Branch Labels - Mail Merge

Labels required - Avery US Letter - 5162 Easy Peel Address Labels

Part One- Preparing your Excel Sheet

- 1- Login to the portal at <u>https://portal.legion.ca/login</u>
- 2- Select Create/View Branch Members on the left side under "In This Section"

| IN THIS SECTION | |
|-------------------|--------------|
| Home | |
| Profile | |
| Payment Informa | tion |
| • Create/View Bra | anch Members |
| Branch Rates | |
| Previous Transac | tions |

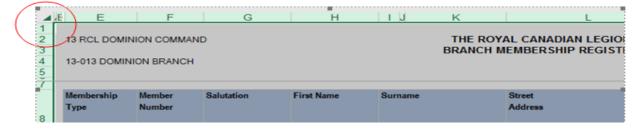
3- Select Export Branch Members at the bottom right of page

Export Branch Members

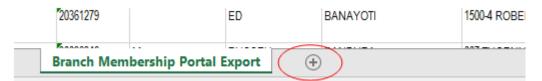
- 4- Select Open
- 5- Select Enable Editing at the top of page.

| Fil | e Home | Insert | Page Layout | Formulas | Data | Review | View | Power Pivot | ${\mathbb Q}$ Tell me what you war | nt to do | |
|-----|----------------|---------|-------------------|------------------|-------------|---------------|----------|-----------------------|------------------------------------|----------------|--|
|) | PROTECTED VIEW | Be care | ful—files from th | e Internet can (| contain vii | ruses. Unless | you need | to edit, it's safer t | o stay in Protected View. | Enable Editing | |
| | | | | | | | | | | | |

6- Click on the top left corner to select the entire worksheet once selected right click and select COPY



7- At the bottom of the page click on the plus sign to open a new worksheet



8- Select worksheet

| (| | A | В | С | D | E | |
|--------|---|---|---|---|---|---|--|
| \sim | 1 | / | | | | | |
| | 2 | | | | | | |
| | 3 | | | | | | |
| | 4 | | | | | | |
| | 5 | | | | | | |
| | 6 | | | | | | |

9- Right click and select Paste Values (123) icon

| 5 million | |
|-----------|----------------|
| 1 X | Cut |
| 2 🗈 | Сору |
| j 💼 | Paste Options: |
| 5 | |

Prepare data in Excel for mail merge:

- Delete Columns A- E and Delete Rows 1-7
- Delete any other unnecessary and columns with no data to simplify the excel sheet for producing labels.
- Your Excel sheet should only have the following columns:

Member Number, Salutation, First Name, Surname, Street Address, City, Province, Postal Code and Country.

• Delete original sheet you copied from (right click and delete) - Ensure that all data to be merged is present in the first sheet of your spreadsheet.

| 1111139983 | IMIT | PETER | вашем | |
|----------------------|-----------|----------|-------|--|
| ${}^{+} \rightarrow$ | SHEET ONE | \oplus | | |
| adv | | | | |

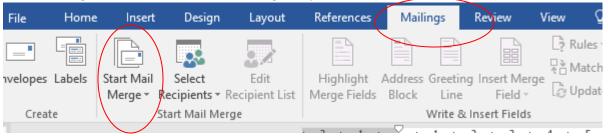
- Shorten titles to less than 20 characters per column
- Make all changes or additions to your spreadsheet are completed <u>before</u> your mail merge Name and Save your Excel Sheet on your desktop

Part Two - Mail Merge in Word

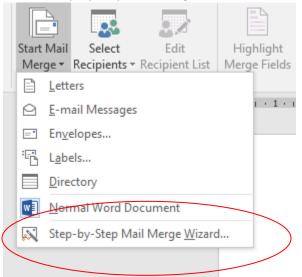
Open Word, choose file > New > Blank Document



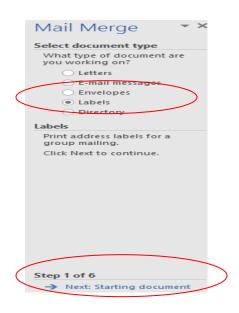
Select Mailings Tab and select Start Mail Merge dropdown arrow



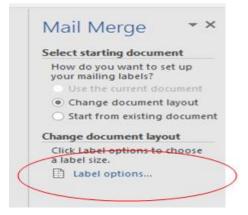
Select - Step by Step Mail Merge Wizard



Step 1 of 6 - Select Labels on the far right column of the page and select Next: Starting Document



