CNPS Training Library

Subject: **How to do a Word mail merge from chapter Excel lists**

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Date: March 18, 2011

To start the mail merge process:

Start Word.

A blank document opens by default. Leave it open. If you close it, the next step won't work.

The Mail Merge process is essentially the same in all versions of Word but there are some differences between versions.

- **Microsoft Word 2002**

 On the **Tools** menu, click **Letters and Mailings**, and then click **Mail Merge Wizard.**

- **Microsoft Office Word 2003**

  On the **Tools** menu, click **Letters and Mailings**, and then click **Mail Merge**.

- **Microsoft Office Word 2007 or later versions of Word**

  On the **Mailings** tab, click **Start Mail Merge**, and then click **Step by Step Mail Merge Wizard**. (If you don't choose the Wizard in Word 2007, each step of the mail merge is still "clickable" from the Mail Merge tool bar at the top of the page.)

First, you choose the type of document that you want to merge information into. Then, you choose the main document that you want to use. The main document is the document that you start with. It's the model for all of the merged documents that you eventually create. Be sure to select "Labels" here.
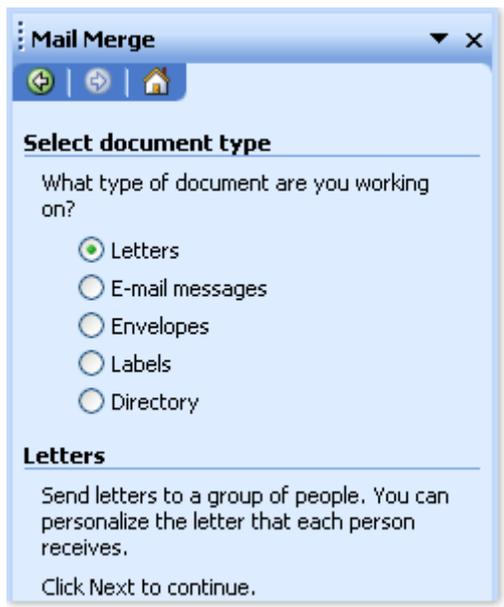
Under **Select document type**, click **Labels**, and then click **Next: Starting Document**.

Under **Select starting document**, click **Change document layout** or **Start from existing document**.

With the **Change document layout** option, you can use one of the mail-merge templates to set your label options. When you click **Label options**, the **Label Options** dialog box appears. Look on the box of labels to find the number to correspond to select in the label options list (for example, Avery 8160). If you are using a custom label, click **Details**, and then type the size of the label. Click **OK**. Word will replace the blank document page with a new document with the label spaces indicated.

With the **Start from existing document** option, you can open an existing mail-merge document and use that as your main document. You may want to use this option the next time you make labels.

Select your data source.
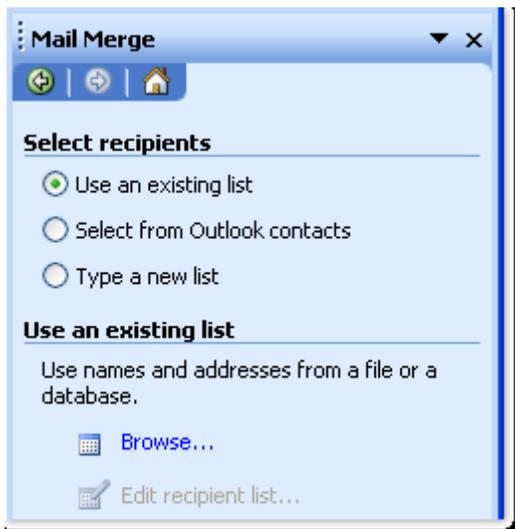
In this case, it will be your full chapter roster in Excel. Hopefully you have saved it with a name that is easy to recall in an easy to remember place on your computer, such as your desktop or a dedicated folder.

Use an existing list, and then click **Browse** to locate the file.

After you connect to the data file that you want to use or create a new date file, the **Mail Merge Recipients** dialog box opens in 2002 or 2003 only. In Word 2007, the file is automatically added but you will need to select "Edit Recipient List" to get to this step. You can select a subset of records for your mail merge by sorting or filtering the list.
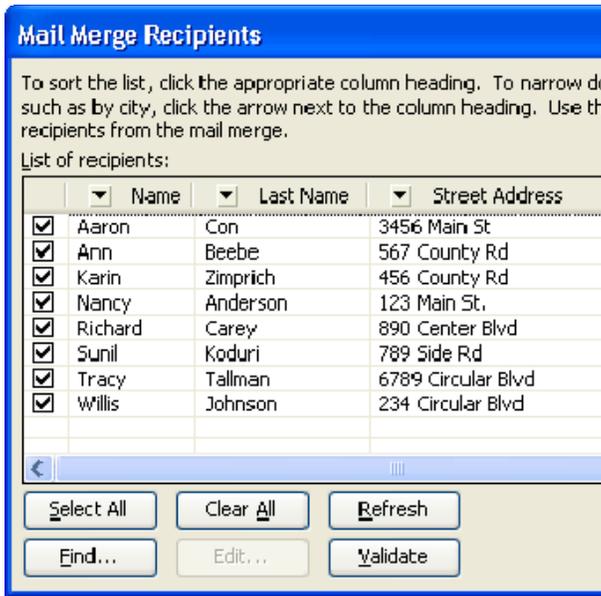

Optional: Do any of the following-

- To sort the records in a column in ascending or descending order, click the column heading.
- To filter the list, click the arrow beside the column heading that contains the value on which you want to filter. Then, click the value that you want. Or, if your list is long, click **(Advanced)** to open a dialog box where you can set the value. Click **(Blanks)** to display only records that contain no information or **(Nonblanks)** to display only records that contain information.

