How to Create Custom Name Badge Inserts with a Mail Merge in Microsoft Word 2007

Many people know that you can use the **Mail Merge** feature in Microsoft Word 2007 to easily create mailing labels, but did you know you can use it to quickly create custom name badge inserts?

Here, you will learn the steps to create custom name badges with the Mail Merge feature. There are five basic steps to creating the custom badges:

1. **Set up the name badge list.** This is the file that contains all names for people that will have a printed badge. Many find it easiest to create this file using Microsoft Excel or Access.

2. **Start your Mail Merge document.** In this step, you will begin the process of creating your Mail Merge.

3. **Link the Mail Merge file to your name badge list.** Your names list is the data source from which MS Word will be pulled directly from MS Excel, MS Access or other data file during the Mail Merge.

4. **Select a layout for your name badges.** It is important to set up a good layout for your name badges. Once you get one badge layout created, it is easy to carry that style over to all other badges and complete the Merge.

5. **Preview and complete the Merge and print your badges.** You will be able to preview each insert before you print the entire set.

Below are more detailed instructions for completing each of the basic steps outlined above.
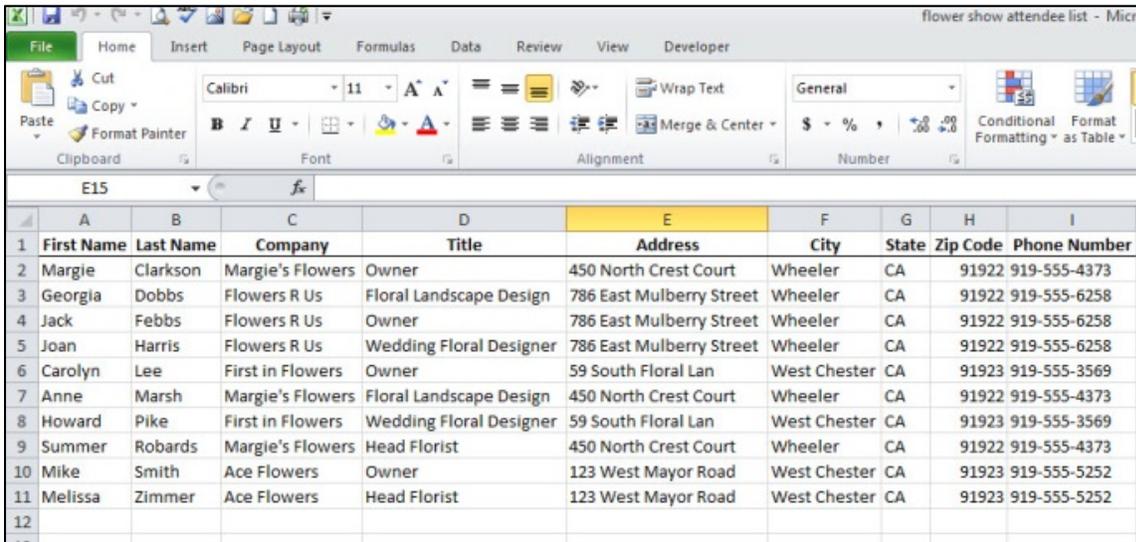
Set Up the Name Badge List

The way to make the Mail Merge process as easy as possible is to first begin with a good set of data. For many people, this is a list of names created in MS Excel or MS Access.

Make sure that all information that will be included on the name badges is in the spreadsheet. You can make some changes during the Merge, but you will not be able to open your data source separately during the merge. The merge process is easier if your data source is ready before you connect to it.

Give all data fields the proper column headings at the top. This will make it easier during the merge process because of the way MS Word reads your data file.

Remember to separate each individual data field into separate columns, as shown in the table on the next page. For instance, if you are going to have an attendees' first and last name appear on different lines on the badge, make sure the first and last name are in separate columns in your spreadsheet. This will make the merge process easier.

Once you have the data spreadsheet set and finalized, **Save** it to your computer or system network. Remember where it is located. You will need to navigate to that place during the merge.

