Appendix C: Label Printing Using Mail Merge - Office 2013

From the Reports submenu, create the desired label type (Follow-up, Patient, etc.). The labels will then be displayed, as seen in the example below:

Note: Once labels have been generated by CPDMS.net and saved to a user's computer, the file may be manipulated and printed using any type of spreadsheet and/or word processing software. However, KCR only supports label printing using Microsoft® Excel and Microsoft® Word.

Choose the "Save" button and a dialog box will appear with the default filename "Labels.csv" and "comma separated" as the specified file format. The filename may be overwritten with another name, but be sure to preserve the .csv extension.
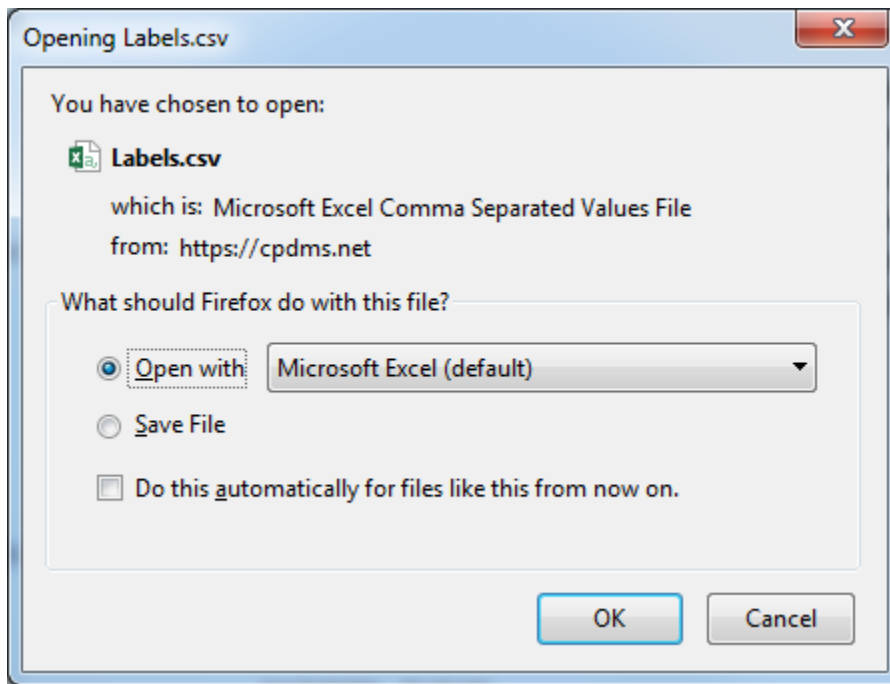
Select "Submit" and then "Save" to save the file to the desired location on a local computer or network drive. In the screen below, for example, the file is saved to the user's computer desktop.
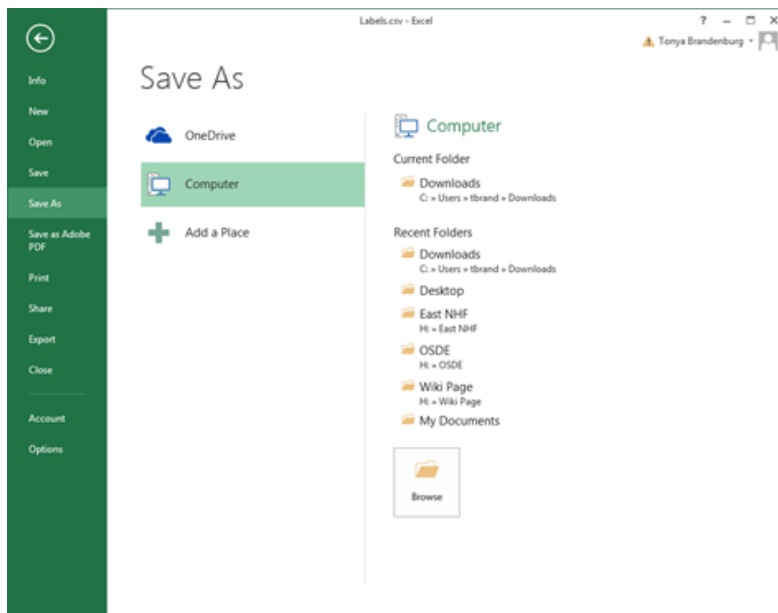

