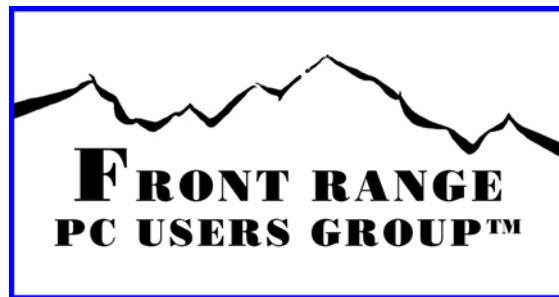


# **Create Mailing Labels Using Microsoft Word—A Tutorial**



## NOTES:

This work is licensed under the Creative Commons Attribution-Noncommercial-No Derivative Works 3.0 United States License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc-nd/3.0/us/> or send a letter to Creative Commons, 171 Second Street, Suite 300, San Francisco, California, 94105, USA.

The license holder on record is Front Range PC Users Group, Fort Collins, CO, <http://www.frpcug.org>.

This tutorial was prepared using Microsoft Word 2002 on a Dell Inspiron 6000 laptop with a 1.5 GHz Pentium M processor, 2 GB RAM, and Windows XP/Pro SP3.

A partial test was successfully performed on a Windows XP/Pro computer using Word 2003.

Trademarks mentioned in this document are registered trademarks of their respective owners.

The author of this document has used his best efforts in preparing this document. The author makes no representations or warranties with respect to the accuracy or completeness of the contents of this document and specifically disclaims any implied warranties or fitness for a particular purpose. The accuracy and completeness of the information provided herein and the opinions stated herein are not guaranteed or warranted to produce any particular results, and the advice and procedures contained herein may not be suitable for every individual. The author, the Front Range PC Users Group, and the Board of Directors of the Front Range PC Users Group shall not be liable for any loss of profit or any other commercial damages, including but not limited to special, incidental, consequential, or other damages.

## Introduction

This Tutorial contains information on 4 ways to create mailing labels using Microsoft Word:

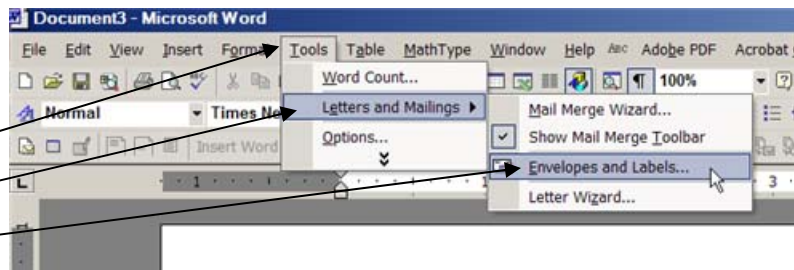
1. How to create a label using the Word “Envelopes and Labels” feature.
2. How to create a sheet of labels with different information for each label using the Word “Envelopes and Labels” feature.
3. How to create multiple labels from an external source, using Gmail contacts as the data source and the Word Mail Merge feature.
4. How to create multiple labels from Outlook (v. 2000) contacts.

### Part 1

#### How to create a label using the Word “Envelopes and Labels” feature.

In Word 2002 (and 2003), access to the Envelopes and Labels feature is from the Tools menu item:

The sequence is Tools/Letters and Mailings/Envelopes and Labels

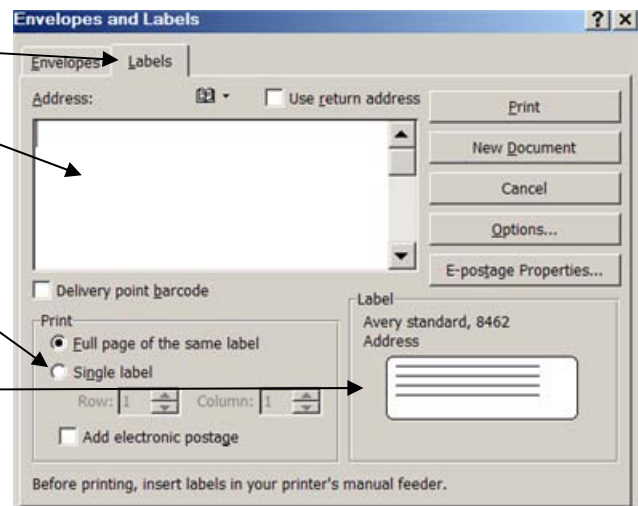


The Envelopes and Labels dialog box is displayed. Click on the Labels tab.

Enter a name and address into the Address field.

Note that you can print a full page of the same label, or a single label. For single label printing you specify a row and a column.

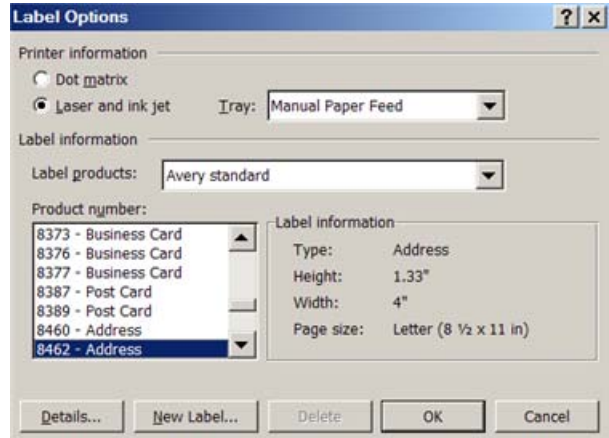
If you need to select the label type, click inside the Label panel (more on this in a moment).



If the label type is acceptable, click on the Print button when you have made your printing choice (single label or full page of same label).

That is all there is to it.

If you need to choose a different label type, the Label Options dialog box is displayed when you click in the Label panel:



From this box you can select the type of printer and how the labels feed. For laser printers, the defaults are Manual paper feed and Avery standard Label products.

There are a large number of choices for label products.

