This is a two part procedure:
1. Preparing an excel file for Name and Address List (page 1)
2. Convert excel member database file to Word Document (page 5)

# Prepare the Excel file for "Name and Address" List
4-1-2010

The Excel document should contain only **Flag Members**, **Honorary Members** and **Associate Members** (Exclude "Foghorn" and "Waiting" entries)

Formatting the spreadsheet

- Open Excel
- Insert the names of the fields in the first row of the Excel spreadsheet ("LastName", FirstName, …)
  - You can cut-n-paste the field names shown below into columns A-N of the first row into the spreadsheet. Don't worry about how the field names look below – they will paste just fine.

| LastName	FirstName	Other	Address	City	State	Zip	Phone	Email	Member	AnivDate	Dues Paid	BoatInfo	Search Terms

- Click in the second row, first cell (A2). This will cause the imported data to begin in the second row (e.g., below the field names in the first row) See figure 1 below
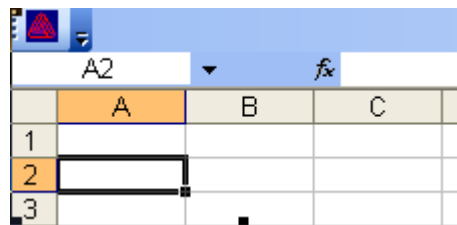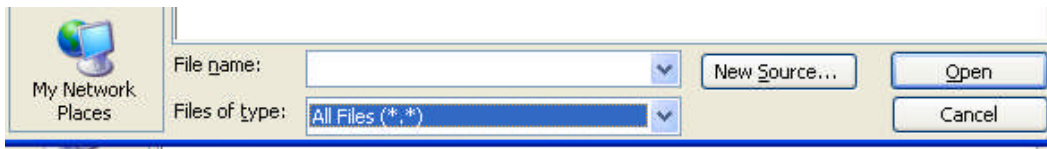

Figure 1

Importing the data (membfile.dat)

