



# Mail Merge: *Creating Address Lists*

*First things first. If you want to use mail merge to make address labels, you need to have a list of addresses. If you use the Outlook program for your emails, you can mail merge straight from your Outlook contacts list. For most people though, you'll need to make an address list in Excel.*

## Creating an address list in Excel

If you plan to use Excel for mail merge, there are a few things you need to bear in mind when you're setting up the address list.

- 1** Use column headings that clearly identify the type of information in the columns – eg 'Name', 'Address Line 1', 'Address Line 2', 'Town', rather than 'Column 1', 'Column 2', 'Column 3'.
- 2** Use a different column for each bit of information that you want to appear on a different line of your address label. If you stick the town and postcode in the same column they'll both come out on the same line.
- 3** Don't leave any blank columns or rows in your spreadsheet.

This example should work quite well:

	A	B	C	D
1	<b>Name</b>	<b>Address</b>	<b>Town</b>	<b>Post code</b>
2	Anne and Jeff Stokes	2 Rose Lane	Liverpool	L1 6AB
3	Mr and Mrs Kyle	5 Buttercup Way	London	WC1B 7CD
4	Tazeen Bhatti	3 Daisy Close	Glasgow	G1 1EA
5	Mrs Olivia Cole	14 Clover Drive	Leeds	LS2 9JT
6	Adam Radford	21 Ivy Avenue	Buxton	SK17 6XN

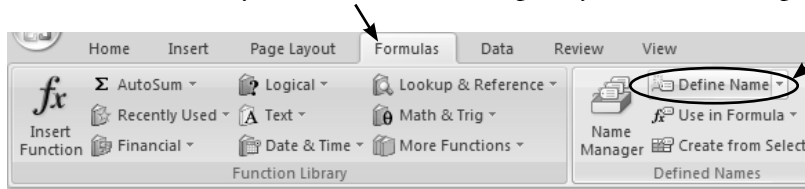
*If you want to include other information in the spreadsheet, eg a phone number, but don't want it to appear on the label, put it in a separate column at the end and it'll be easier for you to miss it out of the mail merge.*

## Define a name for your spreadsheet

*If you use Excel 2003, click on 'Insert' at the top of the page, point to 'Name' and click 'Define'. Type your name, then click 'Add' and then 'Close'.*

To help you find the address list you've made when you come to do the mail merge, you can define a name for it. Here's how.

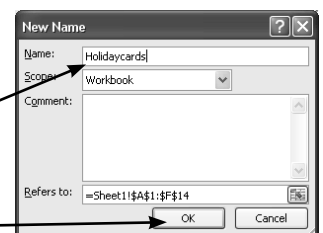
- 1** Select just the columns or rows that you want to use in your mail merge – so if you have a 'Phone number' column on the end that you don't want to include, leave it unselected.
- 2** Click where it says 'Formulas' at the top of your screen to open the 'Formulas' tab.



- 3** Click here, where it says 'Define Name'.

	A	B	C	D	E	F
1	<b>Name</b>	<b>Address</b>	<b>Town</b>	<b>Post code</b>	<b>Phone number</b>	
2	Anne and Jeff Stokes	2 Rose Lane	Liverpool	L1 6AB	01243 544 865	
3	Mr and Mrs Kyle	5 Buttercup Way	London	WC1B 7CD	01243 544 865	
4	Tazeen Bhatti	3 Daisy Close	Glasgow	G1 1EA	01243 544 865	
5	Mrs Olivia Cole	14 Clover Drive	Leeds	LS2 9JT	01243 544 865	
6	Adam Radford	21 Ivy Avenue	Buxton	SK17 6XN	01243 544 865	

- 4** In the little box that pops up, type a suitable name, eg 'Holidaycards'. Don't include any spaces in the name.



- 5** Click the 'OK' button.

*(It might be worth making a note of what you've called it so that you can find it later.)*

1. The recipient's name	2. The recipient's address	3. The recipient's phone number
4. The recipient's email address	5. The recipient's company name	6. The recipient's job title
7. The recipient's city	8. The recipient's state	9. The recipient's zip code
10. The recipient's country	11. The recipient's fax number	12. The recipient's website

# Mail Merge: *Making Labels in Word*

Mail merge makes it easy to quickly print documents or labels using information that's stored in a spreadsheet. There's a step-by-step Wizard to guide you through it, which is surprisingly helpful, despite being a bit intimidating at first. I'll talk you through how to make labels – but there are other things you can do, such as write a letter with all your news on it, and then get Word to address it to every person in your address book.

