How to "Mail Merge" Labels

Mail-Merging allows the ability to make a large number of unique labels while using only a base template and an excel spreadsheet with the preferred information. Mail Merges are most commonly used for address labels and other applications that require uniform, yet unique sets of labels. This guide will take you through the process of creating your own mailing template

Creating a mailing list:

1. Open an Excel sheet

2. In the header for each column, enter the following information:
   1A – Company 1B – Mailing Address 1C – City 1D – State 1E – Zip code

3. Fill in each of the above columns with the desired information until your graph looks similar to the one below

4. Once your spreadsheet is complete save the file and then close Excel
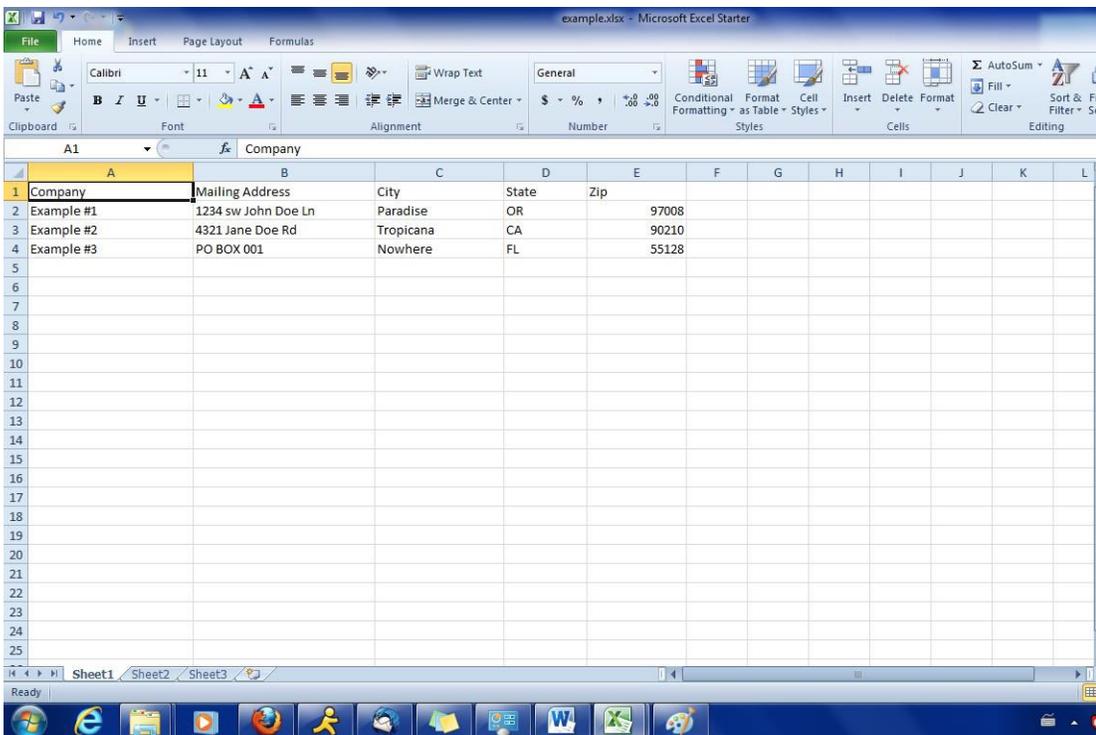
NOTE: If you already have an excel spreadsheet with address information, simply change the Header names to match those above

Creating a template:

1. Open a blank page in Microsoft Word

2 In the page size menu, set the **height** and **width** to a size that will better fit your mailer.

In the examples below we will use **3" height** by **5" width** (**NOTE:** For a tips on basic template creation, including how to adjust page size, please download our Custom Template Guide at:

www.labeltac.com/content/public/Custom_Labels-Microsoft_Word.pdf

3. In the top left corner, enter **your company's return mailing address**

4 In the center of your template, enter the following lines:
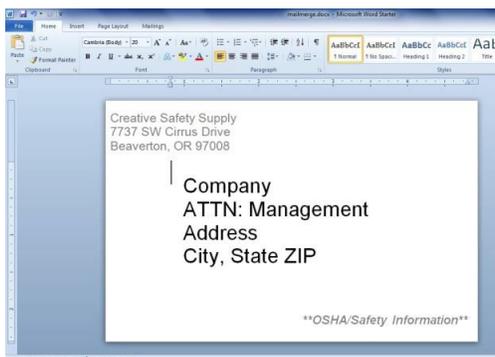
COMPANY
ATTN: Management (*optional*)
**Address**
City, State Zip

