



Capraro Technologies, Inc.

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POCODOC UPDATE

PRINT LABELS USING EXCEL AND MAIL MERGE IN OFFICE 2003 AND 2007

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QUICK LINKS

CNY BUSINESS INFORMATION TECHNOLOGY

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Dear Colleague,

So you want to print some labels? This issue is all about labels. I hope you enjoy it and I hope you all had a Happy Thanksgiving and were able to try our PocoDoc© free service i.e. www.PocoDoc.com.

Sincerely,
Gerard T. Capraro, Ph.D.
President

POCODOC UPDATE

PocoDoc© is an advanced optimization tool which cuts the bloat, making your files smaller, faster and more manageable. In addition, the files stay in their original format.

Our intent for PocoDoc© was to provide a service to users who send Office documents as attachments through email and/or to users over low bandwidth (i.e. mobile) connections. Some of you know many email providers impose a limit on the size of attachments, which is why we want to shrink documents. Admittedly, our free service at PocoDoc.com requires sending the large file to our server and sending the resultant file back to the user through email, if it's size hasn't been reduced enough, poses an issue. We chose email to deliver the optimized files because it is something most people use.

We also intelligently compress any images contained within the document. This is controlled by the several levels of optimization. PocoDoc© tries to compress the images to meet the size constraints of the user while maintaining the highest perceived quality. Again, our thought was that not being able to send a document at all or in a timely manner because of size constraints is worse than sending a lower quality version on time.

We're lifting the limit on the size of the documents submitted to our online version of PocoDoc©. However, the time it takes to submit a file is limited by the user's internet upload speed, which may be slow. We also take users' privacy very seriously. All email addresses and files are used internally for testing purposes only. We will not distribute this information to any third party, nor will we use it to spam our users.

Lastly, we are coming out with a free lite desktop version which operates in a similar manner except the optimized files are returned through the lite version and not through email. This should be out by Jan. 2011.

PocoDoc© has been reviewed by Gizmo's Freeware. Here's the link to the article. <http://www.techsupportalert.com/content/online-office-file-shrinker-has-potential.htm> And if you want to try PocoDoc© - it's free at www.PocoDoc.com.

This applies to **Microsoft Office Excel 2003** -

By creating a mail merge in Word, and then linking to a list in Excel, you can turn worksheet data such as the addresses of your customers into printable mailing labels.

1. In Microsoft Excel, set up the data to use in the mail merge.
 1. Make sure the data is in list format; each column has a label in the first row and contains similar facts, and there are no blank rows or columns within the list. You'll use the column labels to specify what data goes where in the mail merge.
 2. Make sure the column labels clearly identify the type of data in the column; this helps you select the right data as you construct the mail merge. For example, labels such as First Name, Last Name, Street Address, and City are better than Column 1, Column 2, Column 3 and Column 4.
 3. Make sure you have a separate column for each element that you want to include in the mail merge. For example if you're creating form letters and want to use each recipients first name in the body of the letter, make sure you have a column that contains the first names, rather than a single column with both first and last names. If you want to refer to each recipient by title and last name, such as Mr. Smith, you can use a single column containing both titles and last names or use one column for title and another for last name.
 4. To make the list easy to find when you select it for the mail merge, give it a name:
 1. Select the entire list.
 2. On the **Insert** menu, point to **Name**, and then click **Define**.
 3. Type a name for the list.
 4. Click **Add** and then click **Close**.
2. Save and close the workbook that contains the data.
3. Switch to Microsoft Word.
4. On the **Tools** menu, point to **Letters and Mailings**, and then click **Mail Merge Wizard**.
5. In the first two steps of the Mail Merge Wizard, select the document type and start the document. If you are creating mailing labels, click **Labels** in Step 1, and then click **Label Options** in Step 2 to select the size and type of labels to print.

For more information about these steps, see Word Help.

6. In the third step, under **Select recipients**, click **Use an existing list**, and then click **Browse**.
7. In the **Look in** list, click the folder in which you saved the workbook with your data, click the workbook, and then click **Open**.
8. In the **Select Table** dialog box, locate and click your list. Make sure the **First row of data contains column headers** check box is selected, and then click **OK**.
9. In the **Mail Merge Recipients** dialog box, click any column labels in your data that correspond to the Word identifiers on the left. This step makes inserting your data in the form documents easier. For more information about matching fields, see Word Help.
10. If you want to include only selected recipients in the mail merge, click **Edit recipient list** and select the recipients you want.
11. Use the rest of the wizard steps to write, add recipient information, preview, personalize, save, and print or e-mail your documents. For more information about these steps, see Word Help.

