



Writer Guide

Chapter 11

Using Mail Merge

Form letters, mailing labels, and envelopes

OpenOffice.org

Copyright

This document is Copyright © 2005–2007 by its contributors as listed in the section titled **Authors**. You can distribute it and/or modify it under the terms of either the GNU General Public License, version 2 or later (<http://www.gnu.org/licenses/gpl.html>), or the Creative Commons Attribution License, version 3.0 (<http://creativecommons.org/licenses/by/3.0/>) or later.

All trademarks within this guide belong to their legitimate owners.

Authors

Iain Roberts
Peter Kupfer
Agnes Belzunce
Alan Madden
Jean Hollis Weber
Dick Detwiler
Peter Hillier-Brook

Feedback

Please direct any comments or suggestions about this document to:
authors@user-faq.openoffice.org

Publication date and software version

Published 19 December 2007. Based on OpenOffice.org 2.3.



You can download an editable version of this document from
<http://oooauthors.org/en/authors/userguide2/published/>

Contents

Copyright.....	i
Authors.....	i
Feedback.....	i
Publication date and software version.....	i
What is mail merge?.....	1
Creating the data source.....	1
Registering a data source.....	3
Creating a form letter.....	7
Printing mailing labels.....	11
Editing a saved file of mailing labels.....	17
Printing envelopes.....	17
Setting up envelopes for printing.....	18
Merging and printing the envelopes.....	21
Using the Mail Merge Wizard to create a form letter.....	22
Step 1: Select starting document.....	23
Step 2: Select document type.....	24
Step 3: Insert address block.....	24
Selecting the data source (address list).....	25
Selecting the address block.....	26
Matching the fields.....	28
Step 4: Create salutation.....	29
Step 5: Adjust layout.....	30
Step 6: Edit document and insert extra fields.....	31
Step 7: Personalize documents.....	33
Step 8: Save, print or send.....	34

What is mail merge?

OpenOffice.org (OOo) Writer provides very useful features to create and print:

- Multiple copies of a document to send to a list of different recipients (form letters)
- Mailing labels
- Envelopes

All these facilities, though different in application, are based around the concept of a registered “data source”, from which is derived the variable address information necessary to their function.

This chapter describes the entire process. The steps include:

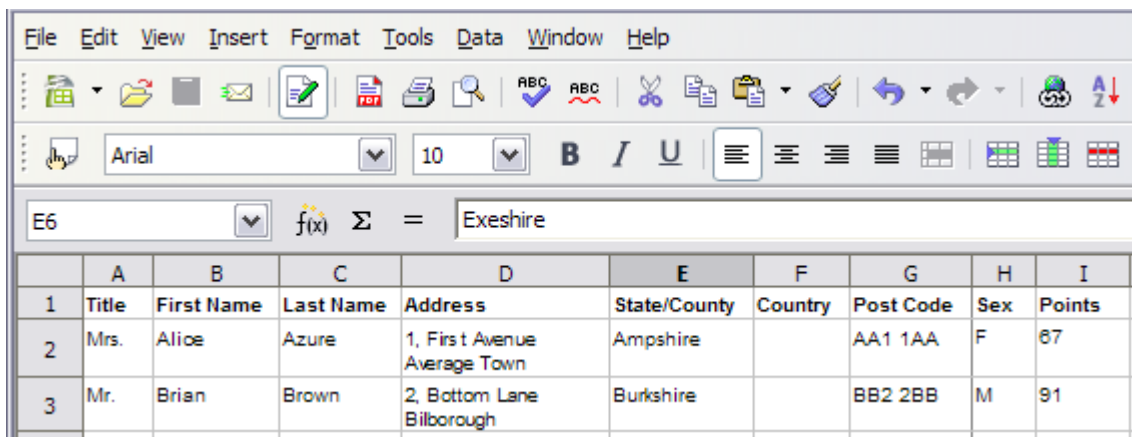
1. How to create and register a data source.
2. How to create and print form letters, mailing labels, and envelopes.
3. Optionally, how to save the output in an editable file instead of printing it directly.

Creating the data source

A *data source* is a database containing the name and address records (and optionally other information) from which a mailing list may be derived. Although you can create and print mailing labels and envelopes without using a data source, in most cases using one is the best approach. This chapter assumes that you are using a data source.

OOo can access a wide variety of data sources, including spreadsheets, text files and databases such as MySQL, Adabas, and ODBC. If the information to be used in the mail merge is currently in a format that OOo cannot access directly, you need to convert it, for example by exporting it to a comma-separated values (CSV) file.

For the following example we use a spreadsheet with the following column (field) headers: *Title, First name, Last name, Address, State/County, Country, Post Code, Sex, Points*. A sample data source is shown in Figure 1.



	A	B	C	D	E	F	G	H	I
1	Title	First Name	Last Name	Address	State/County	Country	Post Code	Sex	Points
2	Mrs.	Alice	Azure	1, First Avenue Average Town	Ampshire		AA1 1AA	F	67
3	Mr.	Brian	Brown	2, Bottom Lane Bilborough	Burkshire		BB2 2BB	M	91

Figure 1: Spreadsheet data source

Registering a data source

For a data source to be directly accessible from within an OOO document, it must first be registered as described below.

- 1) Click **File > Wizards > Address Data Source**.

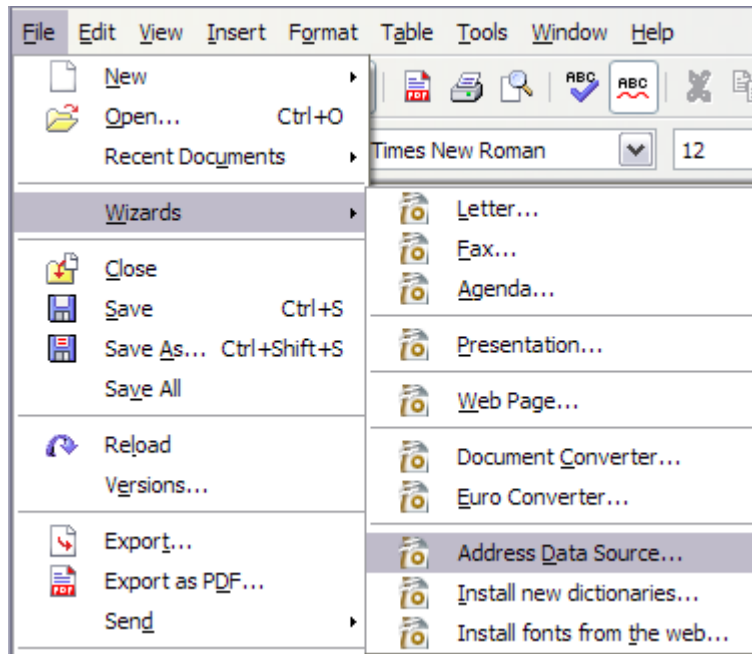


Figure 2: Starting the Address Data Source wizard

- 2) Select the appropriate type of external address book (in this case, **Other external data source**). Click **Next**.