Click on OK when you have completed your selections.

## Part 2

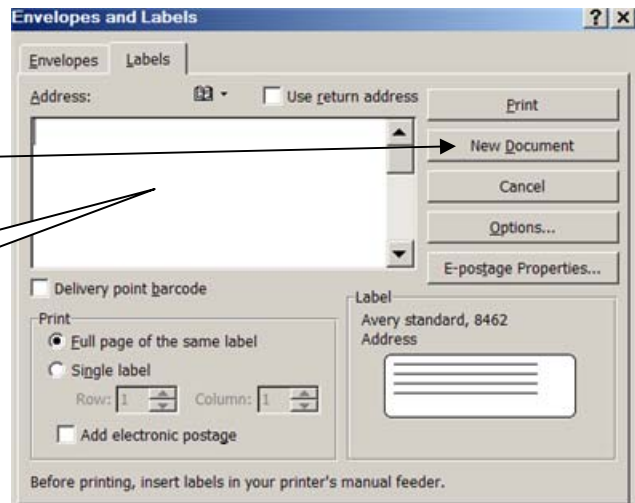
### How to create a sheet of labels with different information for each label using the Word “Envelopes and Labels” feature.

It is very likely that you will need to print labels with different information on each label. The need for printing a sheet of identical labels is rare (return address labels is one case). You can use the Envelopes and Labels feature to enter different names and addresses into a sheet of labels manually.

From the Envelopes and Labels dialog box, select the label type you want, but DO NOT enter any information into the Address field.

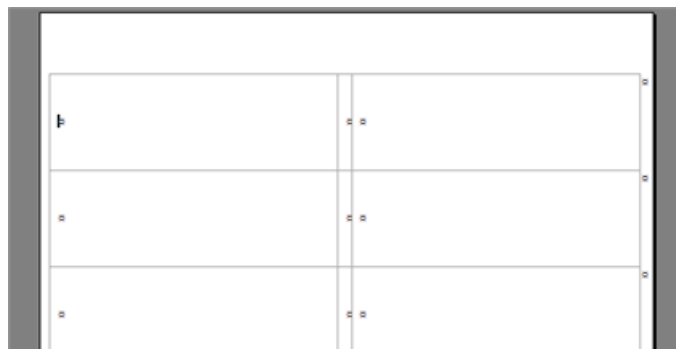
Click on the New Document button.

**LEAVE THE ADDRESS FIELD EMPTY**



A new document is opened, with a table automatically inserted. This graphic shows a part of that document:

If you don't see the lines, click on Table/Show Gridlines.



The default location of the cursor is the first table cell, in the case of this example, the top left cell (or label). Type in the information you want. You navigate to the next label using the Tab key.

#### CAUTION:

Examine that last graphic carefully. Note that there is a small space separating the two columns of blank labels. That is not always the case—it depends on the label product you choose. For this example, in order to move to the second label in the first row, it is necessary to press the Tab key twice (you can use the mouse to move from one label to the next, of course).

OK. You have entered data into all the labels (14 of them in our example). Now what? There is no OK button, no Close button, and no Print button.

Well . . . you just print the labels. Use File/Print, or use the Print tool on the Standard toolbar, or use Ctrl+P, whichever method you like. The document is nothing more than a Word document with a table.

That is simple enough, as long as you need only one sheet of labels. Parts 3 and 4 of this tutorial describe what is necessary if the quantity of address labels is high enough to require multiple sheets of labels.

### Part 3

#### **How to create multiple labels from an external source, using Gmail contacts as the data source and the Word Mail Merge feature.**

Whether the topic is mailing labels or name badges or something similar, there is very often a need to create many labels using an “external” data source. That source is very likely to be an address book or a contacts list (the language varies from one application to another) from an email program or personal information manager.

The first example to be demonstrated here is the use of a contacts list from an email program—specifically a Gmail account.

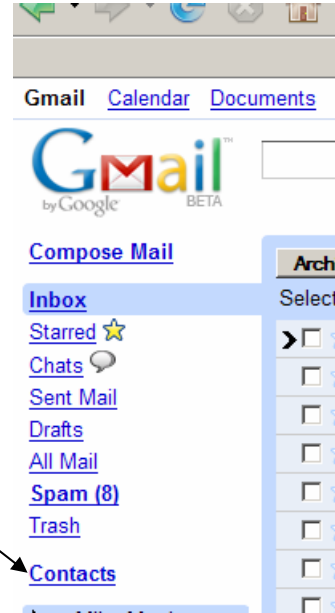
There are 4 steps to this process:

1. Access the email account
2. Access the contacts list (or address book)
3. Export the list.
4. Use the Word Mail Merge feature to create the labels.

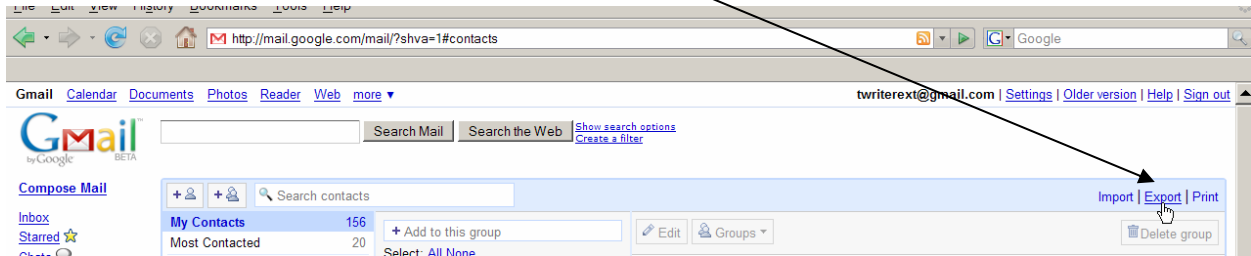
There are a number of subsidiary steps to each of those listed, as we will see in this demonstration. Although a Gmail account is used for this example, the 4 steps listed above are likely to work for any email contacts list. The specific set of keystrokes/mouse clicks needed to access a specific email application and to export those contacts will vary.