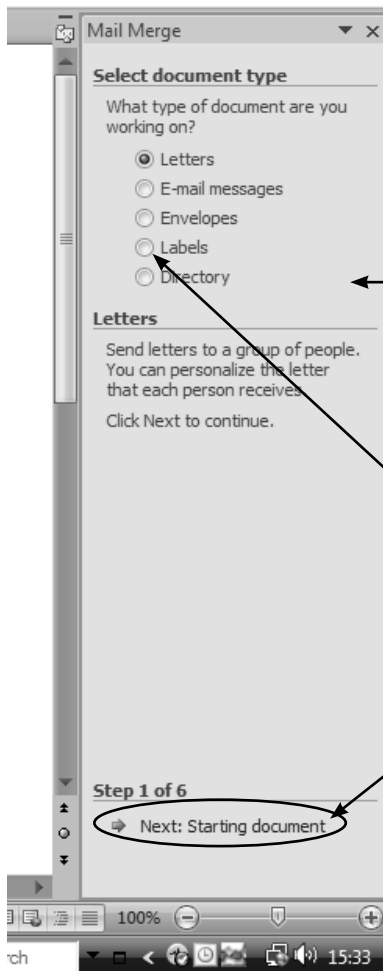
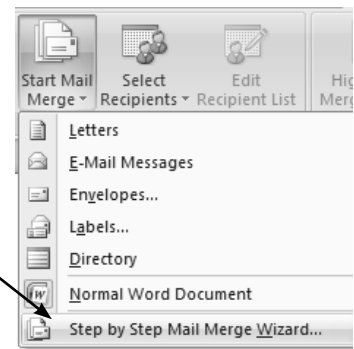
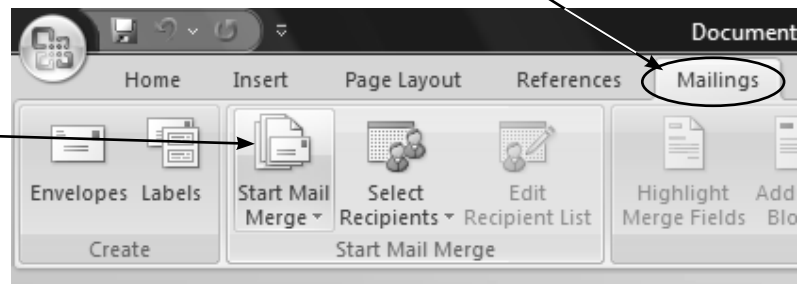
## Starting a mail merge

Wherever you store your addresses, when you do a 'mail merge' to put them on labels, letters, and so on, the document you end up with will be a Word document that you can then print out. So you start the whole process from Word.

**1** In Word, click near the top of your screen where it says 'Mailings'.

**2** Now click here, where it says 'Start Mail Merge'.

**3** A little list of options like this will open up. Click on the one at the bottom to open the Step by Step Mail Merge Wizard.



**4** The Wizard doesn't actually look all that wizardly – it's this slightly disappointing panel down the right-hand side of your screen. But it's very useful at guiding you through the steps one by one.

**5** In Step 1, you need to decide what type of document you're going to create – a letter, an email, an envelope, labels or a directory. I want labels, so I click on this button here.

**6** When you have the right type of document selected, click here at the bottom to move onto the next step (see next page).

*If you use Word 2003, click where it says 'Tools' at the top of the screen, point to 'Letters and Mailings' and click 'Mail Merge'. That opens a step by step guide just like the Wizard in later versions of Word.*