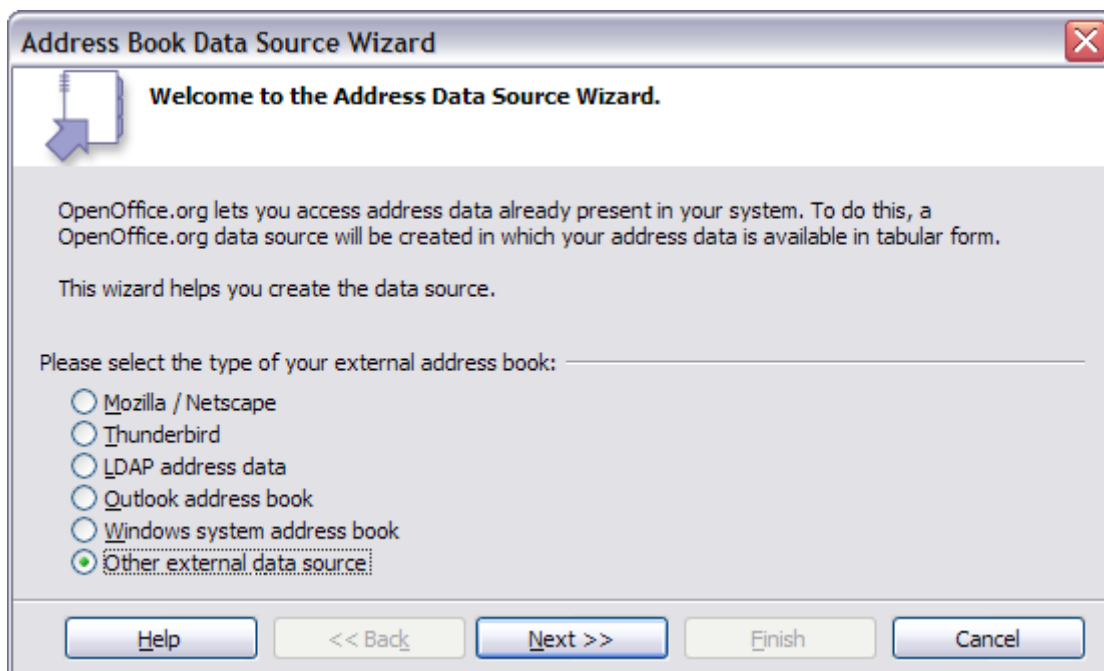


Figure 3: Select type of external address book

3) On the next page of the Wizard (Figure 4), click **Settings**.

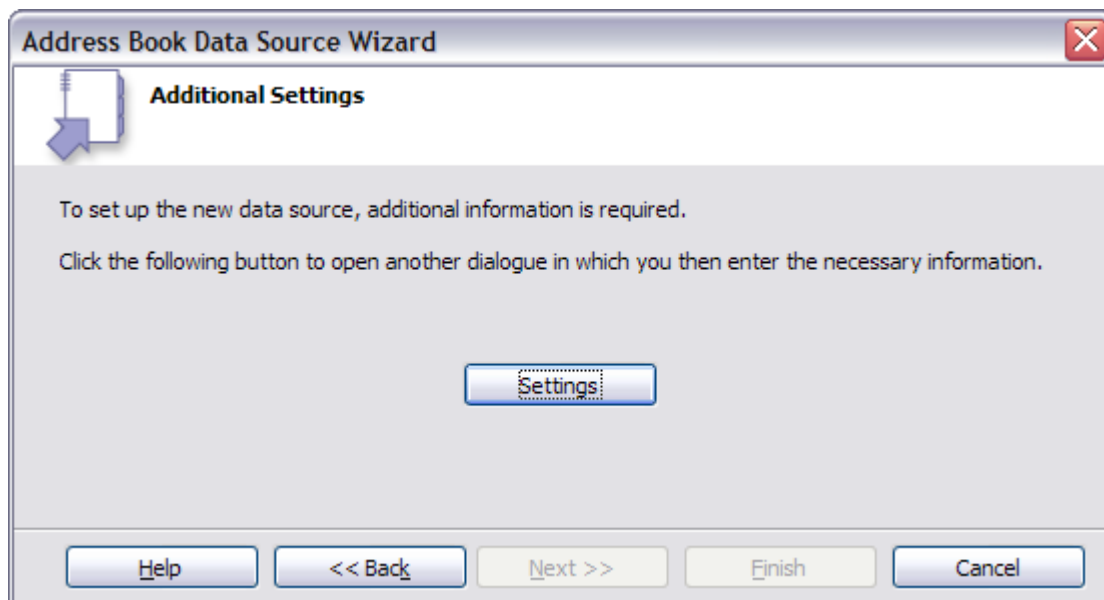


Figure 4: Starting the Settings part of the Wizard

- 4) In the Data Source Properties dialog (Figure 5), select the Database type (in this case, **Spreadsheet**). Click **Next**.

