Outlook - Creating Custom Views using Categories and Mail Merge



Merge from Outlook - Labels or Envelopes

1. Select the contacts you wish to merge.

Tip! To select many contacts at the same time:

If the names are next to one another on the list:

Click on the first name and Shift + click the last.

If the names are not next to one another on the list:

Click on the first name and Ctrl + click each subsequent name.

Ctrl + click also deselects names.

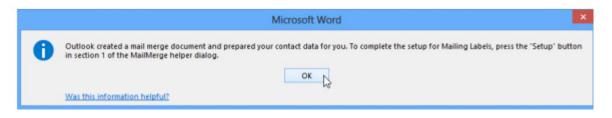
2. Select Home, Mail Merge on the menu bar.

- 3. Select the following options on the Mail Merge Contacts dialog box:
- a. Only selected contacts (unless you want all the visible contacts merged)

b. All contact fields (this doesn't mean you need to use all contact fields, it just means all of them will be available IF you want to use them).

Mail	Merge Contacts
Contacts	Fields to merge
All contacts in current view	All contact fields
Qnly selected contacts	 Contact fields in current view
To filter contacts or to change the colum View, and then choose a command.	ns in the current view, on the View tab, point to Current
Document file	
<u>N</u> ew document	
<u>E</u> xisting document:	Browse
Contact data file	
To save this contact data for future use o	r reference, specify a file name.
Permanent file:	Browse
Merge options	
Document type: Merge to:	
Mailing Labels V New Documen	t 🗸
	OK Cancel

- 4. Select New Document.
- 5. Select Document Type: Mailing Labels.
- 6. Click OK. The following message on the screen.



7. After you click OK, select Setup on the Mail Merge Helper Dialog box.

	Mail Merge Helper	?	×
	locument and data source are now available. Choose the Setup but document.	on to lay	y out
1🕾	Main document		_
1.00	Greate - Setup		
	Merge type: Mailing Labels 48 Main document: Document12		
2 🛍	Data source		
_	Get Data • Edit •		
	Data: C:\Users\\OMM1.doc		
3噚	Merge the data with the document		
50	Merge Query Options		
	Options in effect: Suppress Blank Lines in Addresses Merge to new document		
		Can	cel

8. Choose the Label vendor, Product Number and whether you want manual or Automatically Select printing or a specific print tray. Click OK.

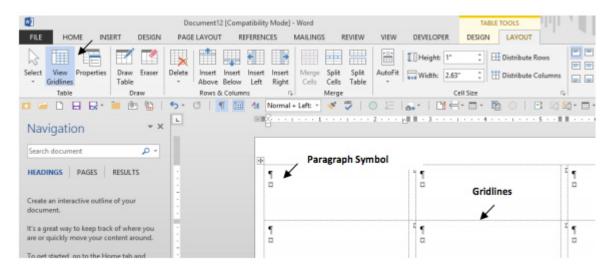
Label Option	ns ? ×
Printer information © Continuous-feed printers © Page printers Iray: Default tray ¥ Label information Label yendors: Avery US Letter ¥ Find updates on Office.com	
Product nymber: 5152 Flexible Name Badge Labels 5153 Print or Write Flexible Mini Name Badge Labels 5154 Print or Write Flexible Mini Name Badge Labels 5155 Easy Peel Return Address Labels 5159 Mailing Labels	Label information Type: Easy Peel Address Labels Height: 1° Width: 2.63° Page size: 8.5° × 11°
5159 Mailing Labels	