- Click on **Data**, then> **Import External Data**, then> **Import Data**. You will see the menu in Figure 2 below.
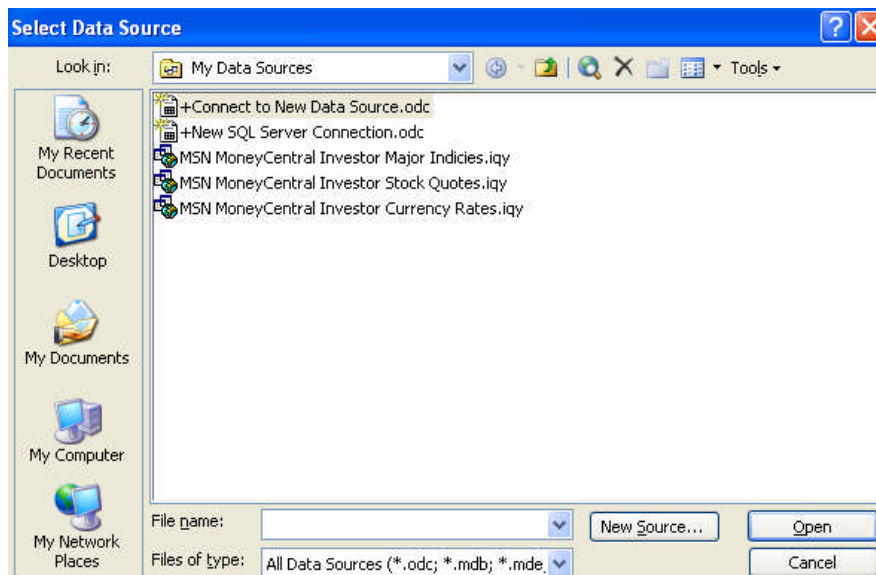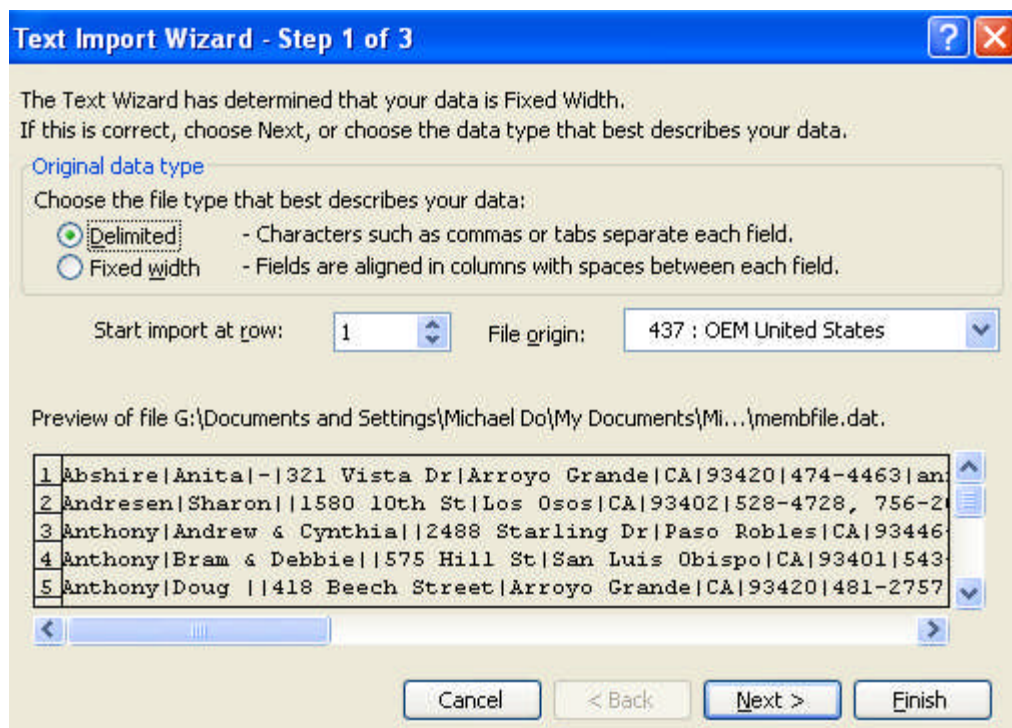

Figure 2

- Select "All Files (*.*) in the Files of <u>t</u>ype: drop down box at bottom of the menu – as shown below in **figure 3**. Now you will be able to browse to the membfile.dat file that will be 'imported.'
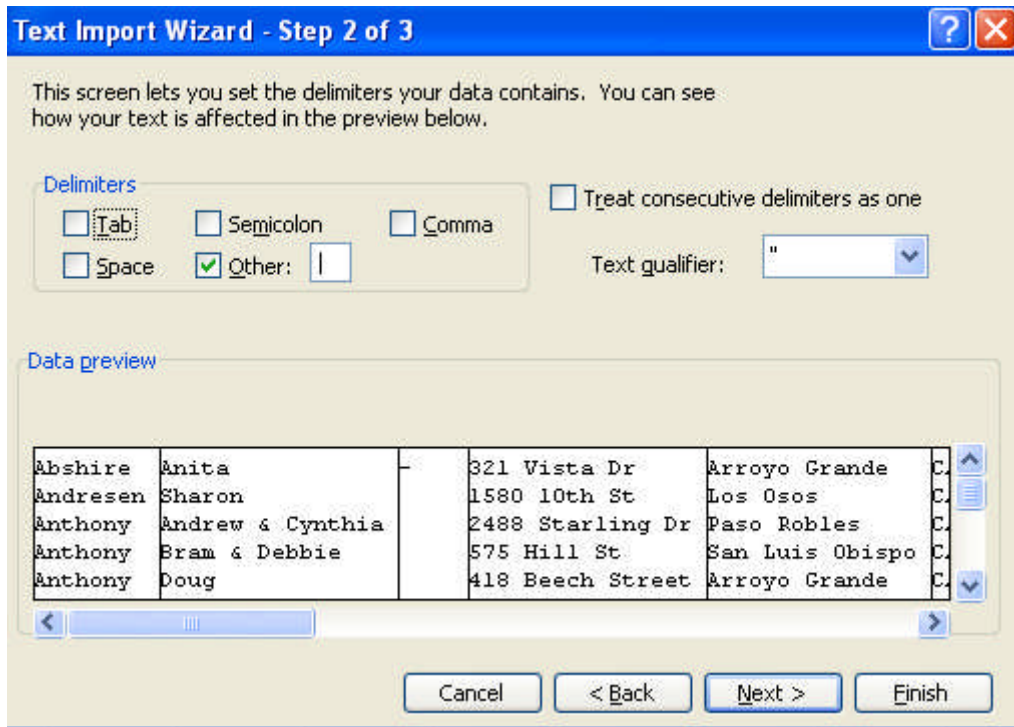

