

MS WORD

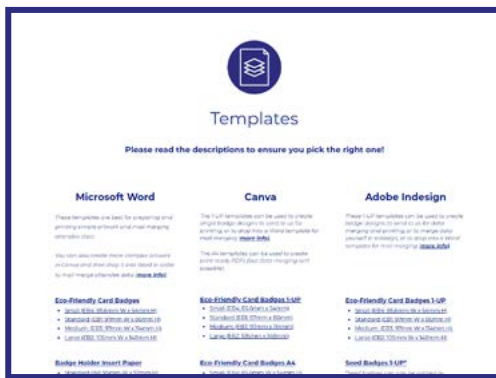
How to mail merge attendee data

Follow this guide to merge a spreadsheet of attendee names, titles, organisations onto a template with your artwork to quickly create hundreds of badges with ease.

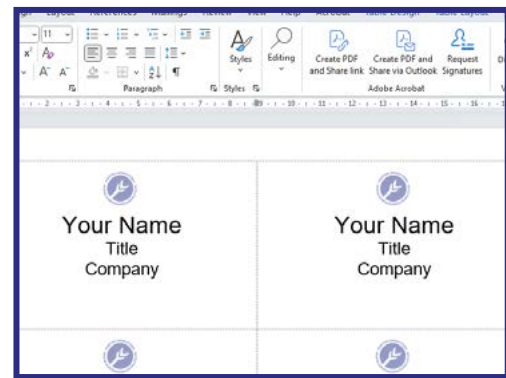
PART 1: BASIC (SINGLE SIDE BADGE) MAIL MERGE

[JUMP TO PART 2: DOUBLE SIDED BADGE MERGE](#)

01 Ensure you have downloaded the correct template from [Guidance & Templates](#) on our website.



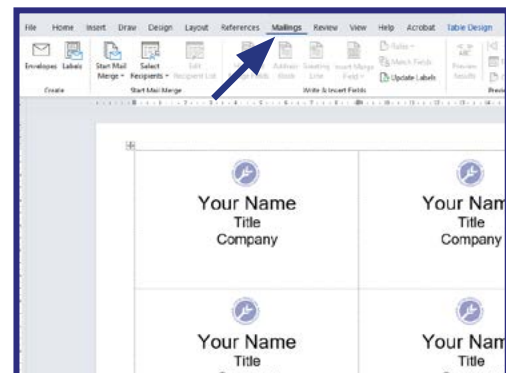
02 Set up your artwork using our [MS Word Artwork Instructions](#).



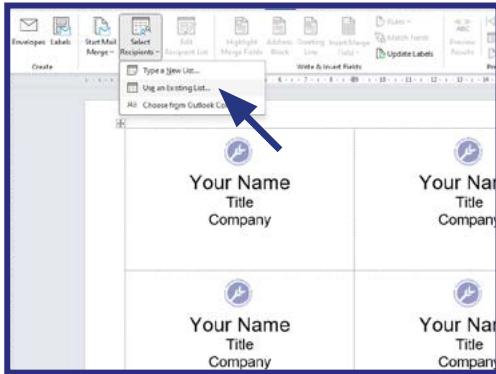
03 Organise your data into columns in your Excel spreadsheet. If your data is in a Google sheet, download it as an Excel file.

First	Last	Title	Organisation
Sarah	Baker	Sustainability Officer	Baker Ltd
Tom	Smith	Managing Director	Smith Ltd
Jane	Jones	CEO	Jones & Co
Dick	Baker	PA	Baker Ltd
Sally	Smith	CEO	Smith Ltd
Harry	Jones	MD	Jones & Co
Kate	Baker	Finance Director	Baker Ltd
John	Smith	PA	Smith Ltd
Emily	Jones	FD	Jones & Co
Ben	Baker	CEO	Baker Ltd

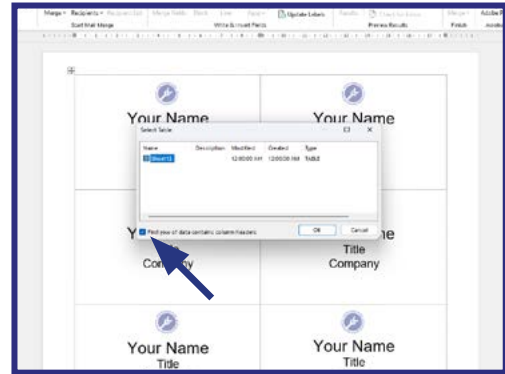
04 With the template open, click **“Mailings”** in the top menu bar.



