

## Creating custom mailing labels Youth Enrollment Help Sheet

**Bulk mailings have new constraints and regulations imposed by the US Postal Service.** Basically, if you are going to use bulk mail, you must either add “Return Service Requested” to your return address, or you must add “or current resident” to the address label, above the address line. Mailing labels cannot be formatted that way directly in Blue Ribbon, so you have some decisions to make. You have three choices, each with their own set of repercussions.

◆ **Use first-class mail instead of bulk mail.**

**Advantages:** You can continue to print labels as you always have. Undeliverable mail will either be forwarded, or returned to your office with the reason that it was not deliverable, so that you can update your address file.

**Disadvantages:** Cost

◆ **Use “Return Service Requested” under the last line in your return address.**

**Advantages:** You can continue to print recipient labels as you always have. Undeliverable mail will be returned to your office so that you can update your address file, not forwarded.

**Disadvantages:** There may be a fee associated with the return, and you may need to have the service registered with an account number to charge that fee.

◆ **Use “or current occupant” after the name in the recipient address.**

**Advantages:** No returns, no additional cost.

**Disadvantages:** You will need to create your own customized mailing labels outside of Blue Ribbon, and you will never know which pieces are not delivered to the correct recipient, so you won’t be aware that you need to update your address file.

**Acceptable formats for the bulk labels with “current occupant” included:**

4-H FAMILY OF  
JOHN JONES OR CURRENT RESIDENT  
1234 ELM ST  
AMES IA 50011

4-H FAMILY OF JOHN JONES  
OR CURRENT RESIDENT  
1234 ELM ST  
AMES IA 50011

JOHN JONES  
OR CURRENT RESIDENT  
1234 ELM ST  
AMES IA 50011

JOHN JONES OR CURRENT RESIDENT  
1234 ELM ST  
AMES IA 50011

**Resources for current information about postal regulations:**

USPS (United State Postal Service): <http://www.usps.com/>

Business Mail 101: Delivery Address Guidelines:

<http://www.usps.com/businessmail101/addressing/deliveryAddress.htm>

Business: The 3 steps for Shipping & Mailing for your Business

[http://www.usps.com/business/welcome.htm?from=global\\_header&page=business](http://www.usps.com/business/welcome.htm?from=global_header&page=business)

MailPro USPS Newsletters: <http://www.usps.com/mailpro/>

Move Update: Post –Mailing Methods: July/August 2008 MailPro Newsletter

<http://www.usps.com/mailpro/2008/julyaug/julyaug.pdf> Pages 8-9

Business Mail 101: Addressing—Special Address Services (Ancillary Service Endorsements)

<http://www.usps.com/businessmail101/addressing/specialAddress.htm>

See especially 1) Physical Standards and 2) Placement of Endorsement, as well as Address Service Requested; Forwarding Service Requested; and Temp—Return Service Requested. Particularly note the “Tips” section. The chart below is taken from “Quick Service Guide 507d”, linked on that webpage.

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## Mailer Endorsement: Return Service Requested

No forwarding, only return. New address notification provided.

USPS Action	Priority Mail, First-Class Mail	Standard Mail	Package Services
Mailpiece returned with new address or reason for non-delivery attached.	No charge.	Appropriate single-piece First-Class Mail or Priority Mail price charged.	Return postage charged at appropriate single-piece price.

## Creating customized mailing labels using information from Blue Ribbon

If you choose the third option, customized mailing labels (including “or current resident” on the recipient label, you can get the data from Blue Ribbon, either through the mailing labels option or Member Query, then use those files either as a merge source in Word, or import the data into a Filemaker database and create labels there.

## Using the Mailing Labels option to create an ASCII file:

- ◆ In Blue Ribbon, go to Special|Mailing Labels, and use your Parameters screen to define your group. In the example below, you would be creating a group of members, given a specific grade range. **Select ASCII file, One-Per-Family, and All Capital Letters.**
- ◆ Click on either the Preview or Print buttons at the bottom of the screen. Either will work the same way.
- ◆ If you wish to leave out or change the “4-H Family of” header, choose “Create your own” and either leave it blank or type in your own text.

