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On occasion I will supplement our Monthly newsletter with an additional newsworthy issue. I find in researching the Web, interesting and relevant articles that are too lengthy for our monthly Bytes. I hope you find the articles interesting and informative.

Yvette, **Bytes Editor**

TrainSignalOffice

Mail Merge for Dummies: Creating Address Labels in Word 2007

By Gosia Grabowska

The Mail Merge function in <u>Word 2007</u> http://www.trainsignal.com/Word-2010.aspx can be a huge time saver, whether you're creating address labels, letters or other documents that require the input of data from a spreadsheet.

Consider this scenario: You're creating invitations for a wedding or another big event, and you think it's no big deal; it's only a few hundred labels and you can knock that out in a couple of hours right? Type them up in Word, print them out and you're done!

A couple of months later, you've got another job ahead of you. The thank you cards. Hopefully you saved the Word doc that you slaved over last time … formatting it and making it look just right.

But even if you did save your doc, you've still got plenty of work ahead of you, going through all of the names one by one, checking them off, making changes; it takes some time.
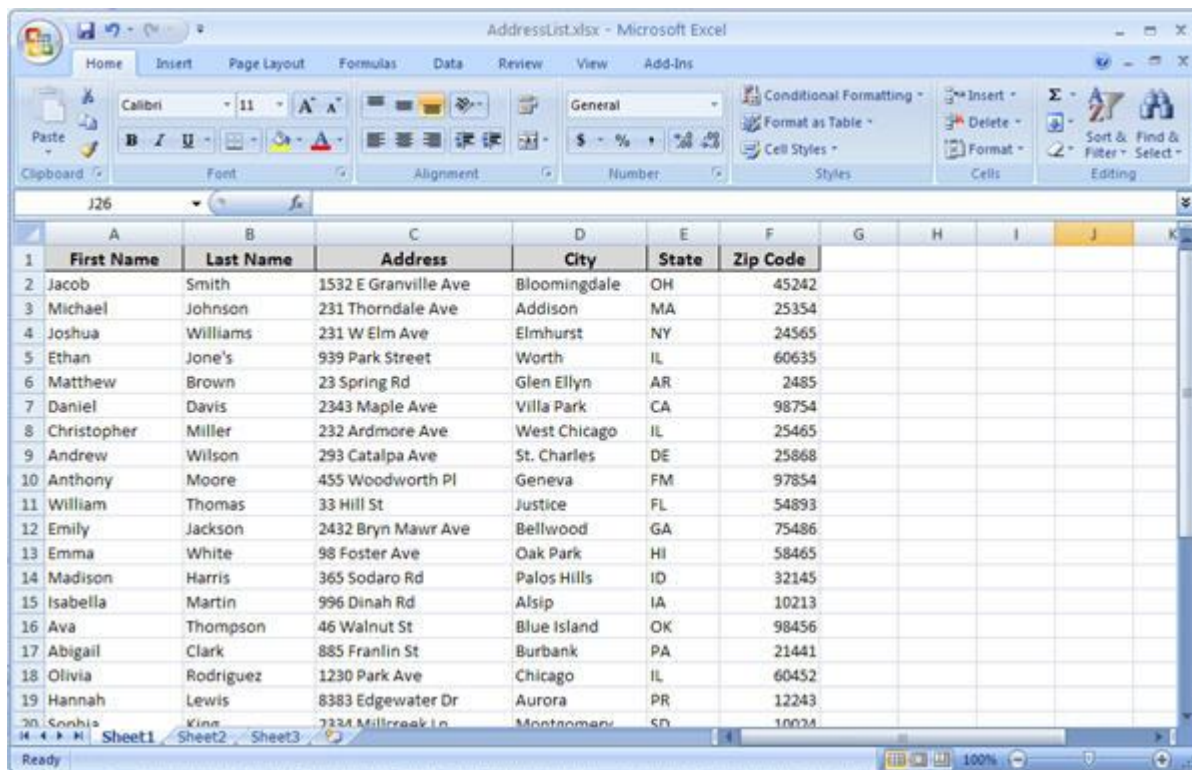
Word Mail Merge

The solution? An Excel spreadsheet that allows you to very easily sort the list, make any necessary changes quickly and have your labels ready in no time.

Working with an Excel spreadsheet makes the whole process of creating address labels — as well as other documents, such as personalized letters, thank you cards, etc. — less time consuming and very easy.

Knowing how to merge Excel and Word documents can come in very handy in many situations. So today I'm going to show you a very easy but very useful time saver — how to create address labels in Word 2007 using the Mail Merge function in Word and an Excel spreadsheet.

Here's what a simple Excel spreadsheet will look like:

Save this baby to your hard drive, call it something obvious like AddressList and all you need to do now is a quick merge between Excel and Word and your address labels are done in less than 10 minutes.

Here's a step-by-step that shows you how easy it is to create address labels in Word 2007!
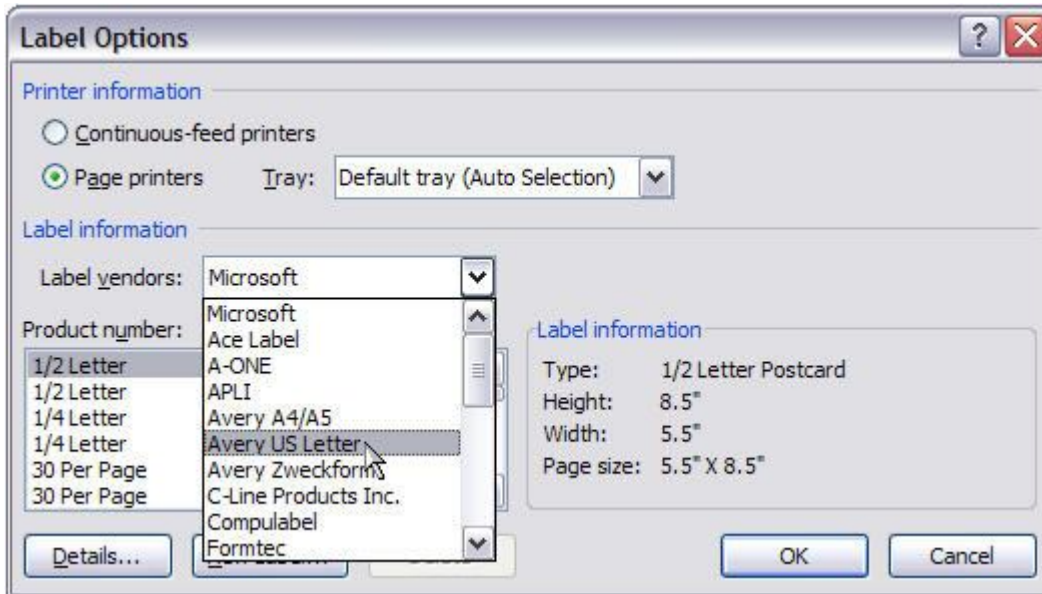
Creating Address Labels in Word 2007

1. Before you start make sure you have your Excel spreadsheet ready. Now open up Microsoft Word 2007 and click on the **Merge** tab.

2. Next, click on the **Start Mail Merge** button and select **Labels**.
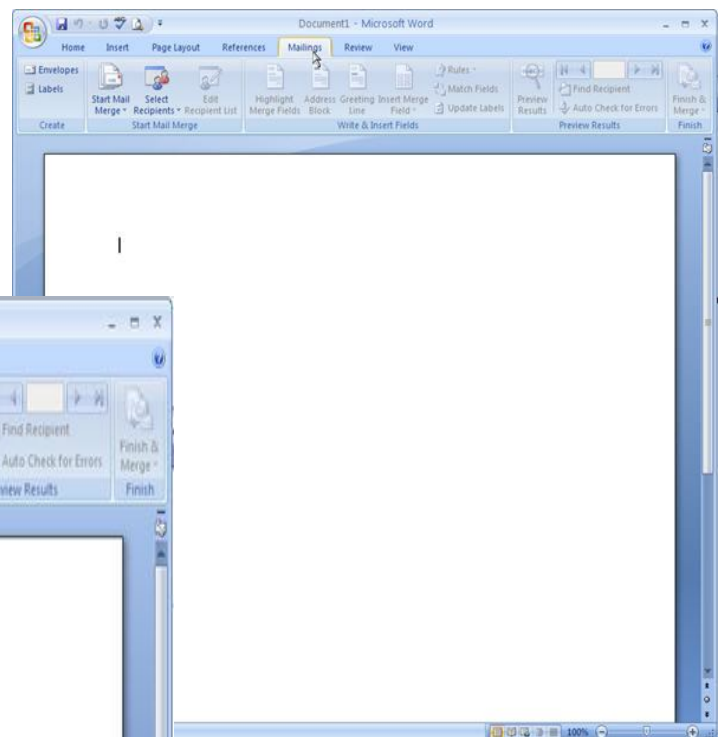
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3. Now it's time for you to select the **Label Vendor**. In my case I am going to use Avery US Letter.


4. I have the 8662 labels so I am going to scroll down and select that. You should find the label number that's appropriate for your labels, it's usually on the box.

When you find your label number, select it and click OK.

5. You might get the following message. What this means is that if you typed something in this document and you did not save it, it will be lost. If you do not want that, hit **Cancel**, save the document and then repeat the steps from 1-5.