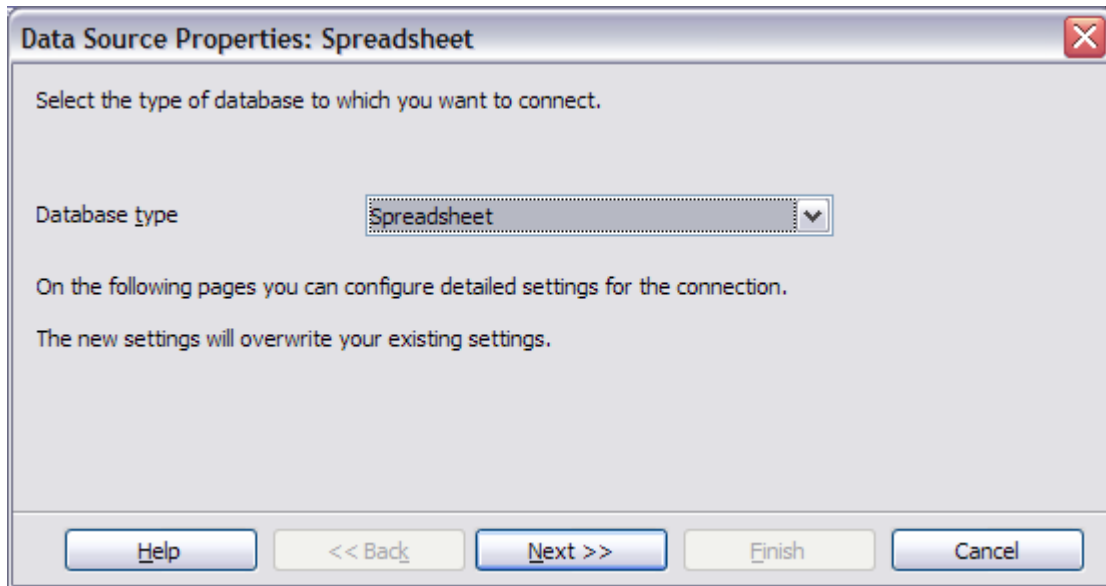


Figure 5: Selecting the database type

- 5) In the next dialog (Figure 6), click **Browse** and navigate to the spreadsheet that contains the address information. Select the spreadsheet and click **Open** to return to this dialog. At this time you may wish to test that the connection has been correctly established by clicking on the **Test Connection** button.

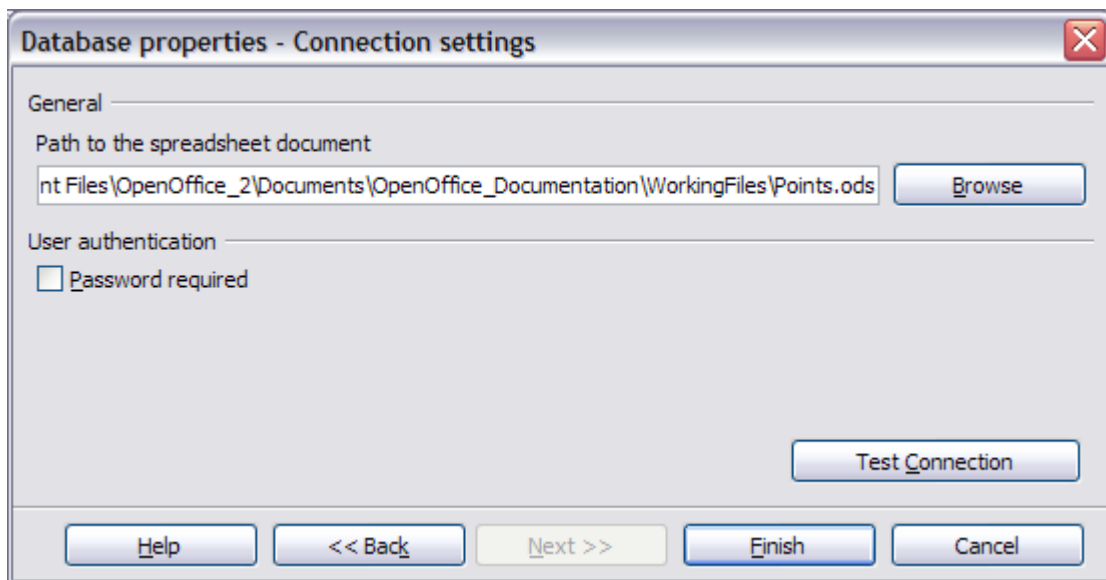


Figure 6: Selecting the spreadsheet document

- 6) Click **Finish**.
- 7) In the following dialog (Figure 7), click **Next**. (Do *not* click **Field Assignment**.)

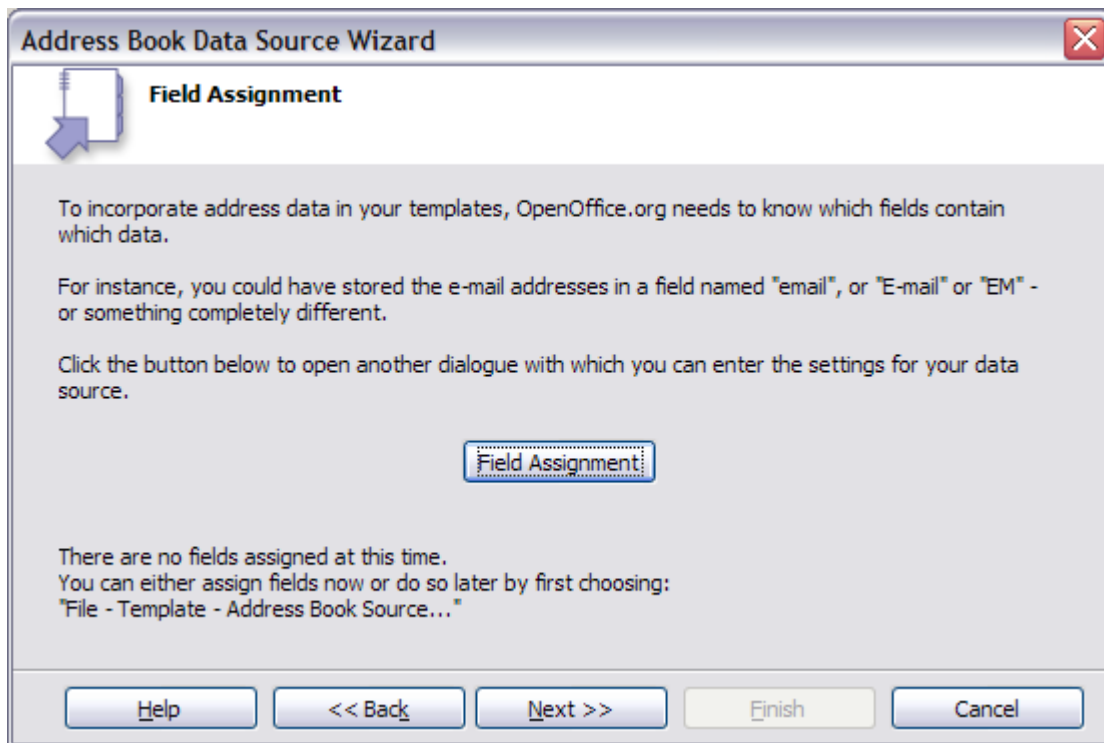


Figure 7: Because this is a spreadsheet, do **not** click *Field Assignment*.

- 8) Name the file in the Location field. The default is ...**Addresses.odb**; but you may replace **Addresses** with another name if you wish. You may also change the name in the “Address book name” field. In our example, the name “Points” was used for both.

