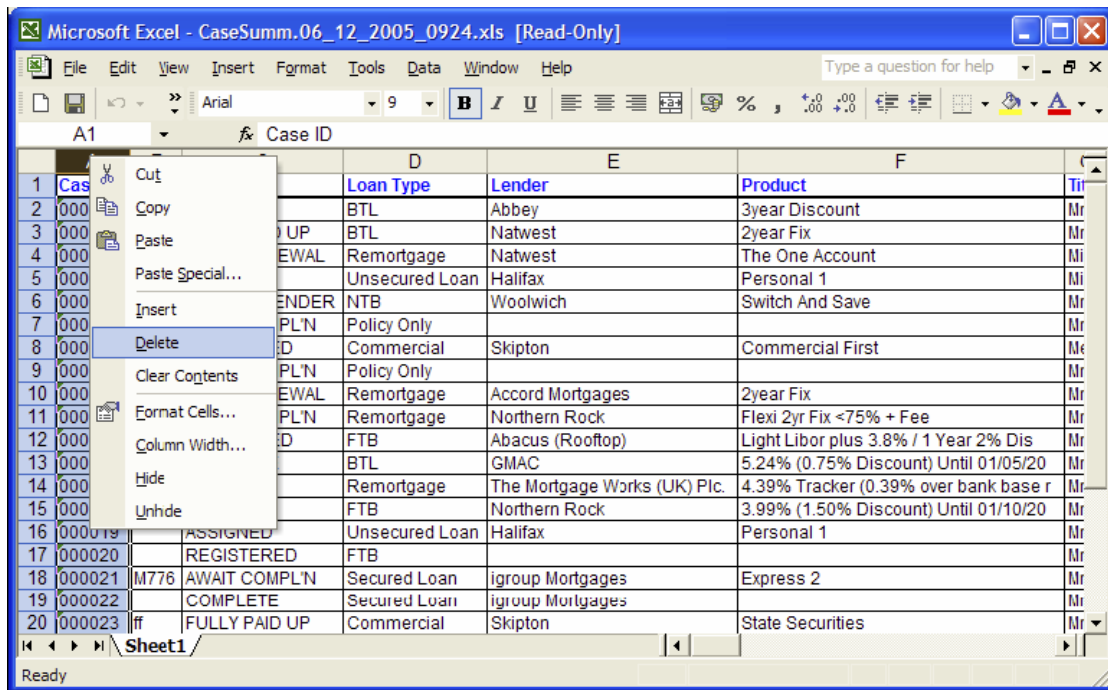


4. Once you have filtered for the contact details you want to use, click the **Report** button at the bottom of the screen. This will export the details to a Microsoft Excel spreadsheet.