Once the file has been saved, open it in Excel. Now choose "Save As" from the "File" menu. In the dialog box that opens, click the arrow to the right of the "Save as type" drop-down menu at the bottom of the screen.
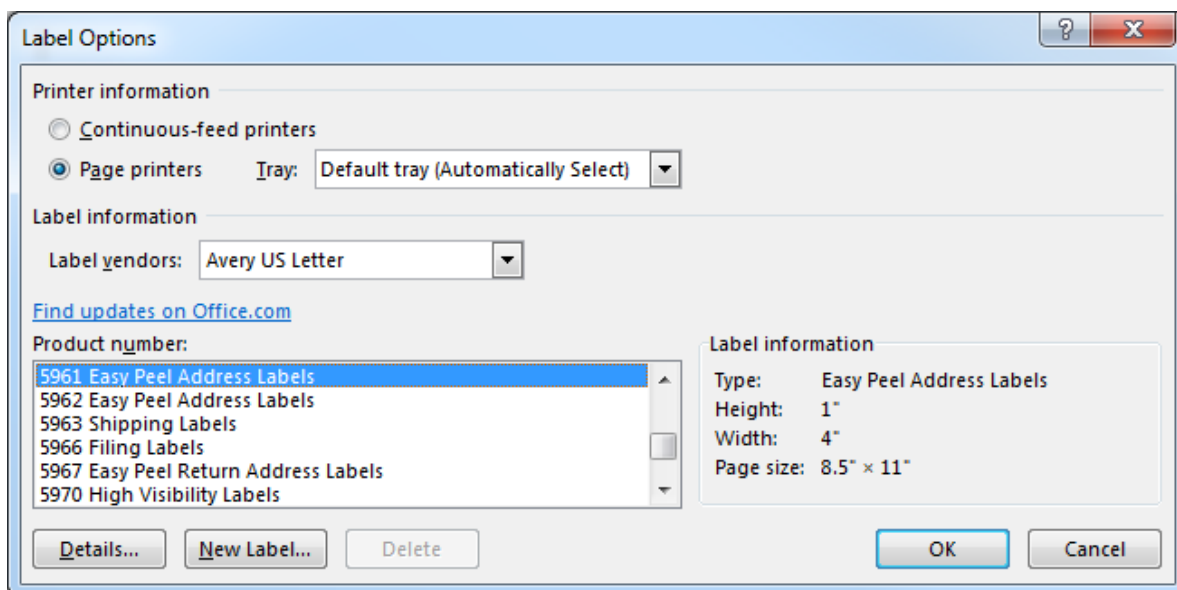
Choose Excel Workbook (scroll to the top of the list to see this option). The file name will now show the extension .xlsx. Click "Save."
