MERGING EXCEL FILES INTO WORD DOCUMENTS   --   BY DIANA PENNINGTON

Here are the basic instructions to merge and Excel list into Word for labels, certificates, or other items. I know they look long, but they go really fast once you get the hang of it. I did instructions for labels, but the instructions are basically the same for other types of documents. Have fun!!
- - - -   - - - -   - - - -   - - - -   - - - -   - - - -   - - - -   - - - -   - - - -   - - - -   - - - -   - - - -   - - - -   - - - -   - - - -   - - - -   - - - -   - - - -

FIRST!!! You need to have a basic list in Excel and it must have a header row with labels; Name, Address, City, State, Zip.

name	address	city	state	zip
Your Name	Your address	Your city	Your state	Your zip
Her Name	Her address	Her city	Her state	Her zip

Etc… and your list goes on…

Then, open Word and go to the "Mailings" tab. Choose "Start Mail Merge" and go to "Step by Step Mail Merge Wizard".

Step 1 of 6 – In the top right hand corner you will see options for letters, email messages, envelopes, labels, and a directory. Choose an option. (I will choose Labels for these instructions.)
- At the bottom right, choose "Next: Starting document".

Step 2 of 6 – In the top right hand corner you have two options. Leave it at the default "Change document layout". Below that you will see "Change document layout" with "Label options…" as a link. Click on "Label options…"
- A new window will appear. Make sure that the label vendor shows "Avery US Letter" or the type of label you are using. Choose your label number and OK.
- At the bottom right, choose "Next: Select recipients".

Step 3 of 6 – In the top right hand corner you will see three options under Select recipients. You will choose the default "Use an existing list" (which is the Excel file that you already created.) Right below, under Use an existing list, you will see a calendar type icon and the word "Browse…" You will choose "Browse…"
- Find your Excel file and choose Open.
- Once you have opened your file, a window will appear that shows the sheets in your Excel file. Usually there are three sheets listed, unless you have changed that in your file. Sheet 1 should be highlighted. It may look like this: Sheet1$. That is okay. (Make sure the sheet that you have your data in is highlighted. Most people type in sheet 1.) Choose OK when ready.
- A new window will appear that will show your data in the columns. There are some customizable options below to change your data file that I am not familiar with. I recommend setting up your data file in order to begin with. Choose OK when ready. You will see the document in Word change in the background to the label you have selected with the words "<<Next Record>>".
- At the bottom right, choose "Next: Arrange your labels".

Step 4 of 6 – In the top right you will see 4 options; address block, greeting line, electronic postage, and more items. Choose "Address block…" This is the tricky part because you will see in the right viewer of this window what your label will look like. If it looks correct, choose OK. If it does not have all your data, you will need to correct it using the bottom part that says "Correct Problems" and choose "Match Fields". Word merger only recognizes certain words for merging. If you set up your Excel file using these key words, you are set. If not, you need to match things. For instance, I used "name" and so a name has not shown up on my label. I need to correct the problem and have the "Last Name" field match my "name" field. When you have finished making corrections, choose OK. Choose OK again when your label looks like you want it to. **NOTE**: You may also choose 'more items' to manipulate the placement of your cells more easily. Once you get savvy, you'll prefer this option.
- This next part is very important!! You must choose "Update all labels" from the right hand side before you proceed to step 5. If you don't you will only see the first name from your database. Choose "Update all labels". You will see that "<<Address Block>> has now appeared on your document.
- Choose "Next: Preview your labels" from the bottom right hand corner.

Step 5 of 6 – You should see that your labels have appeared as you selected them and you should have your full list. You will only see the labels for one page worth. If you want to view other labels, use the preview buttons on the top right to move back and forth.
- Choose "Next: Complete the merge"

Step 6 of 6 – You will see two options; Print and Edit individual labels. If you are happy and you won't need the file again, choose print. If you want to save and see the file in its entirety, choose to "Edit individual labels…" and you will be prompted to save the document (either all, current record or from record to record). Make your selection and choose OK. Your document will appear in its entirety and you can save it. (If you try to save the file after choosing just the Print option, you will only save the first page and you will be frustrated later, believe me, I know!)

Good luck and I hope that you have success merging Excel lists into Word documents. ☺   -Diana Pennington 2011