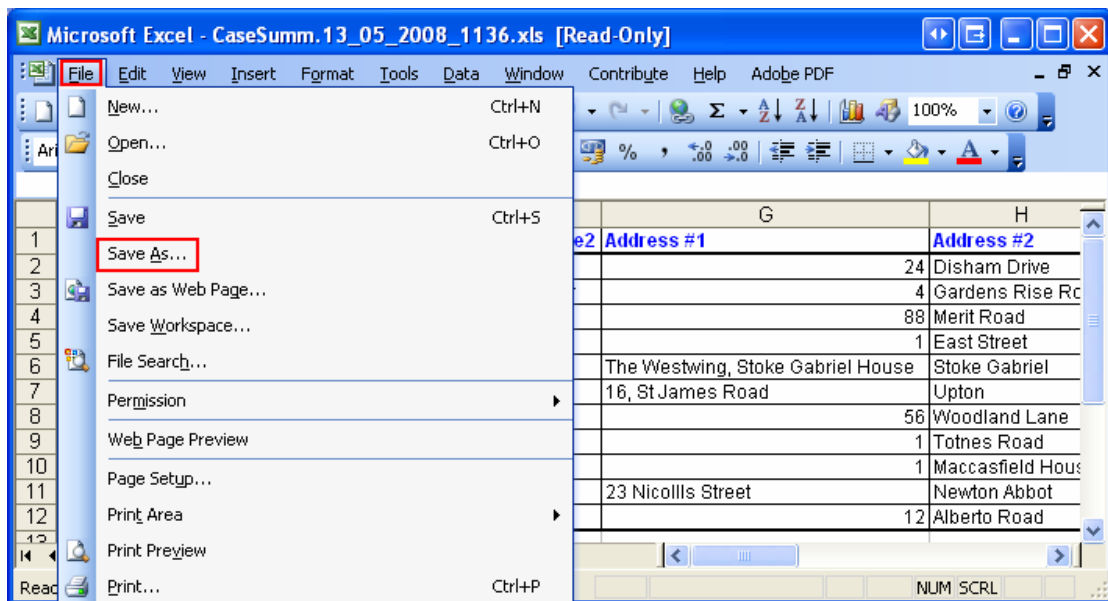


5. Click the **View** button and the spreadsheet will open in Microsoft Office Excel.
6. The spreadsheet may be password protected. If so, the password for the spreadsheet is the same password as the one you use to log into MortgageStream.
7. Now the spreadsheet is opened in Microsoft Excel you need to delete the information fields you do not need for the Merge Label wizard. To do this, select each column, right

click and select **delete**.



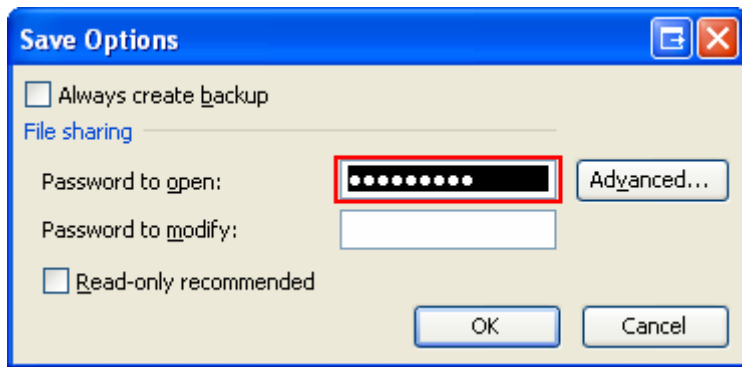
8. Once all un-required fields have been deleted click **File** then **Save As...**



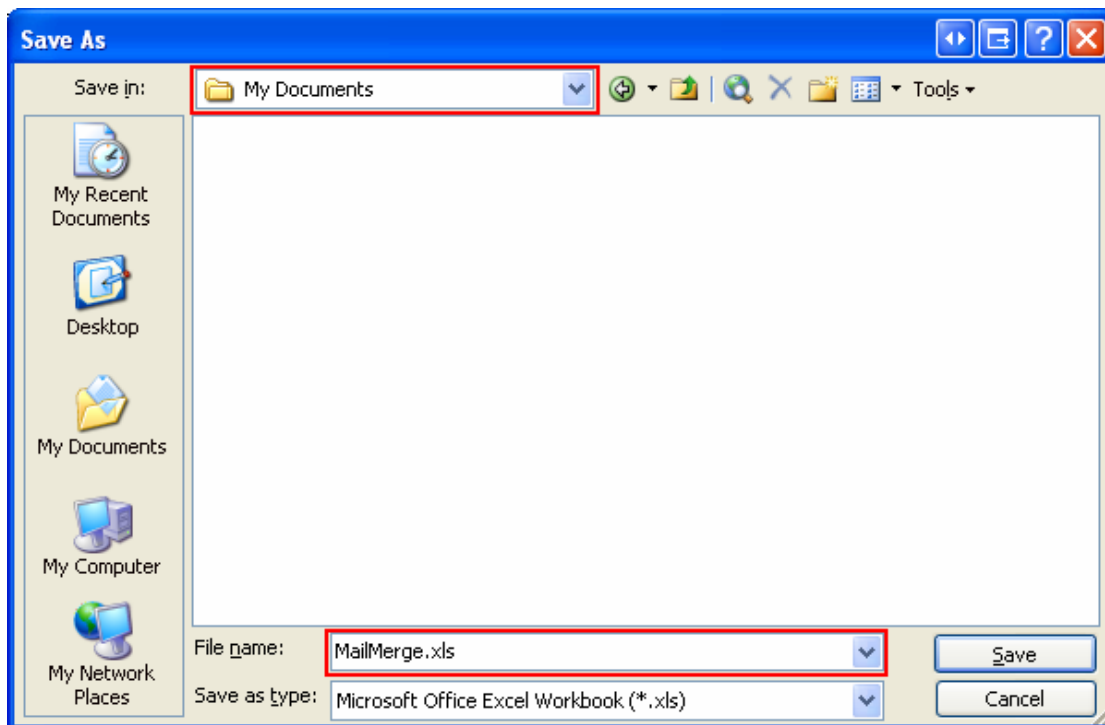
9. If your excel spreadsheet is password protected do the following, else skip to stage 12

