

## TIPS ON PLANNING A RECIPIENT LIST/DATA SOURCE

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- ❖ **Allow enough Data Fields for the Data Records with the most information.**
  - Some data records may have fields such as a post office box and street address while others may not.
  - Some records may not contain a middle name, while others may.
  - Each Data Record has to allow for the extra field even though not all records will have the data for the extra field.
  - When the merge is processed, the program will allow space for the extra field, but will remove the extra space if the record does not contain data in a field.
- ❖ **All Recipient List/Data Records must have the same number of Data Fields.**
  - Even though all records do not have the same amount of data, each record must have enough fields to accommodate the record that contains the extra data.
  - It is not possible to have one Data Record with a post office box field and another one that doesn't.
  - When setting up the Data Record, it is important to provide enough fields to accommodate all of the information.
  - Each Data Record has to be able to accommodate the same amount of data, even if all the fields are not filled in for each record.
- ❖ **Information that is to be used for sorting must be in a separate Data Field.**
  - Fields such as Last Name, First Name, and Postal Code are used for sorting purposes.
  - It is much easier to sort data if a field is created for each of these data types.
- ❖ **Organize data so that it can be used in different ways.**
  - A person's first name could be used in the address of the letter, the opening lines of the letter, and in the body of the letter.
  - If the person's full name was all in one field, it would not be possible to use the first name in the body of the letter.
  - Therefore, it is a good idea to have each of the data items in a separate field.
- ❖ **Set up envelope and label addresses to display postal bar codes.**
  - When working with Mail Merges, it is possible to access an option that will insert a bar code for the mailing address on envelopes and labels.
  - The post office can use these bar codes to speed up the delivery of mail in the United States.
  - The postal bar codes are automatically inserted into the letter based on the postal code and street address on the envelope or label.