If you have a blank screen behind this message then go ahead and click **OK** to continue.
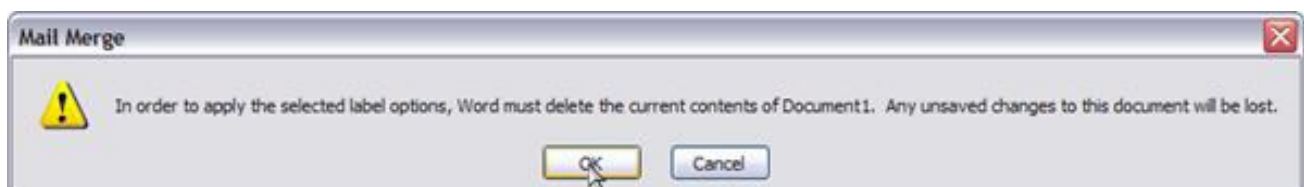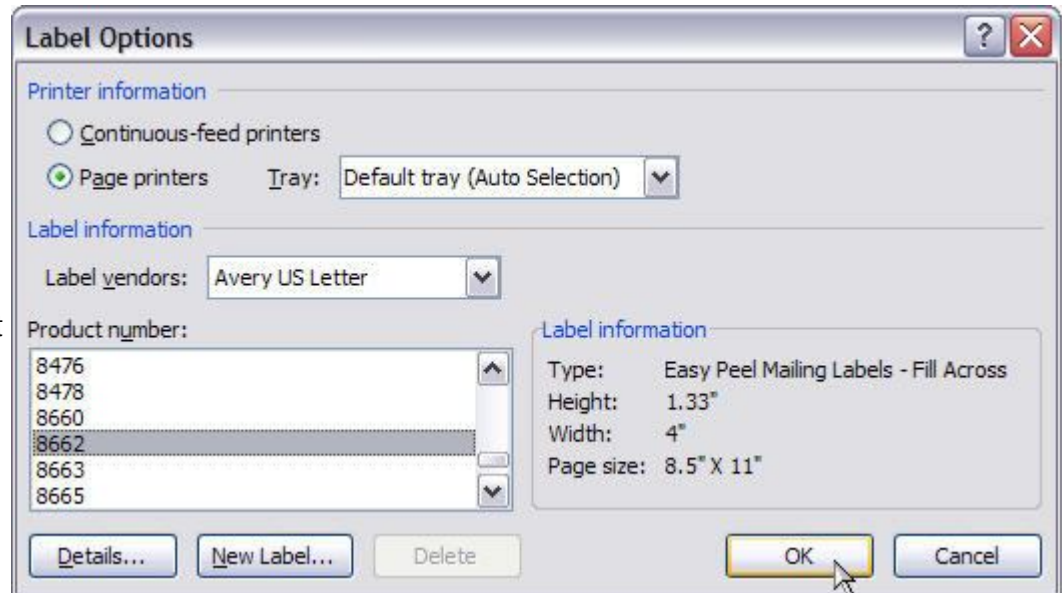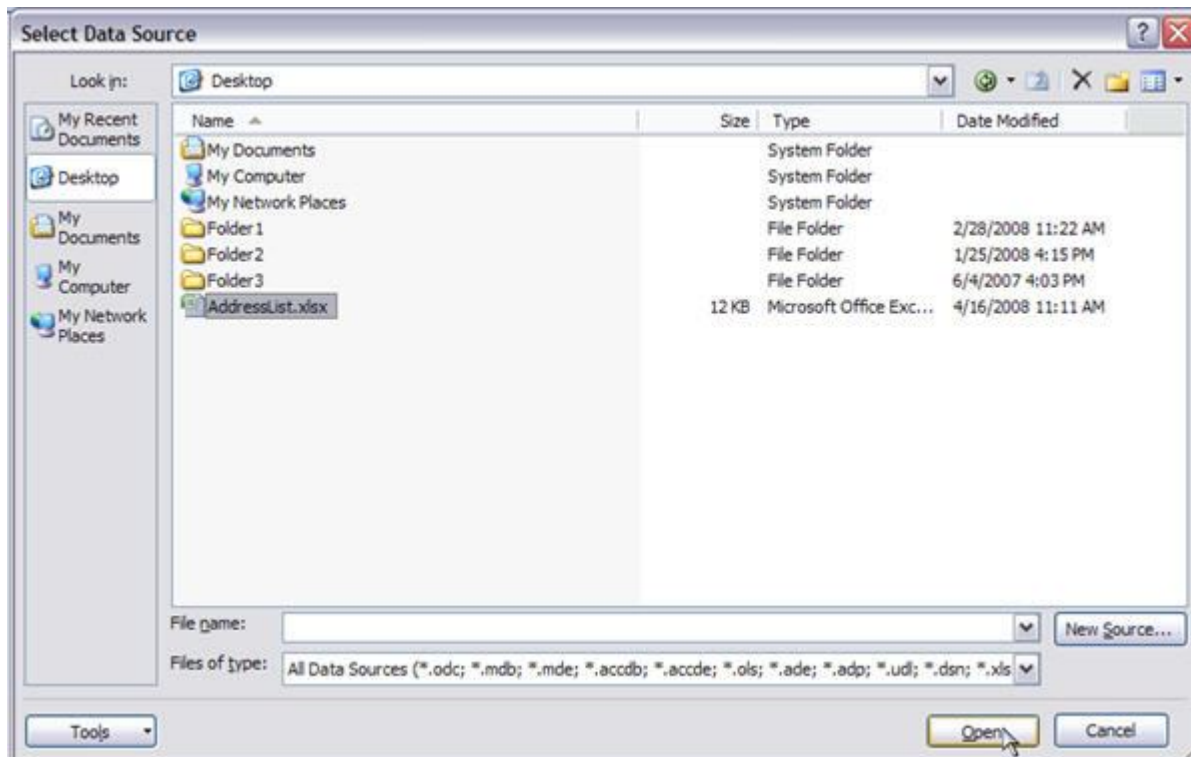
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6. Next, click on the **Select Recipients** button on the ribbon and select **Use Existing List.**
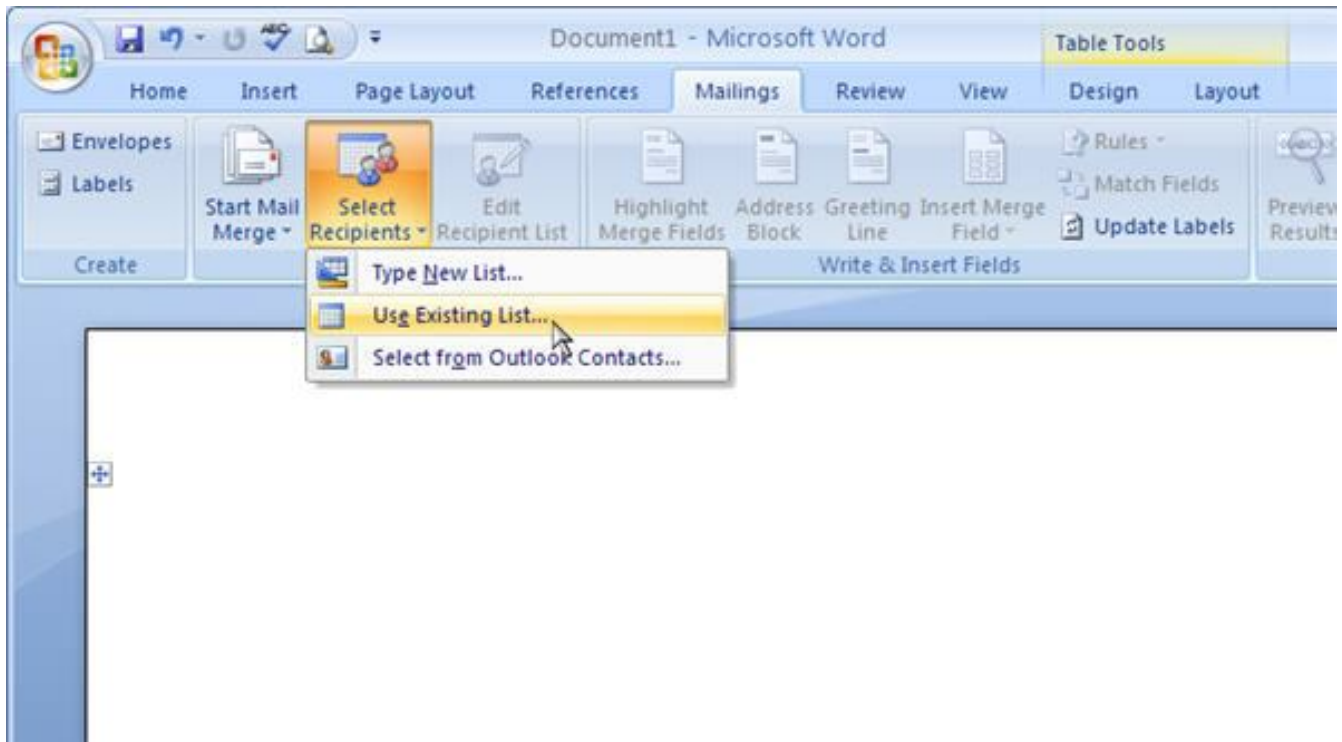
7. Browse to the location where your Address List file is and select it. I have mine on the Desktop. I will click on it once, and then select Open.