10. Click Tools then General Options

11. Delete the password from the Password to open: box and click "OK".

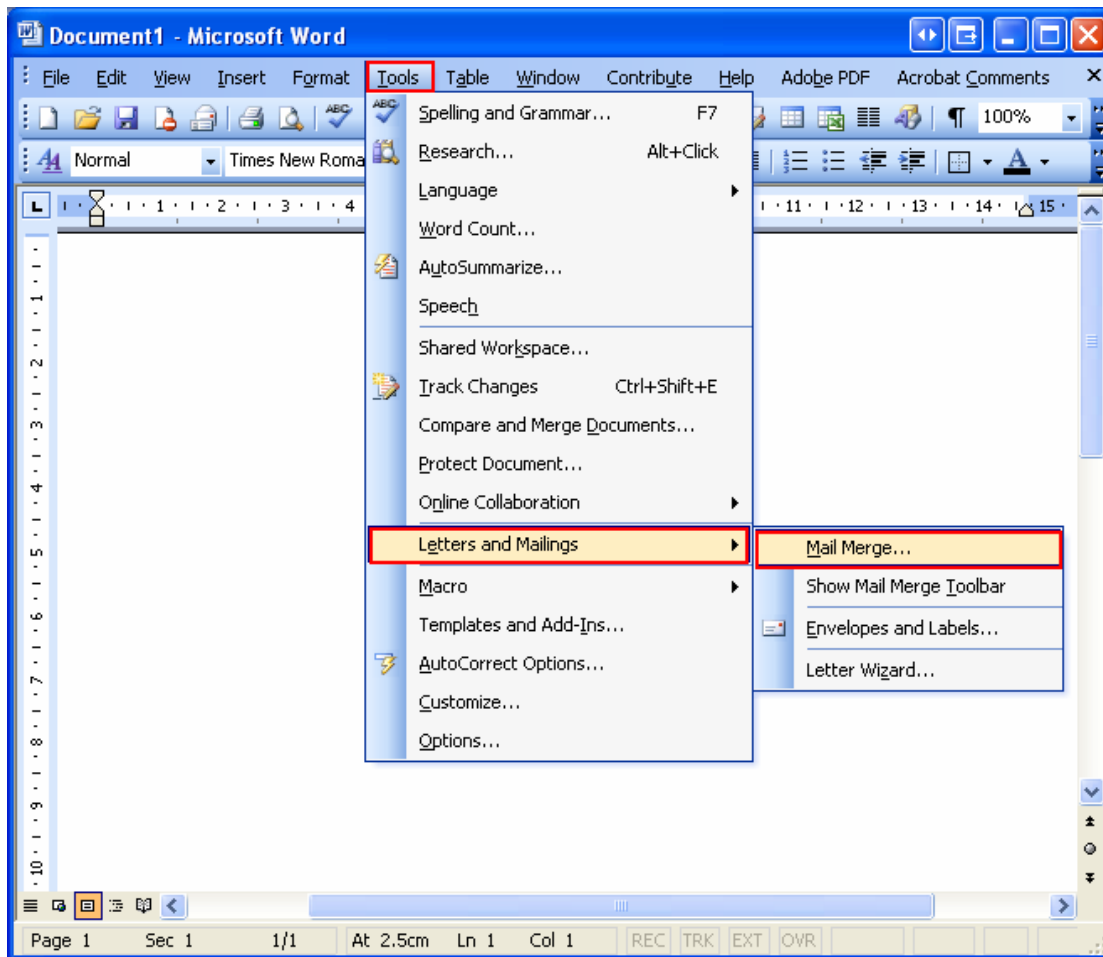


12. Change the **Save in** location to **My Documents**, change the **File Name** to **MailMerge.xls** and click **Save**.



