



SETTING UP DATA FOR PERSONALISATION & MAILING

The most common way of providing data is to export it from a customer database directly into an Excel format. It is important to make certain that the **column headings** in your excel spreadsheet match the **field names** that you want to appear on the printed item.

Typically for an addressing the **field names** would be:

<Title><Firstname><Surname>
<Address1>
<Address2>
<Address3>
<Town/City>
<County>
<Postcode>

Missing address lines – some addresses have fewer address lines than others – this will not matter as the missing lines will close up, providing the main parts of the address are present including the postal town or city and postcode.

There may also be a field for salutation – this being the name to be used in a letter or email – for a contact that you are familiar with this may be <Firstname> but for a more formal letter <Title> and <Surname> may be used.

Therefore the **column headings** in the excel spreadsheet would be as follows:

<Title>	<Firstname>	<Surname>	<Address1>	<Address2>	<Address3>	<Town/City>	<County>	<Postcode>
Mr	David	Pealing	Units 8-11	Ashville Ind Estate	Bristol Road	Gloucester	Gloucestershire	GL2 5EU
Mrs	Rowena	Vizard	Units8-11	Ashville Ind Estate	Bristol Road	Gloucester	Gloucestershire	GL2 5EU

There may be further field names for email addresses, web addresses, telephone numbers etc. Also there may be a date or code to indicate the inclusion of other items such as personalised images or date fields.

Capitals or lower case. In Excel it is possible to alter the text to make the addresses read well and appear uniform. Please ask us if you would like advice on how to do this.

BEWARE – if filtering the data, it is important that all of the field names are filtered or sorted as one – it can be possible to sort one column of data without the other data columns moving – this can mix the data up! Always ensure that all of the fields are carried when carrying out a sort or it may be possible for the wrong name to link to the wrong address.

It is always important to check carefully at random points down the list comparing to the original source data to make sure that data has not become mixed.