Note:

- While Word has your workbook open to create the mail merge, you can't open the workbook in Excel. If you need to see the data and it's column labels, go to Step 3 or 5 of the wizard and click **Edit recipient list**.

This applies to **Microsoft Office Excel 2007**

If you want to send a mass mailing to an address list that you maintain in a Microsoft Office Excel worksheet, you can use a Microsoft Office Word mail merge. The mail merge process creates a sheet of mailing labels that you can print, and each label on the sheet contains an address from the list.

To create and print the mailing labels, you must first prepare the worksheet data in Excel and then use Word to configure, organize, review and print the mailing labels.

Step 1: Prepare the worksheet data in Excel for the mail merge

In Excel, your address list must match the tabular structure that mail merge requires.

1. On a worksheet, do the following to arrange the address list:
 - Use column headers that clearly identify the type of data that each column contains.

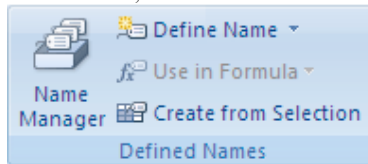
TIP For example, use column headers such as **First Name, Last Name, Street Address**, and **City** instead of **Column 1, Column 2, Column 3**, and **Column 4**.

- Use a separate column for each element that you want to include in the mail merge.

TIP You can also use the mail merge to create form letters that address each recipient by their first name, if you store first and last names in separate columns. You can also add a separate column for a title, such as Mr. or Mrs.

PRINT LABELS BY USING EXCEL DATA IN A WORD MAIL MERGE (CONTINUED)

- Include only rows and columns that contain data. Do not include blank rows or columns in the address list, because the list of labels that is created might not be complete beyond the blank rows and columns when you set up the labels for the mail merge in Word.
1. To help locate and select the address list during the mail merge, do the following to define a name for the address list:
 - a. On the worksheet, select the whole address list, including the cells that contain column headers.
 - b. On the **Formulas** tab, in the **Defined Names** group, click **Define Name**.



- c. In the **Name** box, type a name for the address list, such as **Holiday_Cards**, and then click **OK**.

TIP The first character of a name must be a letter, and you cannot use a space between words. Instead of a space, use an underscore character (_).

2. Save and close the workbook.

Step 2: Configure the labels for the mail merge in Word

You configure the layout of the labels just once, for all the labels in the mail merge. In a mail merge, the document that you configure for the layout is referred to as the main document for labels (or label main document). In this document, you can also configure any content that you want repeated on each label, such as a company logo or your return address on shipping labels.

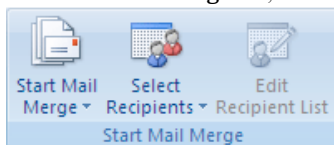
Chances are that you already have a package of label sheets from one of the label sheet suppliers such as Avery AOne, or Formtec. Each label sheet is a certain size and contains a certain number of labels with specific dimensions.

To configure the label main document, you match its dimensions with the dimensions of the labels on the worksheets that you plan to use.

1. Start Word

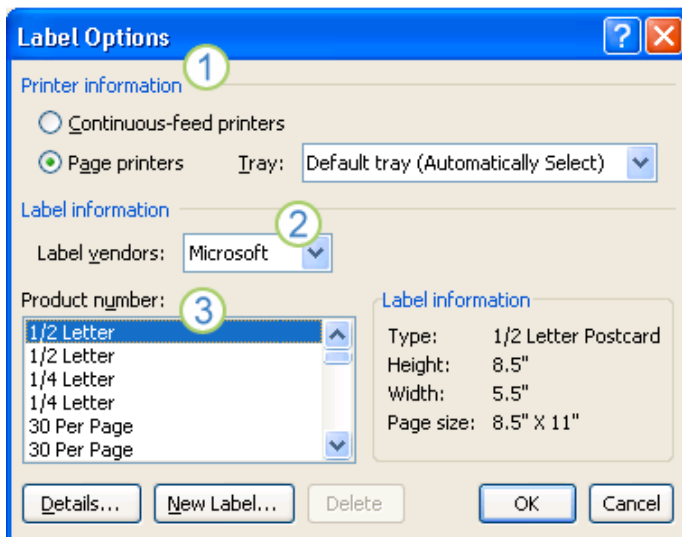
By default, a blank document opens. Leave it open. If you close it the commands in the next step are not available.