13. Now the file is saved. Close down Microsoft Office Excel and open up Microsoft Office Word.

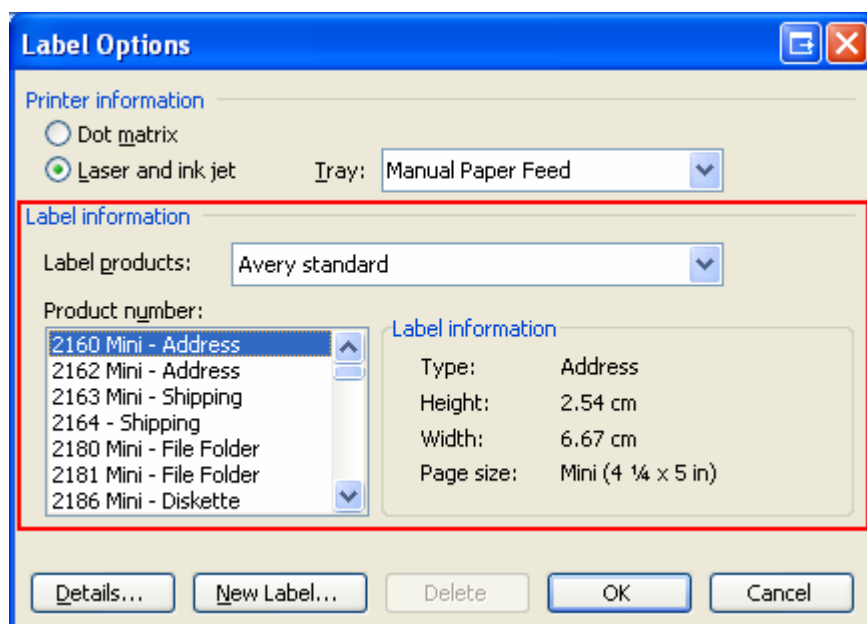
14. In Microsoft Office Word click **Tools, Letters and Mailings** then **Mail Merge ...**



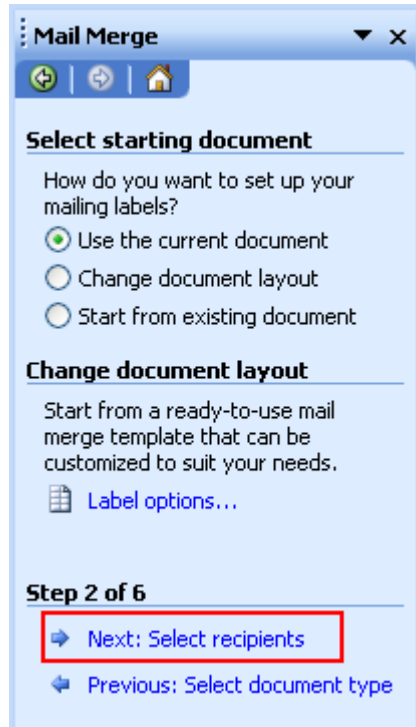
15. On the Mail Merge Panel on the right of the Screen, select **Labels** then click **Next: Starting document**



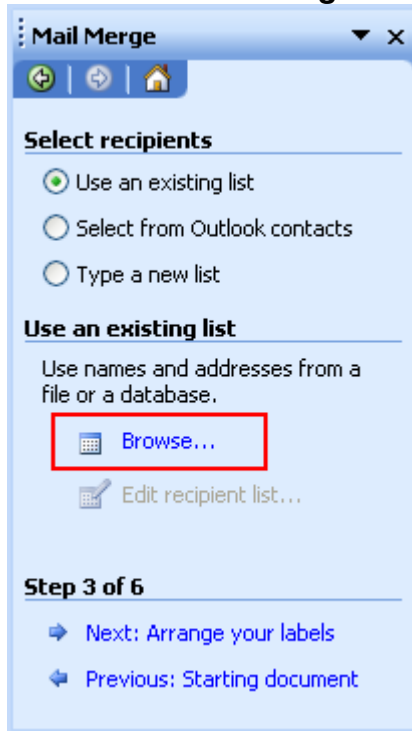
16. Click **Label options...** to select your format of Labels.