NOTE: Set the ATTN:Management line to any string of text you prefer not to change between pages

Starting the Mail Merge:

In the template you just created, begin by selecting **Mailings** from the top toolbar, then:

1. Select **Start Mail Merge** and then **Letters**

2. Choose **Select Recipients**, then **Use Existing List**. Navigate to, and open the Excel spreadsheet you created earlier

3. Highlight the line of text that says **Company**, then select **Insert Merge Field** and choose the corresponding name from the drop-down menu (in this case, Company)
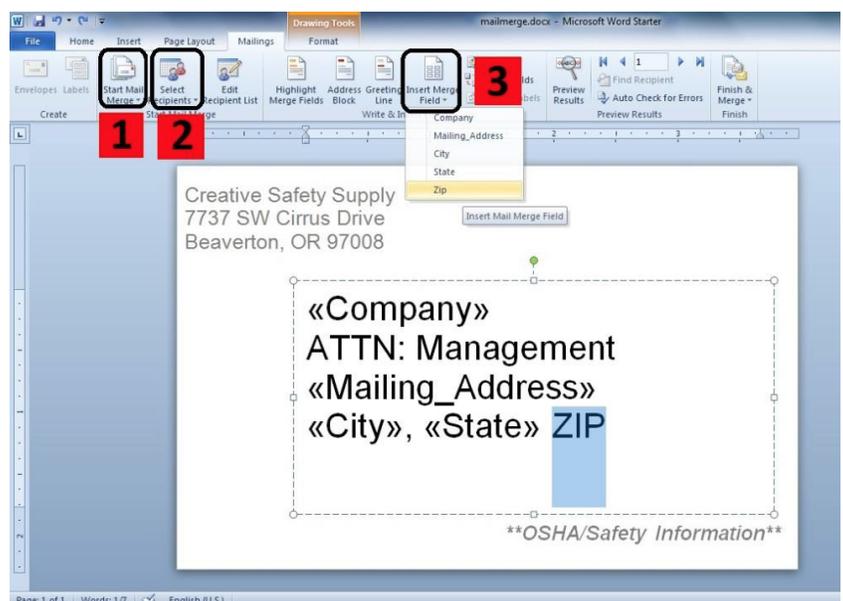
Your template is now complete. To verify the information was entered correctly, select **Preview Results** within the **Mailings** menu to see a preview of what the finished labels should look like.

Printing the mailer labels:

1. To print, select **Finish & Merge** from the right side of the Mailings toolbar

2. Select **Edit Individual Documents**

3. In the Merge Records pop-up, choose **All** and then select **OK**

4. You will now be presented with a list of all the mail labels that will be printed

5. When you are ready to print, hit **CTRL+P** to navigate to the **Print** menu. Ensure you have selected the **Creative LabelTac** printer, then set the copies to **1** and choose **Print**
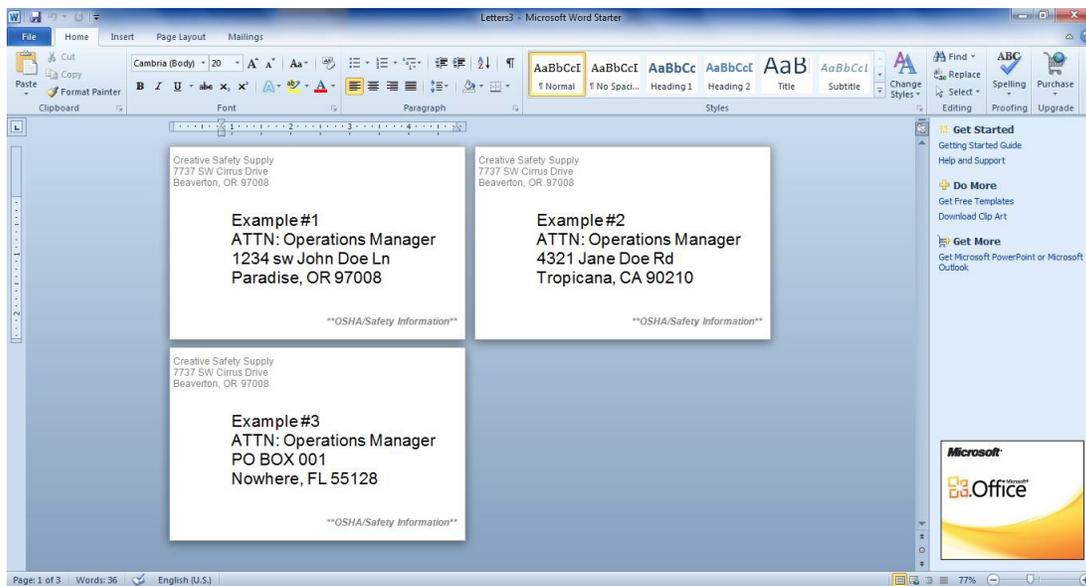
To use barcodes:

To use a barcode in your mail-merge, simply change the desired font to barcode format after merging the pertinent information to your template. (picture examples below)

You have now successfully completed a Mail Merge. This process will greatly simplify the process of contacting multiple customers/employees at one time. If you have any questions or experience any issues please feel free to call us at (866) 777-1360 or by e-mail through Info@CreativeSafetySupply.com

Barcodes

The process of using barcodes is exactly the same as the above steps. The only difference being the text we are replacing won't be related to mailing.

Creating your Excel Sheet:

Your excel sheet will be very similar to the example in the start of this guide. However, with barcodes you will most likely want to save time by using Excel's incrementing number ability (allows you to create strings of numbers that automatically increase). Please review pics below following steps for a visual reference.

1. Open an Excel sheet

2. In the header for each column, enter the information you would like to convert to barcode. For example:

   1A – **Part**   1B – **Location**   1C – **Lot**

3. To create an incremental number, fill the first 3 columns with the numbers you would like to use.
   For example:

   2A – **123**
   3A – **124**
   4A – **125**
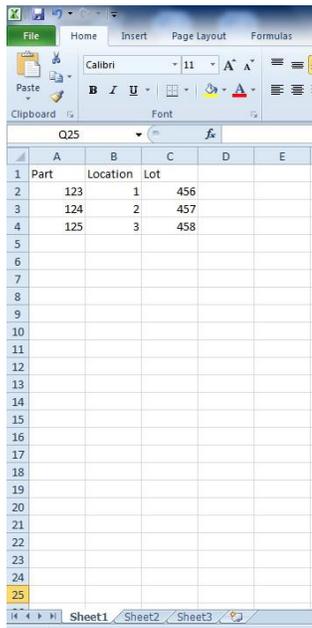
4. **Highlight** all 3 boxes you just created, then **drag** the highlighted box down to the desired number
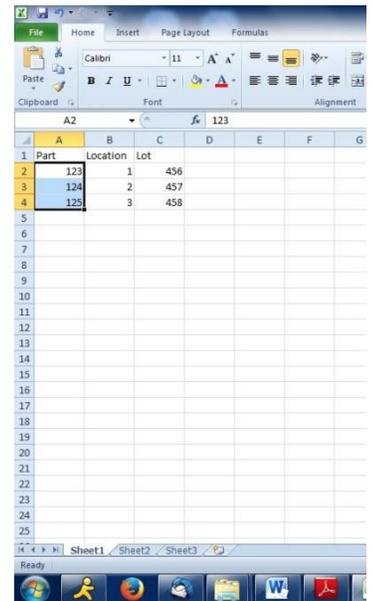
5. Do this for all columns

6. When finished, **save** your Excel sheet and then **close** Excel
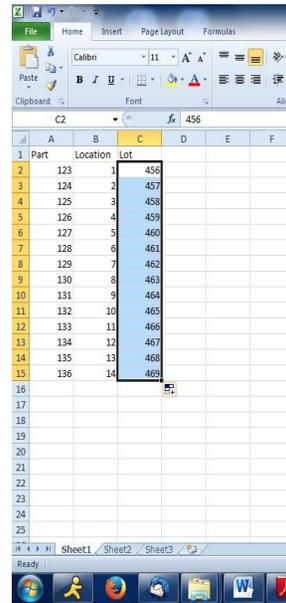
Creating a template:

Now that we have our Excel sheet created, we will want to create the template we will use for editing.