Microsoft®

**R E G I S T E R E D**

Refurbisher

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8. In this window, select the sheet you have your list on. Mine is on the first sheet as this is all I have there. If you didn't do anything special in Excel, your address list should be on the first sheet as well.

Also notice the check box next to **First row of data contains column headers**. You should have that checked if your columns have headers such as: First name, Last name, Address, etc.

If you don't have the column headers, I would recommend going back to the excel file and adding them in. It's going to make your life a lot easier while going through the merge. When ready, click the **OK** button.
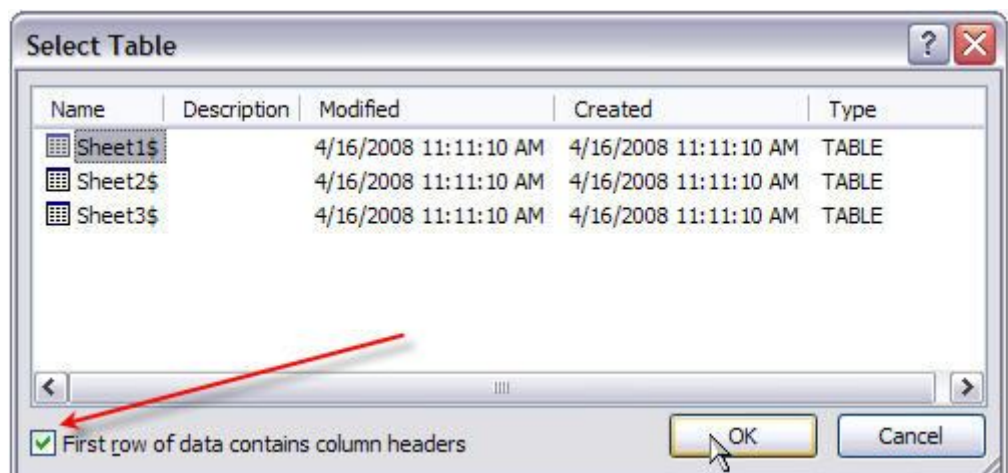
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9. Once you click OK you will see the following document. It may look a bit scary but don't worry, all is good.