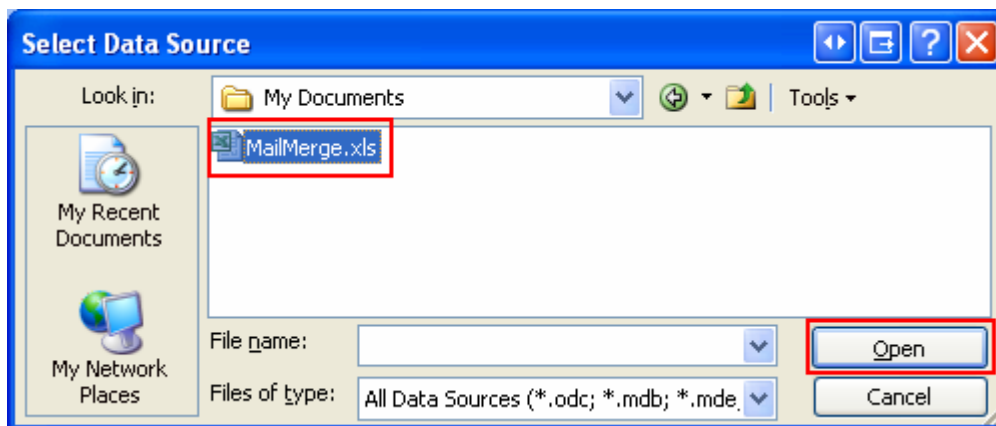
17. Click **OK** then **Next: Select Recipients**



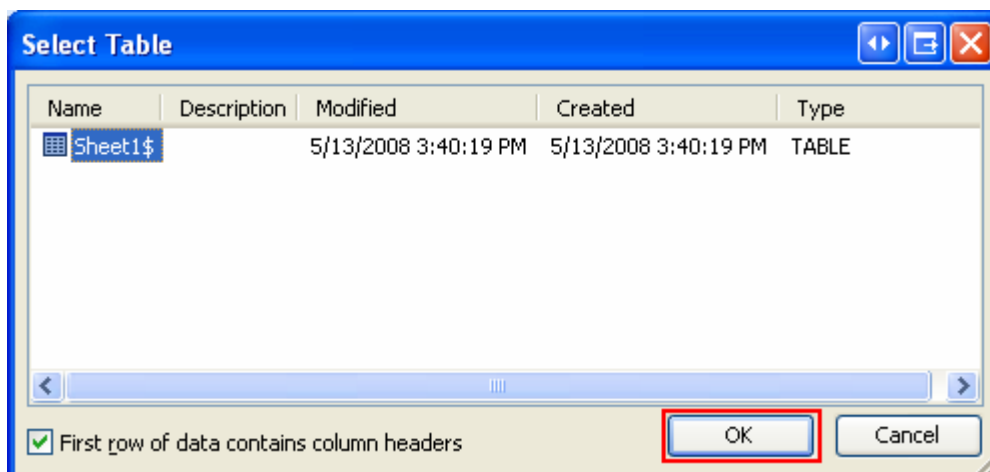
18. Under **Use an existing list** select **Browse**