2. On the **Mailings** tab, in the **Start Mail Merge** group, click **Start Mail Merge**.



3. Click **Labels**.

4. In the **Label Options** dialog box, you have several choices to make.



- 1 The type of printer that you are using to print the labels.
- 2 The supplier that produced your label sheets
- 3 The number that corresponds to the product number listed on your package of label sheets.

- If the product number for the example label sheets does not match any one of the choices in the **Label Options** dialog box. You can still print your labels, but you have to do some customizing. Measure the labels on the sheet that you are using, and note the measurements and how many labels fit on a single sheet.

NOTE: Measure the labels carefully. The actual label size might be a smaller than the size that is indicated by the label manufacturer. For example, a 1-by-2-inch label might actually be 15/16-inch high and 1 15/16-inches wide.

In the **Product number** list, select a label type that is similar in size to your labels.

If you do not see a substitute label type that you can use in the **Product number** box, you still might be able to use another one of the listed labels. If you don't see a label type that fits your needs, you can create a new label size.


1. Click **Details**, and then compare the label dimensions and the number of labels per sheet or the number of columns on the label form.
2. Do one of the following:
 - If the dimensions and label layout match those of your labels, use the selected label.
 - If the dimensions and layout do not match your labels, click **Cancel**.
3. In the **Label Options** dialog box, click the printer type (either **continuous-feed printer or Page printers**), and then click **New Label**.
4. Type a name in the **Label name** box, select the height, width, margin, and other options for you label, and click **OK**.

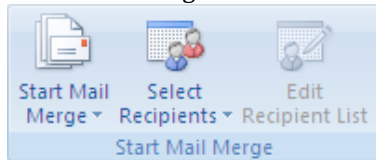
The new label appears in the **Product number** box as **Label name - Custom**. The label is also added to the the **Other/Custom** category. The next time that you use your custom labels, make sure that you select **Other/Custom** in the **Label vendors** list.

5. After you select the label options that you want, click **OK**.

Word creates a document that uses a table to lay out the labels. If you do not see lines separating the labels in the layout, click the **Layout** tab under **Table Tools**, and then in the **Table** group, click **View Gridlines**. **Step 3: Link the worksheet data to the labels in the mail merge**

To merge the address information into your labels, you must connect the labels to the worksheet that contains your address list.

1. If this is the first time that you have ever connected to a worksheet, do the following:
 - a. Click the **Microsoft Office Button** , and then click **Word Options**.
 - b. Click **Advanced**.
 - c. Scroll to the **General** section, and select the **Confirm file format conversion on open** check box.
 - d. Click **OK**.
2. With the mail merge main document open, in the **Start Mail Merge** group on the **Mailings** tab, click **Select Recipients**, and then click **Use Existing List**.



3. Locate the Excel worksheet in the **Select Data Source** dialog box, and double-click it.
4. In the **Confirm Data Source** dialog box, click **MS Excel Worksheets via DDE (*.xls)**, and then click **OK**.

NOTE - If you do not see **MS Excel Worksheets via DDE (*.xls)** in the list, select the **Show all** check box.

5. In the **Microsoft Office Excel** dialog box, for **Named or cell range**, select the cell range or worksheet that contains the information that you want to merge, and then click **OK**.

NOTE - The labels are now connected to the worksheet data, but the sheet of labels is still blank. If needed, you can define the list of recipients as described in step 4, or you can start populating the labels with placeholders for the address information, as described in step 5.

Step 3: Populate the labels with placeholders for address information

When you perform the mail merge, the mail merge fields are filled with information from your address list.

After you connect your labels to your address list, you are ready to add placeholders that indicate where the addresses will appear on each label. You can also type text that you want repeated on each label, such as a company logo or your return address on a shipping label.

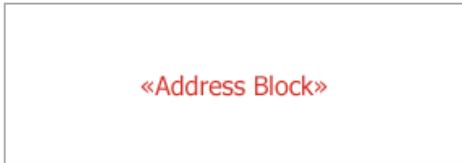
The placeholders for the addresses are called *mail merge fields*. Mail merge fields in Word correspond to the column headers in the data file that you choose.

	A	B	C
1	Name	Last Name	Street Address
2	Nancy	Anderson	123 Main St.
3	Ann	Beebe	567 Country Rd.
4			
5			
6			
7			
8			
9			

1 Columns in a data file represent categories of information. Mail merge fields that you add to the labels are placeholders for these categories.

2 Rows in a data file represent records of information. Word generates a label for each record when you perform a mail merge.