Start your Mail Merge document

1. First, open Microsoft Word and start a new document.

2. Click on the **Mailings** tab to start your Mail Merge.

3. If this is your first time performing a Mail Merge, it is best to use the **Step by Step Mail Merge Wizard**, which will walk you through the process.

4. To do that, locate the **Start Mail Merge** button in the **Mailings** tab. Click **Start Mail Merge**, and then click **Step by Step Mail Merge Wizard**. This will open the Mail Merge Wizard control panel on the right-hand side of your screen.

5. In Step 1, you will need to select the document type. For badge inserts, click **Labels**. Next, at the bottom of the wizard panel, select **Next: Starting Document**, which will take you to Step 2.
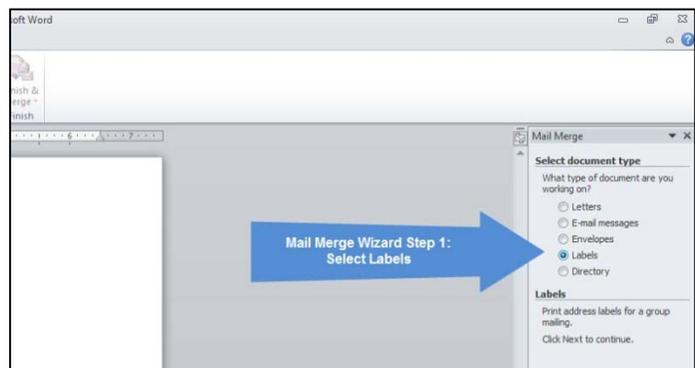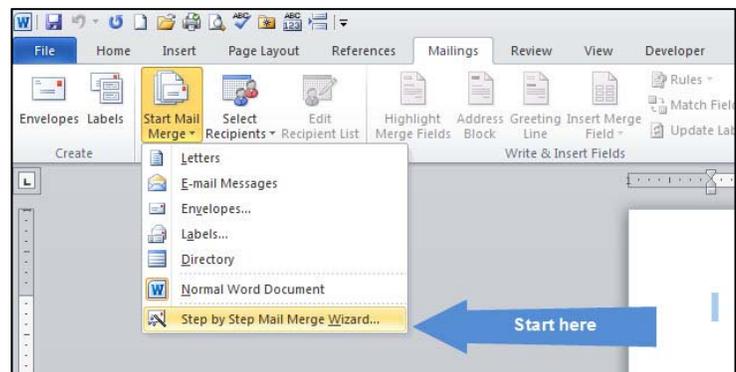
6. In Step 2, you will select your starting document. Click **Change Document Layout**, then select **Label Options.**

a. A popup box will appear, where you can select the name badge insert you have. C-Line has preloaded product templates in MS Word. Make sure your **Label Vendors** menu says **C-Line Products, Inc.** In the **Product number** list, select the insert name or product number.
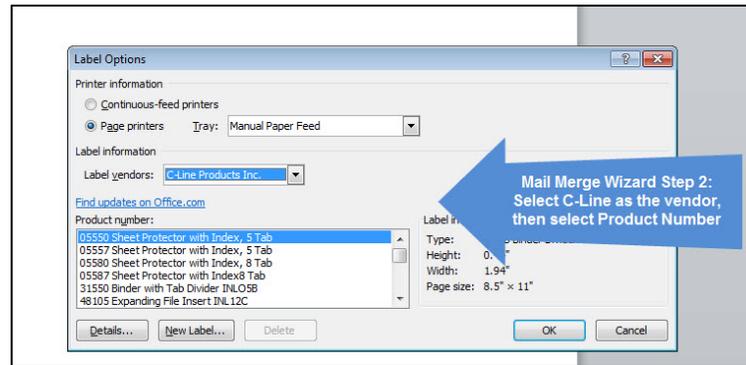

For quick reference, the two most common size name badges C-Line sells are
3 ½ x 2 ¼ (insert number LBI35) and 4 x 3 (insert number LBI43).