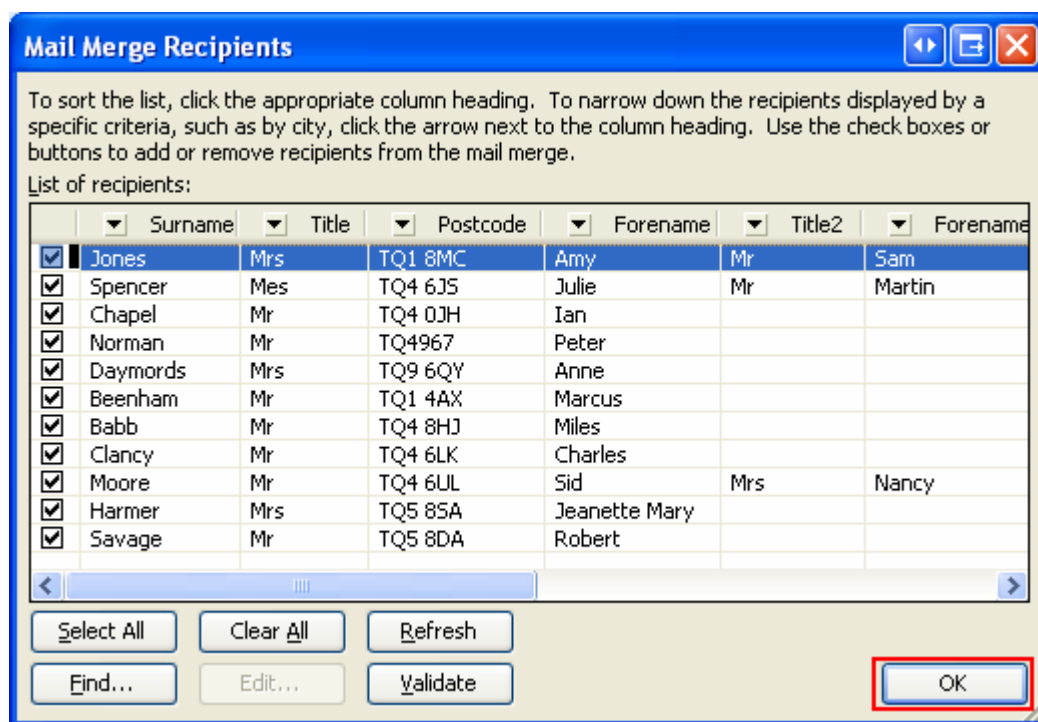
19. Now Navigate to the **MailMerge.xls** that was saved earlier in stage 12



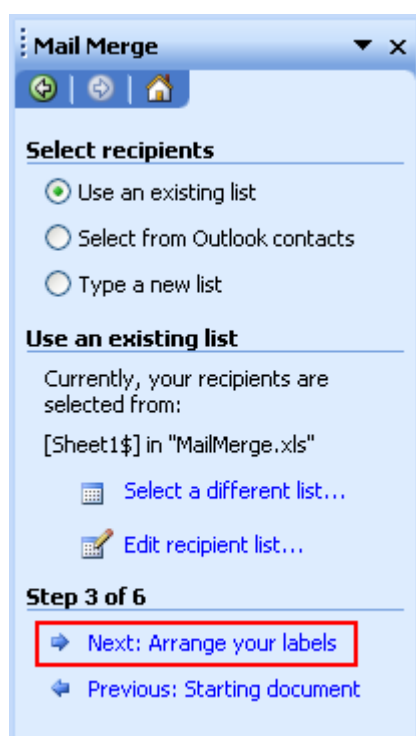
20. Click **OK** to select the first sheet within the Excel Spreadsheet



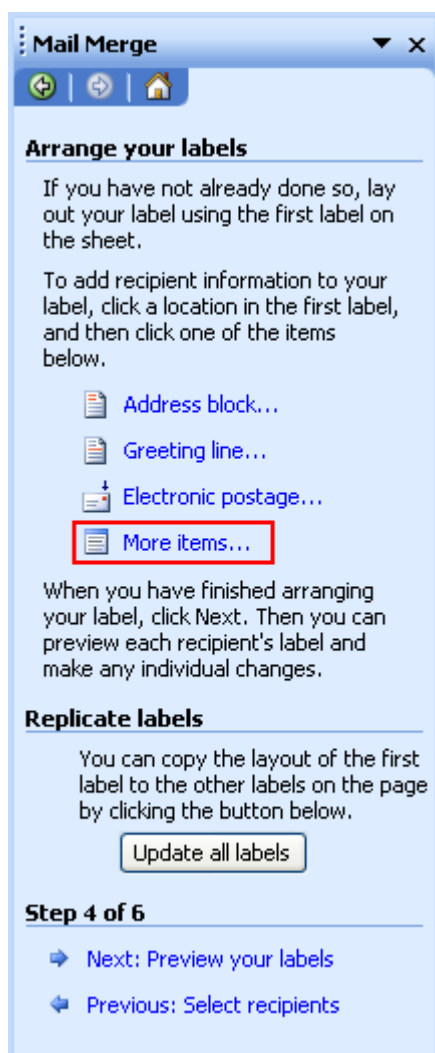
21. If required, un-tick any unwanted rows to narrow down the recipient list and click **OK**