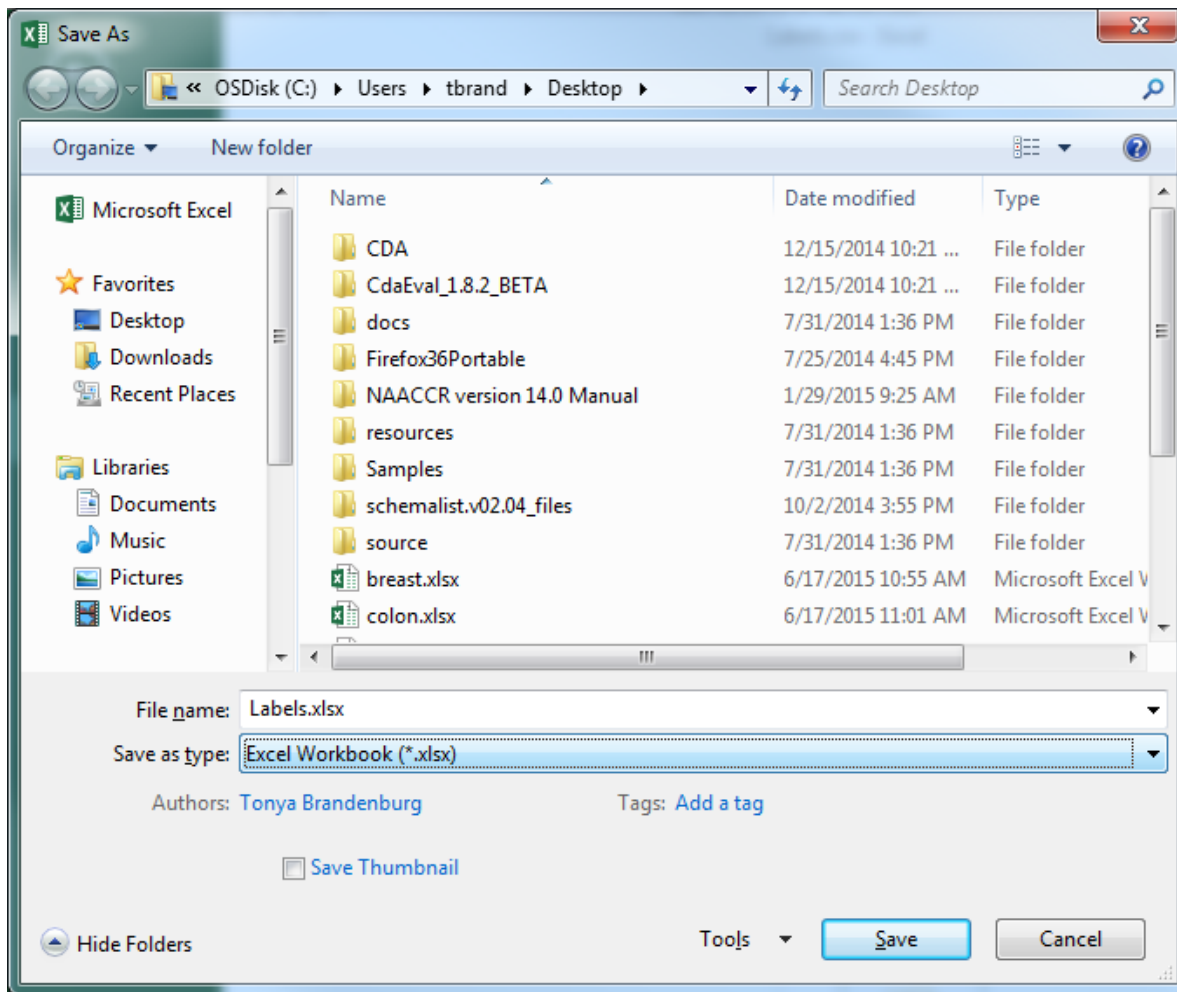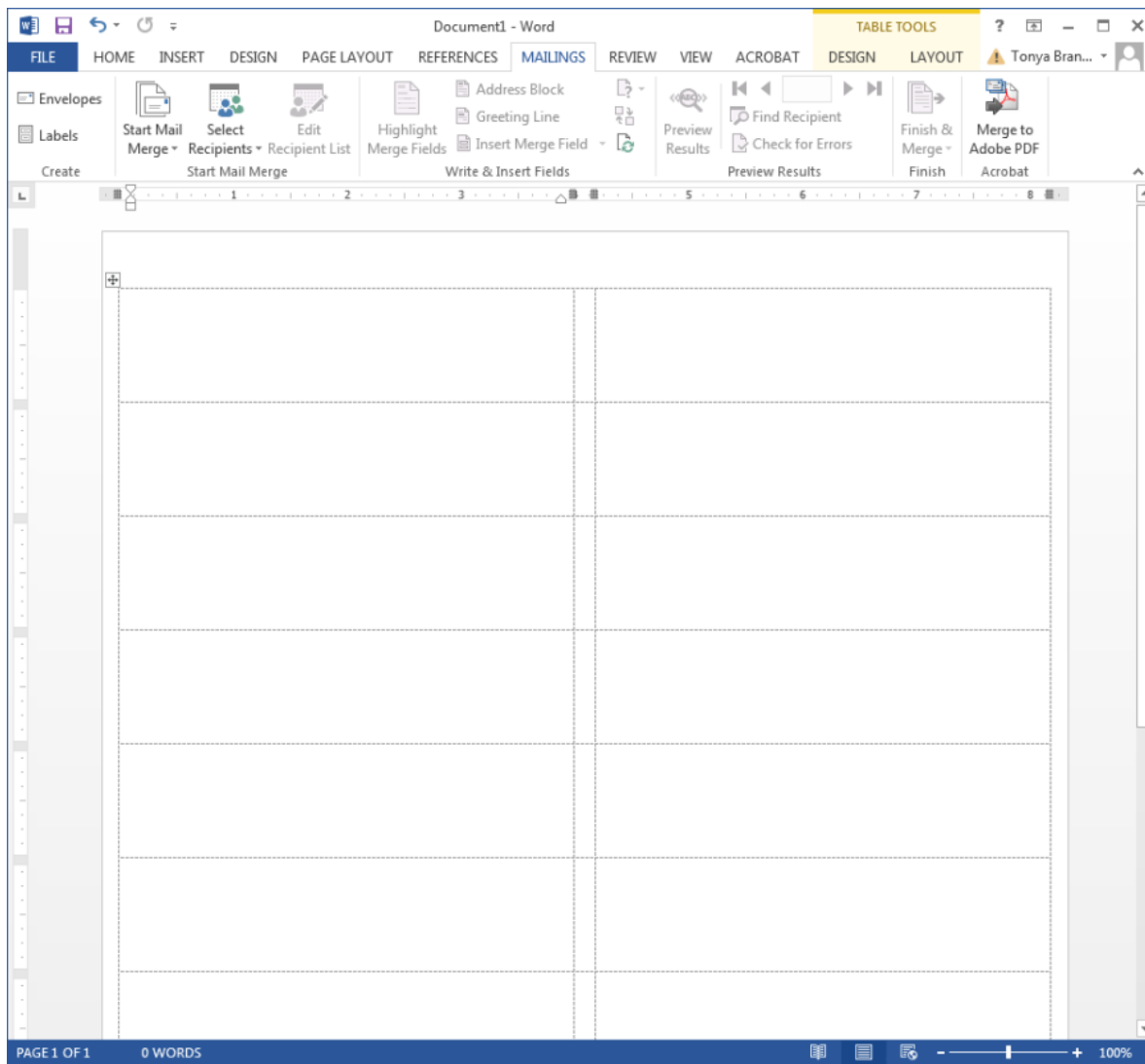
Now open Microsoft Word, go to the "Mailings" menu, and select "Start Mail Merge."
