

Creating Mailing Labels using MS Word and MS Excel

These steps are using MS Word 2000 and MS Excel 2000. The steps are basically the same when using Version 97.

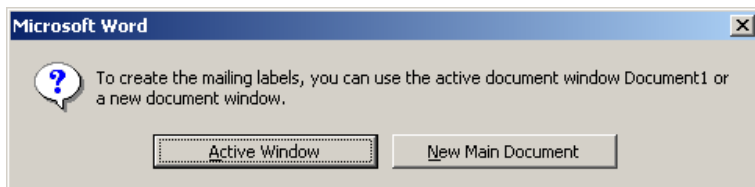
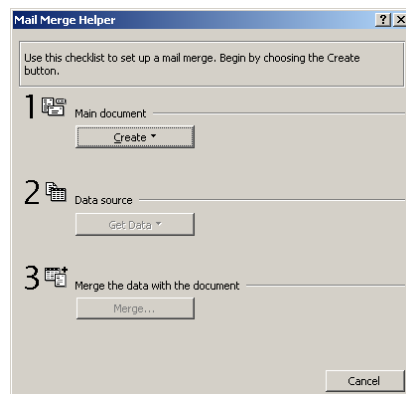
Step One:

- Create query using SAMIEEEE - selecting Address fields required.
- Save and Name Query using SAVE & CLOSE and SAVE Features.
- Run query using Scheduling Agent.
- Download results into Excel Spreadsheet.
- In Excel, replace any #EMPTY fields with blank text - save as Excel Spreadsheet.

Step Two:

- Open MS Word
- Select: Tools
Mail Merge
- Mail Merge Helper appears

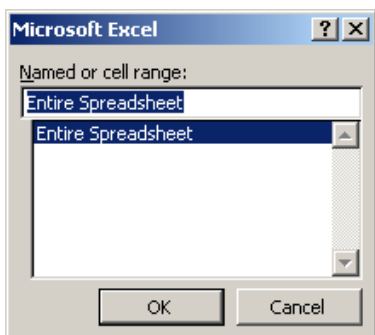
- Select: 1) Main Document
- Select the following:
 - Create
 - Mailing Labels
 - Active Window



Mail Merge Helper appears again.

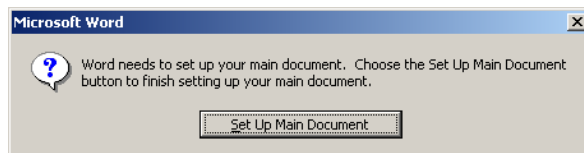
- Select: 2) Get Data
- Open Data Source
(Select your Excel File from Directory - Make sure you change "Files of Type" field. MS Word automatically defaults to Word Format files.)

- Select your Excel File.
- Pop-up Prompt "Names or cell range" appears
- Select "Entire Spreadsheet"
- Click on OK



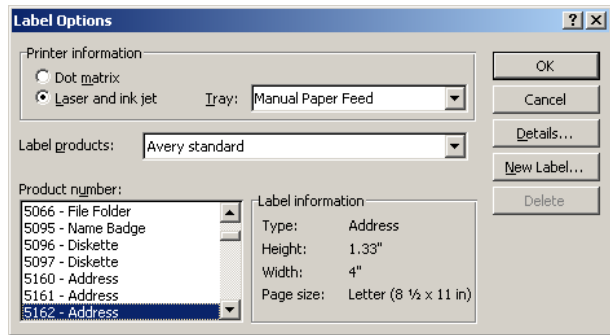
- Pop-up Prompt - "Word needs to set up your main document. Choose the set-up Main Document button to finish" appears.

Click on "Set up Main Document"

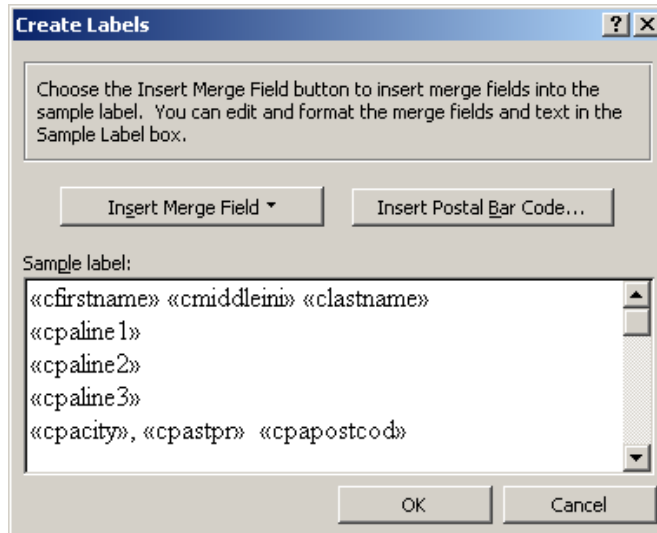


"Label Options" screen appears.