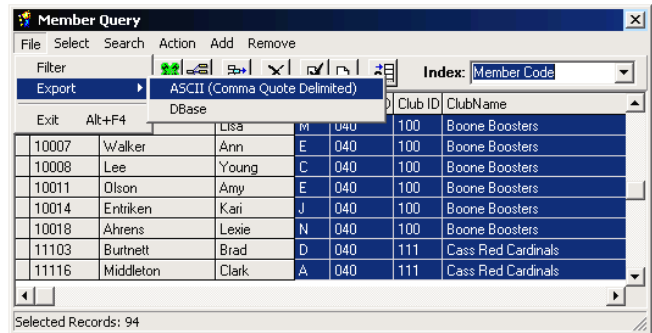
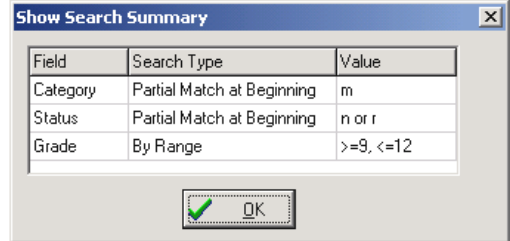
- ◆ Next, you’ll see a typical “Save” screen. Pick a convenient location, and a logical name for the file.
- ◆ The fields in your file will be (Header),First Name, Last Name, Address, City, State, and Zip.

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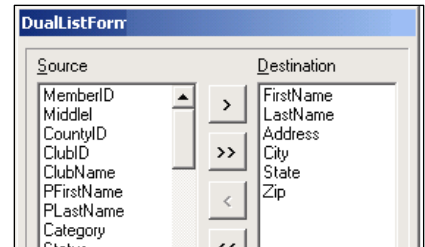
## Using Member Query to create a dBase file:

This example would yield the same results as the Mailing Labels, but you could selectively highlight only the members you want. Another example of when you might want to use Member Query would be labels for only girls—a selection option not available under Mailing labels. The downside to using Member Query is that “one per family” is not available.

- ◆ Go to File>>Member Query.
- ◆ In this example, the filter criteria is for current active high school members: Category = M, Status = N or R, Grade = (by range) 9 to 12. The screen print you see at right is what you would see if you pressed the View Summary button after choosing those criteria.
- ◆ Once you have the records on the screen, you must highlight the ones you wish to export. You can do that by using Select|Select All, or by selectively highlighting (and un-highlighting) using the Control-Click method.
- ◆ Choose File|Export, DBase.

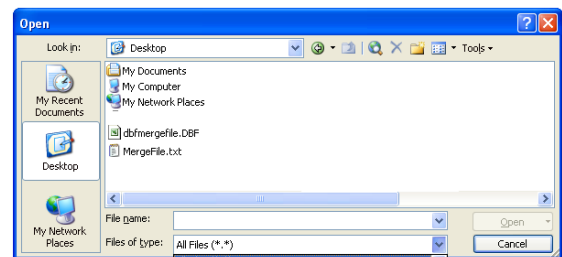
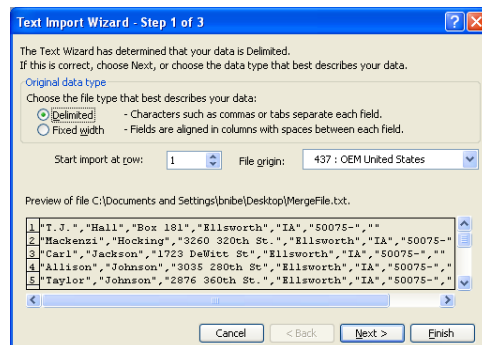


- ◆ Next, choose which fields you wish to export. Double click on each to move to the right-hand column in the Dual-List Form window as shown below. Keep them in logical order.
- ◆ Save somewhere convenient with a logical name.



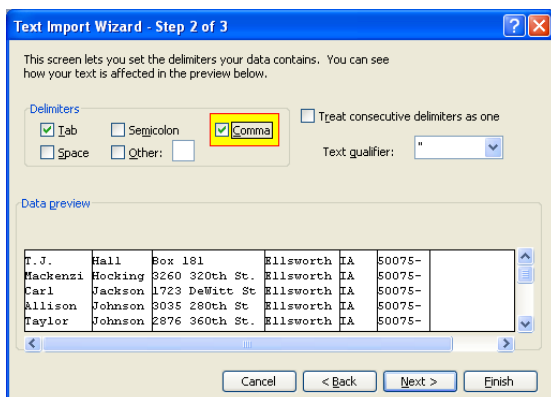
## Opening ASCII files in Excel:

- ◆ Open Excel and select File>>Open. **Make sure you have “All files” selected on the bottom drop down menu.** Locate your document and click “Open”.
- ◆ Make sure delimited is marked – click next.