b. After you select the insert you are using, click **OK**. MS Word will automatically create the badge insert layout grid, using a table. If you are not able to see the lines that separate the inserts, click the **Layout** tab under **Table Tools**. Then, in the **Table** box (far left side), click **View Gridlines**.
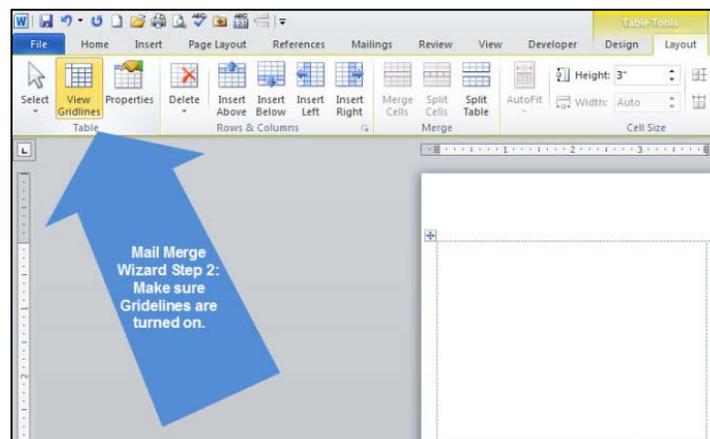
c. Click **Next: Select Recipients** at the bottom of the wizard panel to move to Step 3.

Link the Mail Merge File to Your Name Badge List

In Step 3, you will connect your merge file to your list of names for the badges, which is known as the data source. Most people will use a MS Excel worksheet, MS Access database or other data file.

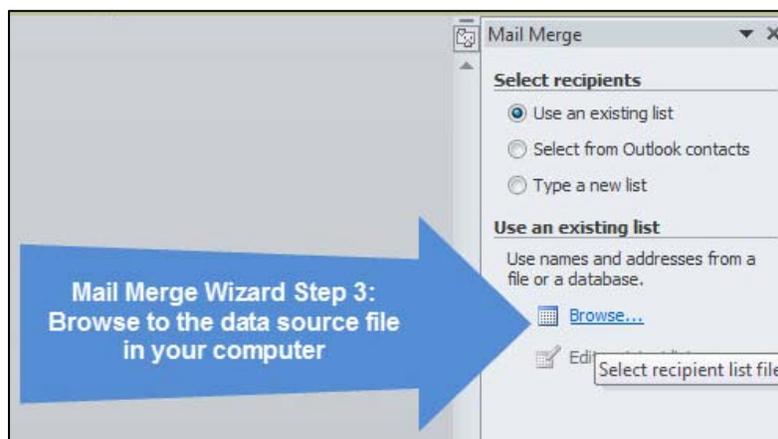1. Make sure **Use an Existing List** is selected at the top of the wizard control panel, then click **Browse**. A popup box will appear which will allow you to navigate to your data source. Once you find it, click on the file, and then click the **Open** button.

For MS Excel, you will data will come from a worksheet or specified range within your workbook. If your workbook contains several worksheets, you will need to select the proper one. Most people have their data entered in the first worksheet, typically title "Sheet1", which is the default name in Excel.

For MS Access, you will need to select which table or query your data will be pulled from within a specified database.

2. If you plan to use all names in your list, click **OK**. You are then ready to proceed with to the next section, where you will determine the badge layout.

a. If you need to refine the list of names, you can do that right now, without having to directly alter your data source. In the wizard control panel, click **Edit Recipient List**. In the Mail Merge Recipients popup box, you will now be able to:

i. **Select individual names.** Simply select or clear the checkboxes in front of each name to include or exclude them from the Merge. If you want to include only a few of the names, it is easiest to uncheck all boxes and then go back and check only the names you need.

ii. **Sort names.** Click the column heading of the item that you want to sort by. The list sorts in ascending alphabetical order (from A to Z). Click the column heading again to sort the list in descending alphabetical order (Z to A).

iii. **Add names.** To add names or information to your data source file, click on the name of your data file, which will be displayed in the white Data Source box. Next click Edit, which will bring up an Edit Data Source popup box. Click New Entry, and type the new information for that person.