Figure 3

- Work your way to the membfile.dat file, and then select <u>O</u>pen. You will see the menu shown in **figure 4**.
  - o Select **Delimited**
  - o Select **1** for the **Start import at row**: box. (This refers to row 1 of the membfile.dat file)
 - o Select **Next>**

Figure 4

- Next you will see the menu in **Figure 5**.
  - Under Delimiters, select **Other** (you may have to deselect **Tab**.
  - Enter | in the box next to <u>O</u>ther:
  - Then select **Finish** at the bottom right

Figure 5

- Next you will see the menu in **Figure 6**.
  - Select **Existing worksheet:**
  - Make sure the box says =A2 (this means beginning at column A, Row 2) – which is just after the header row
  - Select **OK** and you will see your completed Spreadsheet
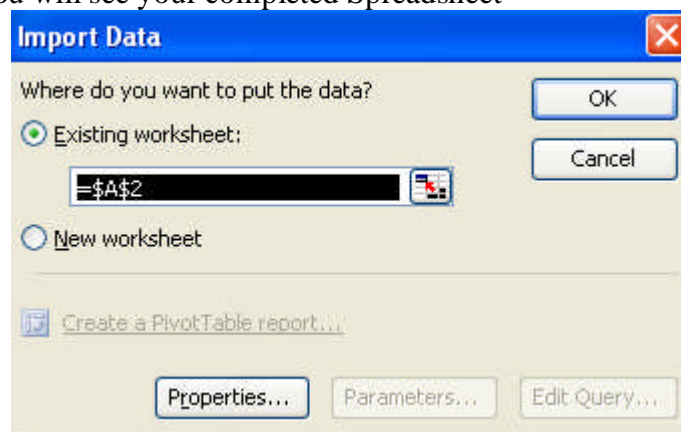
Figure 6

- The spreadsheet will look like **Figure 7** (which is a partial view of the spreadsheet)
  - The spreadsheet includes the following 'Member' categories (column J 'Member'):
    Flag | **Honorary** | **Associate** | **Foghorn** | **Waiting** |
  - The **Foghorn** & **Waiting** categories must be **removed**.
- Remove Foghorn & Waiting categories
  - The easiest way (I think) is to sort on column J, which will group each of the categories.
    - Delete the rows that contain Foghorn and/or Waiting (they will be together)
    - After deletion, sort on column A (LastName) to return the spreadsheet to the original sort.
  - Save the spreadsheet as **Datfile.xls**.
  - The next step will be to merge this file into a Word Document, utilizing **SLYC Dir Format.doc**. See the instructions for making the Word Document