10. Since you are creating address labels, you will have two choices here. The first choice is to click on the **Address Block** button on the ribbon.
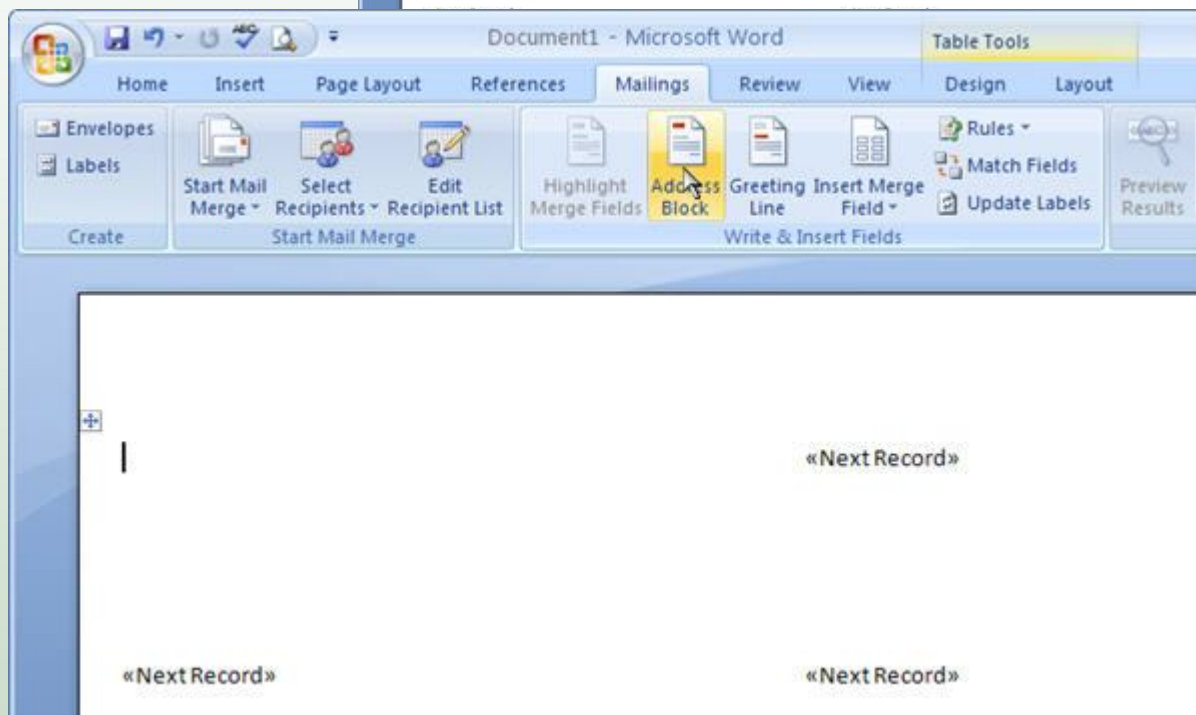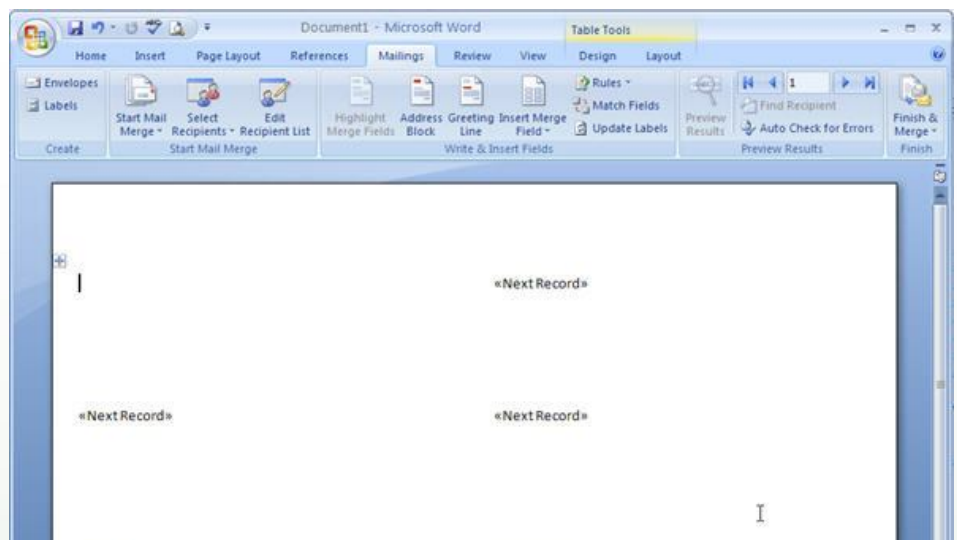
This option will automatically select all your columns and create an address for you.

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Insert Address Block   ? ☒

Specify address elements

☑ Insert recipient's name in this format:

```
Josh
Josh Randall Jr.
Josh Q. Randall Jr.
Joshua
Joshua Randall Jr.
Joshua Q. Randall Jr.
```

☑ Insert company name

☑ Insert postal address:

○ Never include the country/region in the address
○ Always include the country/region in the address
⦿ Only include the country/region if different than:

United States

☑ Format address according to the destination country/region

Preview

Here is a preview from your recipient list:

|◁ ◁   1   ▷ ▷|

```
Jacob Smith
1532 E Granville Ave
Bloomingdale 45242
```

Correct Problems

If items in your address block are missing or out of order, use Match Fields to identify the correct address elements from your mailing list.

