HOW TO: Use Addresses from an Excel 2002 Worksheet to Create Labels in Word 2002

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SUMMARY

You can use the Mail Merge feature in Word to create and print labels for a mass mailing by using data from an Excel Worksheet. This article contains instructions that you can use to create such a list.

When you use the Word 2002 mail merge feature, Word merges a "main document" with a "recipient list" to generate a set of "output documents":

- The main document contains the basic text that is the same in all of the output documents. It may contain a letterhead, text, and instructions in "merge fields" for inserting text (such as recipient names and addresses) that varies from one output document to another.

- The recipient list is a database-for example, a Microsoft Access 2002 database file or a Microsoft Excel 2002 workbook-that contains the data that is to be merged into the output documents. This database is typically a list of names, addresses, and phone numbers.

- The output documents are the result of the mail merge. The text in an output document can be the same in all output documents, but you can apply formatting to specific documents.

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Step 1: Set Up the Excel Data File

Before you proceed with the Mail Merge Wizard, make sure that your Excel worksheet is well structured for this purpose. Note the following requirements for the data table:

- The first row should contain field names for each column. For example, Title, Salutation, First Name, Middle Name, Last Name, Address1, and Address2.

- Each field name must be unique.

- Each row must provide information about a particular item. In a mailing list, for example, each row may include information about a particular recipient.

- The table must not have blank rows.

To arrange your Excel data file, follow these steps:

1. Create your Excel data file, and arrange it by using the fields that you want to use for your label, as shown in the following sample data file:

Last Name	First Name	Title	Address	City	Postal Code	Country
Davolio	Nancy	Sales Representative	1234 Main St. Apt. 2A	Seattle	14222	USA
Fuller	Andrew	Vice President, Sales	1235 Main St.	Tacoma	14222	USA
Leverling	Janet	Sales Representative	1235 Elm St.	Kirkland	14222	USA
Peacock	Margaret	Sales Representative	1236 Main St.	Redmond	14222	USA
Buchanan	Steven	Sales Manager	1237 Main St	London	SW2 8MR	UK
Suyama	Michael	Sales Representative	1238 Elm St.	London	EC3 7HR	UK
King	Robert	Sales Representative	1239 Main St.	London	RK2 9NP	UK
Callahan	Laura	Inside Sales Coordinator	1230 Elm St.	Seattle	14222	USA
Dodsworth	Anne	Sales Representative	1231 Elm St.	London	WG2 7LT	UK

2. After you create your Excel data file, save it, and then close the data file.

For additional information about how to create a mail-merge address list, click the article number below to view the article in the Microsoft Knowledge Base:

294688 HOW TO: Design and Set Up a Mail Merge Address List in Word 2002

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Step 2: Set Up the Main Document

1. Start Microsoft Word 2002, point to **Letters and Mailings** on the **Tools** menu, and then click **Mail Merge Wizard**.

2. Under **Select document type**, click **Labels**.

    The active document becomes the main document (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).

3. Click **Next: Starting document**.

    NOTE: If you are familiar with the mail merge feature or you prefer to work without the wizard, you can use the Mail Merge toolbar.

4. Do one of the following:
    *   Create a new sheet of labels:
        a. Click **Change document layout**.
        b. Click **Label options**.
        c. In the **Label Options** dialog box, select the options that you want, such as the label type and size, and then click **OK**.

For help with an option, click the question mark, and then click the option.

- Start with an existing sheet of labels:
    a. Click **Start from existing document**.
    b. In the **Start from existing** box, select the document that you want, and then click **Open**.
    c. If you do not see the document, click **More files**, and then click **Open**. In the **Open** dialog box, locate the document that you want, and then click **Open**.

    Microsoft Word displays the document in the document window. If you decide to use a different label document instead, Click **Start** from existing document, and then select a different document. If you want to change the layout, click **Change** document layout, and then click **Label options**.

5. Click **Next: Select recipients**.

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Step 3: Specify the Microsoft Excel Data Source

1. Under **Select recipients**, click **Use an existing list**.

2. Click **Browse**.

3. In the **Select Data Source** dialog box, locate and click the Excel worksheet that you want to use.

    By default, Word opens the My Data Sources folder.

4. Click **Open**.

5. If your Excel worksheet has information on multiple tabs, you have to select the tab that contains the information that you want, and then click **OK**. 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.

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Step 4: Select the Recipients

1. In the **Mail Merge Recipients** dialog box, select the recipients that you want to include. To do this, do any of the following:
    - Use the check boxes to designate recipients.