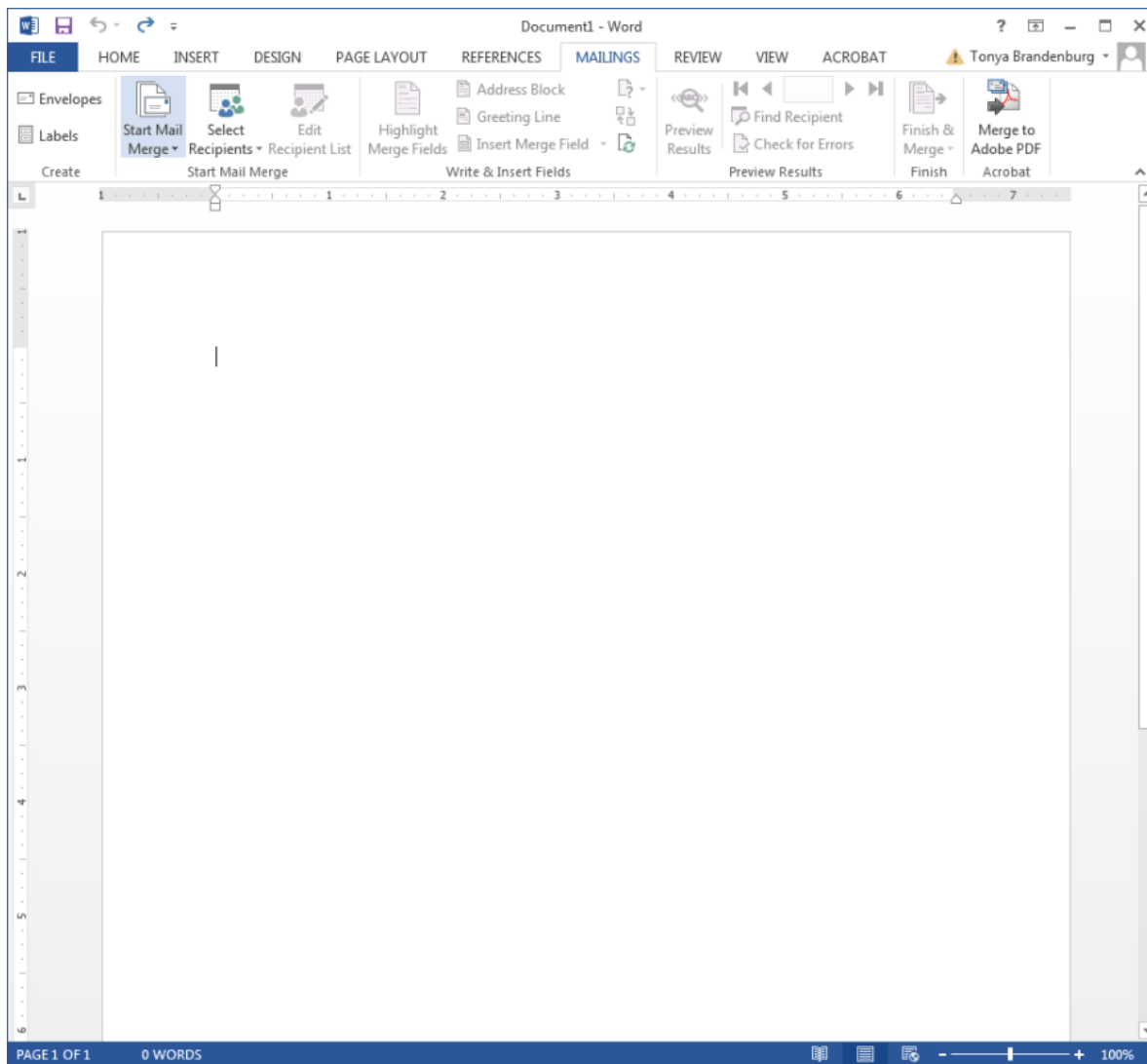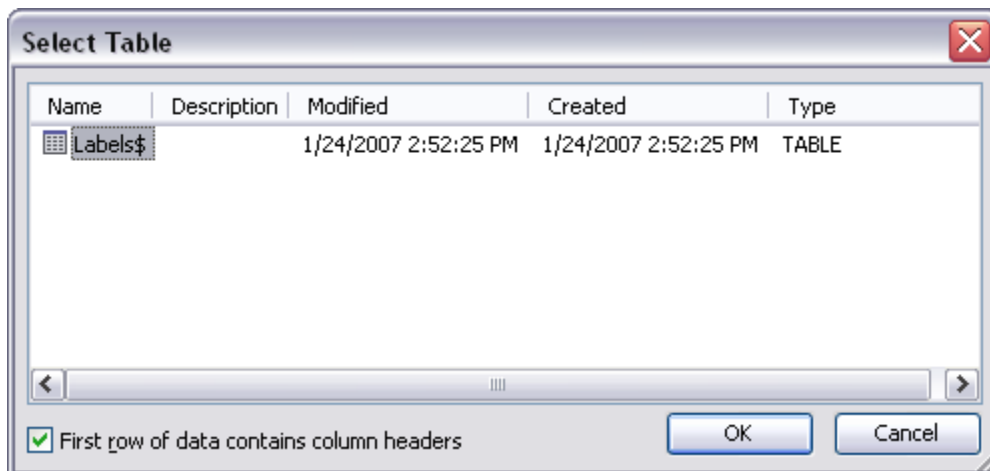
Under "Start Mail Merge," choose "Labels" and then click on "Ok" at the bottom right of the screen.