Examine this Gmail account home page:

Click on "Contacts."



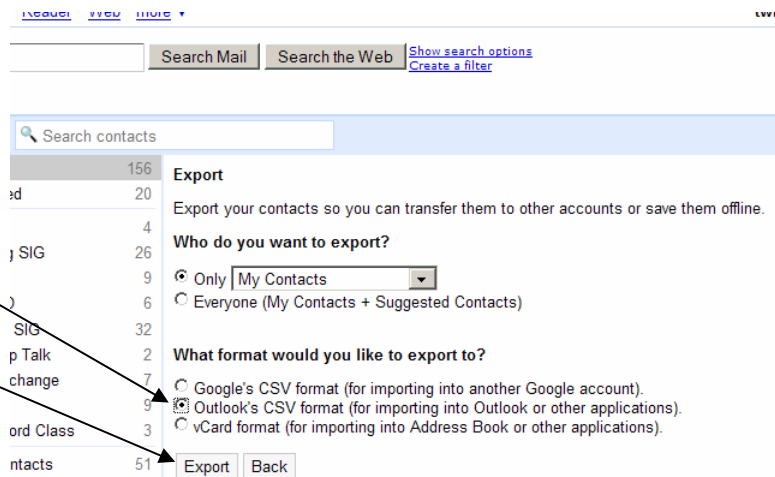
When the Contacts are displayed, click on "Export."



The display changes to:

The second format choice, CSV for importing into Outlook or other applications is the correct choice (although Word will be used and not Outlook).

Click on the Export button.

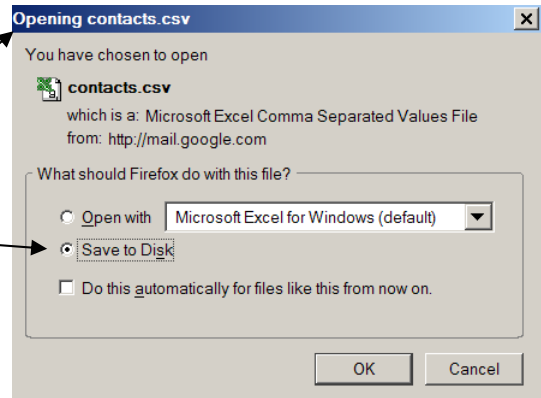


The download window is displayed:

Note the title bar. It says “Opening contacts.csv,” which is the name automatically assigned to the file.

Note also that the “Save to Disk” option is selected.

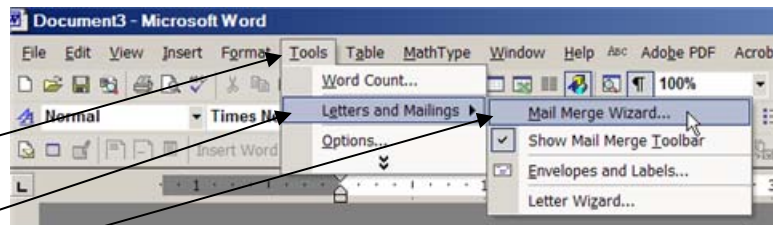
Click OK.



The file will download to whatever folder you have entered into your browser for that purpose.

The contacts will be used to create mailing labels using the Word Mail Merge feature, which is accessible from the Tools menu item:

Starting with a new blank document, the sequence is Tools/Letters and Mailings/Mail Merge Wizard.



Click on Mail Merge Wizard.

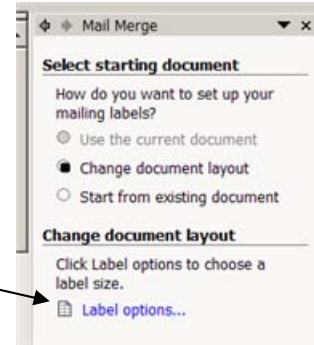
Nothing happens to the blank document, but the Word Task Pane opens and the Mail Merge toolbar is displayed (if it does not display, Click on View/Toolbars/Mail Merge). The Task Pane opens with the initial mail merge step: Select document type. In the Task Pane, letters is the default document type selection, but change that to Labels.

Click on Next (the link in blue at the bottom of the Task Pane).



By selecting labels in Step 1, the default choice for Step 2, Select starting document is “Change document layout.” Leave that choice selected.

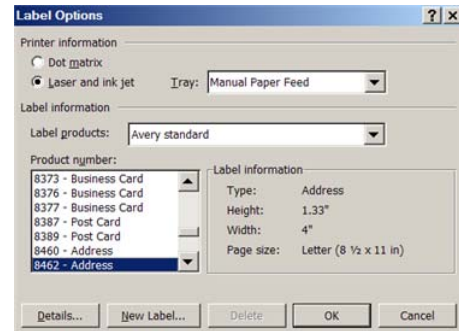
Click on “Label options.”



The Label Options dialog box is displayed. Make your choices and click OK.

Blank labels appear in the document (if they don't, click on Table/Show Gridlines).

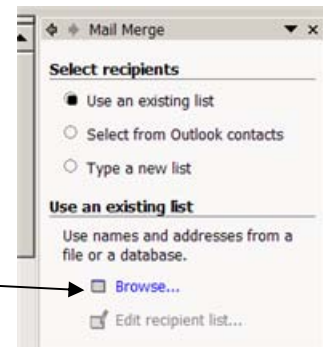
Click on Next at the bottom of the Task Pane.



“Select recipients” is Step 3.

The default choice is “Use an existing list.” That is the correct choice for this demonstration because the “contacts.csv” file will be used as the data source.

Click on Browse and navigate to the “contacts.csv” file, and double click on it.