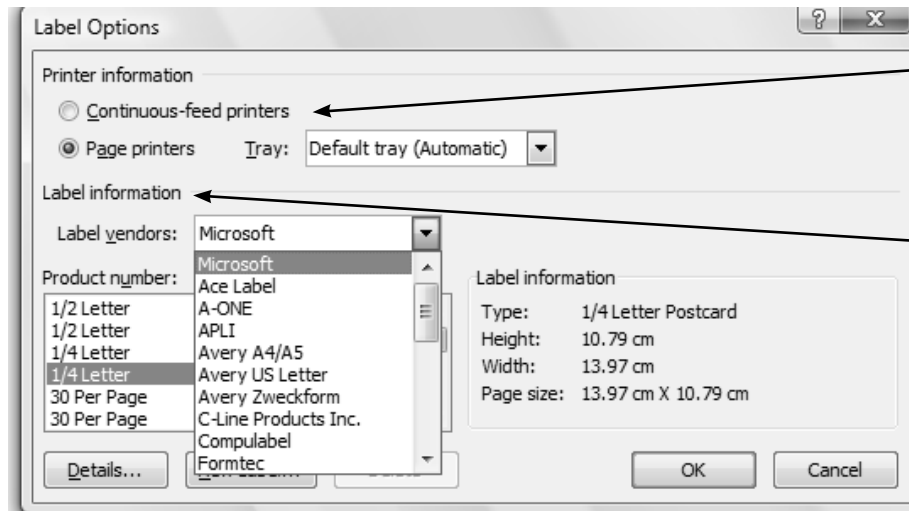
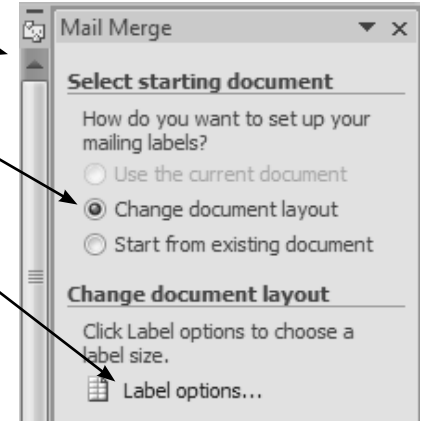
# Mail Merge: *Making Labels in Word*

The second step of the Mail merge wizard is where you tell it what type and size of labels you're using. It's worth keeping the label packaging to hand because it'll usually have a code on.

## Choosing the correct label options

Don't worry if you're doing a document type other than labels – the steps are similar, but actually a bit simpler, and the Wizard guides you through them.

- 1 In step 2 of the wizard you get these options:
- 2 Don't worry too much about this bit at the top – the easiest way to do your labels is to leave it just as it is.
- 3 Looking further down, you need to click on 'Label options...' to tell it what size and shape of labels you're using.  
(Actually, if you try to miss this step out, it'll bring up the Label Options window automatically anyway.)
- 4 This is what the Label Options window looks like:



You should be OK to leave this top section as it is.

THIS is the important section.

- 5 Click the arrow next to where it says 'Label vendors' and choose the manufacturer of your labels from the drop-down list. If you can't find yours on the list, choose "Avery A4/A5" sizes – they're the standard ones.
- 6 Next you need to find the right label size in the list under where it says 'Product number'. There are lots of options, and you can use the up and down arrows to scroll through them.

Make sure your choice matches what it says on your label packet. If the 'Product number' list is all in codes and you can't find a code on your packet, you can click on each code to read the 'Label information' here.



If you realise later on that you've made a mistake on this bit, you can come back and change it.

- 7 When you're happy with your choice, click the 'OK' button.
- 8 Click where it says 'Next: Select recipients' at the bottom of the Wizard panel.

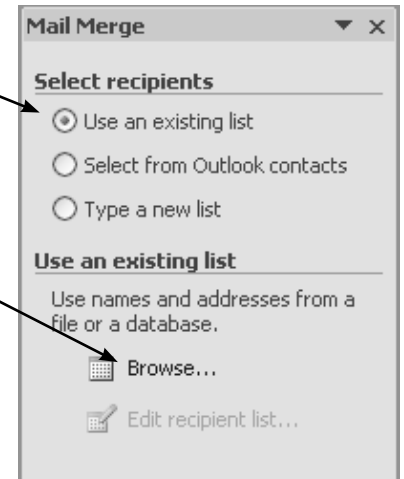
# Mail Merge: *Making Labels in Word*

The next step when you're mail merging is to tell Word where to find the information you want it to use. If you want to use a spreadsheet, make sure you know which folder it's saved in on your computer. You can also use a list of contacts from Outlook (if you have it).