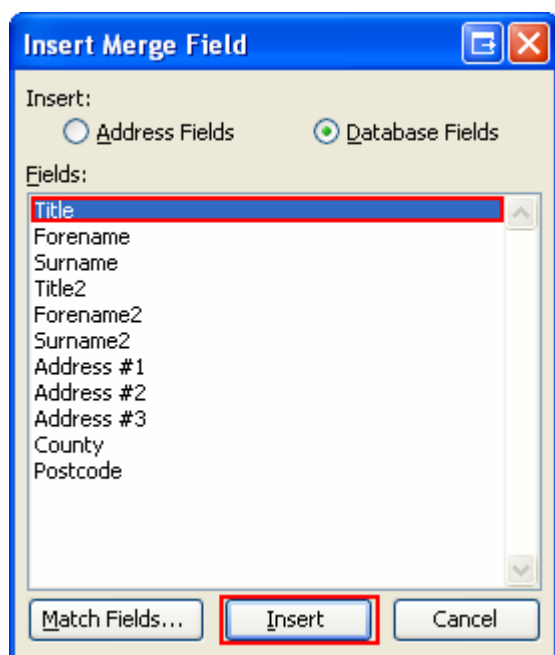
22. Click **Next: Arrange your labels**



23. Under **Arrange your labels** select **More items...**



24. One by one, highlight each field and click **Insert** to add them to the first label (the layout and formatting will be corrected further on).



25. Once all fields have been added, you should have something which looks similar to below.

«Title»«Forename»«Surname»«Address_1»«Address_2»«Address_3»«County»«Postcode»

26. Add spaces and returns to alter the format to the way you require.

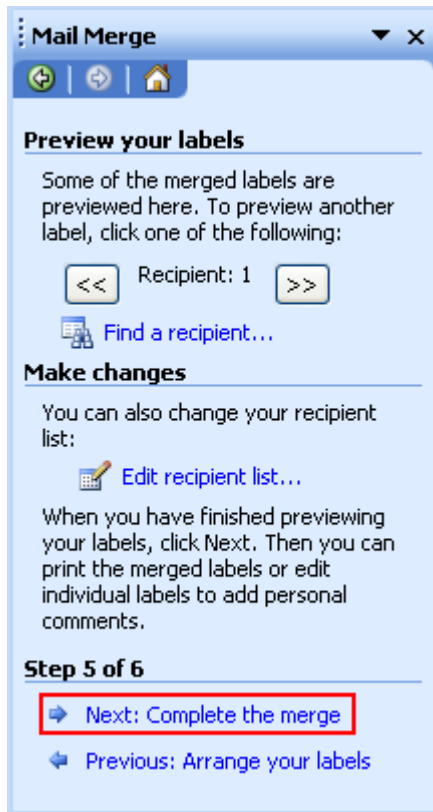
«Title» «Forename» «Surname»
«Address_1»
«Address_2»
«Address_3»
«County»
«Postcode»

27. Click **Update all labels** to copy the layout of the first label to the other labels on the page.

28. Click **Next: Preview your labels**



29. If everything looks as you want, click **Next: Complete your merge**. Otherwise click **Previous** and make the required changes.



30. Once you have clicked **Next: Complete your merge**, under **Merge**, click **Edit individual labels...**



31. Click **OK** in the **Merge to New Document** Screen and a new document will open with the final copy of all of the labels.