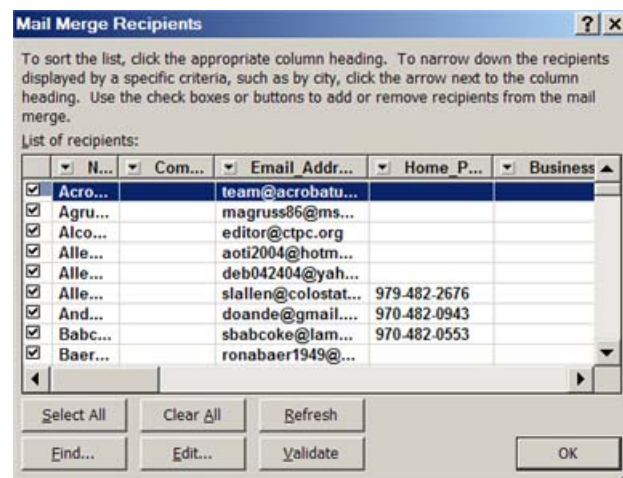


Two actions occur.

1. The Mail Merge Recipients list is displayed:

This window is an important element of the mail merge. Any editing of the contacts, if any is necessary, should be done at this point, for a reason that will be made clear later.

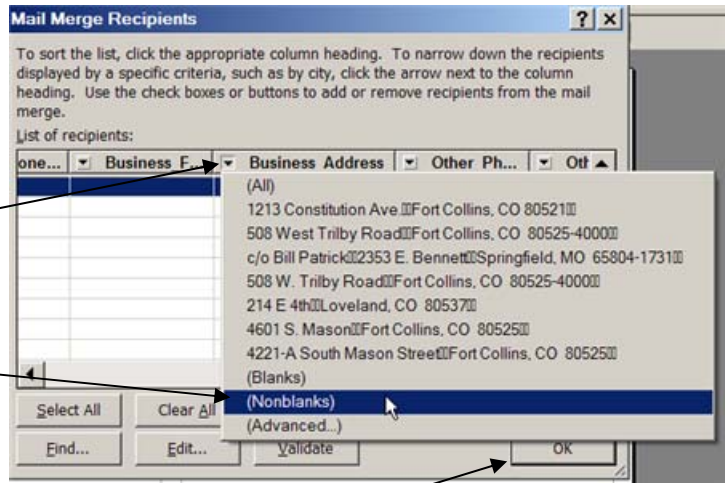
Also, some filtering of records can be done using this window (more on that in a moment).



- Merge fields are entered into each label. A merge field is enclosed in double angle brackets.



If the contacts list has entries that don't include physical addresses (street addresses or PO Box numbers), those entries can be filtered out. For example, this graphic shows the window scrolled to Business Addresses. Click on the down pointing arrow next to the column heading and then click on (Nonblanks).



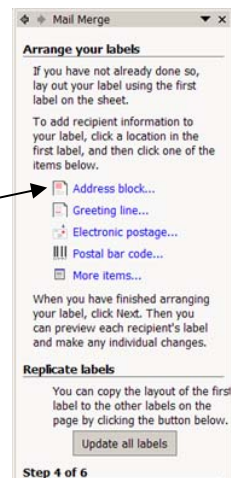
Any name with an empty Business Address field will be filtered out—no label will be created.

When you are satisfied with the list, click on OK.

Click on Next at the bottom of the Task Pane.

Step 4 is called "Arrange your labels." Perhaps it should be called "Enter label data." Whatever name you use, this is where you enter into the label the merge fields (such as name, address etc.) that link to your data source.

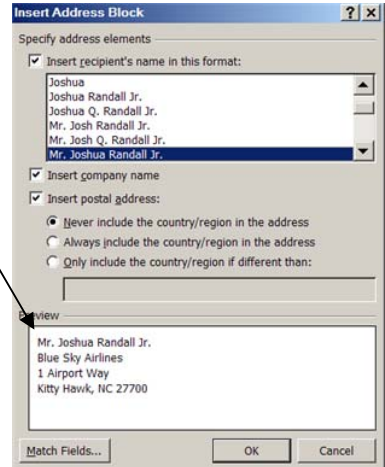
You can enter a complete Address Block by clicking on that choice in the Task Pane.



If you do that, the Insert Address Block dialog box is displayed:

Note that, in addition to a variety of choices, there is a Preview available the displays the results of your choices.

When you are satisfied with the content, click OK.



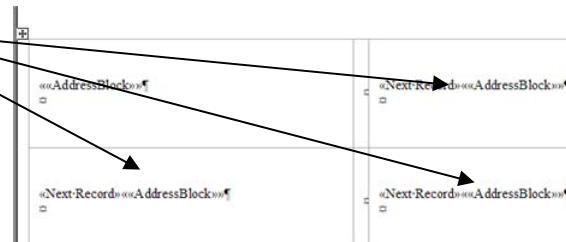
The Address Block merge field is entered into the first label (make sure the cursor is in that first label).



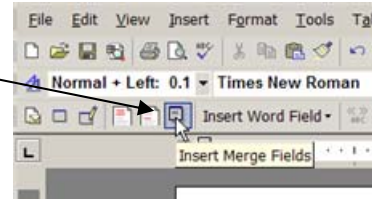
To copy that merge field to all labels, click on the Update All Labels button in the Task Pane:



The Address Block merge field appears in all the labels:



Before moving to the next step, note that, alternatively, you can enter individual merge fields by using the “Insert Merge Fields” tool on the Mail Merge toolbar:



That approach takes a little more effort, but provides greater layout flexibility.

When the labels are updated, click on Next at the bottom of the Task Pane.

Step 5 is called “Preview your labels.” The purpose of this step is to display the labels with actual data from the data source—before completing the merge.

You can view each label, one at a time, by using the “Preview your labels” navigation arrows. Note that as you click on the >> arrow, each label moves into the top row, left column (in this example, or in general, the first label on the sheet).



