

Using Excel to Create a List

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Here are some common questions about this topic:

- What is a list?
A list created in Excel is simply a table of information. For example, the most common thing you'd use a list for is storing names and addresses. But you can also store other information in Excel as well: household inventory, movie/music inventory, parts list, etc.

This paper focuses on using names and addresses for the later purpose of using this information to perform mail merges (see *Setting up a Merge Document*).
- What can you do with a list of names and addresses?
You can use Excel to store and keep track of names and addresses. Excel provides a quick and simple way to add and edit list items. Another thing you can do, and probably the most productive, is to use this information to perform merges with other programs like Microsoft Word.
- Why use Excel to create a list?
As previously mentioned, Excel, unlike a database program, provides a quick and simple solution to storing information.

Hopefully, I've answer one or more questions you may have had. Now let's dive into creating our list.

As mentioned, I'll be focusing on creating a list of names and addresses of people so we can merge this information into a Word document.

Start Excel and create column titles similar to the ones in Figure 1 (see next page).

Column Titles...

Make sure, no matter what type of list you are creating, that you place the titles in the first row, starting in cell A1.

Use upper and lower case letters for your titles and avoid using spaces.

If you're using Excel to enter names and addresses, you'll need to reformat the zip code column. If you forget to do this, any zip code you enter that begins with a zero will not be displayed properly (Excel strips all leading zeros from numbers).

Click on the column letter for your zip codes ("I" in our example); this selects the entire column.

Next, click on the Format menu and choose Cells. A small window will open (Figure 1); click on the Number tab and select Text from the Category listing.

Click OK to accept this change and close the window.

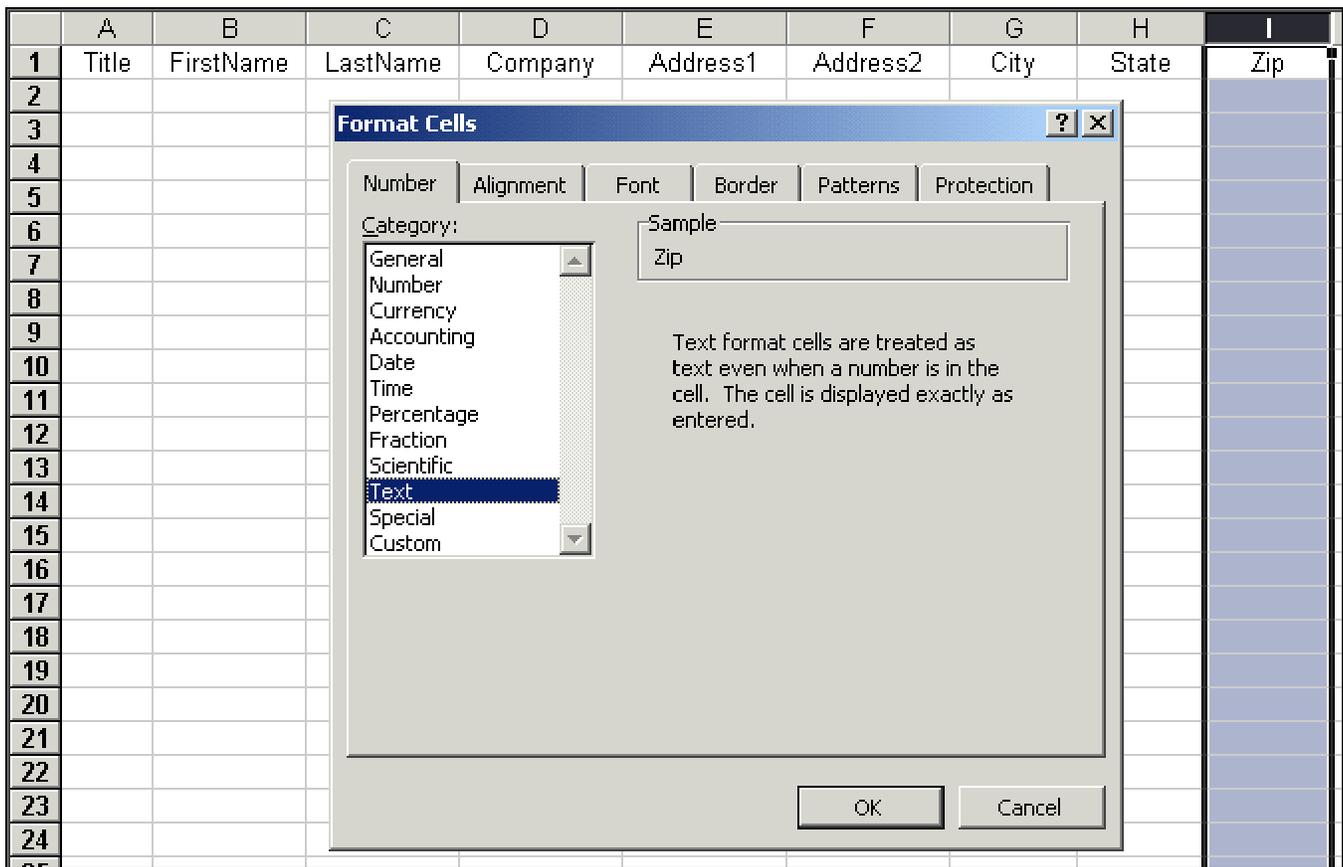


Figure 1

Next, you're ready to start entering names and addresses.

Things to keep in mind when entering this type of data:

- If you are going to use abbreviations (Ave, St, etc.), be consistent throughout your entire list.
- Use proper punctuation (Mr. vs. Mr).
- Spell out the state name, if practical.
- Place all your addresses in Address1. If a name has a second address, use Address2, otherwise leave it blank.*

Once you have completed entering all your names and addresses, you might want to dress up the list a bit to make it easier to read, if that's important to you (see Figure 2).

That's about all there is to creating a list in Excel. One other thing I'd add is the ordering of your list.

With all your names entered, click on the Data menu and choose Sort. You can then sort your list however you want.

Good luck!

* The post office delivers mail to the address appearing in the line immediately above the city and state on a letter (machines actually automate this process). If you've split an address into two or three lines and the line above the city and state is simply RR 3, the post office won't know where to deliver it.

Title	FirstName	LastName	Company	Address1	Address2	City	State	Zip
Mr.	David	Godfrey	ABC Lighting	123 Main Street		Portland	Maine	04101
Mrs.	Julia	Smith	Hair Etc	74G Commission Street		Portsmouth	New Hampshire	03801
Dr.	Robert	Kendall	Foot & Ankle Center	520 Marginal Way		Portland	Maine	04103
Mr.	Stephen	Bodwell		344 Country Road Lane		Saco	Maine	04072

Figure 2