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

      NOTE: If you know that you want to include most of the list in your merge, click **Select All** and then clear particular records. Similarly, if you want to include only a few records in the list, click **Clear All**, and then select the records that 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 that you want to sort by. For example, if you want to display the list alphabetically by last name, click the **Last Name** column heading.

    - Filter items in the list.

      This is useful if the list contains records that you know that you do not want to see or include in the merge. After you have filtered the list, you can use the check boxes to include and exclude records as described in the previous section. To filter the list, follow these steps:
        a. Click the arrow next to the column heading of the item by which you want to filter.
        b. 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.

- The Mail Merge Recipients dialog box displays only the designated records. To display all the records again, click **(All)**.

NOTES:

- For advanced sorting and filtering, click the arrow next to any column name, and then click **(Advanced)**. Use the **Filter Records** tab and the **Sort Records** tab to set up the sorting or filtering query that you want.

- If you have installed address validation software, you can click **Validate** in the **Mail Merge Recipients** dialog box to validate your recipients' addresses.

2.   :Click **OK** to return to the Mail Merge Wizard.

   Word will use the recipients that you designated for the merge.

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

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Step 5: Arrange the Content of Your Labels

To arrange the content of your labels, follow these steps.

Insert Merge Fields

Insert merge fields where you want to merge names, addresses, and other information such as a postal bar code. For example, insert the merge field "City" to have Word insert a city name, such as "Atlanta," that is stored in the City data field. To insert merge fields, follow these steps:

1.   In the main document, click where you want to insert the field.

2.   Insert any of the following:

   - Address block with name, address, and other information
      a.   Click **Address block**.

      b.   In the **Insert Address Block** dialog box, select the address elements that you want to include and the formats that you want, and then click **OK**. For help with an option, click the question mark, and then click the option.

      c.   For help with an option, click the question mark, and then click the option.If the **Match Fields** dialog box appears, Word may not have been able to find some of the information it needs for the address block. 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.

   - Greeting line
      a.   Click **Greeting line**.

      b.   Select the greeting line format, which includes the salutation, name format, and following punctuation.

      c.   Select the text that you want to appear in cases where Word cannot interpret the recipient's name, for example, when the data source contains no first or last name for a recipient, but only a company name.

      d.   Click **OK**.

e. If the **Match Fields** dialog box appears, Word may not have been able to find some of the information it needs for the greeting line. 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.

- **Other fields of information**

  a. Click **More items**.

  b. Do one of the following:
     - To select from address fields that will automatically map to corresponding fields in your data source, even if the data source's fields do not have the same name as your fields, click Address Fields.
     - To select from fields that always take data directly from a column in a database, click **Database Fields**.

  c. In the **Fields** box, click the field that you want.

  d. Click **Insert**, and then click **Close**.

  e. If the **Match Fields** dialog box appears, Word may not have been able to find some of the information it needs to insert the field. 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.

     NOTE: If you insert a field from the **Database Fields** list, and then later switch to a data source that does not have a column with the same name, Word will not be able to insert that field information into the merged document.

- Electronic postage To add electronic postage, you must first install an electronic postage program, such as one that you purchased from a service on the World Wide Web. To use electronic postage, follow these steps:

  a. Click **Electronic postage**.

     If you do not have an electronic postage program installed, Word prompts you to install one and offers to connect to the following Microsoft Web site:Microsoft Office Web

  b. Insert the postage according to the program's instructions.

- To add electronic postage, you must first install an electronic postage program, such as one that you purchased from a service on the World Wide Web. To use electronic postage, follow these steps: Postal bar code You must select a label or envelope type that supports the POSTNET bar code. To use the Postal bar code, follow these steps:

  a. Click **Postal bar code**.

  b. In the **Insert Postal Bar Code** dialog box, select the appropriate address fields.

     NOTE: The **Postal bar code** option appears only if you are using the U.S. language version of Word.

  c. Repeat steps a and b for all of the fields that you want to insert.**NOTES**:
     - You cannot 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 Word is displaying field codes instead of field results. This does not 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.

NOTE: You can also use the Mail Merge toolbar to insert merge fields, work with your mail merge main document, or to run a mail merge. To display the Mail Merge toolbar, point to **Letters And Mailings** on the **Tools** menu, and then click **Show Mail Merge Toolbar**. The Mail Merge toolbar provides additional commands not included in the Mail Merge wizard task panes. For example, you can use the Insert Word Field drop-down menu on the Mail Merge toolbar to insert Word fields for controlling the merge process (for example, an IF field that inserts text only if a particular merge field has a specified value). Or, you can click **Check For Errors** to have Word run the mail merge and report any errors contained in the main document.