**That is NOT a particularly easy way to review a large quantity of labels.**

**That is why it is much easier to start with an accurate contact list even before exporting it. Or, that is why it is easier to edit the contact list when reviewing the Mail Merge Recipients list in Step 3 of the Mail Merge process.**

Click on Next at the bottom of the Task Pane in order to complete the merge. Note that there is an option to “Edit individual labels.”

However, if you decide to choose that option, Microsoft Word creates and opens a new merged document. Your main document also remains open.

That is not a straightforward approach to editing the labels. It will work, but at a cost of significant effort.

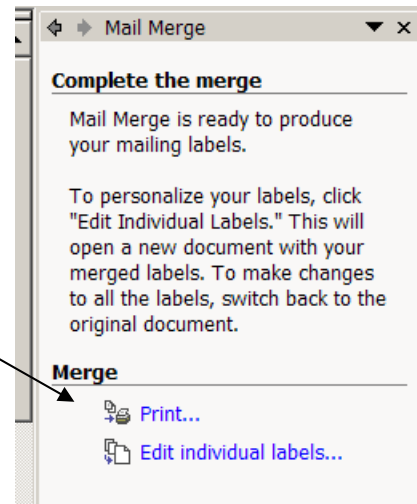


Therefore, it is worthwhile to repeat the earlier statement:

### CAUTION

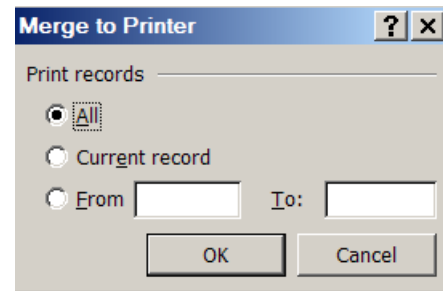
**Start with an accurate contact list even before exporting it. Or, edit the contact list when reviewing the Mail Merge Recipients list in Step 3 of the Mail Merge process.**

If your list is ready, you can print the labels by clicking on the Print link in the Task Pane:



The Merge to Printer dialog box is displayed:

Make your choices and click OK.



Finally! The Print dialog box is displayed. Make sure you know how to feed the label sheets, have them available, and then click on OK.

That completes the instructions for creating mailing labels using an external data source and the Word Mail Merge feature.

## Part 4 How to create multiple labels from Outlook (v. 2000) contacts

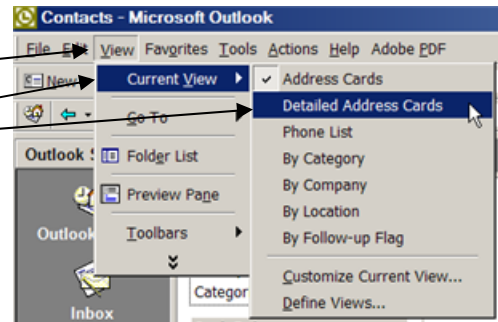
If you use Outlook as your Personal Information Manager, you can start a mail merge for labels directly from Outlook. This demonstration is based on Outlook 2000.

With Outlook open, click on the Contacts button (or View/Go To/Contacts).

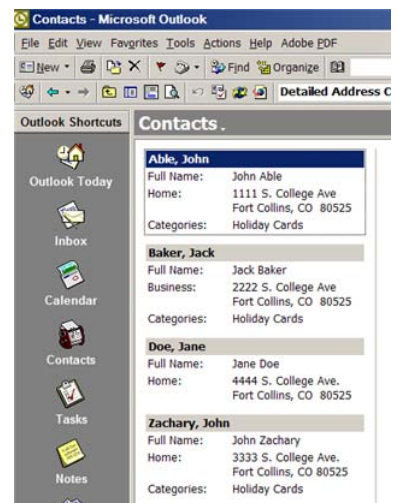


Although not absolutely necessary, it is recommended that the "Detailed Address Card" view be selected:

The sequence is View (on the menu bar)/Current View/Detailed Address Cards.



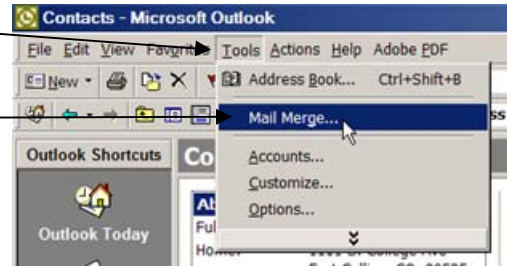
This is a sample of that view:



The Mail Merge feature is available from the Tools menu.

The sequence is Tools/Mail Merge.

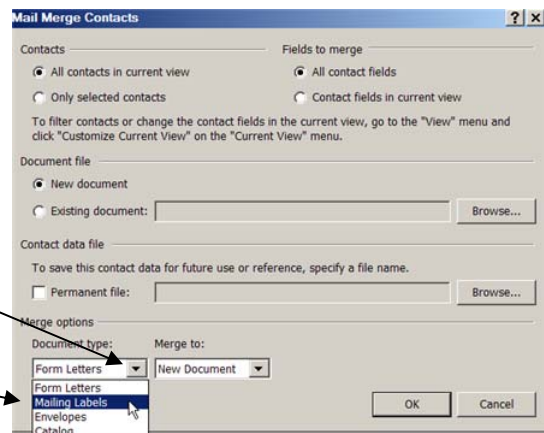
Click on Mail Merge.



The Mail Merge Contacts dialog box is displayed. The default “Contacts” choice is “All contacts in current view.” The default “Fields to merge” choice is “All contact fields.” The default “Document file” choice is “New document.” All three defaults are the correct choices for this demonstration.

Under “Merge options,” click on the down arrow and select “Mailing Labels.”