iv. When you have the data source edited to the way you want it, click **OK**.
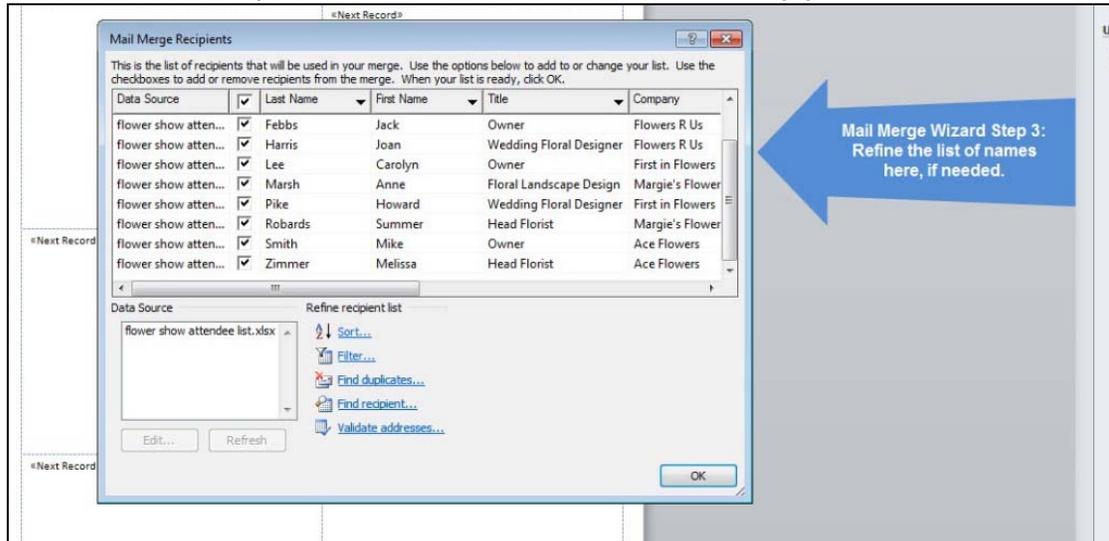
3. You are now reading to arrange the layout for the badges. Click **Next: Arrange Your Labels** at the bottom of the wizard control panel to move to Step 4.

Select a Layout for Your Name Badges

Step 4 is where you will arrange the layout for the badges.

1. First, determine the horizontal and vertical alignment you would like for all of your badges; center justification is recommended for name badges. Once you know that information, follow these steps to set the alignment for all badge cells:

a. Highlight all cells by clicking small box located in the upper left-hand portion of the page (when you hover over it, the cursor arrow will change to a cross) and left-click; all badge cells will now be highlighted.

b. Next, click the **Table Layout** tab.

c. Select the cell alignment you would like to use from the options in the **Alignment** box, which include Upper Left, Upper Center, Upper Right, Middle Left, Middle Center, Middle Right, Lower Left, Lower Center and Lower Right.

2. With the cursor in the first cell, begin to add **Mail Merge Fields** to the insert. Mail Merge Fields act as placeholders for text that will later be merged in the file. The field names correspond with the column headings from your data source. You can view all available Mail Merge Fields by clicking **More Items** in the wizard panel.

3. Begin to insert Mail Merge Fields by clicking them from the **Insert Merge Field** popup box. When you insert a mail merge field into the Merge document, the field name is always surrounded by chevrons (« »). These chevrons do not show up on the final badges. They are there to help distinguish the Mail Merge fields from any other text you type into the document.

Be sure to add line breaks and returns where you would like them. For instance, a line break has been added between «First_Name» and «Last_Name» in the example pictured to the right.
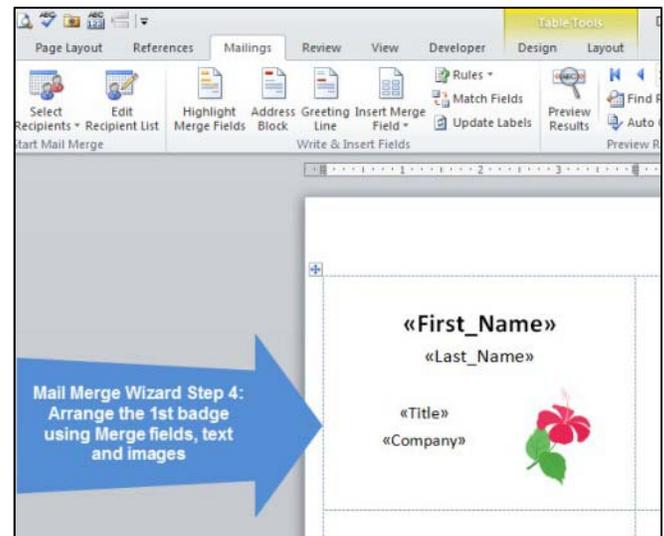
4. Type any additional text or insert any images that you will want to be repeated on each label, such as a company logo, meeting artwork or conference name.

