



## Merging data into another document (mail merge)

You can insert information from a database document into a word-processing or spreadsheet document or [frame](#) using a process called mail merge. For example, you can create a form letter and automatically address it to every person listed in your address list database.

Mail merge requires two documents: the database document and the merge document, which is a word-processing or spreadsheet document. AppleWorks merges the information in the database into the merge document or frame. A merge document contains "constant" information (the same in all copies of the document) and field variables (record-specific information, such as a name).

### Setting up a database for mail merge

The information AppleWorks inserts into a merge document comes from [one or more fields in a database record](#).

When you plan to use a database for mail merge, organize it to reflect the needs of the merge document. For example, if you create a form letter (word-processing document) with a salutation that addresses the recipient by a title (Ms., Mr., Dr., and so on) and last name, your database must have separate fields for first name and last name (rather than one combined name field) and a field for title.

To set up a database for mail merge:

- 1 Open or create the database document.
  - To merge only certain records into the merge document, [use a find request](#) or a [named search](#).
  - To arrange the records in a particular order, [use sorting instructions](#) or a [named sort](#).
- 2 [Save the database](#).

### Merging the two documents

To merge data from a database into a document:

- 1 Set up the database for mail merge.
- 2 Open or create the merge document (the document into which you will merge information from the database).  
Type the information that you want to appear in every copy of the merged documents.
- 3 Choose Mail Merge from the File menu.
- 4 [Locate the database](#) that contains the information you want to merge into your document or frame, then click Open.
- 5 In the merge document, click where you want database information to appear.
- 6 In the Mail Merge window, select a database field and click Insert.  
AppleWorks inserts a field variable (the field name surrounded by chevron characters, for example, «Name») into the merge document.
- 7 Add any necessary punctuation and spaces.  
Be careful not to insert characters within the field variable.
- 8 Repeat steps 5 through 7 in each place where you want merge data inserted.
- 9 Click Merge, then choose an option:
  - Click "Send documents to printer" to print a "merged" copy of the document for each visible database record. The merged documents are not saved.
  - (For word-processing documents only): Click "Save in a new document" to create one new document that contains a copy of the merge document for each visible database record, separated by a section break. Then you can print the document, modify it, or save it.
  - Click "Save each final document on disk" to save a copy of the merge document for each visible database record.

**If the "Save in a new document" option is not available:**

The merged document is too large for

AppleWorks to save it to one file. Choose one of the other two options.

## **Saving the merge document**

When you save the merge document, you preserve the field variables you added. To use the merge document again, open it (AppleWorks opens the corresponding database for you).

## **Related topics**

[Creating a document](#)

[Previewing and printing documents](#)

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