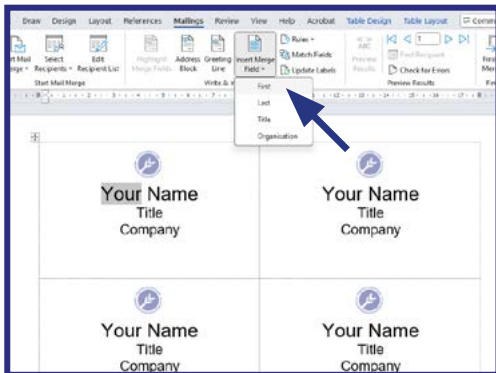
05 Click **“Select Recipients”** and from the dropdown menu chose **“Use Existing List”**, select your .xlsx spreadsheet.



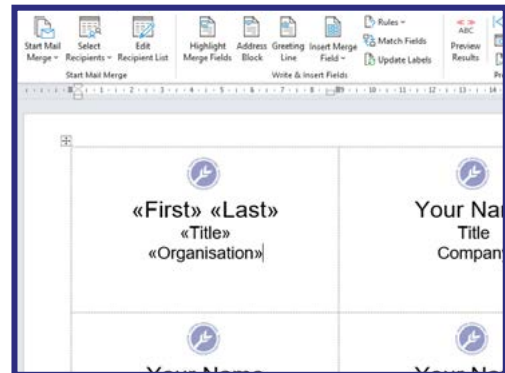
06 Select your spreadsheet of data then in the pop-up, ensure the **“First row of data contains headers”** box is checked on. Then click **“OK”**.



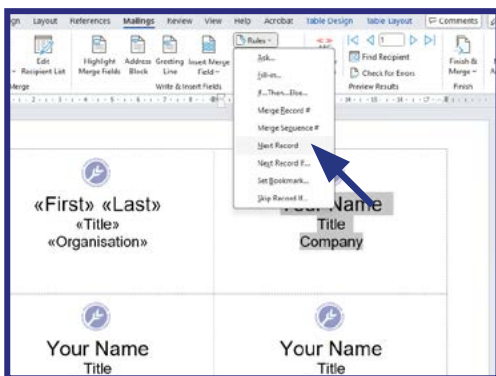
07 Select **“Insert Merge Field”** to start inserting data fields.



08 a) Highlight **“Your”** then click the corresponding field.
b) Repeat for all merge fields so your badge looks like the one below.



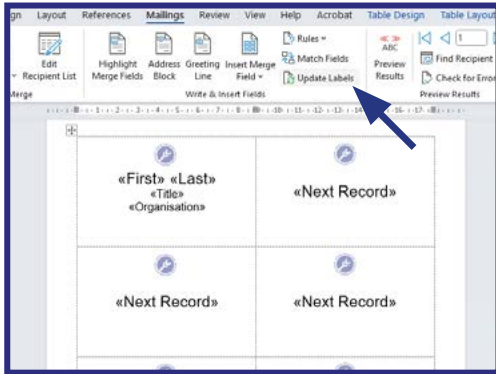
09 For the remaining badges, highlight all the text on each badge and insert a **“Next Record”** rule.



10 Your page should now look like the one below.



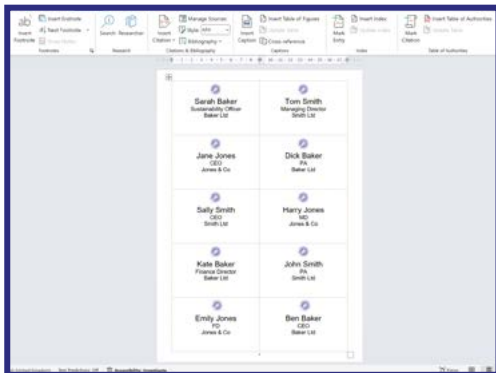
11 To update the badges with the **“Next Record”** rule, click **“Update Labels”**



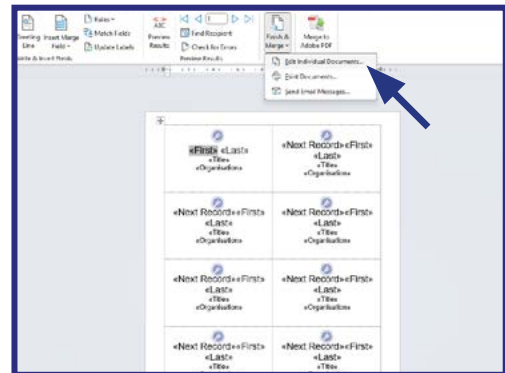
12 Your page should now look like this.