Choose all the records that you want to send to and proceed to select the fields you will use in the mail merge.

Select Address block if you only want the label to contain the main constituent and his or her address. If you want more information on your labels, you might want to skip "Address Block" and go straight to "Insert Merge Field" in Word 2007 or "More items" in older versions of Word shown below:
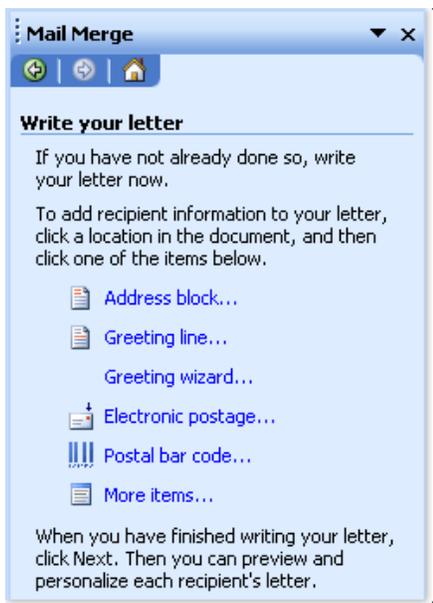
If using the address block option, choose the format you prefer. In Word 2002 and 2003, you will now want to choose "Match Fields" to make sure the column headers in the Excel file will be picked up by Word. Word 2007 users can skip this step because the column headers are automatically imported from the source file.
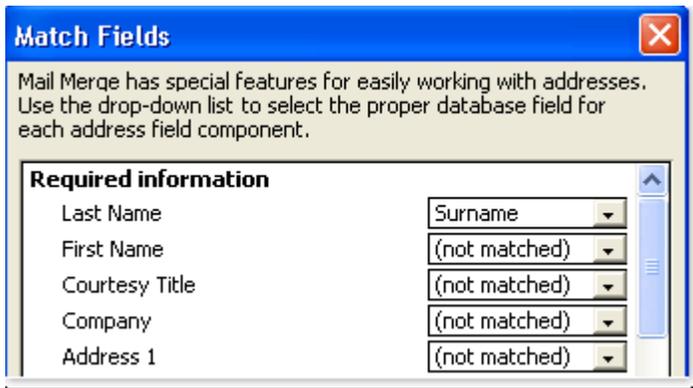
You will see the basic information for your constituent and his/her address in the first block of fields. Make sure the Last Name matches "Last Name", Company equals "Organization", "Spouse" equals "Spouse Name", ect. If you want to add the chapter and expiration date you will have to select a field you will not use for another part of the address block like "Unique Identifier" or "Nickname". Just remember which Word field you used for "chapter" or "Expiration Date" because you will need to insert this field by using Insert Merge Field.

Word 2007 can skip directly to Insert Merge Field. Click the down arrow on Insert Merge Field in the Mail Merge Toolbar. You will see all the column headers from your Excel file and will be able to arrange your labels directly using this.

In Word 2002 and 2003 you will need to select "Arrange Your Labels". Word 2007 users do not have to specifically select "Arrange Your Labels". The process is basically the same.

 In the **Mail Merge** task pane, verify that the **Arrange your labels** step is displayed. In this step, you can lay out your labels.

Word displays the items that you can use to lay out your labels, here you can select "Address Block" if you are using that or "More items" to add specific fields (Expiration Date). Click in the label where you want to insert the merge fields that represent where Word will print the information from the data source. Make sure that you type any spaces or punctuation that you want between two merge fields or after a merge field. You might select the following: «First_Name», «Last_Name», «Spouse», «Organization» «Contact» «Address_1» «Address_2» «City» «State» «Zip» «Chapter»«Expiration_Date», ect. If the fields run off your label, you can change the font size during this process in order to better see how you are arranging your labels or click "View" and select a "Zoom" option to magnify your label. You can always change the font before you print. Don't forget to space between names and return between lines and the comma between city and state or when you update all labels you will have to return to this step or manually edit your labels after you complete the merge.

In Word 2002 and 2003 when you finish setting up one label, click **Update all labels** to replicate all labels. In Word 2007 it is a tiny icon next to "Update Labels" that looks like a piece of paper with arrows that look similar to the recycle symbol.

Click **Next: Preview your labels** to preview your merged data in Word 2002 or 2003 (below). In Word 2007, click the button that says "Preview Results" with the magnifying glass in the mail merge toolbar. If you see anything amiss, click out of preview, change the problem in the first label, click "Update all labels" one more time, and preview again. If you only see one or two labels that need fixing but nothing else, you can edit these after you complete the merge.

Note: if you see wide gaps in "Preview" mode where you have additional fields inserted in the label (example: Address 2 or Spouse), don't worry! They should not appear on the final merged document.

Now you are going to complete the merge. In 2002 and 2003 you will see this:

In Word 2007, there is a button on the task bar that says "Finish and Merge" with a drop down arrow.

Select "Edit individual letters" (2002, 2003) or "Edit individual documents" (2007) to create a new document with the mail merge that you will be able to check before printing.