Click OK



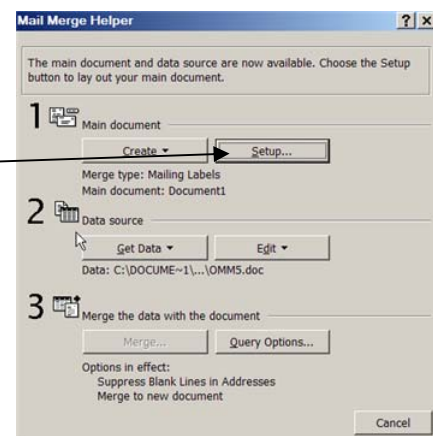
The message “Initializing Microsoft” will be briefly displayed. Then this message:



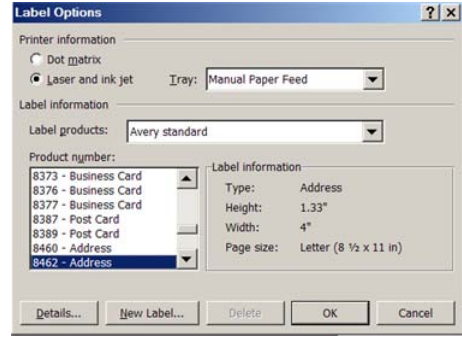
Click OK.

When that message appears, it means that a Microsoft Word document has opened with Mail Merge feature active. That is why you see the Mail Merge Helper dialog box:

Follow the instructions. Click on the “Setup” button.



The Label Options dialog box is displayed. Make your selections and click OK.

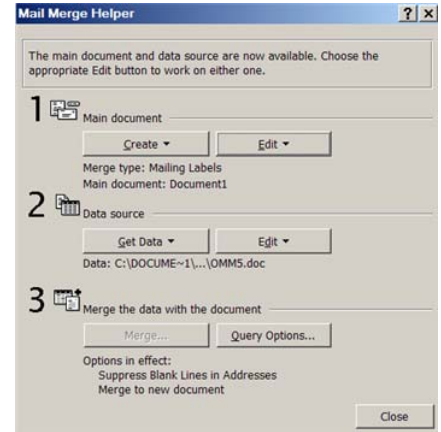


The Mail Merge Helper dialog box changes slightly:

The “Setup” button changes to “Edit.”


DO NOT MAKE ANY OTHER CHANGES.

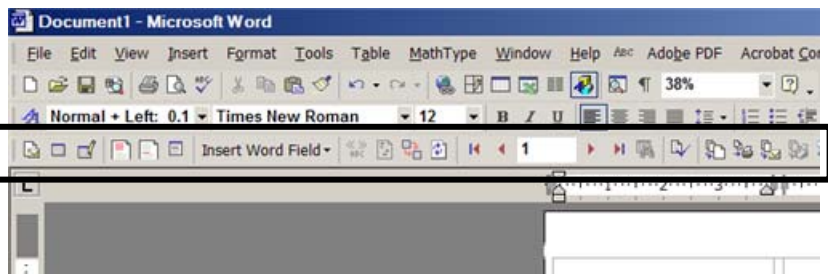
Click on “Close.”



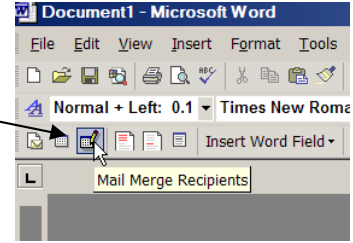
Blank labels are displayed in the document. If the border lines are not visible, click on Table/Show Gridlines.



From this point on, the process is exactly like that described in Part 3, except that there is no Task Pane. Instead, the tools on the Mail Merge →  toolbar will be used (if, for some reason, it is not visible, click on View/Toolbars/Mail Merge).



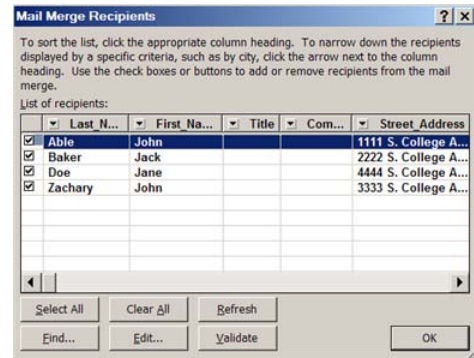
The first tool to use is the Mail Merge Recipients tool. Click on it.



The Mail Merge Recipients list is displayed:

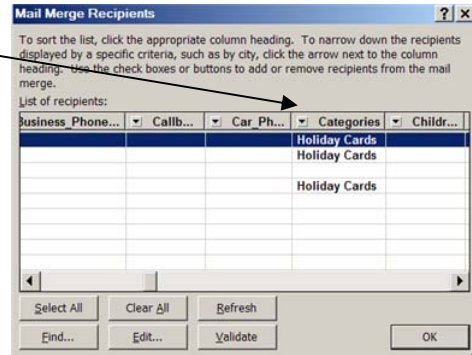
Suppose your list includes names to whom you want to send holiday cards, and other names to whom you don't want to send holiday cards.

You can filter out the unwanted names if you plan ahead. One way to accomplish this task is to use the "Categories" field when entering data for a contact. For example, you can add a category called "Holiday Cards" to the Category list (see Appendix 1). Then, when you enter contact data, select "Holiday Cards" from the Category list. This information will appear in the Mail Merge Recipients list.

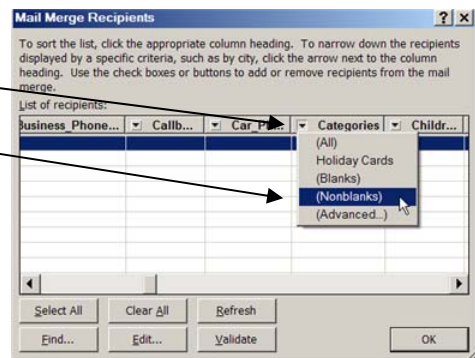


You can see that, in this demonstration, by scrolling to the Categories field in the Mail Merge Recipients list:

Note that, for this demonstration, 3 entries have the "Holiday Cards" entry, and one does not.