1. Open a blank page in Microsoft Word

2. In the page size menu, set the **height** and **width** to the size you prefer. For tips on basic template creation, including how to adjust page size, please download our Custom Template Guide at:

   www.labeltac.com/content/public/Custom_Labels-Microsoft_Word.pdf

3. Insert text for each set of information you would like to convert to barcode

   (**NOTE:** Whatever text you **merge** with Excel will be replaced
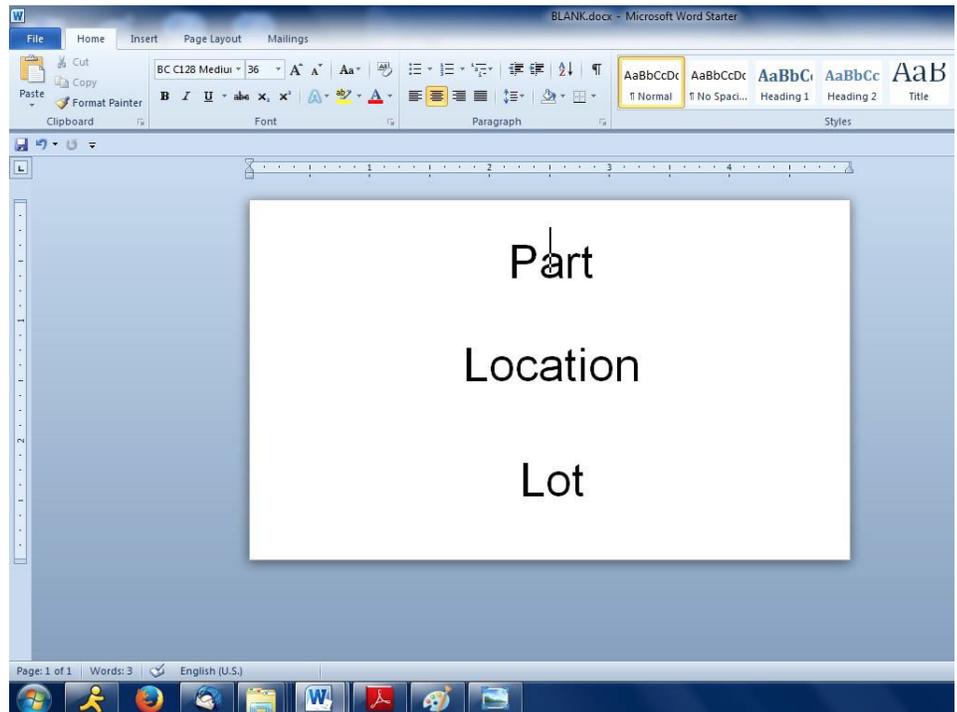
with the info from your Excel sheet. This
means that if you prefer you can just use placeholders for the info. For example, you could simple use the
letters **A**, **B** and **C** instead of **Part**, **Location** and **Lot**)

4. Convert desired text to barcode. To do this, highlight text, right-click within the highlighted area and select **font**