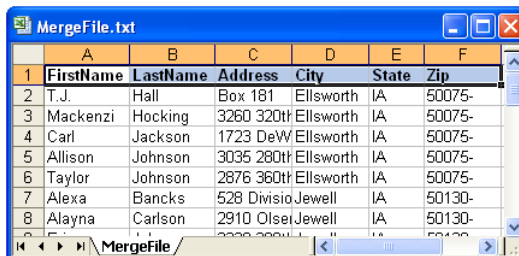


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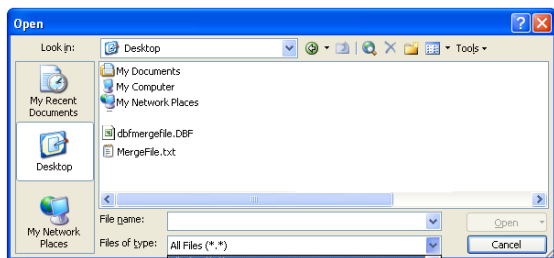
- ◆ Make sure “comma” is checked – click FINISH.



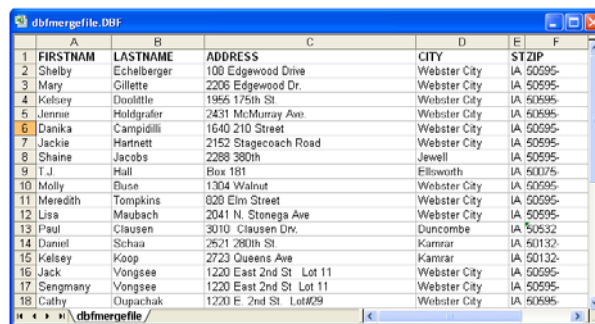
- ◆ Insert a new first row, and enter titles in each cell (FirstName, LastName, etc.) Use names with **NO SPACES** in them.



## Opening DBase files in Excel:



- ◆ Open Excel and select File>>Open. **Make sure you have “All files” selected on the bottom drop down menu.** Locate your document and click “Open”.



- ◆ Normally, DBase files will open correctly in Excel without using the Wizard that was necessary with ASCII. Notice that the columns are already labeled.

## Cleaning up the Excel File

Once the file is open in Excel, Save As... current Excel format, which changes the extension from either “.dbf” or “.txt” to the standard “.xls”. Then you need to clean up the data before you merge into Word.

- ◆ Add a new column. The title can be “CurrentResident”. Fill each cell in that column with the text “Or Current Resident” (without the quotes). You can copy & paste or fill down to put that text into each row that contains address information.
- ◆ **The USPS wants no punctuation in mailing labels** (with the exception of hyphenated last names, 4-H, zip code + 4—50011-3630, etc.). You may have to remove “dashes” from the end of your zip code field. You can do a “replace all”, but be careful, because if you have any 9-digit zip codes, “replace all” will remove the dash in those as well.
  - ◆ There should be no hyphen between street numbers, i.e. 1234 56th St (*not 1234 – 56th St*).
  - ◆ Remove periods from the end of St., Dr., etc. Use standard abbreviations (St = Street, Dr = Drive, Ave = Avenue, Rd = Road) and remove any commas used in addresses.
  - ◆ Make sure all addresses are complete—no empty cells for address, city, etc.
- ◆ Save again when you’re done.

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## Merging the Excel file into Word (2003) for labels

When your Excel file is cleaned up, you can use it as a data source for a mail merge document. The following instructions are for creating labels, but the same process would work just as well to create a plain page (for the outside of your newsletter) or whatever.