Select all Label Options.
Click on OK



"Create Labels" Screen appears.



Click on "Insert Merge Field" button to individually select each field that is required.
Make sure you add (type) in any spaces, returns and/or commas in between fields that are required in order to place them in a address label format.

When completed - Click on OK

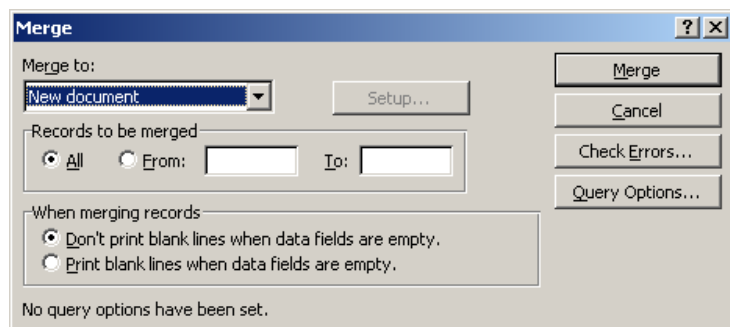
Mail Merge Helper Screen again appears.

3) Merge the data with the document.
Click on Merge

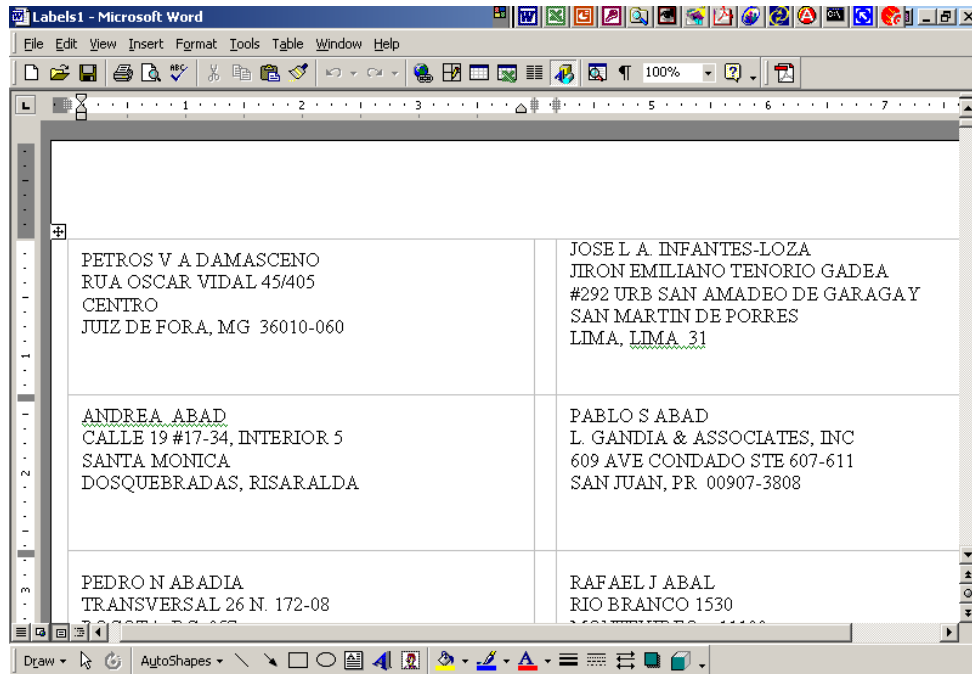
"Merge" screen appears.

At this point you can select
"New Document" or
"Printer"

Select "New Document"
Click on "Merge" button



A new document is created with the address information in label format.



At this point there are 3 files opened.

- 1) The "Excel Spreadsheet" containing the Data Source
- 2) The "Word" Main Document with the merge fields.
- 3) The completed "Word" document with the merged data.

You can save and close the completed Merged Document until you are ready to print.

You can also save the Main Document - giving it a standard name such as "Member Labels"

When using it in the future, you will need to create a new Excel Spreadsheet, give it the same name as the old one and use the same field names. (fields are automatically named the same when exporting it from SAMIEEE.)

Open "Member Labels" (the "Main Document")

Click on the "Mail Merge Helper" Icon

Then follow steps on page 1 starting with

"Mail Merge Helper appears again:

Select: 2) Get Data"