## Finding the information you want to use

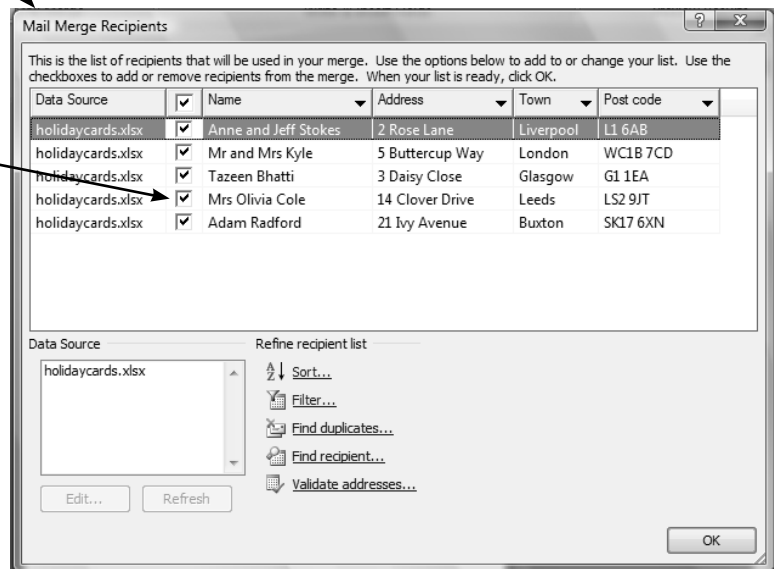
Step 3 of the mail merge Wizard is when you find the list of names and addresses to use. If you're using an Outlook contacts list, jump straight to the bottom section.

- 1 If you're using a spreadsheet of names and addresses, click here to 'Use an existing list' at the top of the Wizard panel.
- 2 Click here where it says 'Browse'.
- 3 A new window opens and you can use this to navigate through the different folders to the one where your spreadsheet is saved.
- 4 Double-click on the spreadsheet name. You'll see a little list, and if you defined a name for your spreadsheet it'll be there. Click to select it and then click 'OK'.



- 5 You'll see a window like this showing all the names and addresses in your list.

- 6 If there are any contacts you don't need, untick the little boxes next to those by clicking on them. Then click 'OK' and the window will disappear.



- 7 At the bottom of the Wizard panel, you can now click 'Next' to move on to the next stage.

## Outlook contacts

- 1 If you're using an Outlook address book, at the start of step 3, click the button 'Select from Outlook contacts' and then click 'Choose Contacts folder'.
- 2 Click 'OK' in the next window to confirm the profile name 'Outlook'.
- 3 Click the 'Contacts' folder you want and click 'OK'. A window will pop up, listing the contacts Word has found, and you can follow steps 6 onwards above.

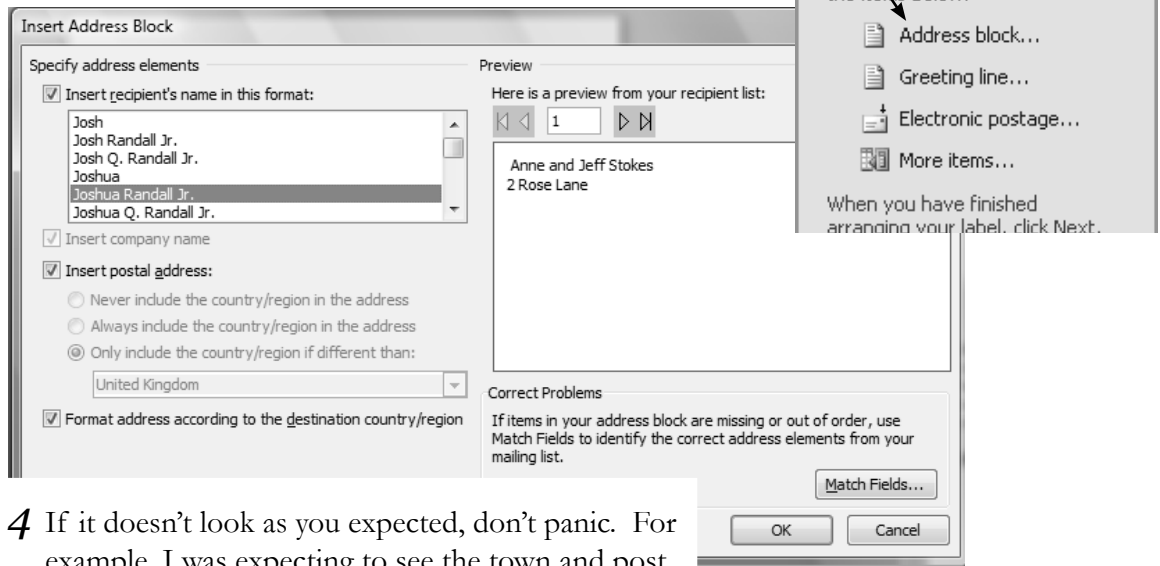
# Mail Merge: *Making Labels in Word*

Nearly there now – we’re on the last couple of steps to finish making your mail merged labels.