5. To add clip art, a picture or logo, click on the **Insert** tab and located the **Illustrations** area.

a. To insert clip art, click the **Clip Art** icon. A side box will appear. From there, search for the appropriate image and **Insert** it into the cell. Resize the image if necessary.

b. To insert a picture, logo or other graphic file saved on your computer, click the **Picture** icon. A popup box will appear. From there, navigate to where the image file is saved in your folders and click to add it to document. Resize the image if necessary.

6. Once the image has been inserted into the first badge cell, you will need to align it within the cell. There many ways to do so, but we've found the following steps to be the easiest:

a. Click on the image. Select **Format** in the **Picture Tools** tab (this will be highlighted in red/pink at the top of your screen).

b. Change the **Text Wrap** setting to **Tight**. The default setting will be **In Line with Text**.

c. While the image is still clicked on and the text wrapping changed, click through the nine default **Position** options. Many times, one of these options will where the image is wanted.

d. If none of the nine placement positions work with the badge layout you want, select **More Layout Options** in the **Positions** menu. This will open the Layout popup box. To have the image placed exactly where you want it on the badge, we recommend selecting an **Absolute Position** for the horizontal and vertical positioning. This will ensure the image remains in the same location for all badges throughout the Mail Merge process.

7. Now that you have all text and images aligned inside the first cell, it is time to change the font type, size and color. In the **Home** tab is a section named **Font**. This is where you can change the font type, the size of the font, and the color of the font. Simply highlight the portions of text with the cursor that you would like to change and alter the font appearance as you like.

8. With the first cell arranged how you want it, click the **Update All Labels** button in the wizard control panel. All cells will automatically update with the Mail Merge Fields and any added text or images.
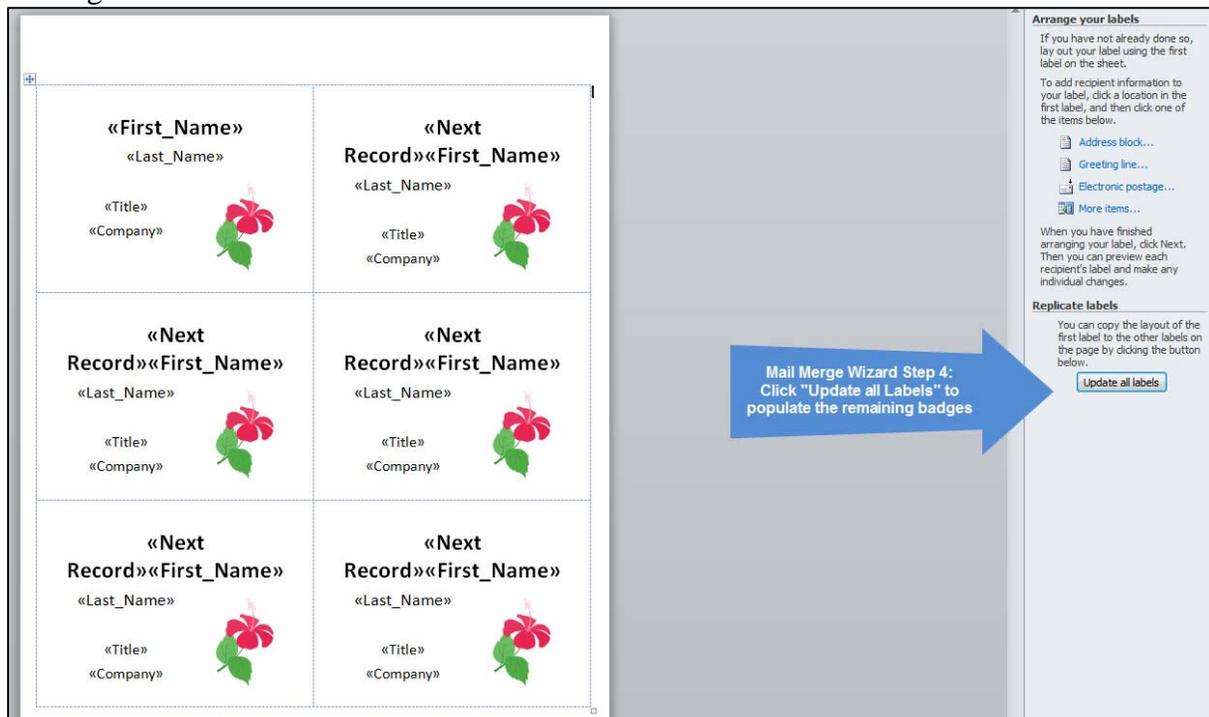
When **Update All Labels** is clicked, the layout of all subsequent cells will look distorted because of the text length of the Mail Merge Field names. Do not worry; this distortion and line wrapping will not carryover to your final document.