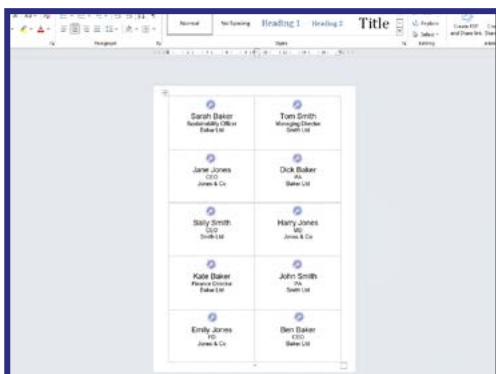
13 You can now preview your merged badges by clicking **“Preview Results”**. You can make any formatting changes required.



14 Select **“Finish & Merge” > “Edit Individual Documents”**.



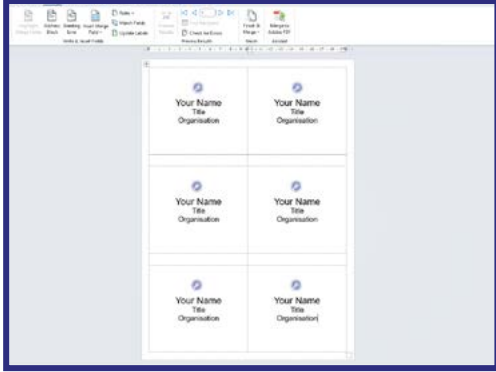
15 You should now have a multi-page document with all your badges merged and ready to print! You can edit individual badges now too.



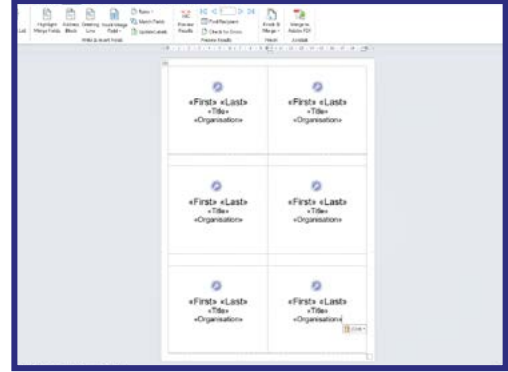
If your document has not merged successfully, please carefully check you have carried out each step correctly.

PART 2: DOUBLE SIDED BADGE MERGE

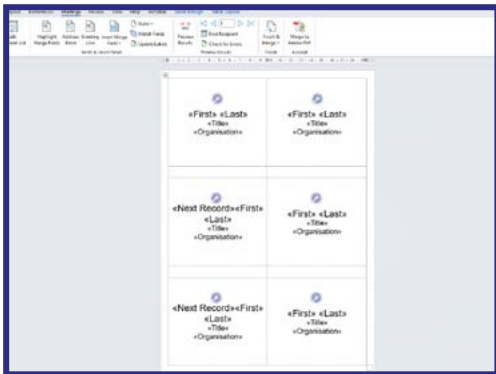
01 Follow steps 1-6 from Part 1.



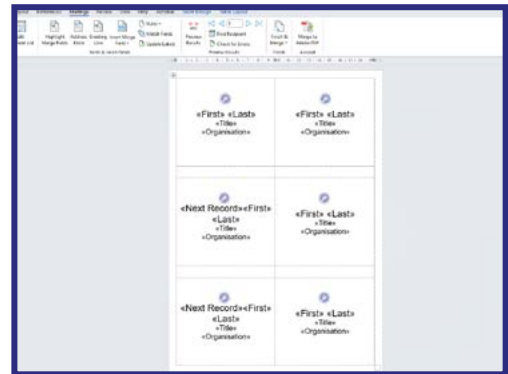
02 Fill in all the merge fields for your badge. Each badge should look like the one below.



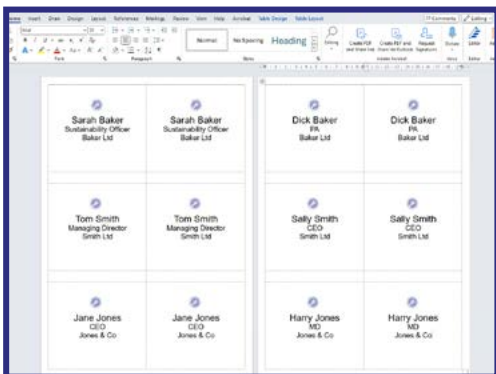
03 To merge the names on both sides of the badge, create a “Next Record” rule for **just the left badges**.



04 To merge the names on both sides of the badge, create a “Next Record” rule for **just the left badges** (don't put “Next Record” on your first badge).



05 You can now preview your merge and click **“Finish & Merge” > “Edit Individual Documents”**



Please note! In preview mode there might be duplicate names. However when merged these will disappear.