Match Fields...

OK   Cancel

The address looks good, but notice that we are missing the state. It's not listed here but when we check back in our Excel document, it's there.

Well this is ok, we can fix it. Go ahead and click on the **Match Fields** button.

11. Now in the left column find **State** and in that row click on the arrow pointing down, then select your header name for the State column. Mine is called State, so I will select that and click **OK**.

Match Fields   ? ☒

In order to use special features, Mail Merge needs to know which fields in your recipient list match to the required fields. Use the drop-down list to select the appropriate recipient list field for each address field component

Required for Address Block

First Name	First Name ▼
Last Name	Last Name ▼
Suffix	(not matched) ▼
Company	(not matched) ▼
Address 1	Address ▼
Address 2	(not matched) ▼
City	City ▼
State	(not matched) ▼
Postal Code	First Name ▼
Country or Region	Last Name ▼

Optional information

Unique Identifier | Address |

| City |
| State |
| Zip Code |
| (not matched) |

Use the drop-down lists to choose the ... database that corresponds to the a... Mail Merge expects (listed on the left.)
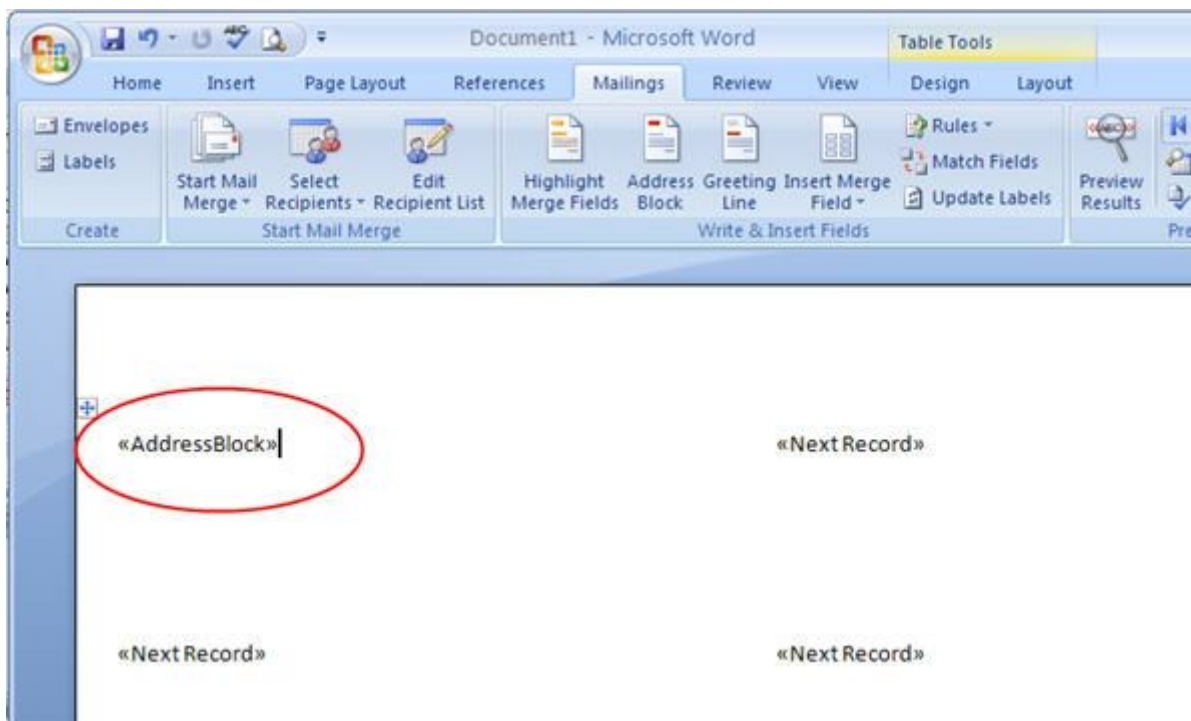
☐ Remember this matching for this set of data sources on this computer