	A2	▼	fx	Andresen					
	A	B	C	D	E	F	G	H	
1	LastName	FirstName	Other	Address	City	State	Zip	Phone	Email
2	Andresen	Sharon		1580 10th St	Los Osos	CA	93402	528-4728, 756-2020(w), 459-3868 (c)	sandrese@calpoly.edu
3	Anthony	Andrew & Cynthia		2488 Starling Dr	Paso Robles	CA	93446-4703	459-0978 (c), 610-0786 (c)	cynthia_anthony@hotn
4	Anthony	Bram & Debbie		575 Hill St	San Luis Obispo	CA	93401	543-7513	debanthony55@gmail.
5	Anthony	Doug		418 Beech Street	Arroyo Grande	CA	93420	481-2757	danthony2@charter.ne
6	Arthur	Bob & Cherrie		14315 Talon Grove Dr.	Bakersfield	CA	93306	661-872-4010/661-319-5949	rarthur1@bak.rr.com
7	Aycock	Anthony		558 S. 13th St.	Grover Beach	CA	93433	710-1689	
8	Barrett	Chris & Elizabeth		1340 Newport Ave	Arroyo Grande	CA	93420	481-1955	chris.e.barrett@lmco.c
9	Barrett	Mike & Jan	-	7660 Rocky Terrace	Creston	CA	93432	237-1816	m32b64@wildblue.net
10	Baxter	John	& Joan Andre	4428 Sunflower Way	San Luis Obispo	CA	93401	542-0737	jrbax@aol.com
11	Bellis	Mary	Midn, USN	P.O. Box 11200	Annapolis	MD	21412		M100384@usna.edu

Figure 7

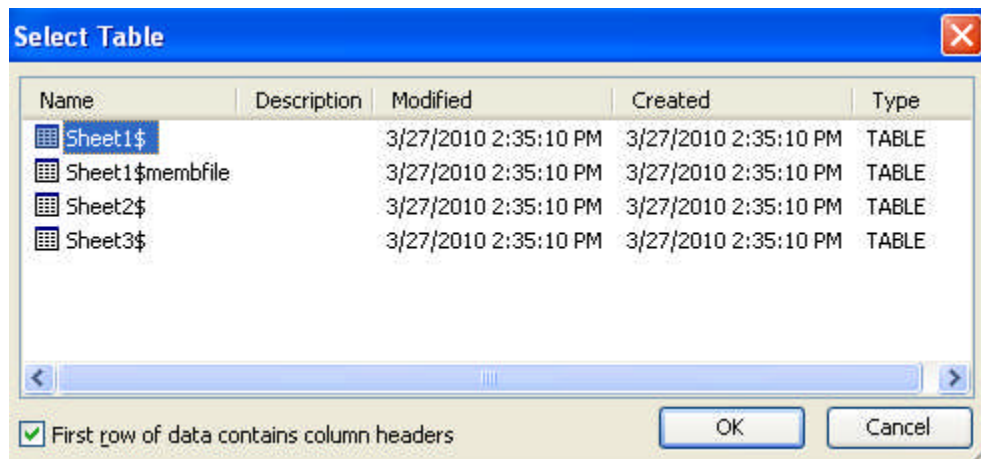**Convert Member Database in Excel form to a Word Document with "Name & Address" List**
4-1-2010