### Creating the document

- ◆ Open a new document in MSWord.
- ◆ Tools >> Letters and Mailings >> Merge Mail. Notice the right-hand, grey sidebar.
- ◆ File >> Save As >> name and save this file, i.e. MergeLabels
- ◆ On the grey sidebar, choose “Labels”. At the bottom, click “Next: starting document”
- ◆ Click “Label Options”. Highlight label option that you’re using (Avery standard 5160 Address probably). Click OK. Now you have a page of Avery 5160 labels on your screen.
- ◆ At the bottom of the grey sidebar, click “Next: Select recipients”.
- ◆ Choose “Browse...”. Locate the Excel merge file you saved, and Open.
- ◆ Select Table. The merge file should be highlighted, click OK.
- ◆ The “Mail Merge Recipients” table will come up. All records are automatically selected. If there are some records with incomplete addresses or that don’t need the mailing, un-check them. When the correct records are selected, click OK.
- ◆ Close the grey sidebar by clicking on the X at the top right of the sidebar, and SAVE your work at this point.
- ◆ ***This document is your template, and you will open it each time that you need to RE-merge files into a labels layout, for instance if you have new additions to the Excel file since the last time you printed labels***

### Inserting Merge Fields

- ◆ Click in the top left label. Press “Backspace” and “Delete” to get the extra return out. Leave the cursor in this label.
- ◆ Find the Mail Merge toolbar at the top of your MSWord document. Item names will appear when you hover over the icons. You are looking for “Insert Merge Fields”.
- ◆ With the cursor in the top left label, click on Insert Merge Fields.
- ◆ Go down the list and double click on all the headers/info you want/need on the label: FamilyOf, FirstName, LastName, CurrentResident, Address, City, State, Zip. The fields and order you choose will depend on what you want your final labels to look like (see page 1). Click Close.
- ◆ All items are now in the first label but need to be spaced. Add spaces and line returns as they are needed. If you do not add a space between FirstName and LastName, they will run into one another. Remember that you WILL NOT add any punctuation.
- ◆ When the fields are laid out the way they should be, highlight all fields in the first label, and click on “Propagate Labels” (11th item from the left) on the Mail Merge toolbar.  
The first label will remain the same, but the others will start with “Next Record”
- ◆ In the Mail Merge toolbar, click on “Merge to New Document” (4th item from right end). Select “All” and click OK.
- ◆ If you are using a DBase file from Member Query, you will have to format your information to ALL CAPS. Highlight the total document. Format >> Font >> Arial, Regular, 10, then below check All CAPS (uncheck any others), and click OK. You may also need to make your font smaller.
- ◆ Now you have a new document with the mail merge info in each label. File >> Save As >> (something to differentiate it from the original file, like “FinalMailMergedLabels”).
- ◆ ***This document is “static”, meaning that if you open it again, it will print exactly as it does this time, with the exact same information.***

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## Merging the Excel file into Word (2007) for labels

The process works a bit differently in Word 2007, but the end result is the same!

- ◆ Open Microsoft Word.
- ◆ Go to the Mailings tab.
- ◆ Select “Start Mail Merge”, with a step-by-step mail merge wizard.
- ◆ Select Labels, then Next.
- ◆ Select the type of label, then OK.
- ◆ Select “Use Current Document”, then Next.
- ◆ Select “Use Existing List” Browse for your Excel document, click Open, OK, and then Next.
- ◆ On the menu bar, choose “Insert Merge field” and insert all the fields on your label, adding spaces and returns as you insert them.
  - ◆ *Because Word 2007 has such wide spacing between rows, press Shift-Enter between rows and that will “single-space” them.*
- ◆ On the right side, press “Update All Labels”, then Next.
- ◆ Preview your labels, then Next.
- ◆ Complete the merge, then Next.
- ◆ Select Print, Select All.

## Using the Excel file with Filemaker Pro:

- ◆ Create a new Filemaker database with the same fields as your spreadsheet, or open an already-created file with fields that will contain the same data.
- ◆ Use File>>Import>>Files to import the data from the Excel spreadsheet into Filemaker, being sure to match up the correct fields.
- ◆ If you create a new database, create a new layout for mailing labels.
  - The New Layout>>Labels wizard will guide you through the process.
  - On the last step, you will be asked to place fields on the labels. Be sure to remember to add spaces and line breaks where you want them.
- ◆ This database can be reused many times for labels. If you need different addresses, you would use the Records menu and “Delete All Records”, then re-import new data into the file. Your layout would still be there, ready to print the labels.

## Closing Credits:

I am SO appreciative of the contributions of others in this document!!

Mary Kay Litzel did an amazing amount of research on the postal regulations, prepared a sample mail merge document in Word 2003, and documented all the steps that she used.

Steph Erpelding, after bringing this problem to my attention, got together with Anjanette Treadway and figured out how to mail merge into Word 2007, and sent me a list of the steps that they used.

Thanks to them for their time and work, and for being so willing to share their knowledge with others!!