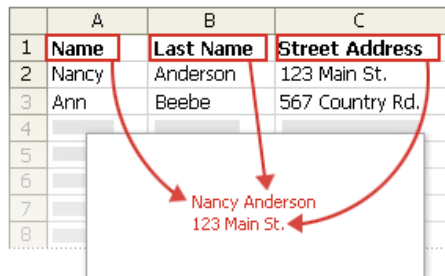
By putting a mail merge field in the original label that you configured in the label main document, you indicate that you want a certain category of information, such as name or street address, to appear in that location.



NOTE When you insert a mail merge field into the label main document, the field name is always surrounded by chevrons (<< >>). These chevrons do not show up on the final labels - they just help you distinguish the fields in the label main document from the regular text.

What happens when you merge

When you perform the mail merge, information from the first row in the data file replaces the fields in the first label. Then, information from the second row in the data file replaces the fields in the second label, and so on.



Working with fields: Examples

When you design labels, you can link any column heading from your data file to a field in a label. For example, suppose you have a subscriber list to your newsletter and your data file includes a column, called ExpireDate, that stores the date that each subscription expires. If you insert an <<ExpireDate>> field in the label main document before you run the merge, that information is added to each mailing label.

You can combine fields and separate them with punctuation marks. For example, to create an address, you can configure the fields in the label main document as follows, using a comma between the <<City>> and <<State>> fields.

<<First Name>> << Last Name>>
 <<Street Address>>
 <<City>>, <<State>> <<Postal Code>>

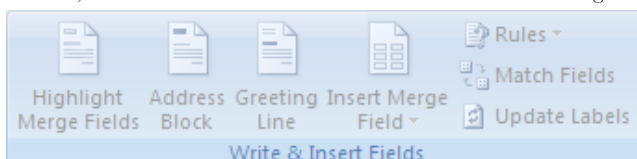
For combinations that you use frequently, like address blocks and greeting lines, Word provides composite fields that group a number of fields together. For example, the Address Block field is a combination of several fields, including first name, last name, street address, city, state and postal code.

You can customize the content in each of these composite fields. For example, in the address, you may want to select a formal name format (Mr. Roger Smith). In the greeting, you might prefer to use “To” instead of “Dear”.

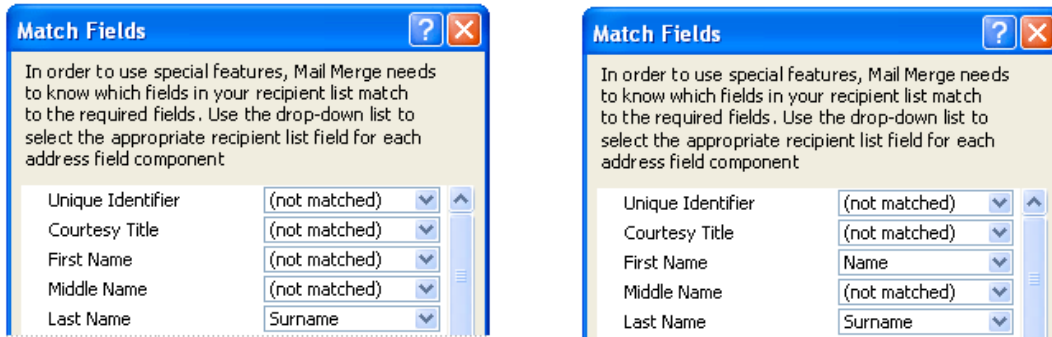
Map the mail merge fields to your data file.

To make sure that Word can find a column in your data file that corresponds to every address element, you might need to map the mail merge fields in Word to the column in your data file.

To map the fields, click **Match Fields** in the **Write & Insert Fields** group on the **Mailings** tab.



The **Match Fields** dialog box appears.



The elements of an address are listed on the left. Column headings from your data file are listed on the right. Word searches for the column that best matches each element. As the graphic illustrates, Word automatically matched the data file's **Surname** column to **Last Name**, but Word was unable to match other elements, such as **First Name**.

In the list on the right, you can select the column from your data file that matches the element on the left. In the graphic the **Name** column is now matched with **First Name**. It is okay that **Courtesy Title**, **Unique Identifier**, and **Middle Name** are not matched, because mail merge label does not need to use every field. If you add a field that does not contain data from your data file, it will appear in the merged document as an empty placeholder - usually a blank line or an empty block of space.