Select label options



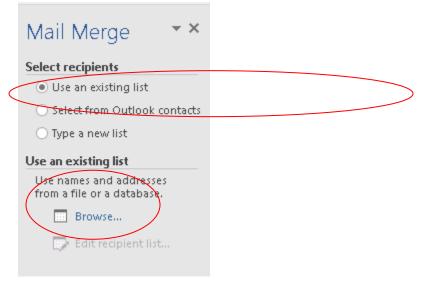
Label Information – Label Vendors: Select Avery US Letter from the dropdown list. Under Product Number: Scroll down to select 5162 Easy Peep Address Labels and select

| Label Options | ? | × |
|---|-----|-----|
| Printer information © Continuous-feed printers © Page printers Iray: Default tray (Automatically Select) Label information Label yendors: Avery US Letter Find updates on Office.com | | |
| Product number: Label information 5154 Print or Write Flexible Mini Name Badge Labels Image: Type: Easy Peel Address Labels 5155 Easy Peel Return Address Labels Image: Type: Easy Peel Address Labels 5160 Easy Peel Address Labels Image: Type: Easy Peel Address Labels 5161 Easy Peel Address Labels Image: Type: Easy Peel Address Labels 5162 Easy Peel Address Labels Image: Type: Typ | ; | |
| Details New Label Delete OK | Can | cel |

Step 2 of 6 - Select Next select recipients



Click on Browse- Select your document from the desktop



Search "Desktop", select the Excel file you are merging, and click "Open"

| w] | Select Data Source | | × | | | |
|--|---|---|---|--|--|--|
| 🛞 🌛 👻 🕇 📜 > This PC > | esktop | Search Deskto | op 🤈 | | | |
| Organize 🔻 New folder | | | := - 🔟 🔞 | | | |
| Image: This PC Image: Desktop Image: Documents Image: Documents <th>Name Other Screenshots 1-004 1-265 Branch merged English BranchesEmailsFinal CHART Copy of Br 643 Memebership Problems (Copy of MAILOUT LABEL TEMPLATE (D</th> <th>Date modified 7/19/2018 11:48 AM 10/4/2017 9:03 AM 8/23/2018 3:36 PM 8/23/2018 3:26 PM 8/23/2018 3:08 PM 8/25/2017 2:19 PM 6/23/2017 11:57 AM 6/23/2017 12:12 PM 6/23/2017 9:33 AM</th> <th>Type File folder File folder Microsoft Excel W Microsoft Excel W</th> | Name Other Screenshots 1-004 1-265 Branch merged English BranchesEmailsFinal CHART Copy of Br 643 Memebership Problems (Copy of MAILOUT LABEL TEMPLATE (D | Date modified 7/19/2018 11:48 AM 10/4/2017 9:03 AM 8/23/2018 3:36 PM 8/23/2018 3:26 PM 8/23/2018 3:08 PM 8/25/2017 2:19 PM 6/23/2017 11:57 AM 6/23/2017 12:12 PM 6/23/2017 9:33 AM | Type File folder File folder Microsoft Excel W | | | |
| 👳 files (\\network-drives\rcl_dat | Copy of Sample Mail Merge Excel | 8/29/2018 9:15 AM | Microsoft Even 97 Internet Shortcut Microsoft Word D 🗸 | | | |
| Network V > New Source File name: Copy of Sample Mail Merge Excel V All Data Sources V Tools Open Cancel | | | | | | |

Step 3 of 6 – Select Next Arrange your labels

| Step 3 of 6 | | | | |
|-------------------------|---------------|---|--|-------|
| > Next: Arrange your la | bels | | | |
| 🗧 Previous: Starting do | cument | | | |
| Click on More Items | | | | |
| | | | Mail Merge | * × |
| | | | Arrange your labels | |
| «Next Record» | «Next Record» | | If you have not already or so, lay out your label us the first label on the shi | sing |
| | | П | To add recipient inform to your label, dick a loc in the first label, and th dick one of the items be | ation |
| | | | Address block | |
| «Next Record» | «Next Record» | | E Creating line | |
| | | | D0 More items |) |
| | | | When you have finished arranging your tablet, di Next, Then you can next | ick |

