

## MAIL MERGE - LABELS USING THE MAIL MERGE WIZARD

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When working with the Mail Merge feature, it is possible to create several types of documents, such as labels. In this document, information on how to set up a labels merge is explained.

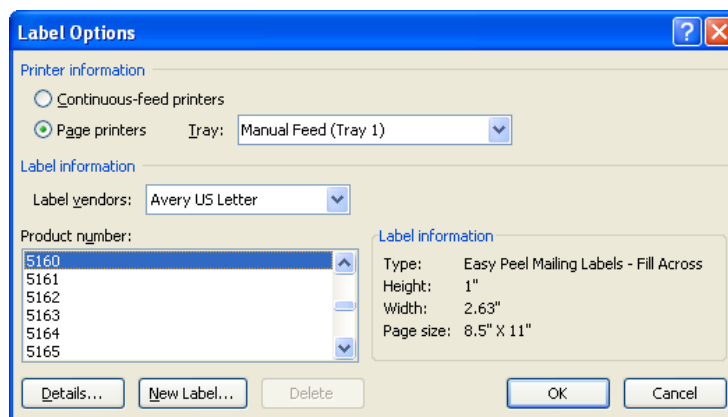
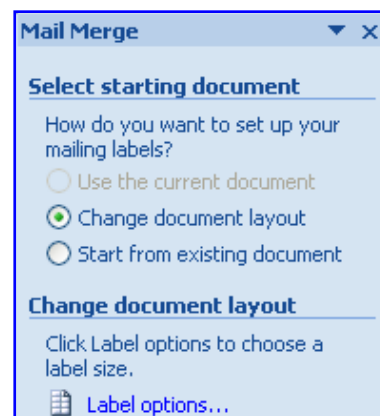
### STARTING THE MERGE

- ❖ Click the **Mailings Tab**.
- ❖ Click the **Start Mail Merge** list arrow.
- ❖ Click the **Step by Step Mail Merge Wizard** link at the bottom of the list.
- ❖ The **Mail Merge Task Pane** will appear, displaying the first step in the Mail Merge process (see illustration at right).
  
- ❖ **Select Document Type** - The following choices will appear:
  - **Letters**
    - This option is used to create letters, memos, and so forth by inserting Boilerplate information and variable information from the Recipient List/Data Source.
    - Each letter or memo is placed on a new page.
  - **E-mail Messages**
    - Use this option to create a Mail Merge to send to e-mail recipients.
    - It uses the e-mail addresses contained in the Outlook contact list.
    - When using this feature, it is not possible to add an attachment to the letter.
  - **Envelopes**
    - This option is used to create Envelopes by inserting the variable information from the Recipient List/Data Source.
    - Each envelope appears on a new page.
  - **Labels**
    - Use this option to create Mailing Labels by inserting variable information from the Recipient List/Data Source.
    - Labels are placed one after another on a page.
    - The size and type of label are defined when they are created.
  - **Directory**
    - This option is used to create a document with variable information from the Recipient List/Data Source.
    - Instead of each item appearing on a new page, the data is placed continuously on a page.
  - Select **Labels** for the type of document.



❖ **Click Next: Starting document.** This appears at the bottom of the Mail Merge Task Pane.

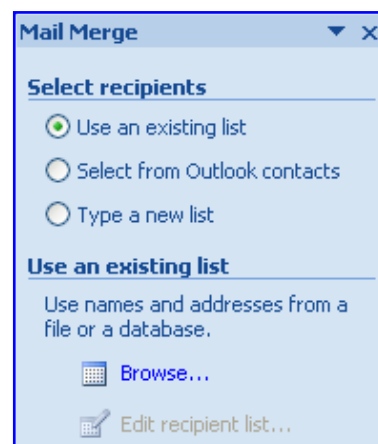
- In this step choose one of the three options:
  - **Use the current document** - This option uses the document where the insertion point is currently at.
    - If this option is chosen, when you click **Next**, the **Labels Options** dialog box will appear.
    - See the illustration bottom right for the options that may be changed in this dialog box.
    - To find out what type of label to choose, check the number on the box of labels that are to be used to print the labels.
  - **Change document layout** - Click **Label options** to choose the type of label to use and other label options. See the illustration at the right for the options that may be changed in this dialog box.
  - **Start from existing document** - A list of documents will appear. Choose the document that is to be used for the merge.