1. Open "**SLYC Dir Format.doc**" (this is the main mail merge document)
   - The *Select Data Source* menu (**figure 1**) will open
   - Select (*.xls) in *Files of type:* dropdown menu
   - Browse your way to the **datfile.xls** file you created from the **membfile.dat** file, then click <u>O</u>pen
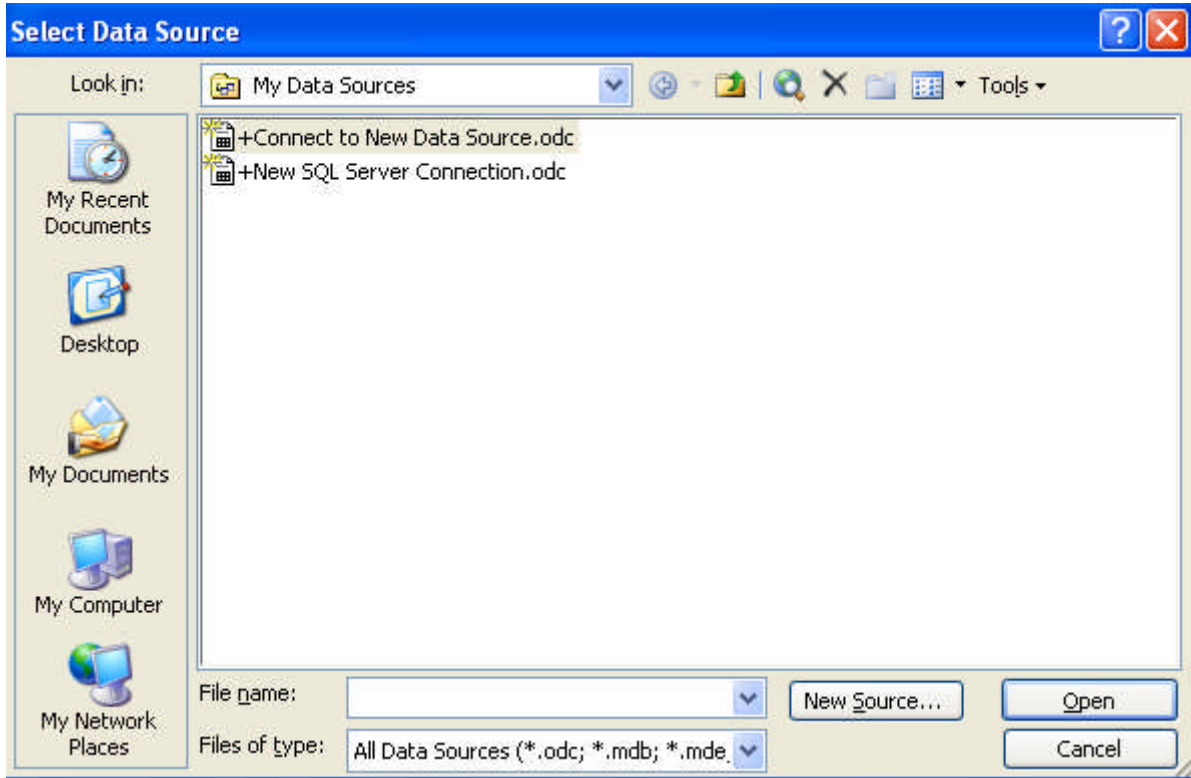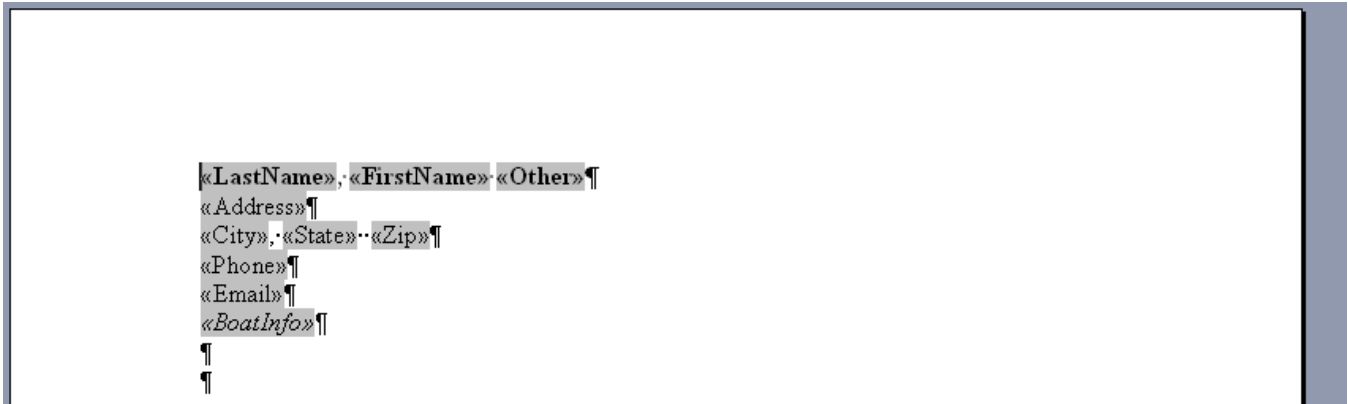