The following screen will now be displayed.

Under "Select Recipients" choose "Use an Exhisitng list" selected. Click on the location where you saved your list and click "Open."

Next the "Select Table" dialog box will appear. Click "Ok."

The following screen will then appear:

TABLE TOOLS

? ⊡ — □ ✕

FILE | HOME | INSERT | DESIGN | PAGE LAYOUT | REFERENCES | MAILINGS | REVIEW | VIEW | ACROBAT | DESIGN | LAYOUT

Tonya Bran...

Envelopes
Labels

Start Mail Merge ▾ | Select Recipients ▾ | Edit Recipient List | Highlight Merge Fields | Address Block | Greeting Line | Insert Merge Field ▾ | Preview Results | Find Recipient | Check for Errors | Finish & Merge ▾ | Merge to Adobe PDF

Create | Start Mail Merge | Write & Insert Fields | Preview Results | Finish | Acrobat

	«Next Record»
«Next Record»	«Next Record»
«Next Record»	«Next Record»
«Next Record»	«Next Record»
«Next Record»	«Next Record»
«Next Record»	«Next Record»
«Next Record»	«Next Record»

100%

To edit the recipient list, choose the "Edit Recipient List" option under the "Mailings" menu.

Choose the "Insert Merge Field" and insert the items you want in the label.

You can match the fields with parts of the label as well.

Match Fields

In order to use special features, Mail Merge needs to know which fields in your recipient list match to the required fields. Use the drop-down list to select the appropriate recipient list field for each address field component

Unique Identifier	(not matched) ▼
Courtesy Title	(not matched) ▼
First Name	(not matched) ▼
Middle Name	(not matched) ▼
Last Name	(not matched) ▼
Suffix	(not matched) ▼
Nickname	(not matched) ▼
Job Title	(not matched) ▼
Company	(not matched) ▼
Address 1	(not matched) ▼
Address 2	(not matched) ▼
City	(not matched) ▼
State	(not matched)

Use the drop-down lists to choose the field from your database that corresponds to the address information Mail Merge expects (listed on the left.)