OK   Cancel

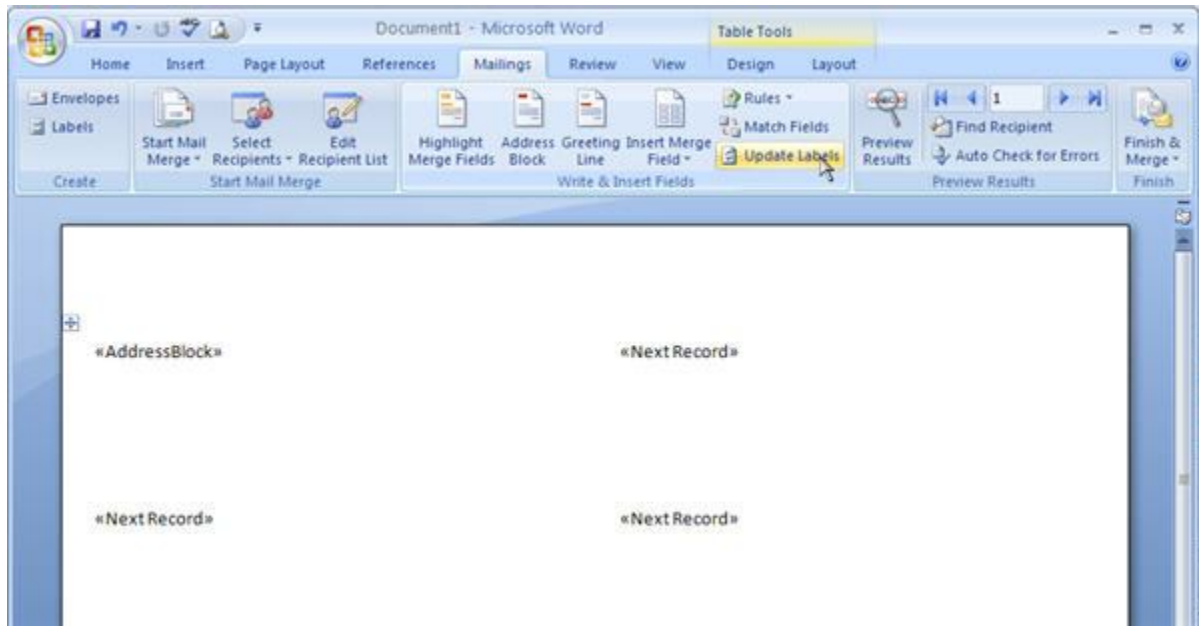# Charlotte Bytes Supplement

12. Now we see that the state is showing and the address looks good. Go ahead and click the **OK** button.

13. You will notice that in our first address label spot we have something called << AddressBlock >>.
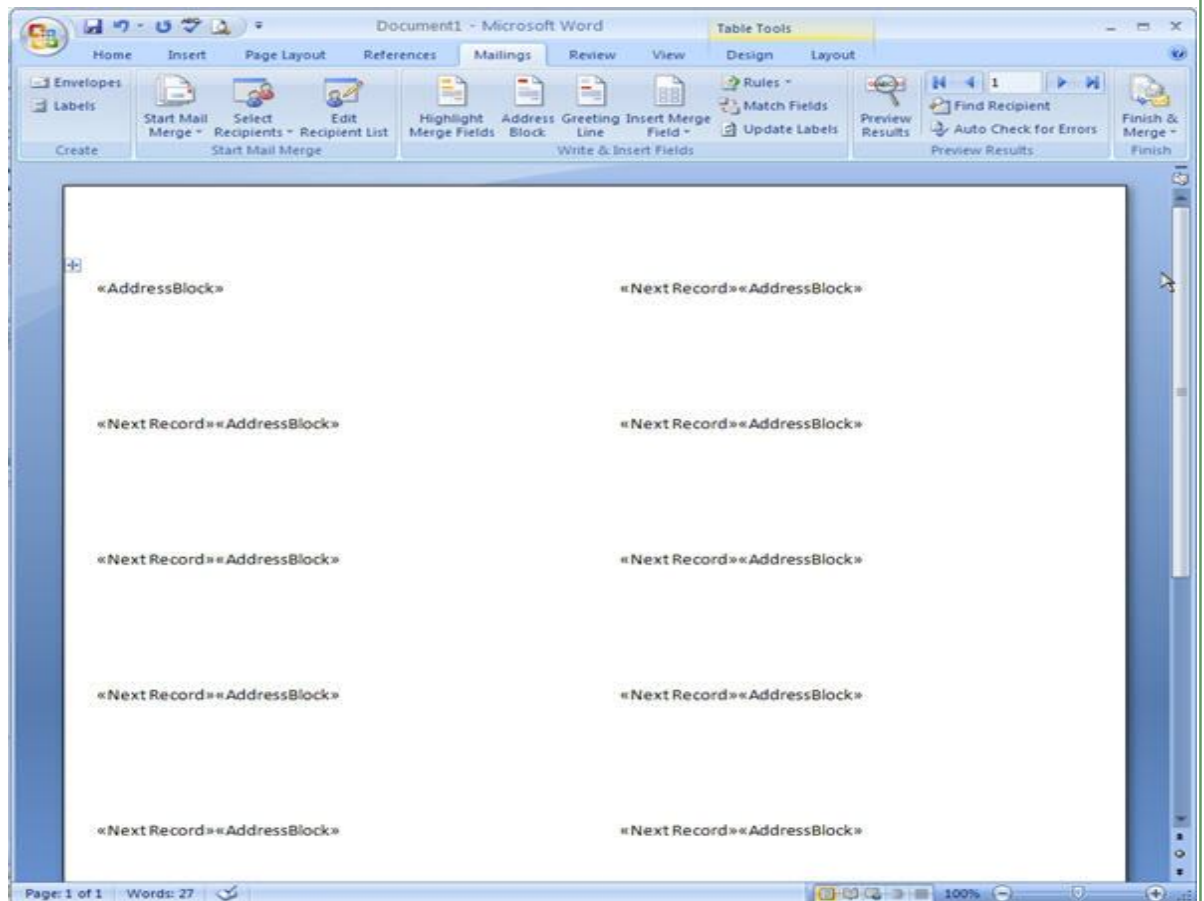
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If you decide to print your labels now, you will only get that first address in the first label. You need to make sure that the << AddressBlock >> appears on each label following the << NextRecord >> code. To do that you need to click on Update Labels option on the ribbon.
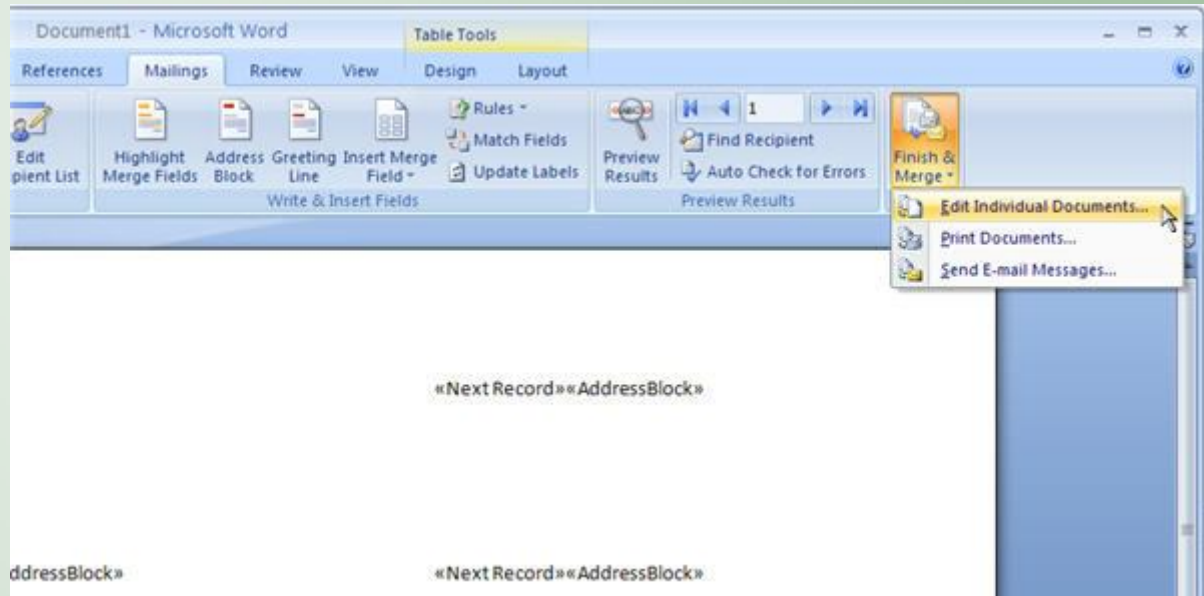

