# Creating Holiday Mailing Labels with Word 2007

Overview

- This outline will show you how to use your data in WinSearch and the mail merge feature in Microsoft Word to create mailing labels for your Holiday Cards.

- Once the WinSearch mail merge template has been successfully created it can be used repeatedly with any data in WinSearch.

- If you set up the WinSearch mail merge template while logged in as SYSADM, users that have not set up their own mail merge settings in WinSearch will inherit those settings.

- Creating Mailing labels can be done in just five easy steps:

    o Create a mail merge template in WinSearch

    o Specify your Columns in WinSearch

    o Create a Mail merge template in Microsoft Word 2007

    o Layout your labels in Word 2007

    o Use your new template to print labels!

Mailing Labels in Five Steps

Step 1: Create a mail merge template for mailing labels in WinSearch

1. Pull up any person, or a list of people in WinSearch.

2. Select the **REPORTS | STANDARD REPORTS** command.

3. Select the **MERGE FILE** button.

4. Select a number (1 through 9) for this new mail merge under **Available Merge File Options.**

5. Select the **SETUP OPTIONS** button to see a dialog box like the one shown below.
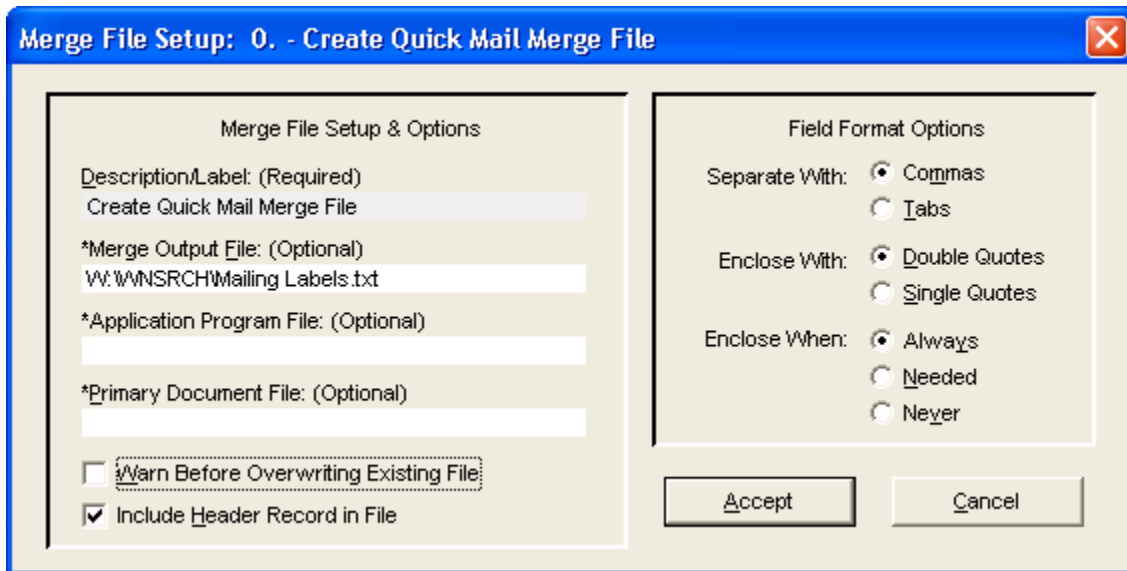
6. In the Description/Label field, type a description for this mail merge (e.g. Mailing Labels).

7. In **Merge Output File**, type a path and filename for where you want to put the resulting data. The file's extension should be .txt. An example might be W:\WNSRCH\MailingLabels.txt.

8. Clear the **Warn Before Overwriting Existing File** check box so you do not have to respond to a reminder when the merge data file you are about to create will replace an existing file.

9. Choose the **ACCEPT** button.

Step 2: Specify your Columns in WinSearch

10. Select **SPECIFY COLUMNS** in the **Create Merge File Options** dialog box to open the window shown below.
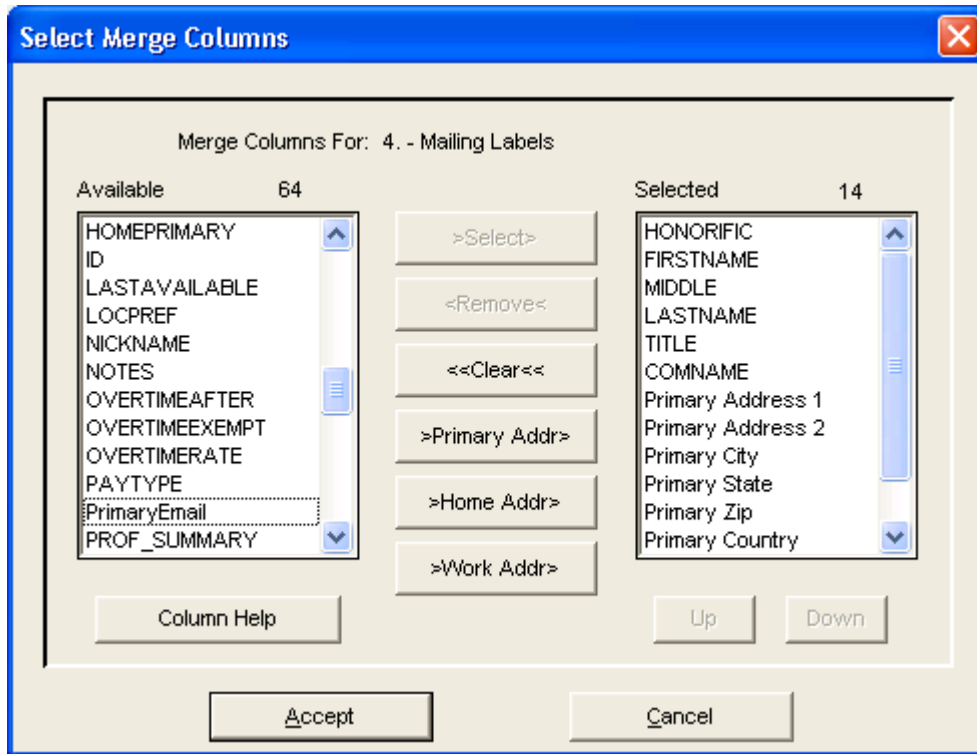
11. Choose the entries that you want available in the mail merge. On the left are all fields that you can use for a mail merge. On the right are the fields that you have selected for the mail merge. To add fields to the results, highlight them on the left and choose **SELECT**. To get all the fields for a person's address, choose **PRIMARY ADDRESS, HOME ADDRESS, or WORK ADDRESS.**