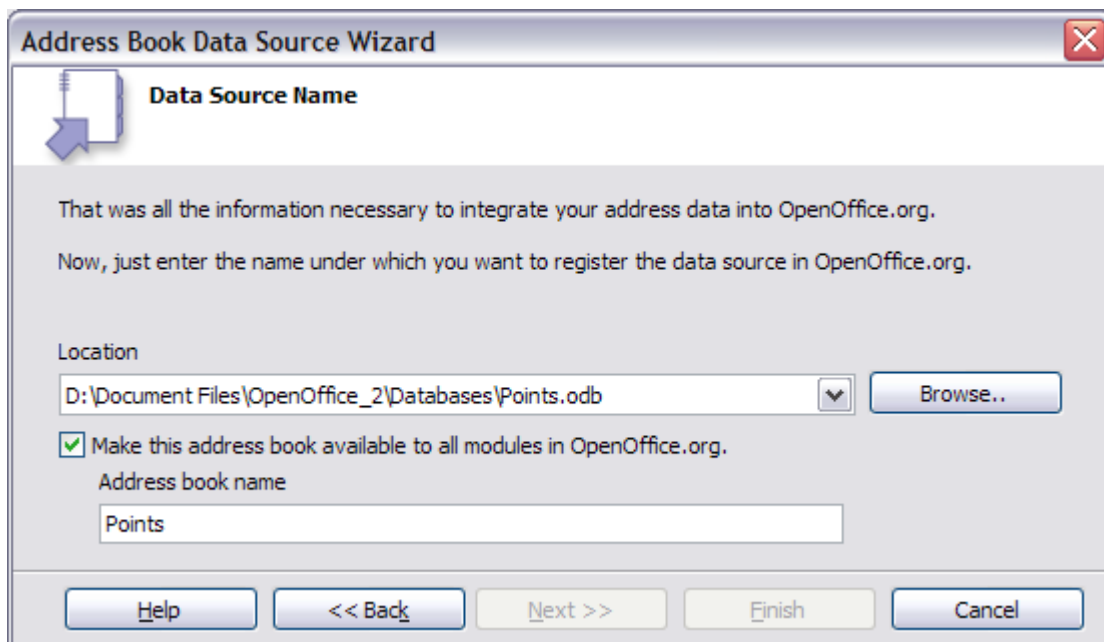


Figure 8: Name the .odb file and the address book.

- 9) Click **Finish**. The data source is now registered.

Creating a form letter

Example: Sending a letter to your customer base

A mail order company organized a campaign to assign credit points to their customers according to the quantity of goods they buy during one year.

At the end of the year, they want to send a letter to each customer to show the total of credit points collected.

You can create a form letter manually, which is the simplest and most comprehensive method and is described here, or you can use the Mail Merge wizard as described in “Using the Mail Merge Wizard to create a form letter” starting on page 21. If you elect to use the wizard, pay close attention to its current (OOo V2.3) limitations, as identified within its description.

- 1) Create a new text document: **File > New > Text Document**, or open a pre-existing form letter with **File Open**.
- 2) Display the registered data sources: **View > Data sources** (or press *F4*).
- 3) Find the data source that you wish to use for the form letter, in this case **Points**. Expand the **Points** and **Tables** folders, and select **Sheet1**. The address data file is displayed. (See Figure 9.)

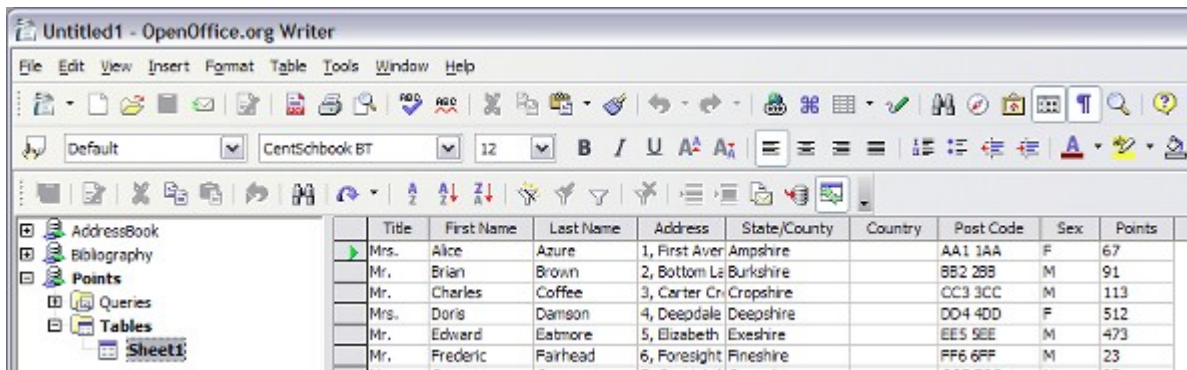


Figure 9: Selecting the data source.

- 4) Now create or modify the form letter by typing in text, punctuation, line breaks, and so on that will be present in all of the letters, and adding fields where needed by clicking in the field heading and dragging to the appropriate point in the letter. (See Figure 10.)

Note that address lines should be in individual paragraphs, not separated by line breaks as might seem preferable. The reason for this will be made clear in the next paragraph.

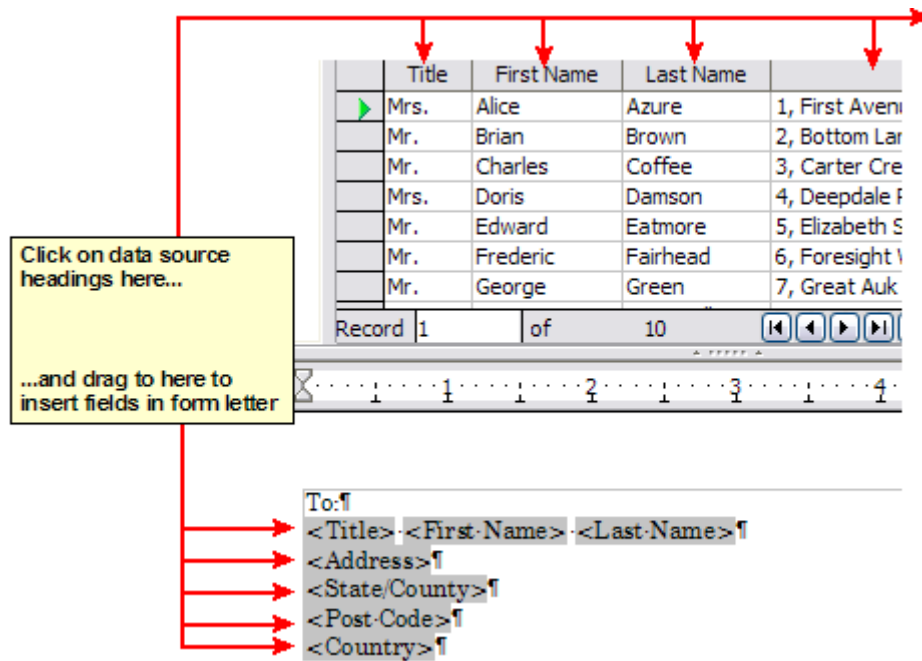


Figure 10: Dragging fields to the body of the form letter

- 5) Continue until you have composed the entire document. (See Figure 11 for an example.) At this time you may wish to consider suppressing any blank lines that may appear in the resulting letters. If not, skip ahead to Step 7.