## Arranging the layout of the labels

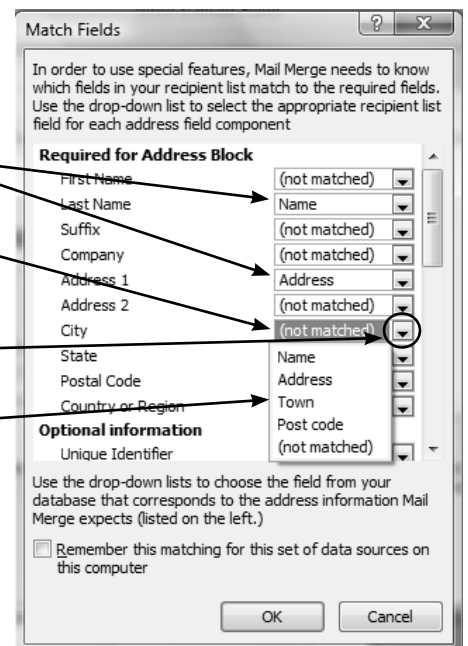
In Step 4 of the mail merge, here’s what you need to do:

- 1 The white sheet on the left of your screen represents your first label. Either leave the cursor where it is (I’d recommend this option!), or double-click where you want the first line of the label to go and you’ll see your cursor move there.
- 2 Then look at the options in the panel on the right. For labels you’ll need to click on ‘Address block...’. If you were making letters with a personalised greeting line, you’d click on ‘Greeting line...’ instead.
- 3 Now a window will pop up with a preview of how your first label will look, like this:



- 4 If it doesn’t look as you expected, don’t panic. For example, I was expecting to see the town and post code on my labels. All that’s happened is that I’ve used slightly different headings in my spreadsheet columns from the ones Word recognises. You can fix these problems by clicking on ‘Match fields...’.

- 5 You then see a window like this. Here it’s already matched my ‘Name’ column with its ‘Last Name’ field, and my ‘Address’ column with its ‘Address 1’ field. But it hasn’t matched my ‘Town’ column with its ‘City’ field, or my ‘Post code’ column with its ‘Postal Code’ field. So for missing fields, you can click the arrow next to where it says ‘(not matched)’ and choose the correct column name from the drop-down list.



- 6 Click ‘OK’, and then look at the preview in the window below. If it looks as you expected it to, click on ‘OK’ again.

- 7 Back in the Wizard panel again, click on the ‘Update all labels’ button. Then click ‘Next’ at the bottom to go to the next step.

The	Basics

# Mail Merge: *Making Labels in Word*

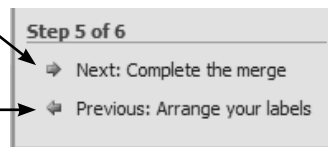
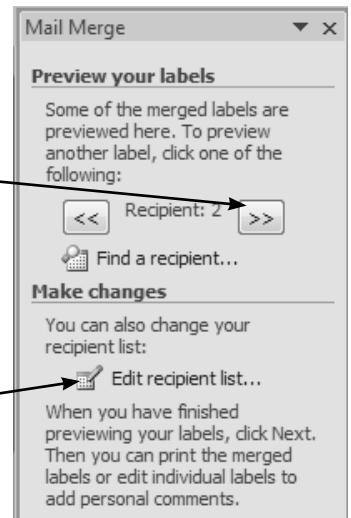
Now you get the chance to preview your labels and make sure there are no nasty surprises before you start to print them.

## Previewing your labels

In Step 5 you get the chance to see how your labels are going to look.

- 1 The previews are shown on the white sheet, and you can click them and move the text about a bit if you need to. If you move the text around on one label, the same will happen to each of the others.
- 2 When you're happy with the first label, you can click this arrow to move on and look at the next one. The other arrow allows you to move back and look again at the previous label.
- 3 If there's a label you don't need in there, or you realise you do actually need one you unticked earlier, you can click here to edit the list of recipients again.
- 4 When you're happy with your previews, click where it says 'Next: Complete the merge' at the bottom of the Wizard panel.

