



## Generating Mail Merge Labels with StockTrack

There are many reasons that you might want to print labels or customized letters from the names, addresses and other shareholder related information in StockTrack, and there are several ways you can do this.

- You can generate mailing labels for many styles and sizes of labels using StockTrack's mailing labels function (Reports/Mailing Labels).
- You can generate a mail merge file and send it to a mailing house to create and send letters or labels.
- You can generate a mail merge file that you can use with Microsoft® Word, Excel or other products to generate your own custom mailings.

Following is information on how to generate custom labels using StockTrack and Microsoft Word.

### **TO SET UP A LABEL MERGE FILE:**

Select Reports from the menu bar. Click on the **Export Merge File** option. This window will open.

Export?	Fields to Export	Description
<input checked="" type="checkbox"/>	HOLDERID	Unique shareholder identification number
<input checked="" type="checkbox"/>	REFNAME	Reference name can be an alpha numeric
<input checked="" type="checkbox"/>	NAME1	Used as First line of name on certificate
<input checked="" type="checkbox"/>	NAME2	Used as Second line of certificate name if
<input checked="" type="checkbox"/>	NAME3	Used as Third line of certificate name if ap
<input checked="" type="checkbox"/>	NAME4	Used as Fourth line of certificate name if a
<input checked="" type="checkbox"/>	ADDRESS1	Mailing Address
<input checked="" type="checkbox"/>	ADDRESS2	Second line of mailing address
<input checked="" type="checkbox"/>	ADDRESS3	Third line of mailing address
<input checked="" type="checkbox"/>	CITY	City holder resides in
<input checked="" type="checkbox"/>	STATE	State holder resides in
<input checked="" type="checkbox"/>	ZIP	Zip code
<input checked="" type="checkbox"/>	PHONE	Phone number
<input checked="" type="checkbox"/>	PHONE2	additional phone number
<input checked="" type="checkbox"/>	EMAIL	Holder's email address
<input checked="" type="checkbox"/>	OUTSAL	Name for envelope - order is First name MI
<input checked="" type="checkbox"/>	INSAL	Salutation for letter
<input checked="" type="checkbox"/>	WITHHOLD	Percent for Withholding

Select DBF to the right of the File Name and any other criteria and click on *Process* to build a merge file. (You can select records based on a proxy or dividend date, select only shareholders

who have opted to receive advertising mail and many other selections. See *Export Merge File* in the Online Help for detailed information on the available filters.)

### **TO SET UP A LABEL TEMPLATE IN MICROSOFT® WORD:**

The **Export Merge File** can be imported as a data file into most word processors and list managers. Check your word processor or list manager for instructions on how to import a Foxpro or dBase III data file or secondary merge file. (*Sometimes it's called import secondary merge file or import merge data file.*) Do not try to open the merge file as a document in your word processor. It is a dBASE III file and must be imported.

In Word 2003:

- Open Word.
- Click on **Tools | Letters and Mailings | Mail Merge**.
  - The Mail Merge Wizard window will open in the task pane.
- **Select document type** - choose **Labels**. Click **Next: Starting document**.
- **Select starting document** - if you have nothing else open, choose **Change document layout**. Click **Label Options** to select the label template you want to use. Press **OK**. Click **Next: Select Recipients**.
- **Select recipients** - click **Use an existing list**, and click **Browse...**
- The **Select Data Source** window will open.
  - Browse to the file location where you saved the merge file.
  - Make sure file type has DBase Files (\*.dbf) selected.
  - Click on the file name you created (this may be "STOCKHLD.DBF" if you didn't change the file name). Click **Open**.
- A window will open to **Select Mail Merge Recipients**. You can edit the list or click **Select All** to use the complete exported list. Press **OK**. Click **Next: Arrange your label**.
- **Arrange your labels** - select the fields you want on your labels. Word has some preset items you can choose, or to select from the fields in your file, click **More items...**
- A window will open to **Insert Merge Field** – the field names from your exported file will be listed. (*See the table at the end of this document for a dictionary of all the field names.*)

- Double-click each field name you want to insert into the label. Once all the fields are selected, close this window and layout your label on the main screen. (Hit **ENTER** at the end of each field. The following is a sample format for a mailing label. Include your commas and spaces between fields.)

```
<<totvotes>> (for proxy mailings)
<<name1>> <<name 2>>
<<address1>>
<<address2>>
<<address3>>
<<city>>, <<state>> <<zip>>
```

- Select your fonts and other formatting here as well.
- Once you have the layout set on the first label, Click **Update all labels** to set up the other labels. Click **Next: Preview your label**. *NOTE: If you want to save this template to be used again for other mailings, save the document before clicking Next.*
- You can now **Preview your labels** as they will be printed. You can use the >> buttons to scroll through each label. Click **Edit recipient list** to remove some recipients from the printed list, or click **Next: Complete the merge**.
- At this step, you can **Edit individual labels**, or select to **Print...** In the **Merge to Printer** window, make sure **All** is selected and click **OK**. Your labels will print on your selected printer.
- You can save the merged labels at this point to print at another time.

[Click here for complete instructions to generate custom letters from StockTrack.](#)

## APPENDIX: Partial List of Available Export Fields

Field Name	Description
HOLDERID	Holder ID
REFNAME	Reference name (Short identifier)
NAME1	First line of name on certificate
NAME2	Used as second line of certificate name if applicable
NAME3	Used as third line of certificate name if applicable
NAME4	Used as fourth line of certificate name if applicable
OUTSAL	Name for envelope - order is First name Middle Last (eg: John Q Jones)
INSAL	Salutation for letter
ADDRESS1	Mailing Address
ADDRESS2	Mailing Address Line 2
ADDRESS3	Mailing Address Line 3
CITY	City holder resides (For Foreign address holds the Country holder resides)
STATE	US addresses-State holder resides in
ZIP	US addresses-Zip code
PHONE	Phone number
PHONE2	Additional phone number
EMAIL	Holder's email address
FEDNUM	OPTIONAL FIELD: Federal ID number - SSN or EIN. Includes dashes
FEDNUM2	OPTIONAL FIELD: Second Payee Federal ID number -SSN or EIN. Includes dashes
WITHHOLD	Percent for withholding (Actually used as 99.999%)
EMPLOYEE	Insider - Is holder an employee? (Y/N)
OFFDIR	Insider - Is owner an officer or director? (Y/N)
BENOWNER	3 character beneficial owner code (All holders with the same beneficial owner marked in StockTrack will share the same code.)
USERDEF01 - 10	All ten of the Used Defined fields are available for export. In the merge, they are named USERDEF01 through USERDEF10
DIRDEP	Direct deposit account number
RTN	Bank Routing number for holder's direct deposit bank account
DD_ACCOUNT	to which account is the direct deposit going: 'C' = checking, 'S' = savings
MAIL	Send advertising mail? (Y/N) - should advertising mail be sent to this party? N or blank = Do not send advertising mail
TOTSHARES	Holder's total number of shares (for all stock classes).
CTOTSHARES	TOTSHARES non-numeric character formatted w/ commas
REGCODE	REQUIRED -Registration code: corresponds to registration codes available in CODES table
SPONSOR	Sponsor name
ETITLE	Employee Title
OTITLE	Officer Title
CERTNO	Certificate number
STOCKID	Stock class code (ID)
ACQPRICE	Price at which shares were acquired
DATEAQR	Date these shares were acquired