Type the content and add the fields

1. In the original label that you configured in the label main document, click where you want to insert the field.
2. Use the **Write & Insert Fields** group on the **Mailings** tab.
3. Add any of the following:
 - Address Block with name, street address, and other information
 1. Click the **Address Block**
 2. In the **Insert Address Block** dialog box, select the address elements that you want to include and the formats that you want to apply and then click **OK**.
 3. If the **Match Fields** dialog box appears, this means that Word is unable to find some of the information that it requires to complete the address block. Click the arrow next to **(not match)**, and then select the field from your data source that corresponds to the field that is required for the mail merge.

Individual fields

You can insert information from individual fields, such as first name, telephone number, or the amount of a contribution from a list of donors. To quickly add a field from your data file to the label main document, click the arrow next to **Insert Merge Field**, and then click the field name. To insert other optional fields in the document, do the following:

1. On the **Mailings** tab, in the **Write & Insert Fields** group, click **Insert Merge Field**.
2. In the **Insert Merge Field** dialog box, do one of the following:
 - To select address fields that will automatically correspond to fields in your data source, even if the names of those fields are not the same as the field names in Word, click **Address Fields**.
 - To select fields that always take data directly from a column in your data file, click **Database Fields**.
3. In the **Fields** box, click the field that you want.
4. Click **Insert**, and then click **Close**.
5. If the **Match Fields** dialog box appears, this means that Word is unable to find some of the information that it requires to insert the field. Click the arrow next to **(not matched)**, and then select the field from your data source that corresponds to the field that is 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 contain a column with the same name, Word will be unable to insert that field information into the merged document.

1. After you finish setting up the first label the way you want it, in the **Write & Insert Fields** group, click **Update Labels**. Word replicates the layout of the first label to all the other labels.

Notes

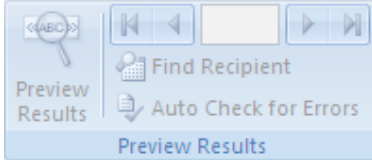
- You cannot type merge field characters (<<>>) manually or use the **Symbol** command on the **Insert** menu in Word. You must use mail merge.
- If the merge fields appear inside braces, such as { *MERGEFIELD* City }, Word is displaying **field codes** (field code: Placeholder text that shows where specified information from your data source will appear, the elements in a field that generate a field's result. The field code includes the field characters, field type, and instructions) instead of field results (field results: Text of graphics inserted in a document when Microsoft Word carries out a field's instructions. When you print the document or hide field codes, the field results replace the field codes.). This doesn't affect the mail merge, but if you want to display the results instead, right-click the field code, and then click **Toggle Field Codes**.

Step 5: Preview and print the labels

After you have added the fields to the original label that you configured in the label main document, you are ready to preview the mail merge results. After you are satisfied with the preview, you complete the mail merge and print the labels. You can then save the label document for future use.

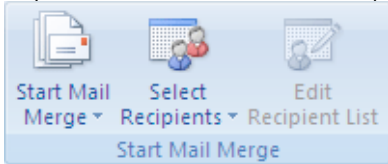
Preview the mail merge

You can preview your labels and make changes before you actually complete the mail merge. To preview, do any of the following in the **Preview Results** group of the **Mailings** tab:



- Click **Preview Results**.
- Page through each label by clicking the **Next Record** and **Previous Record** buttons in the **Preview Results** group on the **Mailings** tab.
- Preview a specific label document by clicking **Find Recipient**.

Note: Click **Edit Recipient List** in the **Start Mail Merge** group on the **Mailings** tab to open the **Mail Merge Recipients** dialog box, where you can filter the list or remove recipients from the merge if you see records that you do not want to include.

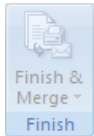


Note: Word uses a table to lay out a sheet of labels on the page. As you page through the labels, the active record is displayed in the first cell of the table, with the following records displayed in subsequent cells.

Complete the mail merge

To print the labels, do the following:

1. On the **Mailings** tab, in the **Finish** group, click **Finish & Merge**, and then click **Print Documents**.



2. Choose whether to print the whole set of labels, only the label that is currently visible, or a specific subset of the labels.

To change individual labels, do the following:

1. On the **Mailings** tab, in the **Finish** group, click **Finish & Merge**, and then click **Edit Individual Documents**.
2. Choose whether you want to edit the whole set of labels, only the label that is currently visible, or a specific subset of the labels. Word saves the labels that you want to edit to a separate file.

You can now find Capraro Technologies, Inc on Facebook (<http://www.facebook.com/pages/Utica-NY/Capraro-Technologies-Inc/138676162813774?ref=ts>) and Twitter (<https://twitter.com/CapraroTech>)

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