

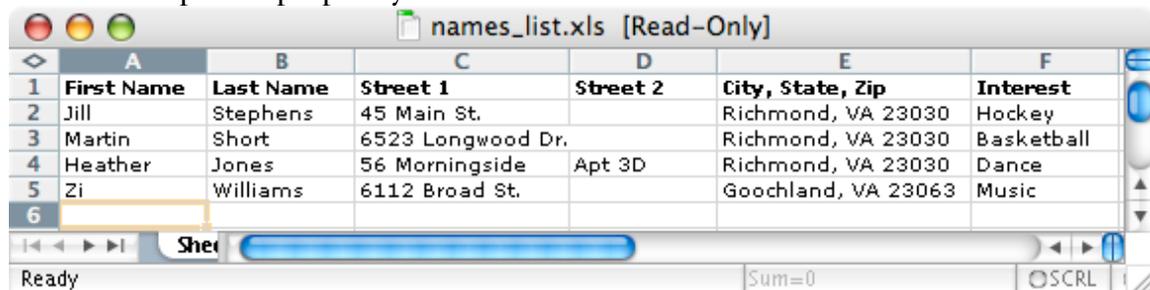
# PERFORMING DATA MERGE IN WORD X

One of the most often-asked questions about advanced word processing centers around the use of data merge, or as it is more commonly called, *mail merge*. The question? How do you do it?

Data merge takes records from one file (another Word document, an Excel document, or a database) and plugs these records into a form. This form could be envelopes, a form letter, or labels.

## Gather Your Data

The first step is to prepare your data set. I created mine in Microsoft Excel.

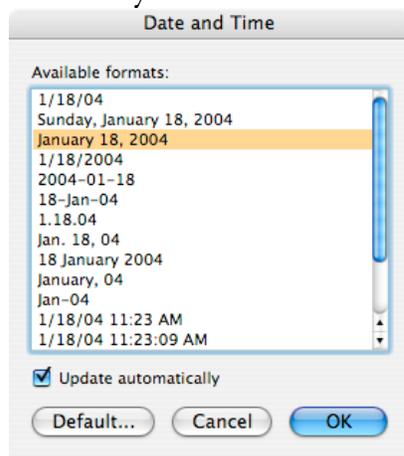


	A	B	C	D	E	F
1	First Name	Last Name	Street 1	Street 2	City, State, Zip	Interest
2	Jill	Stephens	45 Main St.		Richmond, VA 23030	Hockey
3	Martin	Short	6523 Longwood Dr.		Richmond, VA 23030	Basketball
4	Heather	Jones	56 Morningside	Apt 3D	Richmond, VA 23030	Dance
5	Zi	Williams	6112 Broad St.		Goochland, VA 23063	Music
6						

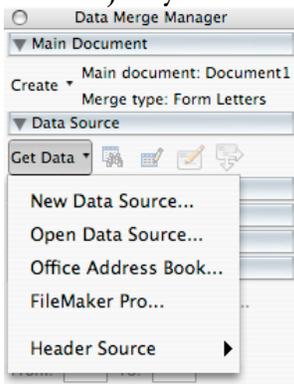
Putting “titles” or field names at the top is important. You can also use Excel’s List Manager, if you like. This information can be entered-in within Excel, or can be imported from another program or data source. Limit one field per column, as seen above.

## Create Your Letter

Next, create your template document. I am choosing to write a form letter. After putting in my address, I’ve chosen to insert the current date. This date will always reflect the current date.



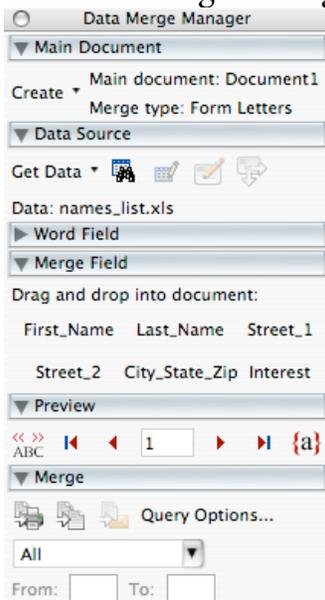
Next, I need to grab the fields from my data set to ready for the letter. You do this by going to Tools > Data Merge Manager. Make the settings appropriate for the job you're undertaking.



Notice above, I've chosen "Form Letters." And I'm in the process of selecting my Data Source. Notice, if you maintain an address book with Microsoft Entourage (Mac) or Outlook (PC), you can merge addresses of your contacts.

## Drag and Drop

Now that my data source has been selected, I simply drag the field names from the Data Merge Manager into my letter.



My letter takes on a new look, when fields have been inserted.

January 18, 2004

«First\_Name» «Last\_Name»  
«Street\_1»  
«Street\_2»  
«City\_State\_Zip»

Dear «First\_Name»,

Field names cannot be typed, but appear typed with <<angled brackets>> around the field names. Finally, I can view my results (Merge to a new document) or print them (Merge to Printer). My result:

