



Generating Mail Merge Letters 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, and there are several ways you can do this with StockTrack.

- 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 are instructions on generating custom letters 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 a
<input checked="" type="checkbox"/>	NAME3	Used as Third line of certificate name if a
<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

Pick 'DBF' in the file type box after the 'File Name'. Select the rest of the criteria for your letter 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 LETTER 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.

- 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 **Letters**. Click **Next: Starting document**.
- **Select starting document** - if you are starting from scratch, select **Use the current document** or **Start from a template**. If you already have a letter prepared, select **Start from existing document** and choose (**More files...**) to browse to the file and click **Open**. 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: Write your letter**.
- **Write your letter** – if you are starting from a blank document, write the body of the letter now and then select the recipient fields you want to include. Word has some preset items you can choose, or to select from the fields in your file, click **More items...** **NOTE:** *Position your cursor at the insertion point first. The fields will insert wherever your cursor is.*
- 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.*)
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- Double-click each field name you want to insert into the letter. Once all the fields are selected, close this window and layout these fields on the main screen. (Hit **ENTER** at the end of each field. The following is a sample format. 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.
- Click **Next: Preview your letters**. *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 letters** as they will be printed. You can use the >> buttons to scroll through each letter. 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 letters**, or select to **Print...** In the **Merge to Printer** window, make sure **All** is selected and click **OK**. Your letters will print on your selected printer.
- You can save the merged letters at this point to print at another time.

Also see instructions for generating custom labels with StockTrack and MS Word.

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