Figure 1

2. The *Select Table* menu will pop up, shown in **Figure 2** below.
   - Make sure Sheet1$ is selected and *First <u>r</u>ow of data contains column headers* is selected
   - Click OK
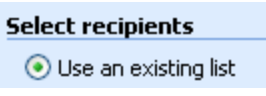
Figure 2
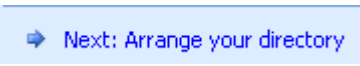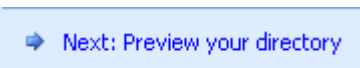
3. A preview page will come up, as shown in **Figure 3.**

«LastName», «FirstName» «Other»¶
«Address»¶
«City», «State» «Zip»¶
«Phone»¶
«Email»¶
«BoatInfo»¶
¶
¶

Figure 3

4. Select *Tools > Letters & Mailing > Mail Merge*

5. *Select* ◉ Use an existing list (on right side)

Select recipients

6. *Select* ➡ Next: Arrange your directory

7. Select ➡ Next: Preview your directory

8. You will see a preview of the directory (first entry) as shown in **Figure 4**

Abshire, Anita ¶
321 Vista Dr¶
Arroyo Grande, CA 93420¶
474-4463¶
anitadabshire@yahoo.com¶
¶
¶

Figure 4

9. Select ➡ Next: Complete the merge
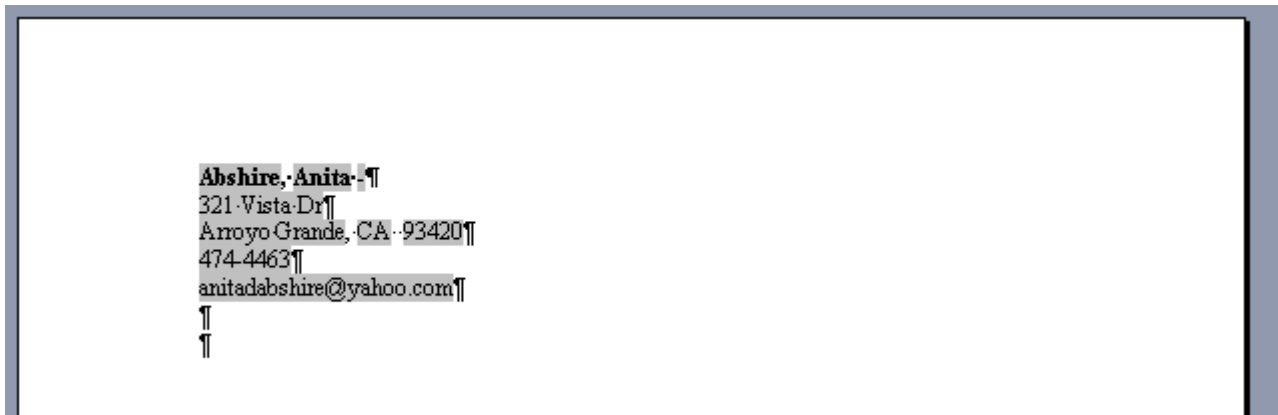
10. Select 📄 To New Document...
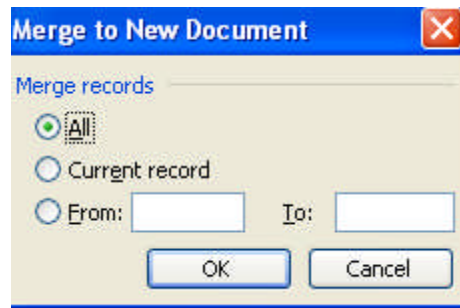
11. A *Merge to New Document* menu will appear as shown in **Figure 5**
 - Select *All*, then click OK

Figure 5

12. You will see the directory of members, in one long column (30+ pages), as shown in **Figure 6**
13. Save this list (suitable name) for future use

Figure 6