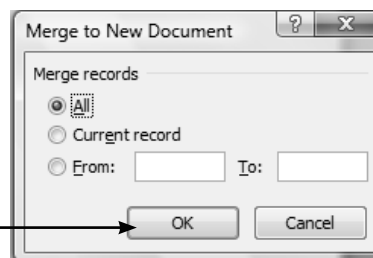
*Bear in mind that you can click where it says 'Previous' right at the bottom of the Wizard panel to go back through the steps and change something you did earlier.*



## Editing individual labels

The mail merge Wizard is now ready to complete your merge and produce your labels.

- 1 Always click here, where it says 'Edit individual labels...', rather than going straight to 'Print...'. It's best to have one final check rather than risk wasting sheets of labels.
- 2 Word will now prepare to do the mail merge and open a new document with the labels in it. But first you'll see a little box like this pop up – click 'OK'.




- 3 Your new document will open, and you can make any final changes to individual labels before you print them. At this point **make sure you save** both the original Word document, which you used to work through the wizard, and the new document with the finished labels (click the Office button, then click 'Save'). Use similar names so you know they belong together and put them in the same folder.
- 4 When you're sure you're happy with how the labels look, it's time to print them (see next page).

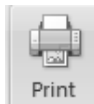
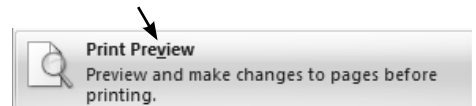
# Mail Merge: *Making Labels in Word*

*The moment of truth is upon us – it's time to print the labels.*

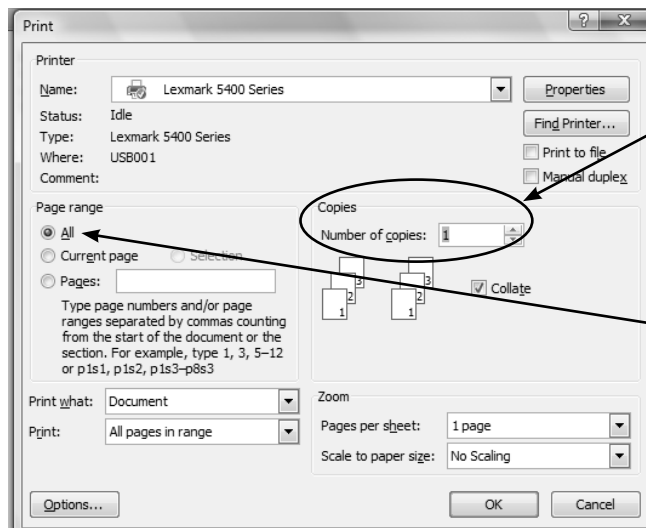
## Printing your labels

You're happy with the look of your labels on the screen, so now it's time to print them.

- 1 First, empty your printer of paper.
- 2 Take a single sheet of your labels and check one final time that the size printed on the packet matches the size you entered in Step 2 of the mail merge Wizard. Put the single sheet of labels into your printer.
- 3 Click 'File' at the top left of your screen (or the round Office button  if you're using an older version of Word). Choose 'Print' from the list of options down the left-hand side. What the next bit looks like depends on which version of Word you have. If you can see a 'Print Preview' button click on that (it's worth having a last quick look, just to make sure everything looks right). If you don't have a separate preview option, you'll be able to see a small version of the page on the right-hand-side of the print window.



- 4 If it looks fine, click the 'Print' button.



- 5 You'll see a window a bit like this. Make sure the number of copies is right – you'll probably just want one. And even though you're just going to print one sheet at first, it's probably easiest if you just leave it printing 'All' of the document.

- 6 Click 'OK', and wait for your first sheet to print. Your computer will complain that it needs more paper after this sheet prints, and if it looks OK, load in the correct number of sheets and print out the rest of your labels.
- 7 If they're printing funny, cancel the print job and work out what went wrong. Is the label size you entered correct? If not, open up the saved document that you used to work through the Wizard stages and go back to Step 2. Enter the correct size and try again.
- 8 On the other hand, it may just be that the paper was wonky in the printer – if this is the most likely suspect, just repeat the steps on this page again, making sure you put the paper in straight this time.