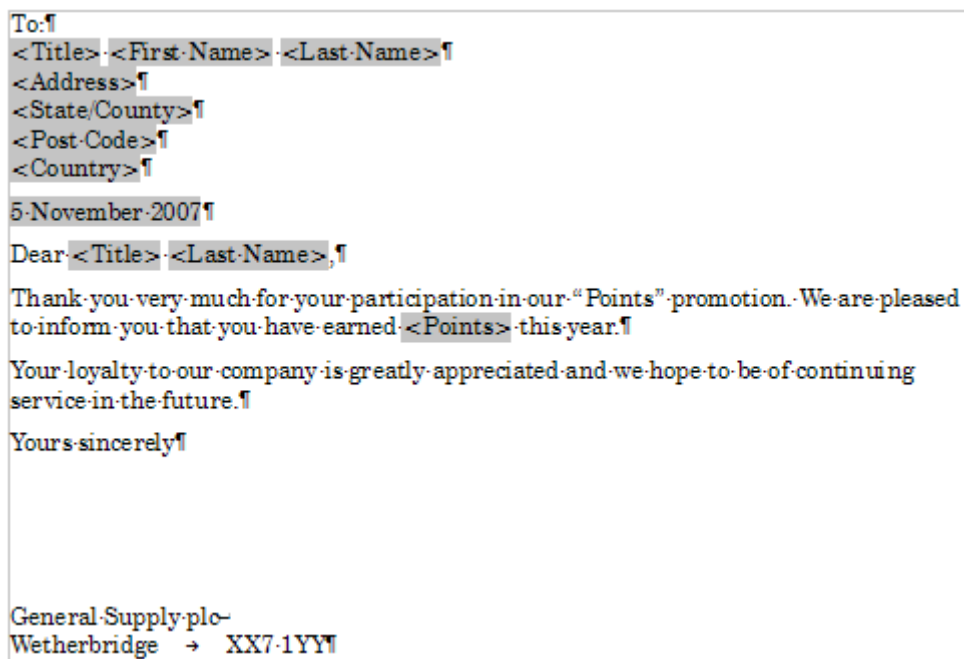


Figure 11: The completed form letter

- 6) To suppress blank lines:
- Click at the end of the first paragraph to be suppressed and then select **Insert > Fields > Other**.
 - Select the **Functions** tab and then click on Hidden Paragraph in the **Type** column.
 - Now click in the **Condition** box and enter the details of the condition that defines a blank address field. It has the general form of:
 ![Database.Table.Database field]
 where the '!' (NOT) character indicates the negative case and the square brackets delineate the condition.

 For example, in our Points database the condition to test if the Last Name field is empty would be:
 ![Points.Sheet1.Last Name] as illustrated in Figure 18
 - To test for multiple conditions use the operators *AND* and/or *OR* between the conditional statements, for example:
 ![Points.Sheet1.Title]AND![Points.Sheet1.Last Name].
 - Click **Insert**, but do not close the dialog until all lines have been amended.
- 7) The document is now ready to be printed. Click **File > Print** and respond with **Yes** in the resulting dialog.

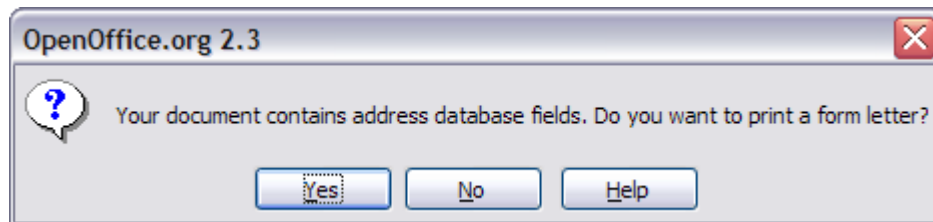


Figure 12: Mail Merge advisory dialog

- 8) In the Mail Merge dialog (Figure 13), you can choose to print all records or selected records. To select records to be printed, use *Ctrl+click* to select individual records. To select a block of records, select the first record in the block, scroll to the last record in the block, and *Shift+click* on the last record.

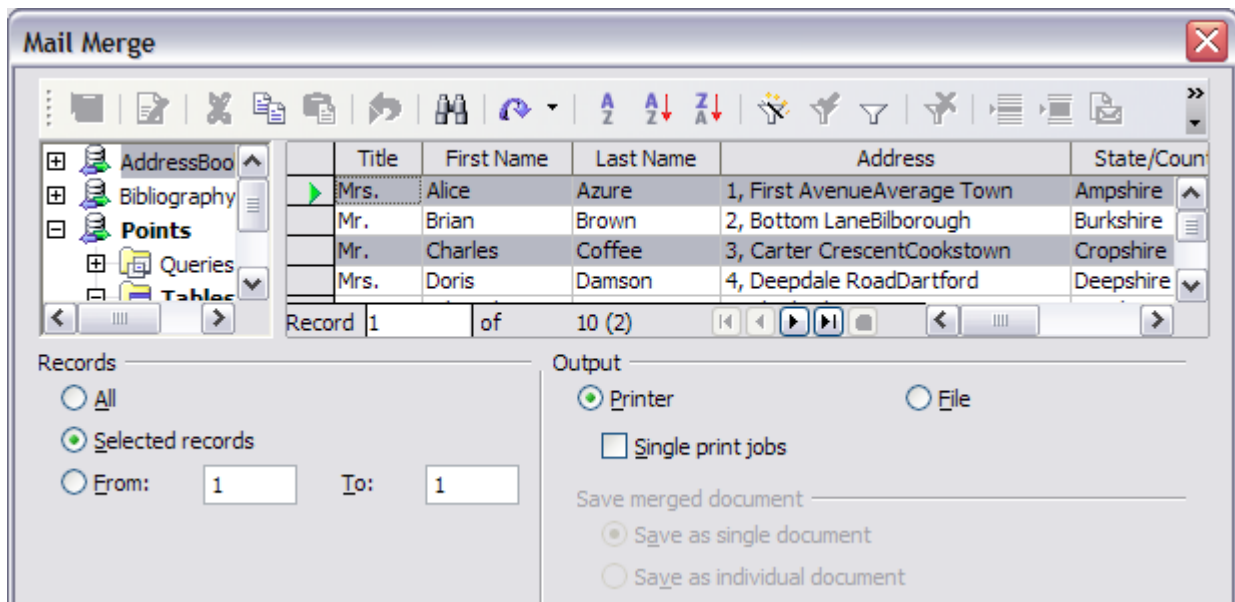


Figure 13: The Mail Merge dialog

9) Click **OK** to send the letters directly to the printer.