Select the first field you would like to see on your label. Select <<First Name>> insert and close, space bar, 'More Items' <<Surname>>, insert, and close.

| | Insert Merge Field 🛛 ? 🔤 🗙 |
|---------------|---|
| «Next Record» | Insert: <u>A</u> ddress Fields <u>E</u> ields: |
| «Next Record» | Member Number Salutation First Name Surname Street Address City_ Province Postal Code Country |
| «Next Record» | Match Fields Insert Cancel |

Select More Items and Surname. Insert and Close. Enter to go to next line

| «First_Name» | «Next Insert Merge Field ? × |
|---------------|--|
| «Next Record» | Insert: Address Fields Database Fields Eleids: Member_Number Salutation errst Name Street_Address Gry Province Postal Code Country |

Enter, 'More Items' select <<Street Address>>. Insert and close. Enter for the next address line.

| «First_Name» «Surname» | «Next Insert Merge Field ? 🗙 |
|------------------------|---|
| - «Next Record» | Insert: Address Fields Database Fields Fields: Member_Number Salutation First Name Surname Street Address City_ Province Postal Code Country |
| «Next Record» | «Next <u>Match Fields</u> Insert Cancel |

Select More Items select <<City>> Insert and Close, select comma and space to separate the city and province on the same line. Select <<Province>> insert, close and enter

«First_Name» «Surname» «Street_Address» «City_», «Province»

«Next Record»

Select 'More items' and select << Postal Code>> space and select << Country>>

«First_Name» «Surname» «Street_Address» «City_», «Province» «Postal_Code» «Country»

«Next Record»

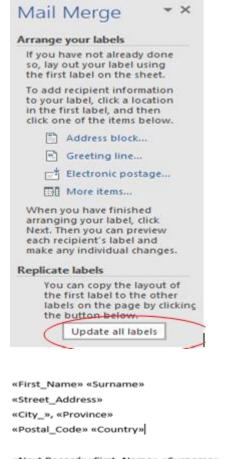
«Next Record»

«Next Record»

«Next Record»

«Next Record»

Select << Update all labels>>



«Next Record»«First_Name» «Surname» «Street_Address» «City_», «Province» «Postal_Code» «Country»

Step 4 of 6 – Select Next: Preview your labels



Note: Full names and addresses will populate for labels on page 1.

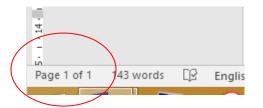
«Next Record»«First_Name» «Surname» «Street_Address» «City_», «Province» «Postal_Code» «Country»

«Next Record»«First_Name» «Surname» «Street_Address» «City_», «Province» «Postal_Code» «Country»

Step 5 of 6 – Next: Complete the Merge



Step 6 of 6 - Edit Individual Labels (double check that labels are formatted correctly) by printing this page and ensure it is aligned properly on the label before printing all pages.



When selecting the (plus) button on the left corner outlines the labels for printing.

| +++ | |
|--------------------|-------------------|
| TREVOR ADAMS | |
| 5066 BENTLEY DRIVE | |
| DELTA, BC | |
| V4K4J9 Canada | |
| <u></u> | |
| TREVOR ADAMS | TRACY ADAMS |
| 5066 BENTLEY DRIVE | 6208 53 AVE |
| DELTA, BC | BEAUMONT, AB |
| V4K4J9 Canada | T4X 1V4 Canada |
| | |
| DANIELLE ADJUN | FRED ADVINCULA |
| 8 OLIGONA DRIVE | 210-14377 103 AVE |
| KUGLUKTUK, NU | SURREY, BC |
| XOB OEO Canada | V3T 5V5 Canada |
| | |

Select Edit Individual Labels

| Mail Merge 🔹 🗙 | |
|---|--|
| Complete the merge Mail Merge is ready to produce your mailing labels. | |
| To personalize your labels, click "Edit Individual Labels." This will open a new document with your merged labels. To make changes to all the labels, switch back to the original document. | |
| Merge | |
| Merge to New Document ? × | |
| Merge records | |
| OK Cancel | |

Select – <<All>> and OK the page numbers should increase if you have more than 14 labels to print.



Load the labels into the printer and select File Print.

Questions? Please call Membership 1-855-330-3344

Prepared by: Amanda Black Document revised: September 9, 2018