With the layout of your badges set, you are almost finished with the Mail Merge. Click **Next: Preview Your Labels** to preview your badges and complete the Merge.

Preview and Complete the Merge and Print Your Badges

In Step 5 of the Mail Merge, you will be able to preview how the badges will look with your data. This step can be used to see how the information look before it is finalized and alter the layout, if necessary.

1. When you are satisfied with the preview, you can complete the Mail Merge. At the bottom of the wizard control panel, click **Next: Complete the Merge**.
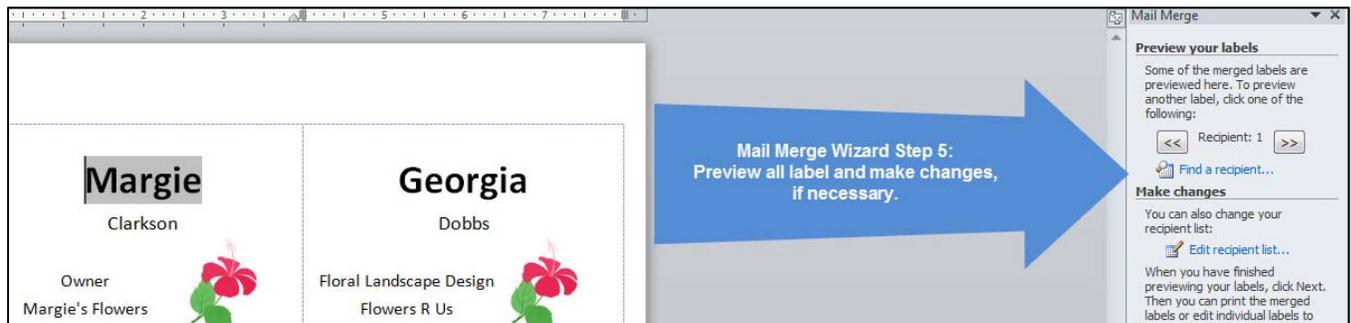
2. In Step 6, you can now complete your Mail Merge and either **Print** your badges or **Edit the Individual Labels**.
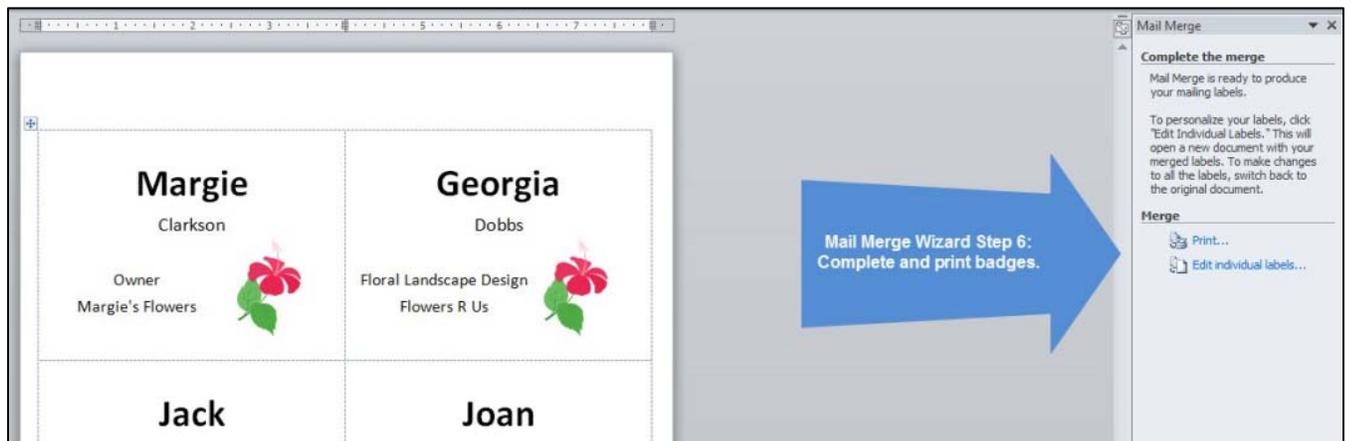
a. If you are happy with how the preview looked, click **Print**. You can choose if you would like to print an individual badge or the entire group. Either option will bring up your Printer window. You can now print your badge inserts.

