

# Create Mailing Labels from an Electronic File

## Microsoft Word 2002 (XP)

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Electronic data requests for mailing labels will be filled by providing the requester with a comma-delimited text file. When you receive this file via email you will need to copy the file to your local computer and then use Microsoft Word to convert the file to mailing labels. Following are the steps to save the electronic file to your computer and to produce the mailing labels from the file.

### Save the Electronic data file

1. Open the email message that contains the data file.
2. Select the attachment, right-click and choose **Save As...**  
-or- from the **File** menu, click **Save Attachments...** select the attachment, and click **OK**.
3. Save the file to a location on your computer.

If you use Windows XP you have a folder called **My Data Sources** inside the **My Documents** folder. I recommend you use this folder or create a folder in your My Documents folder just for your data files so that you can locate them easily.

4. The file will be sent to you in or **Comma-Separated** format. Give the file a name that represents the data, for example `graduating_seniors.csv`. If you change the filename make sure to include the **.CSV** extension.

### Create labels for a mass mailing

1. Start Word 2002 (XP).
2. On the **Tools** menu, point to **Letters and Mailings**, and then click **Mail Merge Wizard**.  
The **Mail Merge Wizard** will open in the **Task Panel** on the right-hand side of the screen.
3. Under **Select document type**, click **Labels**.

The active document becomes the **main document**<sup>1</sup>.

4. Click **Next: Starting document** (bottom of the Task Panel.)

**Tip** If you're familiar with the mail merge feature or prefer to work outside the wizard, you can use the **Mail Merge toolbar**.

- From the **View** menu, select **Toolbars > Mail Merge**.

5. The wizard guides you through the rest of the mail merge process. The following are more details, listed in step-by-step order.

### Set up and display your labels

1. Click **Change document layout**.
2. Click **Label options....**
3. In the **Label Options** dialog box, select the options you want, such as the label type and size.

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<sup>1</sup> **Main document:** In a mail-merge operation in Word, the document that contains the text and graphics that are the same for each version of the merged document, for example, the return address or salutation in a form letter.

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**Note:** For Help on an option, click the question mark, and then click the option.

4. The label size you choose will depend on the amount of information you will place on your labels. Example label sizes:
  - 5159 Avery labels = 4 to 6 lines of information; size is 1.5” by 4”.
  - 5160 Avery labels = 3 to 4 lines of information; size is 1” by 2.63”.
  - 5161 Avery labels = 3 to 4 lines of text; size is 1” by 4”.
5. Click **OK**

## ***Locate a data source***

1. Click **Next: Select Recipients** (bottom of the Task Panel.)
2. At the top of the Task Panel, under **Select recipients**, click **Use an existing list**.
3. Click **Browse**.
4. In the **Select Data Source** dialog box, locate and click the **data source**<sup>2</sup> you want. By default, Microsoft Word opens the My Data Sources folder.
5. Select the data source and click **Open**.

**Note:** Depending on the type of data source you select, other dialog boxes may appear asking you to request specific information. For example, if your data source is a Microsoft Excel worksheet that has information on multiple tabs, you need to select the tab containing the information you want, and then click **OK**.

6. All of the entries in the data source appear in the **Mail Merge Recipients** dialog box, where you can refine the list of recipients to include in the merge.

## ***Select recipients***

If you will be using all of the names in the list, skip to the next section, “**Setup the Labels.**”

1. In the **Mail Merge Recipients** dialog box, select the recipients you want to include.
2. Do one of the following:
  - **Use the check boxes to designate recipients**

Select the check boxes next to the recipients you want to include, and clear the ones next to the recipients you want to exclude. (This method is most useful if your list is short.)

If you know you want to include most of the list in your merge, clicking **Select All** first makes it easy to clear particular records. Similarly, if you want to include only a few records in the list, click **Clear All**, and then select the records you want.
  - **Sort items in the list**

This is useful if you want to see items in alphabetical or numeric order.

Click the column heading of the item you want to sort by. For example, if you want to display the list alphabetically by last name, click the **Last Name** column heading.

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<sup>2</sup> **Data source:** A file that contains the information to be merged into a document. For example, the list of names and addresses you want to use in a mail merge. You must connect to the data source before you can use the information in it.

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- **Filter items in the list**

This is useful if the list contains records that you know you don't want to see or include in the merge. Once you've filtered the list, you can use the check boxes to include and exclude records as described in the previous section.
3. Click the arrow next to the column heading of the item you want to filter by.
  4. Click any of the following:
    - **(Blanks)** displays all the records in which the corresponding field is blank.
    - **(Nonblanks)** displays all the records in which the corresponding field contains information.
    - If your data source contains records that share the same information, and there are ten or fewer unique values in the column, you can filter by specific information. For example, if there are multiple addresses that list Australia as the country/region, you can filter on **Australia**.
    - **(Advanced)** For advanced sorting and filtering, click the arrow next to any column name, and then click **(Advanced)**. Use the **Filter Records** and **Sort Records** tabs to set up the sorting or filtering query you want. Click **OK** to close the Advanced dialog.
  5. The **Mail Merge Recipients** dialog box displays only the designated records. To display all the records again, click **(All)**.