- The **Label Options** dialog box will appear.
- Make any necessary changes, such as label type and size and then click **OK**.
- Another message may appear. If so, click **OK**.
- An outline of the document structure will appear in the Word window.

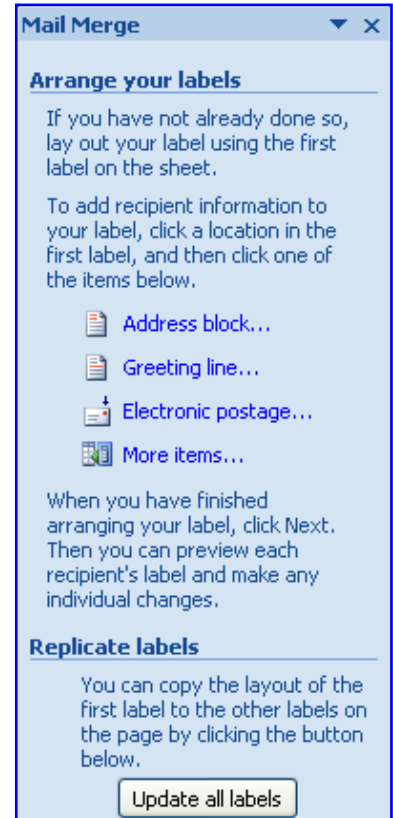
❖ **Click Next: Select recipients.**

- The options in this step are:
  - **Use an existing list** - Click **Browse** to select the list that is to be used for the merge.
  - **Select from Outlook contacts** - Click the **Choose Contacts Folder** link. A dialog box will appear asking which Contact Folder is to be used.
  - **Type a new list** - Click **Create** to input custom fields or to start a new list of recipients.
  - For information on creating a new Recipient List, go to the link for **Creating a Recipient List** on the Word Web page.
- Choose the option that is to be used for this merge.



❖ **Click Next: Arrange your labels.**

- Click somewhere within the first label.
- **Address Block** – When this option is chosen, the entire address, such as Last Name, First Name, etc. is inserted into the document. Options are available to choose the format for the names. See the illustration at the right for the options that are available in this dialog box. These include:
  - **Insert recipient's name in this format** - Click a format to use from the list.
  - **Insert company name** – Click this option to deselect it if the company name is not to be included in the address block.
  - **Insert postal address** – Choose from one of the three options listed below this area. These include:
    - Never include the country/region in the address.
    - Always include the country/region in the address.
    - Only include the country/region if different than \_\_\_\_.When this option is chosen, specify the country or region in the box below the option.
  - **Match Fields** – If the fields in the recipient list are different than the Word default ones, this option allows you to match the fields with the default ones so that they will appear in the Address Block.
- Click **Address Block**.
- The rest of the labels will contain **Next Record** as the option.
- Choose **Postal Bar Code**, if desired – This option is used to insert the bar code used by the Post Office for delivery.
- Click **Update Labels** to copy the information in the first label to all the rest of the labels.
- The information included here will now say **Next Record, Address Block**.
- **If field names are used in the first label instead of the Address Block, the names of the fields will appear in each of the other labels, along with Next Record.**



❖ **Click Next: Preview your labels**

- ❖ The following options are available in this step.
  - **Left/Right Arrows** – These arrows allow you to move through the merge one labels at a time.
  - **Find a Recipient** – This option allows you to look for a particular person in the recipient list.
  - **Edit Recipient List** – To display the recipient list so it can be edited, click this option.
  - **Exclude this recipient** – To remove a recipient from the Mail Merge results, but not from the recipient list, click this button.



❖ **Click Next: Complete the merge**

- **Print** - To send labels directly to the printer, choose this option.
- **Edit Individual Labels** - To make changes to individual labels, click this option.
  - When this option is selected, another dialog box will appear.
  - In this box, it is possible to choose whether to merge all the records or just part of the records.

❖ When the merge is completed, the labels will appear in a new Word window.

❖ **Changing the Font Type and Font Size for Labels**

Once the labels have been completed, it may be necessary to change the size of the font or the type of font. To do this:

- Choose **Edit Individual Labels** in the **Complete Mail Merge Task Pane**.
- Choose one of the following options:
  - **Ctrl + A** - Selects the whole document.
  - **Click the Home Tab, in the Editing Group, click the Select button, then click Select All** - Selects the whole document.
- Make any necessary changes to the Font Type, Font Size, etc. using the options in the **Font Group** on the **Home Tab**.