If you prefer to save the letters to a file, perhaps to allow proofreading or some later editing such as changing the typeface or paragraph format, then you should select **File** in the output section of the Mail Merge dialog, instead of using the default **Printer** selection. This changes the dialog to display the *Save merged document* section, where **Save as single document** is pre-selected. You can choose to save each letter as a single, individual document, if preferred.

In this case, clicking **OK** brings up the Save as dialog (Figure 14), where a file name can be entered for the saved letters. They will be saved consecutively in the single document, or numbered consecutively in individual files if saved as single documents.

If you have not saved the original, prototype form letter document (template) previously, then you will be prompted to do so now by another Save as dialog. This could greatly simplify the creation of other form letters in the future and is highly recommended.

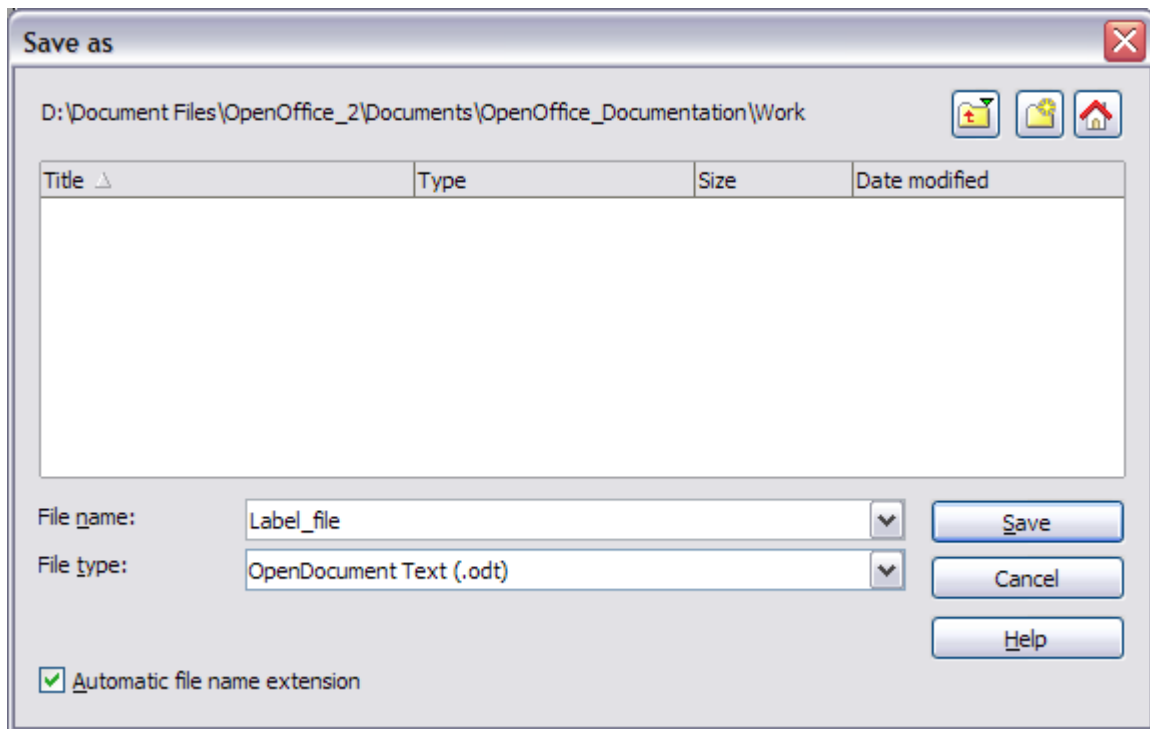


Figure 14: Mail Merge Save as dialog

Printing mailing labels

Before beginning this process, note the brand and type of labels you intend to use.

To print mailing labels:

- 1) Click **File > New > Labels**.
- 2) On the **Options** tab, ensure that the **Synchronise contents** checkbox is selected.
- 3) On the **Labels** tab (Figure 15), select the **Database** and **Table**. Select the **Brand** of labels to be used, and then select the **Type** of label.

TIP If the type of label you wish to use is not on the list, you need to use the **Format** tab to define a new Brand and Type. This is beyond the scope of this document, but is relatively simple to implement, given knowledge of the dimensions of the label .

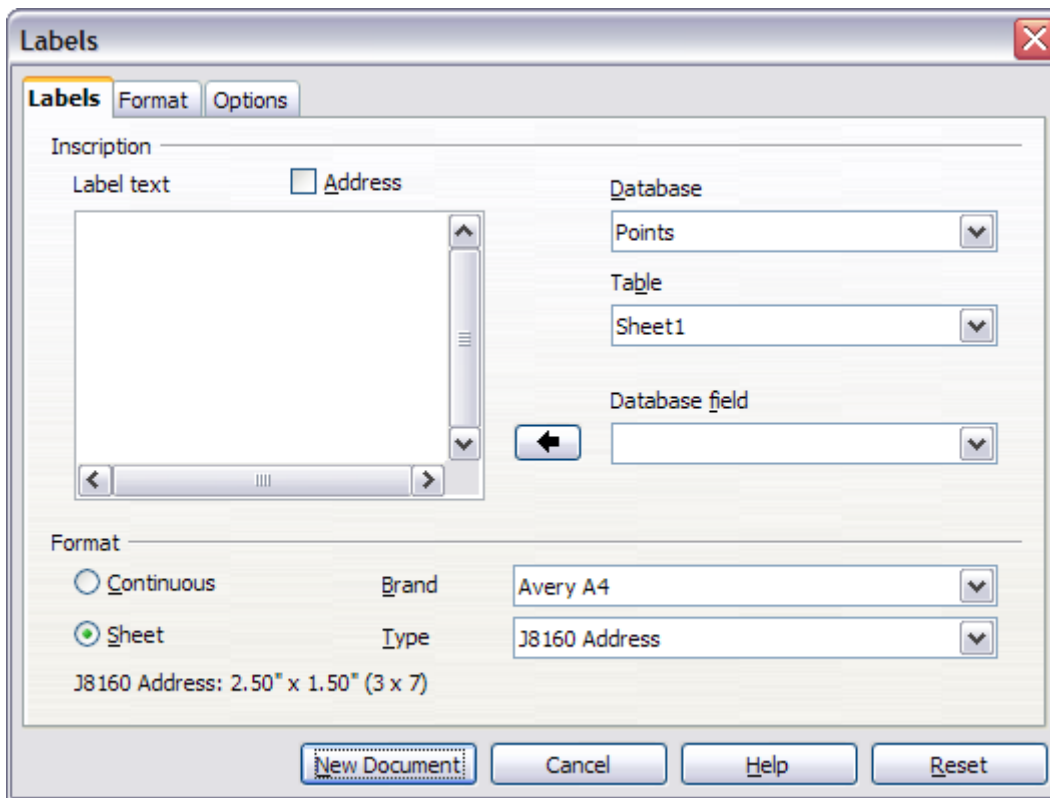


Figure 15: Select Database, Table, label Brand, and label Type.