## **Setup the Labels**

1. Click **OK** to return to the **Mail Merge Wizard**. Microsoft Word will use the recipients you designated for the merge.
2. Click **Next: Arrange your labels**.
3. Insert **merge fields**<sup>3</sup> where you want to merge names, addresses, and other information such as a postal bar code.
4. In the **main document**, click where you want to insert the **field**<sup>4</sup>.
5. Insert any of the following:
  - **Address block with name, address, and other information**
    1. Click **Address block**.
    2. In the **Insert Address Block** dialog box, select the address elements you want to include and the formats you want.
    3. Click the **Match Fields** button.
    4. Click the arrow next to **(not available)**, and then select the field from your data source that corresponds to the field required for the mail merge.
    5. Match the First Name field to the name field in your data if your data source contains only one name field. Otherwise, match the name fields accordingly.
  - **Other fields of information**

To insert additional fields of information from you data source:

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<sup>3</sup> **Merge field:** A placeholder that you insert in the main document. For example, insert the merge field «City» to have Word insert a city name, such as "Paris," that's stored in the City data field.

<sup>4</sup> **Field:** A set of codes that instructs Microsoft Word to insert text, graphics, page numbers, and other material into a document automatically. For example, the DATE field inserts the current date.

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1. Position the cursor at the location where the information should appear.
  2. Click **More items**.
  3. With the **Database Fields** choice selected, click the field you want from the **Fields** box.
  4. Click **Insert**, and then click **Close**.
  5. Repeat steps 1 through 4 as needed.

#### Notes

- If you insert a field from the **Database Fields** list, and then later switch to a data source that doesn't have a column with the same name, Word won't be able to insert that field information into the merged document.
- You can't type merge field characters (« ») or insert them by using the **Symbol** command on the **Insert** menu.
- If the merge fields appear inside braces, such as { MERGEFIELD City }, then Microsoft Word is displaying *field codes*<sup>5</sup> instead of *field results*<sup>6</sup>. This doesn't affect the merge, but if you want to display the results instead, right-click the field code, and then click **Toggle Field Codes** on the shortcut menu.

### **Format merged data**

To format merged data, you must format the merge fields in the main document. Don't format the data in the data source, because its formatting isn't retained when you merge the data into the document.

1. In the main document, select the field containing the information you want to format, including the surrounding merge field characters («« »»).
2. On the **Format** menu, click **Font**, and then select the options you want.

### **Formatting by using field codes**

1. To control other aspects of formatting, press **ALT+F9** to display field codes, and then add *switches*<sup>7</sup> to the merge fields.

For example:

- To display the number "34987.89" as "\$34,987.89," add the Numeric Picture switch (\#).
  - To print client names in uppercase letters, add the Format switch (\\*).
  - To ensure that the merged information has the same font and point size you apply to the merge field, add the \\* Charformat switch.
3. To copy the format and layout of the first label to all the other labels on the page, click **Update all labels**.

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<sup>5</sup> **Field code:** Placeholder text that shows where specified information from your data source will appear; the elements in a field that generate a field's result.

<sup>6</sup> **Field results:** Text or graphics inserted in a document when Microsoft Word carries out a field's instructions. When you print the document or hide field codes, the field results replace the field codes.

<sup>7</sup> **Switch:** When working with fields, a special instruction that causes a specific action to occur. Generally, a switch is added to a field to modify a result.

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4. After you've completed the main document and inserted all of the merge fields, click **Save As** on the **File** menu. Name the document, and then click **Save**.
  5. Click **Next: Preview your labels**.

### ***Preview the labels and fine-tune the recipient list***

1. Preview the items. Do one of the following:
  - To preview the items in order, click the arrow buttons . Each record is previewed in the first label on the sheet.
  - To locate and preview a specific item, click **Find a recipient**, and then enter the search criteria in the **Find Entry** dialog box.
  - For Help on an option, click the question mark , and then click the option.
2. If you want to fine-tune the recipient list — for example exclude a recipient — click **Edit recipient list**, and then make your changes in the **Mail Merge Recipients** dialog box.
3. Click **Next: Complete the merge**.

### ***Complete the merge***

Do any of the following:

#### **Personalize individual labels**

To personalize individual items, you actually complete the merge, and then edit the information you want in the resulting merged document.

1. Click **Edit individual labels**.
2. In the **Merge to New Document** dialog box, select the records you want to merge.
3. For Help on an option, click the question mark , and then click the option.
4. Click **OK**.

Microsoft Word creates and opens a new merged document. Your main document also remains open, and you can switch back to it if you want to make a change to all the items.

5. Scroll to the information you want to edit, and make your changes.
4. Print or save the document just as you would any regular document.

### ***Print the sheet of labels***

Do one of the following:

#### **If you personalized the items and the merged document is active**

1. On the **File** menu, click **Print**.
2. Select the options you want.

#### **If you want to print directly from the Mail Merge Wizard**

1. In Step 6 of the Mail Merge Wizard (**Complete the merge**), click **Print**.
2. In the **Merge to Printer** dialog box, do one of the following, and then click **OK**.
  - To print all the documents, click **All**.
  - To print the document that you see in the document window, click **Current record**.

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- To print a range of documents, click **From**, and then type the record numbers in the **From** and **To** boxes.
3. In the **Print** dialog box, select the options you want.
  4. For Help on an option, click the question mark, and then click the option.

### ***Save the sheet of labels for later use***

If you want to edit merged labels or save them for later use, you can collect them into a single document.

1. Click **Edit individual labels**.
2. In the **Merge to a New Document** dialog box, do one of the following, and then click **OK**.
  - To merge all the documents, click **All**.
  - To merge only the document that you see in the document window, click **Current record**.
  - To merge a range of documents, click **From**, and then type the record numbers in the **From** and **To** boxes.
3. Microsoft Word opens a single new document that contains all the individual labels. You can then save the document for later use, just as you would any regular document.