

# Loupetron Marketing & Technology

## Creating Mail Merged Labels in Microsoft Word

In this project, you will create a set of mail merged labels in Microsoft Word based on an Excel spreadsheet. You will need Microsoft Office installed on your computer. If you are looking to do exercise with other apps, let us know!

### Basic skills required for this project

- Navigating Microsoft Windows
- Basic Microsoft Excel editing
- Basic Microsoft Word editing

### Document conventions

How it appears	Purpose	Example
<b>Bold text</b>	When you see bold text, you will be looking for a label on the computer screen that you will interact with.	The <b>File</b> menu
Monospaced text	When you see monospaced text, you will be typing this content.	My name
<b>CAPITALIZED TEXT</b>	When you see capitalized text, this indicates a key on your keyboard	<b>ENTER</b>

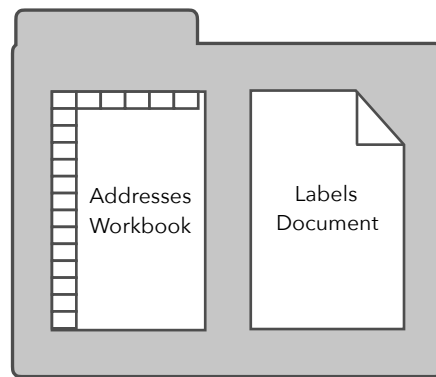
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## 1.0 The First Step Everyone Doesn't Do

Mail merges are made up of two files: The **Labels document** in **Microsoft Word** and the **Addresses workbook** in **Microsoft Excel**.

When people do mail merges, they tend to do them willy-nilly. They create the spreadsheet somewhere, and then create the document somewhere else. The next day, they move one of the files into different locations and now it's broken. That's why we must start with some file management:



Labels folder

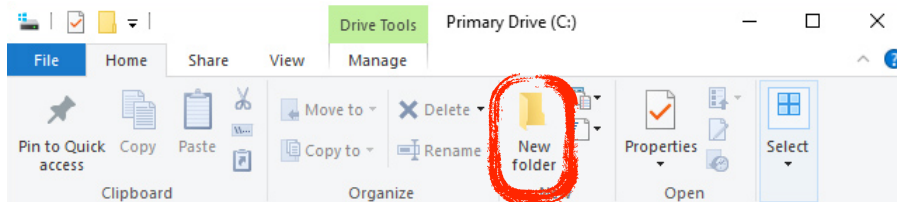
Project 1: Create a folder for your labels

In this project, we will create a folder for our two mail merge files.

1. Open up the **File Manager** in Microsoft Windows:



2. Click **Documents** on the left-side of the window.
3. On the **Home** ribbon tab, click **New Folder**:



4. Name the folder as **Staff Labels** and hit **ENTER**.
5. Close the **File Manager** window.

## 2.0 Creating our address workbook

Now that we have a location for our project, it's time to create the content for our labels. Though you can build this content within Microsoft Word, Microsoft Excel is the best place for this content. We need to build headers in the first row of our workbook, and then fill the content in the rows below.

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### Project 2.0 Creating our spreadsheet

In this project, we will create the workbook with the contents of our labels.

1. Open **Microsoft Excel**.
  - If you are using Windows 10, click the search box and type **Excel** and hit **ENTER**.
2. Click cell A1 and type **FirstName** and press **TAB**.
3. Click cell A2 and type **LastName** and press **TAB**.
4. Click cell A3 and type **Employee#** and press **ENTER**.
  - Notice how the selected cell is A2 now.
5. Enter the following data:

	A	B	C
1	FirstName	LastName	Employee #
2	Margaret	Pederson	12454
3	Charles	Lamb	41243
4	Patrick	Tesh	45252
5	Alice	Pollock	34124
6	Laura	Redmane	12321
7	Michael	Jennings	78066
8			

6. Click the **File** menu and click **Save**.
7. Click **Documents** on the left side of the window.
8. Locate the **Staff Labels** folder and double-click it.
9. Name the file as **staff\_label\_data** and click **Save**.
10. Close **Microsoft Excel**.

### 3.0 Creating our labels

Since we have created our data in Microsoft Excel, now we can build our labels in Microsoft Word. But first we need to know which labels we are using. If you have Avery® labels, You'll find a 4 digit product number that you will need in Microsoft Word. (Take a look at the image to the right.)

For this project, we will be using the label number 5259, but make sure you use your label type.

For this project, we will be working exclusively with the Mailings tab of the Microsoft Word ribbon.

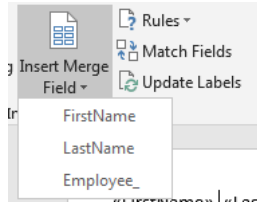


#### Project 3.0 Creating our labels

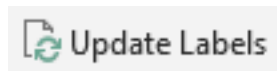
In this project you will create our labels and connect them to the data we created in Microsoft Excel.

1. Open Microsoft Word.
  - If you are using Windows 10, click the search box and type **Word** and hit **ENTER**.
2. Double-click **Blank Document** to get started.
3. Click the **Mailings** tab of the ribbon.
4. Click **Start Mail Merge**, and then click **Labels**.
5. Under **Label Vendors**, select **Avery US Letter**.
6. In the **Product number** list, select **5259 Address Labels**.
7. Click **OK**.
8. Click **Select Recipients**, and then click **Use an Existing List**.
9. Click **Documents** on the left side of the **Select Data Source** window.
10. Double-click **Staff Labels**.
11. Click **OK** to select the first sheet of the workbook.
12. Your cursor should now be in the first label.

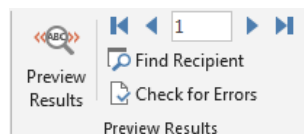
- Click the bottom part of the **Insert Merge Field** button.



- Click **FirstName**.
- Press **SPACEBAR** to add a space. This will add the space between the first and last name.
- Click the bottom part of the **Insert Merge Field** button, and click **LastName**.
- Press **ENTER** on your keyboard.
- Click the bottom part of the **Insert Merge Field** button, and click **Employee\_**.
  - Notice how the # sign cannot be read correctly. Don't worry the data will be fine!
- Now that your label contents are complete you can add formatting if you would like.
- Once your first label is designed correctly, click the **Update Labels button** to automatically lay out the other labels.

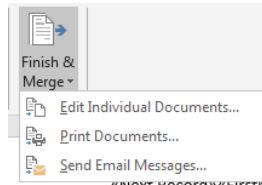


- Now, it's time to test our labels. Click the **Preview Results** button.
  - Now you can examine your results and make any formatting changes you need. Remember to work in only the *first label*, then can click **Update Labels** to fix all labels at once.



- Click the **File** menu and click **Save**.
- Click **Documents** on the left side of the window.
- Locate the **Staff Labels** folder and double-click it.
- Name the file as **staff label structure** and click **Save**.
- Let's finish this project! Click the **Finish & Merge** button at the end of the ribbon.

- If you just want to print them directly, click **Print Documents**. This will automatically print the file for you. I tend never to use this function because I make mistakes and want to catch them before printing.



27. Click **Edit Individual Documents**.
28. Click **OK** to select all labels.
29. Now you should have a finished document ready for printing. If you need to save a copy of this document you can as well.
  - Just remember this document is not the structure. This is the final product of the data and structure together.

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## THANKS FOR MAKING WITH ME!

This is an example of a manual you will get when you get training from



Your staff will leave capable of working through any project, whether it's the next day or months down the line.

Get in touch with us to get started today!

[loupetron.ca](http://loupetron.ca) • [loupetron@mac.com](mailto:loupetron@mac.com) • 226.268.7047