- 4) Click the dropdown arrow under **Database field**. Select the first field to be used in the label (in this example, **Title**). Click the left arrow button to move this field to the **Label text** area (Figure 16).

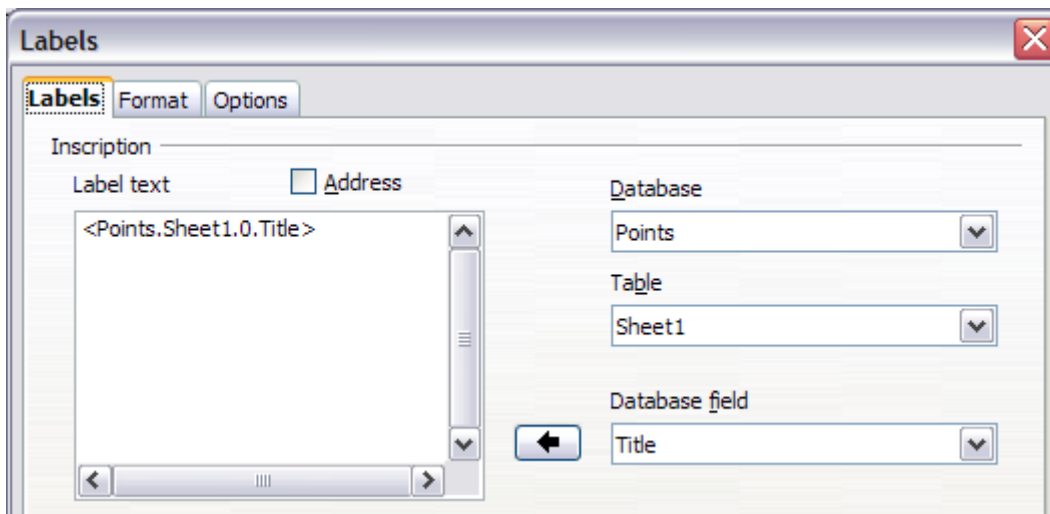


Figure 16: Move fields from Database field list to Label text area.

- 5) Continue adding fields and inserting desired punctuation, spaces, and line breaks until the label is composed. Figure 17 shows the completed label.

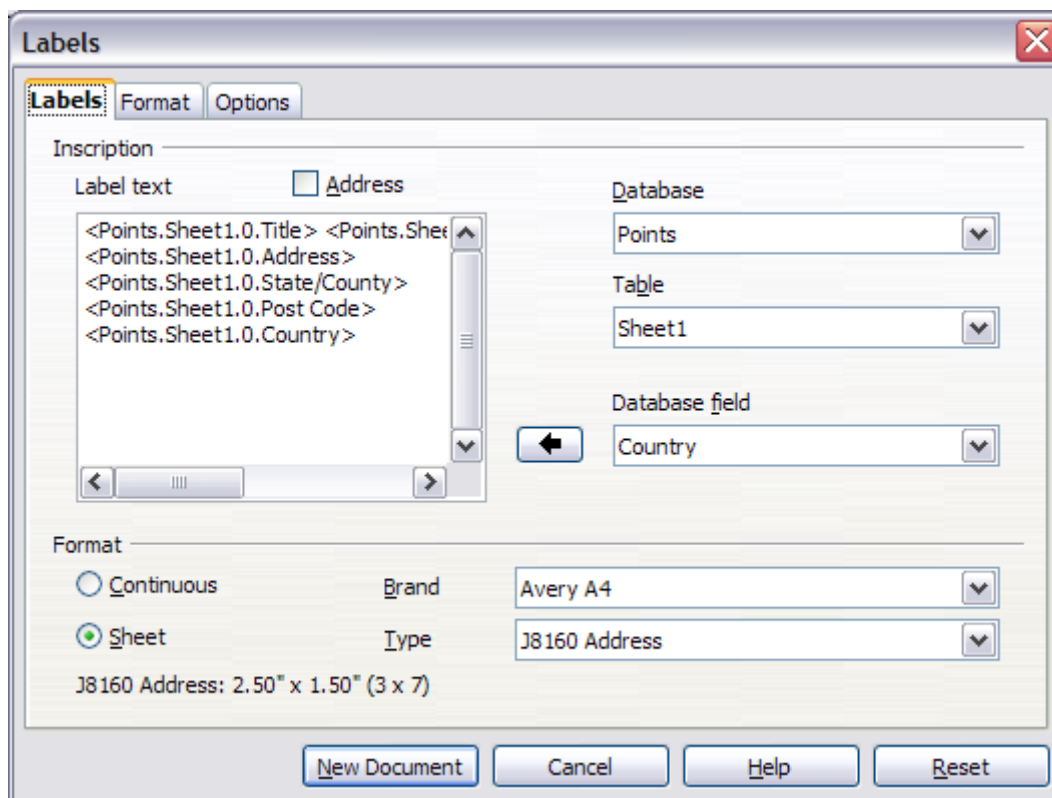


Figure 17: The completed label.

6) Click **New Document**. You now have a new, single-page document containing a series of frames, one for each label of the selected type and filled with the data source address fields that you selected. Quite often some of the fields in your address data source will be unused, leading to blank lines in your labels. If this is not important, you can skip the next few paragraphs and go straight to Step 7, otherwise continue as described here.

- a) First ensure that the label frames are showing the field contents (data source headings), rather than their underlying field names. If this is not the case, then either press *Ctrl+F9* or select **View>Field Names** to toggle the view.
- b) Next, ensure that you can see non-printing characters, such as paragraph marks, line breaks and so on. If these are not already visible, select **View > Nonprinting Characters** from the menu bar, or press *Ctrl+F10*, or click on the paragraph icon ¶ in the Standard toolbar.