12. Choose **ACCEPT** once you have selected all the appropriate fields.

13. Select **ENTIRE RESULTS SET** in the **Create Merge File Options** dialog box, then select **GO**. You will get a message saying that WinSearch has written a number of records to the merge output file. Select **OK**.

Step 3: Create a Mail merge template in Microsoft Word 2007

14. Open Microsoft Word and start with a new, blank document.

15. Switch to the Mailings ribbon then click **START MAIL MERGE** button then choose Labels.

16. Select your label style and choose OK.

17. Click the **SELECT RECIPIENTS** button and then choose **Use Existing List**.

18. Find and double-click the merge output file that you created in WinSearch. You will need to change Files of Type to Text Files (*.txt).

Step 4: Layout your labels in Word 2007

19. Click on **ADDRESS BLOCK** and from the Insert Address Block dialog box, then select how the name and address shall be presented. You may also need to click the **MATCH FIELDS** button and match up these fields that Word will use with the ones used by WinSearch.

Courtesy Title	Honorific
Company	COMNAME
Address 1	Primary_Address_1, Address_1 or ComAddress_1
City	Primary_City, City or ComCity
State	Primary_State, State or ComState
Postal Code	Primary_ZIP, ZIP or COMZIP
Job Title	Title
Address 2	Primary_Address_2, Address_2 or ComAddress_2

20. Choose **OK** when completed with the Match Fields dialog box.

21. Choose **OK** when completed with the Insert Address Block dialog box.

22. Click the **Update Labels** button on the Mailings ribbon.

23. Click on **FINISH & MERGE** button in the Mailings ribbon then choose **Edit Individual Documents** and choose OK.

24. Review the results and close the Labels document. If the results are correct, continue to the next step. Otherwise, change the primary mail merge document and try again by repeating the previous step.

25. Select the **FILE | SAVE** command on the primary mail merge document. Save the file to a location that you will subsequently choose in WinSearch. If you want to share this mail merge primary document with other WinSearch users, put the file in a network location.

26. Close Word and return to WinSearch.

27. Select the people whom you want in the resulting merge. This can be by using Lookup features, a persons form or table window, a search list containing people, or a saved list containing people.

28. Select the **REPORTS | STANDARD REPORTS** command to open the **Standard Report Options** dialog box.

29. Select the **MERGE FILE** button to open the **Create Merge File Options** dialog box.

30. Select your new Mailing Label template.

31. Move to **Primary Document File**, press **F2** and find the Word document that you saved earlier.

32. Choose **ACCEPT** to return to the **Create Merge File Options** dialog box.

33. Choose **Entire Results Set** or **Selected Row(s) Only** and choose **Go**. Select **OK** to the prompt when WinSearch finishes creating the merge output file. This time, Word opens with the document that you just created.

34. Click on **FINISH & MERGE** button in the Mailings ribbon then choose Edit Individual Documents and choose OK.

Step 5: Use your new template to print labels!

35. Select the people whom you want in the resulting merge. This can be by using Lookup features, a persons form or table window, a search list containing people, or a saved list containing people.

36. Select the **REPORTS | STANDARD REPORTS** command to open the **Standard Report Options** dialog box.

37. Select the **MERGE FILE** button to open the **Create Merge File Options** dialog box.

38. Select your new Mailing Label template.

39. Choose which records that you want in the merge data file. Choose the **ENTIRE RESULT SET** option button to have the merge data file include all the records that are currently selected in the form or table. Choose the **SELECTED ROWS ONLY** option button to have the merge data file only include the current record or the multiple rows that you have selected in the table.

40. Select the **GO** button to create the merge data file, start your Word and open the primary document. If you have not provided a file name in the merge file options, you will need to enter a filename and select **OK**.

41. Click on **FINISH & MERGE** button in the Mailings ribbon then choose **Edit Individual Documents**.

42. Click **Print**.