5. Select desired **barcode font**, and select **OK**
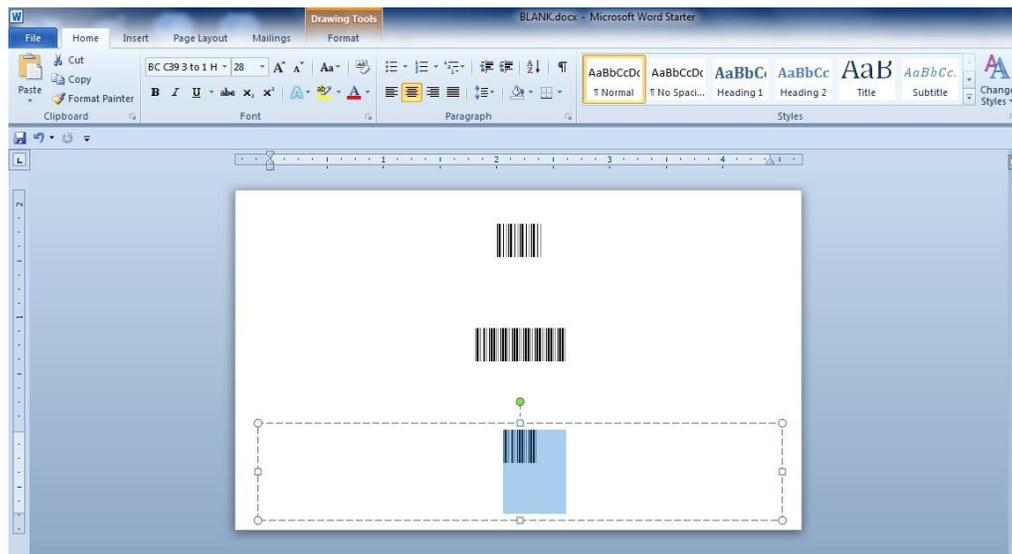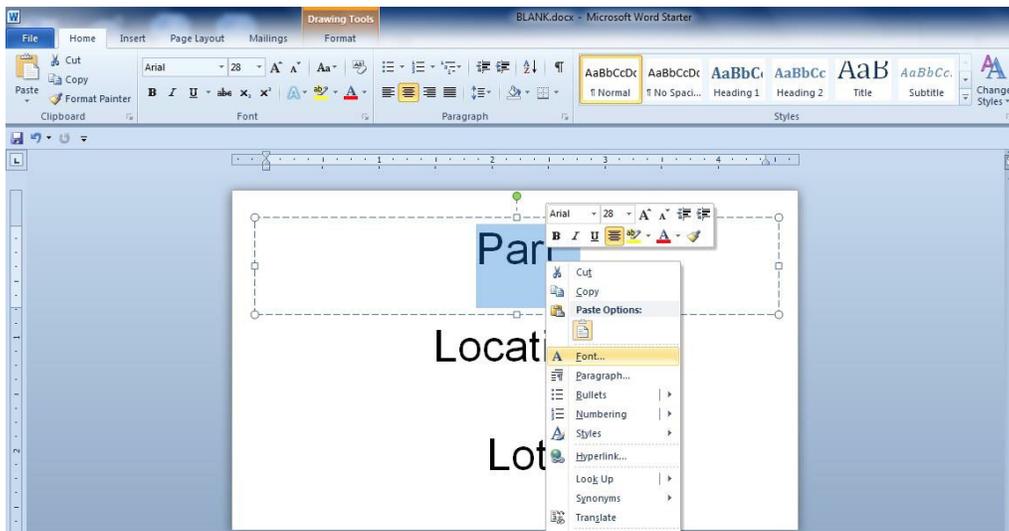
Starting the Mail Merge:

We will now want to merge our template with Excel. In the template you just created, begin by selecting **Mailings** from the top toolbar, then:

1. Select **Start Mail Merge** from toolbar and then **Letters**
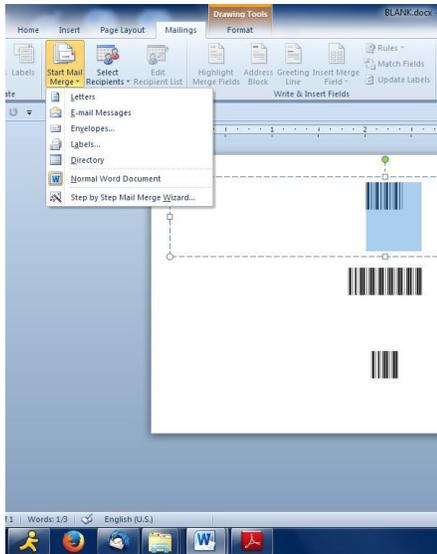
2. Choose **Select Recipients**, then **Use Existing List**, navigate to, and open the **Excel spreadsheet** you created earlier (if presented, select **Sheet 1**)
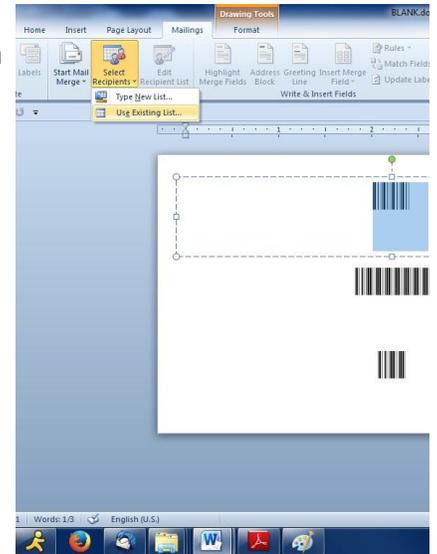
3. Highlight the line of text that says Part, then select **Insert Merge Field** and choose the corresponding name from the drop-down menu (in this case, **Part**)
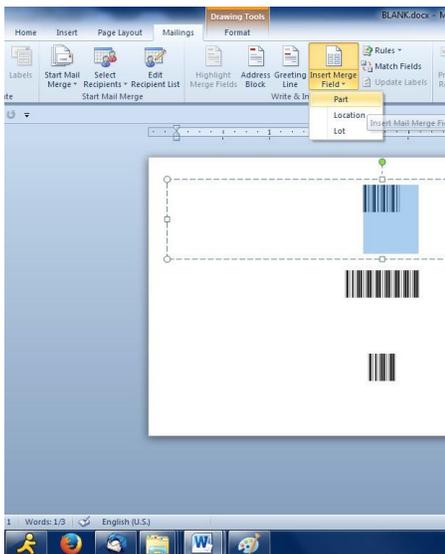
4. Repeat this process for all information you would like to mail merge
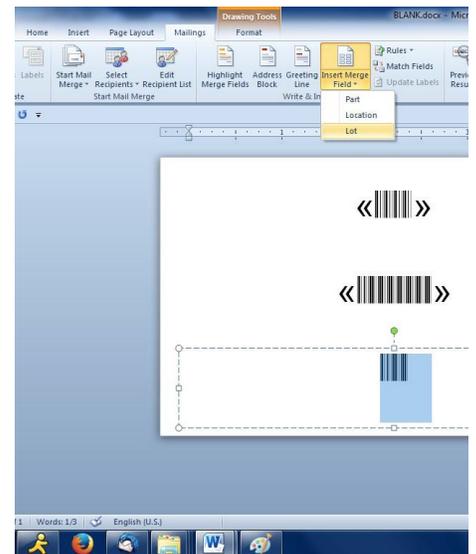
5. Once you have the barcodes inserted, feel free to edit the rest of your template as desired (inserting human readable text, outlines, shapes, etc). Any info you do not use **insert merge field** with will remain unchanged between prints.
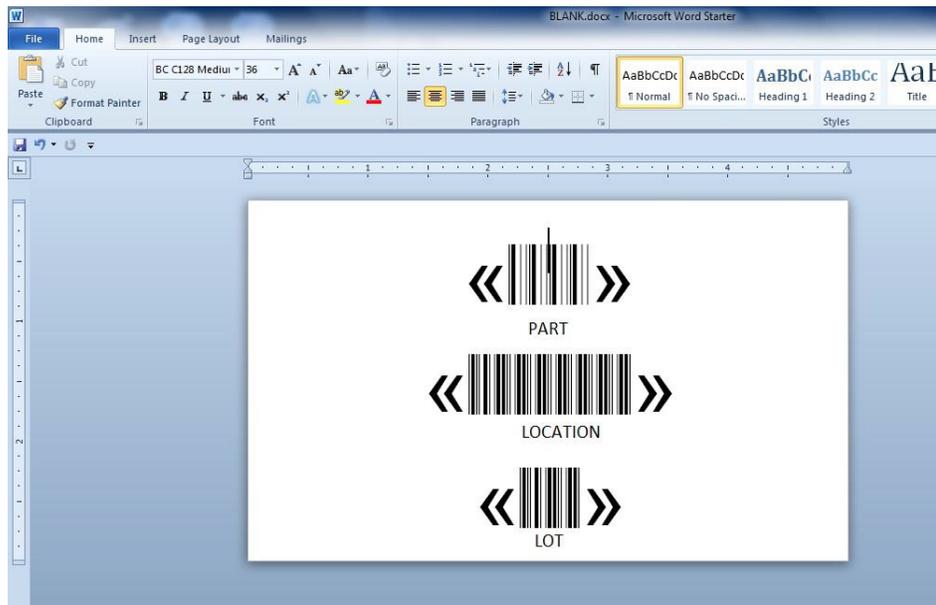
Printing the mailer labels:

1. To print, select **Finish & Merge** from the right side of the Mailings toolbar

2. Select **Edit Individual Documents**

3. In the Merge Records pop-up, choose **All** and then select **OK** (alternatively, select **from** and then the **range** for a specific amount of labels)

4. You will now be presented with a list of all the mail labels that will be printed

5. When you are ready to print, navigate to the print menu (File>**Print** or **CTRL+P**). Ensure you have selected the **Creative LabelTac** printer, then set the copies to **1** and choose **Print**

This completes the process for creating a mail-merge using barcodes.

If you have questions about these instructions, please feel free to contact your account manager. You can also contact us by e-mail at Info@CreativeSafetySupply.com or by phone at (866) 777-1360.