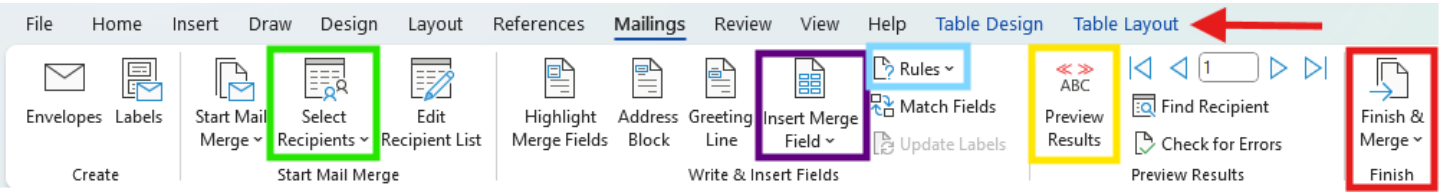
Mail Merge Instructions for Microsoft Windows users



NOTE: Highlighted portions in the image above correspond to the highlighted portions of the same colour below.

1. Open the Word template. If it opens blank, click on the 'Table Layout' tab on the far right of the top ribbon (indicated above with), then click on the 'View Gridlines' button.

NOTE: This is different than the 'Gridlines' check box under the 'View' tab.

2. Finalize the Excel spreadsheet with a title for each column in the top row. Close the file when finished.
3. In Word, select the 'Mailings' tab on the top ribbon and click on the **'Select Recipients'** button.

NOTE: Do not select 'Start Mail Merge'. This is only necessary when starting a template from scratch.

   a. Choose 'Use Existing List'. Find the Excel list and click 'Open'. If prompted, select which tab in the spreadsheet to pull the data from.

4. Click on the blank badge on the top-left of the template.

NOTE: If you received a Word template from pc/nametag that already has your badge fields entered and positioned, highlight the fields you want to assign, and then follow step (a) below. This way, the position and style of the text will remain the same.

   a. Select the button **'Insert Merge Field'**. The titles from the Excel list should show up in the drop-down menu. Select each field one at a time, place them in the top-left badge.
   b. After placing all the Merge Fields, select **'Rules'** and choose 'Next Record'. Ensure the 'Next Record' rule appears below all inserted fields. **If using a 1-up template, the 'Next Record' rule is not needed.**

5. To customize the appearance of the text, select **'Preview Results'** to see how the fields will print. If needed, change font, size, colour, alignment, and other font features in the 'Home' tab.
6. To include an image, go to the 'Insert' tab in the top ribbon and select 'Pictures'. Browse for the image and click 'OK'.
   a. Once the image is selected, ensure the 'Picture Format' tab is selected, then choose 'Wrap Text' and place 'Behind Text'. Now the picture is highlighted, and the arrow keys can be used to nudge the picture into place on the 1st badge. Press Control +A and then click on the graphic to select it again (or click and hold to move the graphic).
7. Once the first badge is formatted, go back to the 'Mailings' tab and select 'Preview Results' to show the Merge fields again. Copy all the text (and logo if used), as well as all the space above the Merge fields, and paste it into the remaining badges to duplicate the tag on each one.
8. IMPORTANT: Remove the 'Next Record' rule from the bottom-right badge on the page. If this rule is not removed, a record may be skipped. All other badges on the page should have the 'Next Record' rule.
9. To merge all the data to your document, select **'Finish & Merge'** and choose 'Edit Individual Documents'.
   a. Select 'All' and press 'OK'. A new print-ready document will appear with the data from the Excel sheet.
   b. IMPORTANT: No matter what pages you choose to print from this new document, **ALL** pages will print.

pc/nametag

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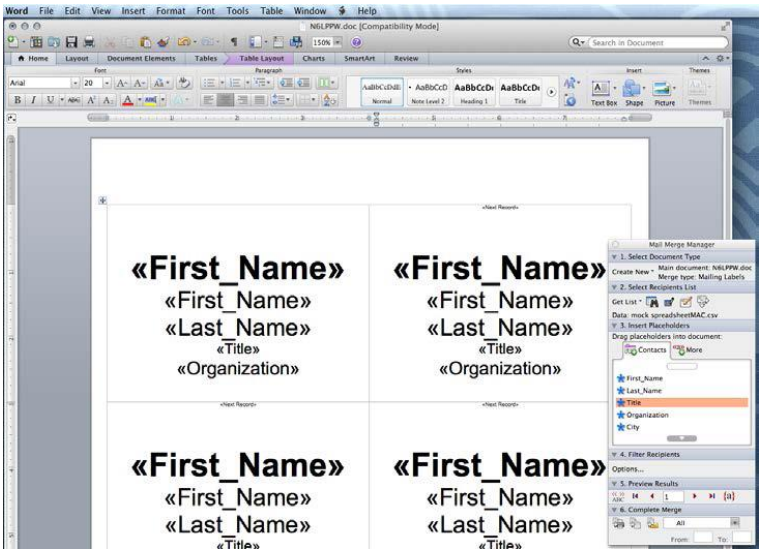
Mail Merge Instructions for Mac users

1. Open the Word template. If the template opens blank, click on the page and go to 'Table Layout' then select 'Gridlines'.
2. Finalize your Excel spreadsheet with a title for each column in the top row. Close the Excel file when finished.
3. In Word, go to the Tools Menu and select the Mail Merge Manager.



4. Mail Merge Manager Steps:
    a. Select Document Type
    b. Choose **Create New**, then **Labels**. Click **Cancel**, as the required template should already be open in Word. Your file should appear next to **Main Document**.

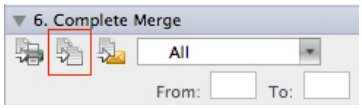
5. Get List
    a. Select **Open Data Source** and locate your Excel file by browsing to its saved location.

6. Insert Placeholders
    a. Insert the fields based on your column headers. Format the fields with your desired font styles, sizes, and colours. Add logos or design elements if needed.

7. Filter Recipients.

8. Preview Results
    a. Preview the tags and make final alterations to layout and formatting. Click on View Merged Data.

9. Complete Merge
    a. Click **Merge to New Document.**



10. Review the final merged document to ensure names and titles display correctly and no personalization fields remain.

Mail Merge Troubleshooting Tips

Some of the records are being skipped when I try to merge the full list.

Please double-check that the last record on the page does not have the 'Next Record' rule added. The end of the page will automatically go to the next record on the spreadsheet as it is. Using 'Next Record' at the end can cause the template to skip entries on the list. If the issue persists, double-check the spreadsheet to ensure it is loading in the expected order.

My template will not load the values from my Excel spreadsheet.

Option 1:

First, double-check the Excel spreadsheet being loaded. Sometimes, when the spreadsheet file is moved or resaved, the Word template no longer knows where to look for the values that will be used for the badges. Confirm the location of the file, as well as the name.

Option 2:

If the Excel spreadsheet is where it is expected to be, try opening the template again. When opened, an alert should come up that says, 'Opening this document will run the following SQL command'. Using the prompts, select your merged document. If this is successful, you should be able to go to the Mailings tab in Word and select 'Preview Results' to see if the correct data is populating into the template file. If it is not, you may need to select your spreadsheet again so the template knows what to connect to.

My background image is throwing off the alignment of the template.

Use these steps to properly align a background image on your template:

Select the image in the Word file, then go to the 'Layout' tab, click on 'Wrap Text', and select 'Behind Text'. This will lock the image in place, so set the image position before making further selections.