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Change the Format of the Merged Data

To format merged data, you must format the merge fields in the main document. Do not format the data in the data source, because its formatting is not retained when you merge the data into the document. To change the format of the merged data, follow these steps:

1. In the main document, select the field containing the information that you want to format, including the merge field characters ("" "") that enclose it.

2. On the **Format** menu, click **Font**, and then select the options that you want.

Format by Using Field Codes

To control other aspects of formatting, press ALT+F9 to display field codes, and then add switches to the merge fields. When you work with fields, a switch is special instruction that causes a specific action to occur. Generally, you add a switch to a field to modify a result.

For example:

1. To display the number "34987.89" as "$34,987.89," add the Numeric Picture switch (\#).

2. To print client names in uppercase letters, add the Format switch (*).

3. To make sure that the merged information has the same font and point size that you apply to the merge field, add the * Charformat switch.

To copy the format and layout of the first label to all the other labels on the page, click **Update all labels**.

For example, in the sample database shown earlier in this article, if you insert only the AddressBlock field, and then click **Update all labels**, the page should appear similar to the following:

<<AddressBlock>><<Next Record>><<AddressBlock>>

<<Next Record>><<AddressBlock>><<Next Record>><<AddressBlock>>

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Step 6: Save the Document

After you have completed the main document and inserted all of the merge fields, save the document before you proceed.

1. Click **Save As** on the **File** menu.

2. Name the document, and then click **Save**.

3. Click **Next: Preview your labels**.

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Step 7: Preview the Labels and Fine-Tune the Recipient List

When the wizard displays the Step 5 Mail Merge task pane, it replaces each of the merge fields in the main document with the actual text from the first entry of the recipient list, so that you can see how your first output document will look.

For example, if you continue to use the sample database shown earlier, after you click **Next: Preview your labels**, the first page should appear similar to the following:

```
Vice President, Sales Andrew Fuller      Sales Representative Anne Dodsworth
1235 Main St                             1231 Elm St.
Tacoma                                   London


Sales Representative Janet Leverling      Inside Sales Coordinator Laura Callahan
```

```
1235 Elm St.                          1230 Elm St.
Kirkland                              Seattle
```

To preview additional entries, do either of the following:

- To preview the items in order, click the left or right 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.

To fine-tune the recipient list, for example, to exclude a recipient:

1. Click **Edit recipient list**, and then make your changes in the **Mail Merge Recipients** dialog box.
2. Click **Next: Complete the merge**.

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Step 8: Complete the Merge

To complete the merge, do any of the following:

Personalize Individual Labels

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

1. Click **Edit individual labels**.
2. In the **Merge to New Document** dialog box, select the records that you want to merge.
3. Click **OK**.

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

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Print the Sheet of Labels

To print the sheet of labels, do either 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 that 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**.
     - 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 that you want.

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. 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.

REFERENCES

For more information about IF fields, click **Microsoft Word Help** on the **Help** menu, type **Field Codes: IF field** in the Office Assistant or the Answer Wizard, and then click **Search** to view the topics returned.

For more information about MERGESEQ fields, click **Microsoft Word Help** on the **Help** menu, type **Field Codes: MERGESEQ field** in the Office Assistant or the Answer Wizard, and then click **Search** to view the topics returned.

For more information about SET field, click **Microsoft Word Help** on the **Help** menu, type **Field Codes: SET field** in the Office Assistant or the Answer Wizard, and then click **Search** to view the topics returned.

For more information about general field formatting switches, click **Microsoft Word Help** on the **Help** menu, type **general switches** in the Office Assistant or the Answer Wizard, and then click **Search** to view the topic.

For additional information about mail merge, click the article numbers below to view the articles in the Microsoft Knowledge Base:

294691 WD2002: Mail Merge Basics - The Process Explained

294686 HOW TO: Use Mail Merge to Create a List Sorted by Category in Word 2002

290408 WD2002: Frequently Asked Questions About Mail Merge

294688 HOW TO: Design and Set Up a Mail Merge Address List in Word 2002

294693 WD2002: How to Use Mail Merge to Create a Directory

294683 HOW TO: Use Mail Merge to Create Form Letters in Word 2002

APPLIES TO

- Microsoft Word 2002 Standard Edition
- Microsoft Excel 2002 Standard Edition

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