b. If you decide to **Edit Individual Labels**, all merged inserts will be brought up in a new document. You can save the file for future use or reference from here. After you finish editing the new document of badge inserts, you are now ready to print your badge inserts.

3. Once all inserts are printed, remember to **Save** the mail merge document, for your records or future use.

4. When you **Save** the Mail Merge document, you also save the connection to your data file. The next time you open this file, you will be asked to choose whether you want to information to be merged again.

> a. By clicking **Yes**, the document will open with the information from the first record merged in.

> b. By clicking **No**, the link between the Mail Merge file and the data file will be broken.

Congratulations, you have completed a Mail Merge and created your Custom Name Badges Inserts!

FAQs and Troubleshooting Tips

Q: When should I do a Mail Merge to make name badges versus downloading a template from your website?

A: If you will be making more than one sheet of name badges, we recommend you perform a Mail Merge. When manually typing information using a blank template, the page spacing will slightly shift every time you add a new page. This means, the information on the badge inserts will not be in the correct area on the pages following the first sheet. However, Microsoft Word will automatically add the correct spacing between pages when using a Mail Merge.

Q: I am not able to complete the Merge right now. Can I save the file from where I am? Or do I have to close out of the file and start over at a later date?

A: You do not have to start over from the beginning if you cannot complete the Merge process in one sitting. If you need to stop working in the Merge file before you have completed the process, simply **Save** the main document. MS Word will retain the connection to your data file and the fields being used in the Merge. When you open the file at a later time, you will receive a message asking you to confirm if you would like to open the document. Because this file is connected to your data file, click **Yes**. The text of the document, along with any fields that you inserted, will appear. Click on the Mailings tab to resume the Merge.

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Q: I am not able to edit the data source from MS Word once I connect it to Merge document. Why?

A: Depending on the type of data source you are using, some functions may not be available, which is why it is recommended that your data file be as complete as possible before you connect it to your Merge document.

Q: There is an extra space at the end of each insert which preventing my data from being centered vertically. How can I fix this?

A: If the inserts have an extra line at the end of each badge, click on the Paragraph icon (¶) while in the **Home** tab. This will display all the places where a paragraph line break is in the document. If there is a paragraph symbol at the end of the badge, this will add an extra line at the bottom of the badge. To remove this line, simply delete the last paragraph symbol, and update all records.

Q: I like the text layout in my first badge, but not for the rest of the badges on the page. Why didn't all formatting carry over when I click **Update All Labels** in Step 4?

A: While clicking that button does update the data fields for each inserts, it will not change the text layout. This needs to be done manually by you, during Step 4.

For instance, the default alignment for each insert has the text beginning in the upper left-hand corner. If you want the text centered in the badge, highlight all cells with your cursor. While the cells are still highlighted, click the **Table Layout** tab and chose the text alignment you would like to use from the options in the **Alignment** box.