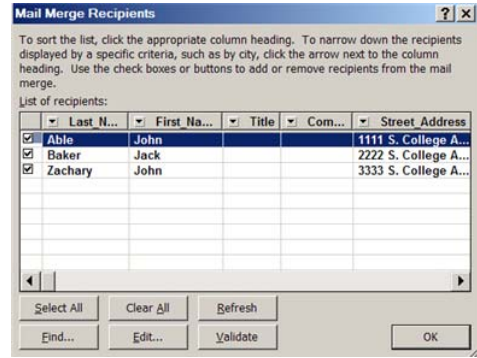
Now click on the down arrow in the Categories heading, and then on "Nonblanks."



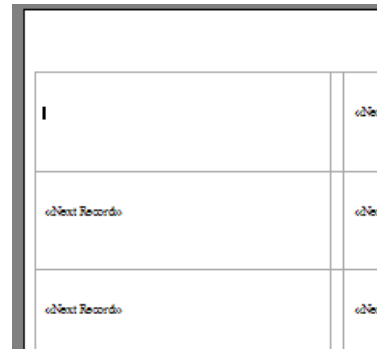
The name with the Categories field blank is hidden from view (not deleted—just removed from the merge list).

Click OK.

**MAKE ANY OTHER EDITS TO THIS LIST AT THIS TIME.**

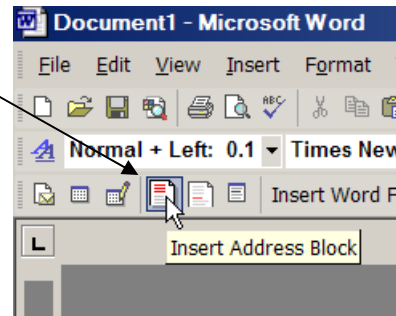


The document (part of which is shown in this graphic) now has a merge field in each label:

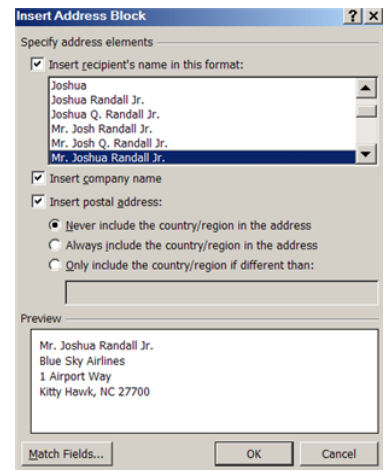


The next step is to enter the appropriate merge fields that link to the data into the labels. One way to do this is to use the Address Block tool:

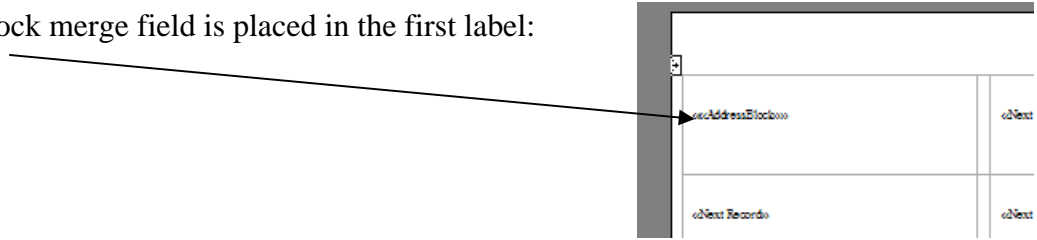
Click on that tool.



The Insert Address Block dialog box is displayed. Make your selections and click OK.

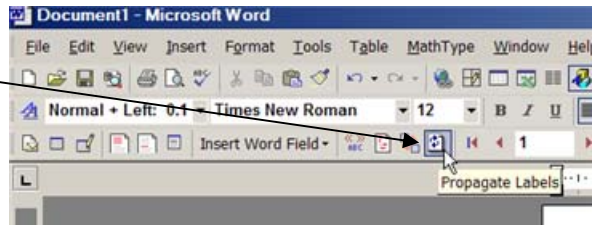


The Address Block merge field is placed in the first label:

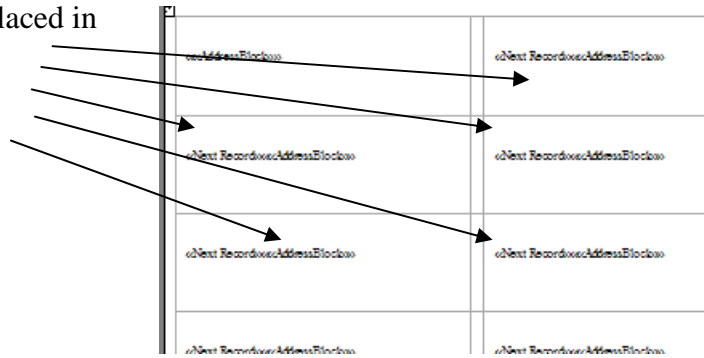


Use the “Propagate Labels” tool to copy the Address Block into the other labels:

Click on the “Propagate Labels” tool.

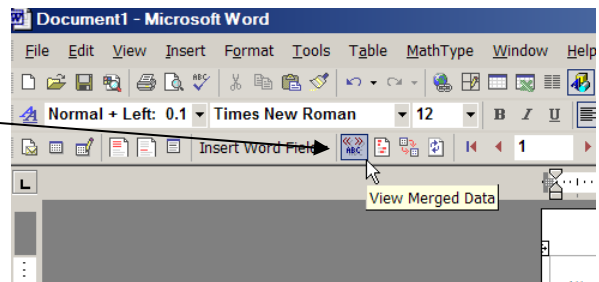


The Address Block merge field will be placed in all labels:



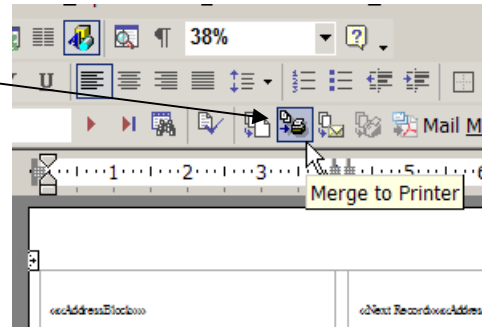
The labels are ready to merge, review and print.