9. Select Edit, Mailing Label

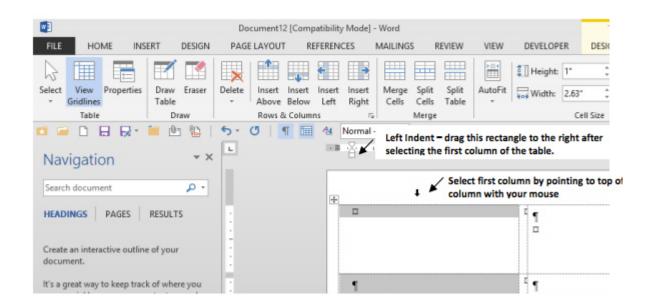
		Mail Merge Helper	? ×
	ocument and data sou either one.	arce are now available. Choose the appr	opriate Edit button
1階	Main document		
142	<u>C</u> reate *	Edit *	
2 🖻	Mailing Label: Do Main document: 1 Data source	cument12 by	
2 900	Get Data -	Edit -	
	Data: C:\Users\\	OMM1.doc	
3電	Merge the data with	the document	
2 2	Merge	Query Options	
	Options in effect: Suppress Blank Merge to new o	Lines in Addresses Jocument	
			Close

Tip! If you cannot see the layout of your table (because table gridlines are not shown) select View Gridlines on the Table Tools Layout tab.

Tip! Also notice the paragraph symbol in the upper left corner of the first label. Delete the paragraph symbol if you want your label to have more room for text.



Tip! The first column always prints too far to the left. To prevent this: Select the first column and drag the left indent for the first column only, slightly to the right



10. Select individual fields or the Address Block for the top left label (see Merging letters to insert Fields or Address Block).

Addre Block	ss Greeting Insert Merge	ules + atch Fields odate Labels 🖌
4	Normal + Left: 🔹 🔸 🏅	=t O
	ress Block an address to your letter.	. 2
locat with recip	specify the formatting and tion, and Word will replace it actual addresses from your pient list when you finish the merge.	

11. When the top left label looks perfect, click update labels to copy those fields to all other labels.

Imp! If you need to make changes to your labels, always change the one in the top left corner only and then select Update Labels to copy the changes to all the other labels.

Imp! If you need to make changes to your labels, always change the one in the top left corner only and then select Update Labels to copy the changes to all the other labels.

RENCES MAILINGS	REVIEW VIEW D	EVELOPER	DESIGN	LAYOUT	- III.	
dress Greeting Insert Merge lock Line Field * Write & Insert Fields	Rules + Match Fields Update Labels	view ults Preview I	Recipient ck for Errors Results	Finish & Merge * Finish		
94 Normal + Left: * ◆*	🍣 O 🗄 🖬	· D! H-			≦0 - □ - 7 A	
•	Update Labels If you are creating labels the labels in the docum information from the re	ent to use cipient list.				
«AddressBlock»¢	For a mail merge to a pr or e-mail, this comman necessary.		rd»¶		¤ «Next:Record»¶ ¤	a
«Next-Record»¶ □	E	«Next-Reco	ord»¶		¤ «Next:Record»¶ ¤	a

Notice update fields puts the Address Block in all of the other labels and it removes the extra paragraph symbol as well.

«AddressBlock»¤	X	«Next-Record»«AddressBlock»¤	10	«Next Record»«AddressBlock»□
«Next Record»«AddressBlock»¤	x	«Next Record»«AddressBlock»¤	Ę	«Next Record»«AddressBlock»¤
«Next Record»«AddressBlock»□	12	«Next Record»«AddressBlock»©	14	«Next Record»«AddressBlock»□

12. Select Preview Results to make sure everything looks good.

Nick & Robin Rylander¶ 30922 East 103rd Street¶ Tulsa, OK 74137¤	Eric & Suzanne Rylander 2 Oak Street San Mateo, CA 980100	≭ Alex Rylander¶ Perham HallRoom-604¶ 1624 NE-Colorado Street¶ Pullman, WA-99163¤	р
Stephen Rylander¶ 46105 N. 27th¶ Waco, TX 76708¤	t ¤	r ¤	g

- 13. Save your labels.
- 14. Select Finish and Merge, Edit Individual Documents. Click Ok on the Merge to New Document box. Congratulations, you successfully navigated the Outlook to Word Merge for Labels!

•	Merge to New Document ?
inish & Merge *	Merge records
Edit Individual Documents	○ <u>F</u> rom: Io:
<u>Print Documents</u> Send Email Messages	OK Cancel

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