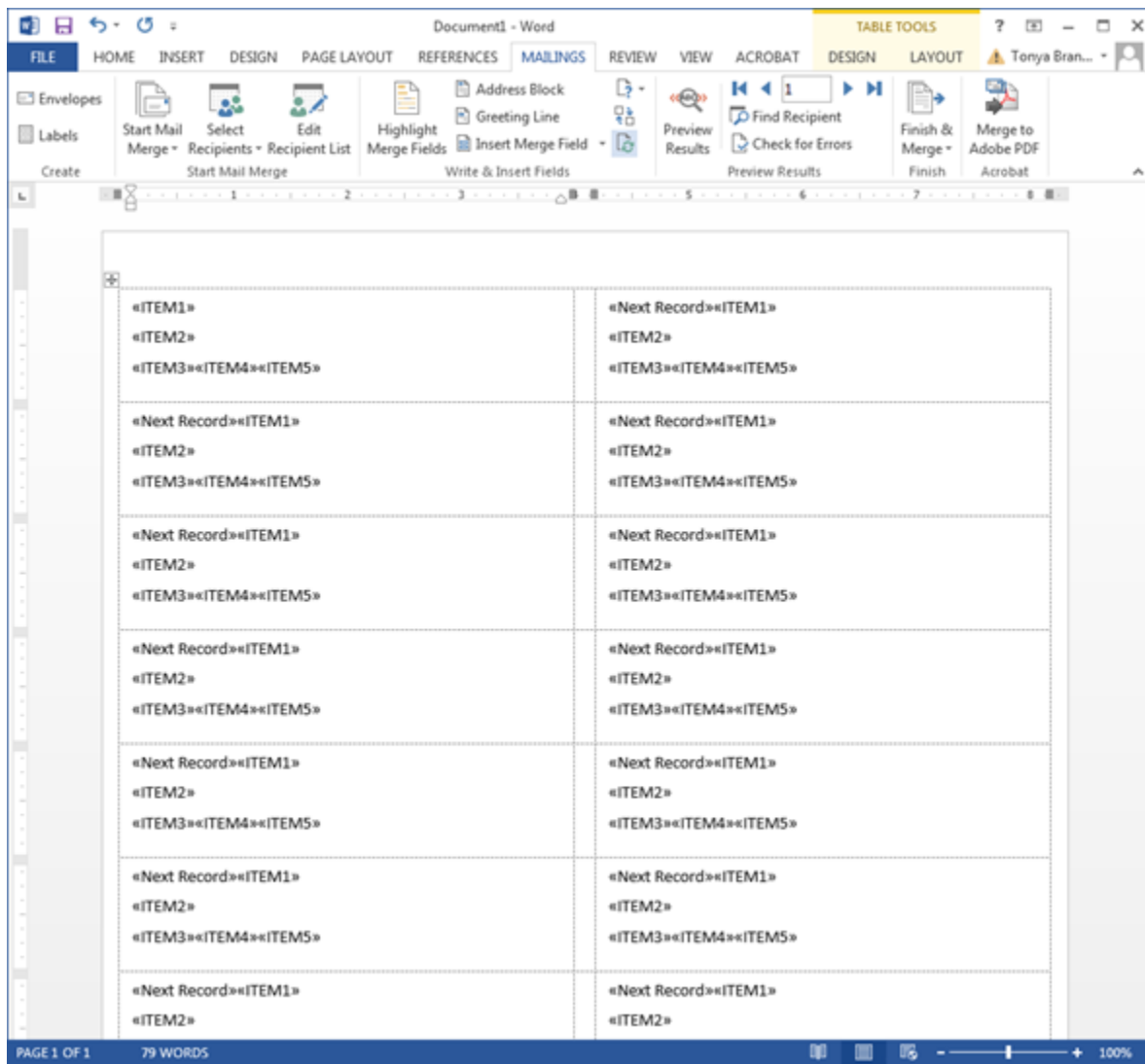☐ Remember this matching for this set of data sources on this computer

[OK]   [Cancel]

«ITEM1»
«ITEM2»
«ITEM3»«ITEM4»«ITEM5»

«Next Record»

«Next Record»

«Next Record»

«Next Record»

«Next Record»

«Next Record»

«Next Record»

«Next Record»

«Next Record»

«Next Record»

«Next Record»

«Next Record»

«Next Record»

«Next Record»

Now click on the "Update all labels" button below "Replicate Labels."

«ITEM1»
«ITEM2»
«ITEM3»«ITEM4»«ITEM5»

«Next Record»«ITEM1»
«ITEM2»
«ITEM3»«ITEM4»«ITEM5»

«Next Record»«ITEM1»
«ITEM2»
«ITEM3»«ITEM4»«ITEM5»

«Next Record»«ITEM1»
«ITEM2»
«ITEM3»«ITEM4»«ITEM5»

«Next Record»«ITEM1»
«ITEM2»
«ITEM3»«ITEM4»«ITEM5»

«Next Record»«ITEM1»
«ITEM2»
«ITEM3»«ITEM4»«ITEM5»

«Next Record»«ITEM1»
«ITEM2»
«ITEM3»«ITEM4»«ITEM5»