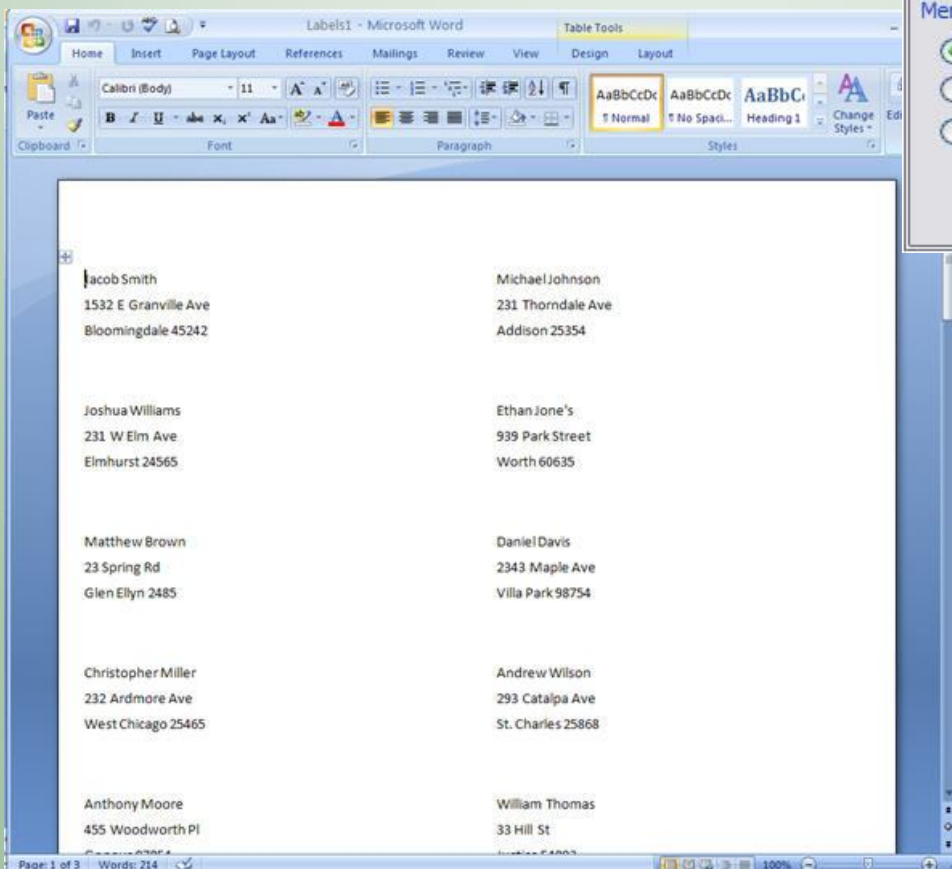**14.** Once you click on that button, all labels will update.

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And you are almost done! Now you have to click on the **Finish & Merge** button and select **Edit Individual Documents** to see what your labels will look like

15. Make sure **All** is selected and click **OK**.

16. TA DA!!! Now all you need to do is print your labels.