

Addressing Christmas Cards From an EXCEL Data Base

Using Microsoft Word 2000 (In Office Suite) Mail Merge

By Richard Kennon

Open a clean sheet in Word 2000.

Click on **Tools>Mail Merge**. This leads to a pop-up titled Mail Merge Helper. Don't you just love these helpers?

Click on **1. Create>Mailing Labels**. Or, you can click on **Envelopes** if you have a printer that will feed envelopes properly. Good luck. We will do labels here.

Assuming you started with a clean document, choose **Active Window**.

Click on **2. Get Data>Open Data Source**. This will get you a browse window where you will have to locate your data source. Select the data source and click on **Open**.

Then you will be given a choice of the entire spread sheet or maybe a couple of alternatives. If you have more than one sheet in the workbook, the names of the sheets will be listed. Choose the proper sheet or "Entire" and click **OK**.

Then you will be asked to set up the main document. So, click on **Set Up Main Document**.

Since you started out by choosing mail labels, a window pops up so you can choose the label you will be using. Choose the proper label and click **OK**.

Next you will be given a window titled "Create Labels." If you really want to be a good citizen, click **Insert Postal Bar Code...** Then you will be asked which field has the Zip code. Scroll down the list and pick it out and press **Enter**.

Click on **Insert Merge Field** and choose which one is first (usually "First Name"). Then press the Space bar and click on **Insert Merge Field** again and choose the last name field. Then press **Enter**.

You see, what you are doing is choosing "Fields" for words or numbers and typing the spaces and returns and commas and/or periods as needed. Up to now, you have chosen the first names and last names with a space in between and a carriage return (remember that term?) at the end to get you set for the second line.

Click on **Insert Merge Field** and then click on "Street Address" or whatever. Press **Enter**.

Click on **Insert Merge Field** and click on "City_State" and then press the space bar. If your data base has the City and State in different columns, first choose :City" then type a comma and a space then click on "State." Then press space, click on **Insert Merge Field** and choose the zip code heading.

After you have typed and inserted all you want, click on **OK**.

Click on **3. Merge**. This is where the rubber meets the road. A window titled "Merge" pops up and asks "Merge To:" and you should choose "New document" and then click on **Merge**. Walla! With a little luck, the sheet will pop up just as you want it. So, put the label stock in the printer and print.

*If you have the same problem I just had and the sheet pops up with Field Names on the labels instead of actual names and addresses, click on a **Merge** button at the top of the page in the middle. Also, mine wants to print ten pages so count the actual number with stuff on them and tell it to print that many.*

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Open a clean sheet in Word 2002.

Click on **Tools>Letters & Mailings>Mail Merge Wizard**. The Mail Merge Wizard pops up in the right hand column. Don't you just love these wizards?

On the right under "Select Document Type" click on **Labels**, then on **Next** at the bottom.

Click **Change Document Layout** and **Label Options**. Select your labels on the pop-up window and click **OK**. Click **Next** at the bottom.

Under "Select Recipients" click on **Use an existing list** then under "Use an existing list" click on **Browse**. Browse to your data base and click on **Open**. Something undecipherable pops up. Go down the list and select **All\$**. Also make sure the box at the bottom left (First row...) is checked. Click **OK**. A pop-up will show you all the columns of your list with boxes on the left. All the boxes are checked. If there is someone you are mad at, just click on their box and it will be unchecked. Don't waste a label on them. Click **OK**.

Click **Next** at the bottom right.

Under "Arrange your labels" click on **Address Block**. An "Insert Address Block" window will pop up. First select how you want the name printed (i.e. Joshua Randall Jr. – that is firstname lastname is probably what you want). Leave all the square boxes checked. If there is no company name, it will just skip it. Select which circular bull's-eye you want. Now, click **Match Fields**. This will allow you to match your column headings with what they think should be in an Address Block. The "Match Fields" window pops up. Using the data spaces on the right, match your headings with their "Required Information." Click on a down arrow and then select your heading from the list that matches what they call "Last Name." If you do not have a match, like for "Courtesy Title," just leave the "(not available)" message there. Do this for each category so the program will know where to look for your address block data. Click **OK**. Then click **OK** again.

Click on **Update all labels** under "Replicate labels."

Click on **Next** and **Next** again. This gets you to step 6 where you can print. Place the label stock in your printer and go for it. *Mine wants to print ten pages so count the actual number with stuff on them and tell it to print that many.*

You will notice there were many options I did not tell you about. And, I wont. I don't understand most of them.

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Open a clean sheet in Word 2000 (In Works Suite)

Click on **Tools>Mail Merge>Document Type**. Document type window pops up. Select **Mailing Labels** and click **OK**.

In "Open Data Source" window select **Merge information from another type file**. Browse until you find the .xls file that contains your data. Select it and click **Open**.

A window pops up asking if you want to use the first row of data as field names. Click **Yes**.

Then, maybe, a window pops up asking which sheet in the database you want to use. If that happens, type the sheet name into the blank space and click **OK**.

Window says you need to set up your merge document. Click **OK**.

In "Mail Merge Helper" window, click **Setup** in line 1. In the Label Options window, select the label stock you will use and click **OK**.

Now you are finally down to it – the "Create Labels." Click **Insert Postal Bar Code** if you want to be a good citizen. When you do this, another window pops up asking which merge field contains the zip code. Click on the down arrow and select the field name. Click **OK**.

Move the cursor to the second row just below the bar code row. Click on **Insert Merge Field** and you will see a list of the fields in the top row of your data sheet. Select the one you want (i.e. First Name) and it will pop up where you had the cursor. Now, you must press the space bar to make a space between the first name and what is next. Click on **Insert Merge Field** again and select another field (i.e. Last Name). Now you must press **Enter** to get down to the next line. Again click on **Insert Merge Field** and select the street address. **Enter**, again, to get down to the next line and so forth until you have the whole address block completed. Then click **OK**.

In the next window click **Merge** on line 3. A "Merge" window pops up. Select **New document** and **All** and click on **Merge**. With a little luck, a page will pop up with all the blanks filled in. Now you can load your label stock into the printer and print your labels. I suggest you scroll through the pages on the screen and only print those with stuff on them. Mine says there are ten pages but only three have printing. If I hit the **Print** button it would grind through all ten.

Setting Up A Mail List
In
EXCEL

Open a new Excel spread sheet and start labeling columns in the top row (row 1). I would do them in this order but you may do them in any order you please: Last Name, First Name, Street Address, City, State (or, you can combine City and State with a comma and a space), Zip Code, Birth Day, Color of Hair, Color of Eyes, How well you like them from 1 to 10, Phone Number, Email Address, Make and Model of Car, and on and on. There are other things you can do besides address Christmas cards. If you have recorded your likes from 1 to 10, you can print out a list of those from 1 to 5 for instance. Or you can print out a list of people born in October. First you have to decide whether to put individuals in the list or families. If families you can have a column for his birthday and a column for her birthday and columns for the names and ages of the children. You can go wild! The column headings must be in the first line in order for the mail merge to work. Fill in the data, save it and you are ready to go. You do not have to use all the headings in a merge – just the ones you want.