Use the “View Merged Data” tool to view the labels with actual data.

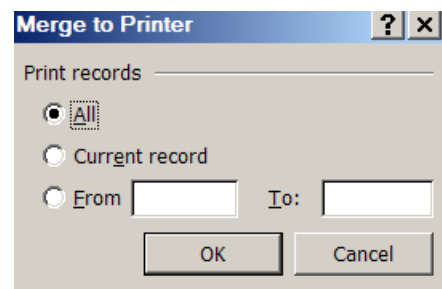


Then use the “Merge to Printer” tool to complete the merge.

Click on the “Merge to Printer” tool.



The “Merge to Printer” dialog box is displayed. Make your selections and click OK.

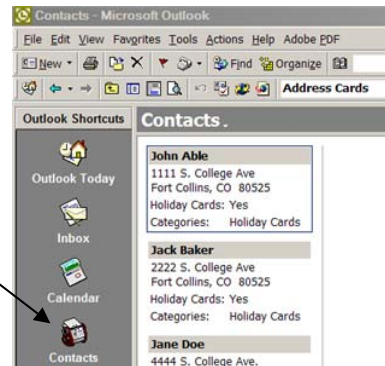


The Print dialog box is displayed. Make your selections and click OK.

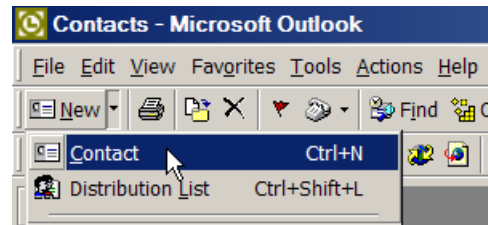
That completes the instructions for creating multiple labels from Outlook (v. 2000) contacts.

## Appendix 1. Adding a Category to the Outlook Categories List

With Outlook open, click on the “Contacts” button (or click on View/Go To/Contacts).



With the Contacts window displayed, open any contact or click on New/Contact.



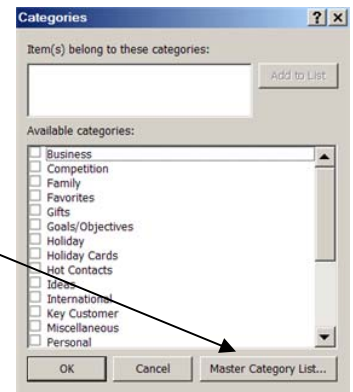
The Contact window looks like this:



Click on the “Categories” button:

The Categories window is displayed:

Click on the “Master Category List” button:

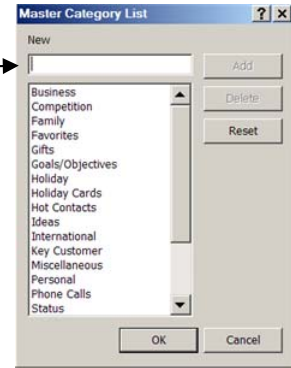


The “Master Category List” Window is displayed:

Enter a Category name into the “New” field:

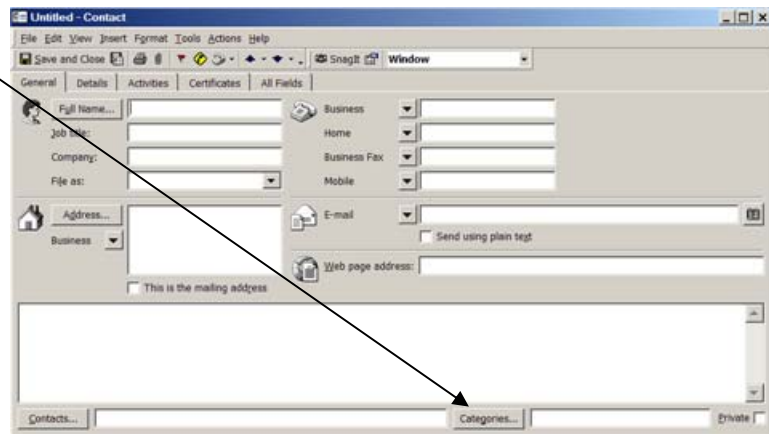
As soon as you start typing, the “Add” button becomes available. When you are finished typing, click on OK. That will add the new category to the list.

For example, you can add a Category called Holiday Cards.

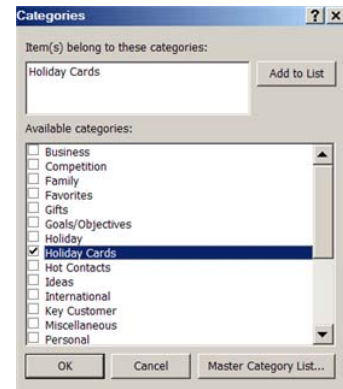


Click OK, and then OK again.

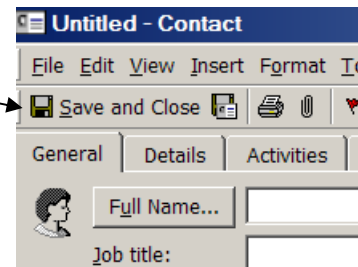
To use this new Category, or any Category, click on the Category button when entering data for a contact.



Choose the Category you want and click OK.



Don't forget to click on the “Save and Close” button in the Contact window before you close that window:



Now, if you choose the Holiday Cards Category for those contacts to whom you intend to send cards, that information will appear in the exported contact records that will be used in a label mail merge. You can then filter those contacts as explained in Part 4 of this tutorial.

That completes the instructions for adding a Category to the Outlook Categories List