«Next Record»«ITEM1»
«ITEM2»
«ITEM3»«ITEM4»«ITEM5»

«Next Record»«ITEM1»
«ITEM2»
«ITEM3»«ITEM4»«ITEM5»

«Next Record»«ITEM1»
«ITEM2»
«ITEM3»«ITEM4»«ITEM5»

«Next Record»«ITEM1»
«ITEM2»
«ITEM3»«ITEM4»«ITEM5»

«Next Record»«ITEM1»
«ITEM2»
«ITEM3»«ITEM4»«ITEM5»

«Next Record»«ITEM1»
«ITEM2»

«Next Record»«ITEM1»
«ITEM2»

The following screen demonstrates that the layout of the first label has been duplicated in every label.

«ITEM1»
«ITEM2»
«ITEM3»«ITEM4»«ITEM5»

«Next Record»«ITEM1»
«ITEM2»
«ITEM3»«ITEM4»«ITEM5»

«Next Record»«ITEM1»
«ITEM2»
«ITEM3»«ITEM4»«ITEM5»

«Next Record»«ITEM1»
«ITEM2»
«ITEM3»«ITEM4»«ITEM5»

«Next Record»«ITEM1»
«ITEM2»
«ITEM3»«ITEM4»«ITEM5»

«Next Record»«ITEM1»
«ITEM2»
«ITEM3»«ITEM4»«ITEM5»

«Next Record»«ITEM1»
«ITEM2»
«ITEM3»«ITEM4»«ITEM5»

«Next Record»«ITEM1»
«ITEM2»
«ITEM3»«ITEM4»«ITEM5»

«Next Record»«ITEM1»
«ITEM2»
«ITEM3»«ITEM4»«ITEM5»

«Next Record»«ITEM1»
«ITEM2»
«ITEM3»«ITEM4»«ITEM5»

«Next Record»«ITEM1»
«ITEM2»
«ITEM3»«ITEM4»«ITEM5»

«Next Record»«ITEM1»
«ITEM2»
«ITEM3»«ITEM4»«ITEM5»

«Next Record»«ITEM1»
«ITEM2»

«Next Record»«ITEM1»
«ITEM2»

Once finished click on "Finish & Merge."

The labels are now ready to be printed. You can make any changes needed and then print when ready.

ABE, MOHAMMAD Z	ABE, MOHAMMAD Z
Address1	Testis 02/20/1997
Address2HOSKINSTON, KY 40844	REG ACC # : 19970695 SEQ # : 1BD: 07/01/1969 DLC: 06/21/2011
SUSAN JACKSON	ABE, MOHAMMAD P
8 MEDICAL CIRCLE	Kidney 10/08/1999
GEORGETOWN,KY 40324	REG ACC # : 19991125 SEQ # : 1BD: 08/27/1934 DLC: 04/04/2013MD: DOC3 JACKSON
LastName, FirstName	ABE, MOHAMMAD E
Address1	Liver 07/28/2000
Address2CROPPER, KY 40057	REG ACC # : 20000403 SEQ # : 1BD: 10/05/1953 DLC: 08/29/2000
ABE, MOHAMMAD I	ABE, MOHAMMAD I
Address1	Testis 02/15/2001
Address2LEXINGTON, KY 40590	REG ACC # : 20010034 SEQ # : 1BD: 05/13/1959 DLC: 09/05/2012
ABE, MOHAMMAD Z	ABE, MOHAMMAD Z
Address1	Floor of mouth 07/10/2002
Address2LOUISVILLE, KY 40253	REG ACC # : 20021400 SEQ # : 1BD: 05/05/1961 DLC: 12/28/2007
ABE, MOHAMMAD J	ABE, MOHAMMAD J
Address1	Brain 01/14/2003
Address2GRAYSKNOB, KY 40829	REG ACC # : 20030020 SEQ # : 1BD: 09/06/1962 DLC: 11/08/2008
JONATHAN JOHNSON	ABE, MOHAMMAD X
1485 MAIN ST	Hypopharynx 04/01/2003