You will now see that address field separation is created by line breaks ↵, rather than paragraphs ¶. As the suppression of blank address fields depends on hiding paragraphs, not lines, you need to replace line breaks with paragraphs as follows.

- c) Click in the first label, at the end of the first data source address field. Press *Delete* to remove the new line and then press *Return* (or the *Enter* key) to insert a paragraph. Repeat this action for each data source address field.

If the line spacing in the first label is not satisfactory, you may wish to correct this before proceeding, by modifying the paragraph style associated with the address. Unless you have changed it, the address uses the Default style.

Caution


The objective of step c) is to replace all line breaks at the end of data source address fields with paragraphs. Sometimes the address data field may be longer than the width of the label and will wrap to the next physical line: make sure that you are not misled by this into deleting and replacing anything other than line break characters.

- d) Click again at the end of the first paragraph to be suppressed and then select **Insert > Fields > Other**. Select the **Functions** tab and then click on Hidden Paragraph in the **Type** column. Now click in the **Condition** box and enter the details of the condition that defines a blank address field. It has the general form of:

![Database.Table.Database field]

where the '!' (NOT) character indicates the negative case and the square brackets delineate the condition.

For example, in our Points database the condition to test if the Last Name field is empty would be ![Points.Sheet1.Last Name] as illustrated in Figure 18.

To test for multiple conditions, use the operators *AND* and/or *OR* between the conditional statements, for example:

![Points.Sheet1.Title]AND![Points.Sheet1.Last Name].

Click **Insert**, but do not close the dialog until all lines have been amended.

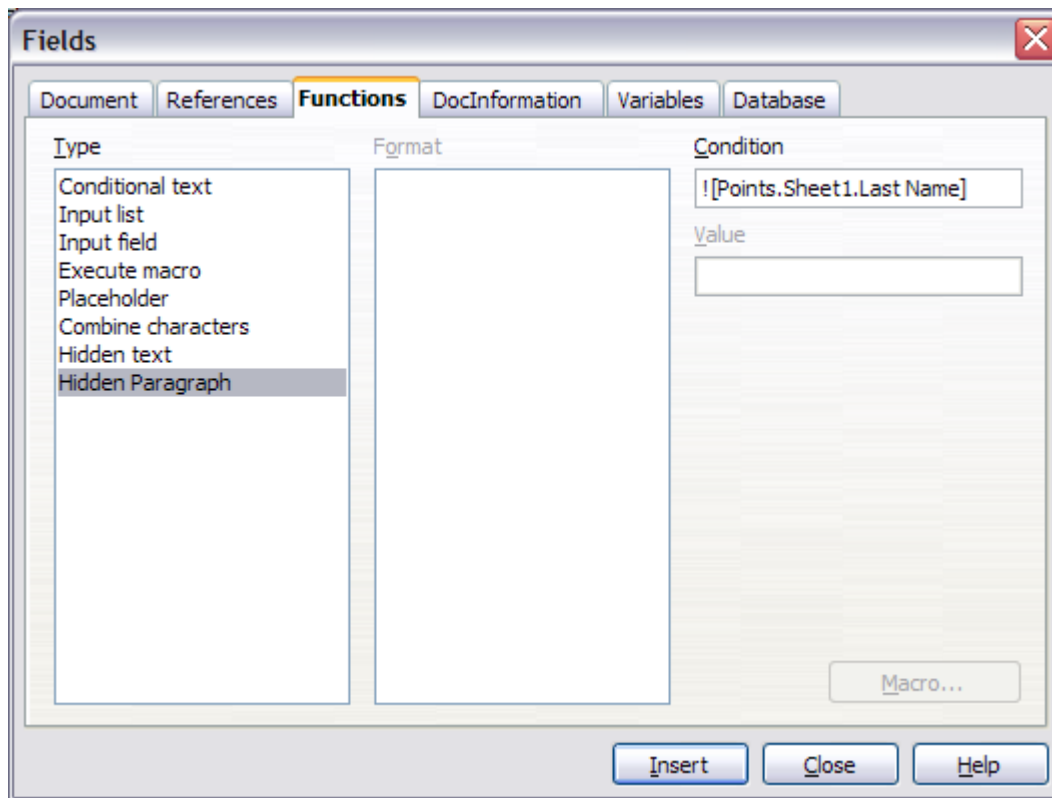


Figure 18: Hidden paragraph insertion

- e) Repeat for each paragraph to be conditionally suppressed, remembering to advance the cursor to the end of the line in question before changing the last element of the condition and **Inserting** the result.

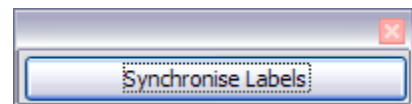
Caution



The last paragraph of the label address block ends with a special field, Next record:Database.Table (Next record:Points.Sheet1 in our example), and the Hidden paragraph field **MUST** be inserted before this field. This can generally be accomplished by clicking at the end of the paragraph and then using the *Left Arrow* key once to skip back over it.

A clue that you omitted this action is the observation that some records have been skipped and are missing from the final output.

- f) Remembering that we selected **Synchronise contents** earlier, you should now be able to see a small window containing a button labelled **Synchronise Labels**. Click on this button and the hidden paragraph fields are propagated to all the labels in your document.



You now have a template suitable for future use with the same data source and type of label. If you wish to save it, use either **File > Templates > Save as**, or save it as an Open Document Text Template (.ott) into the private template directory (folder) that you have previously defined in **Tools > Options > OpenOffice.org > Paths > Templates**.

- 7) Click **File > Print**. The following dialog appears. Click **Yes**.

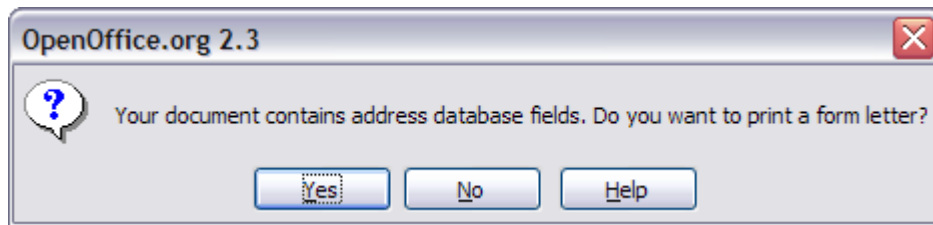


Figure 19: Mail Merge advisory dialog

- 8) In the Mail Merge dialog (Figure 20), you can choose to print all records or selected records. To select records to be printed, use *Ctrl+click* to select individual records. To select a block of records, select the first record in the block, scroll to the last record in the block, and *Shift+click* on the last record.

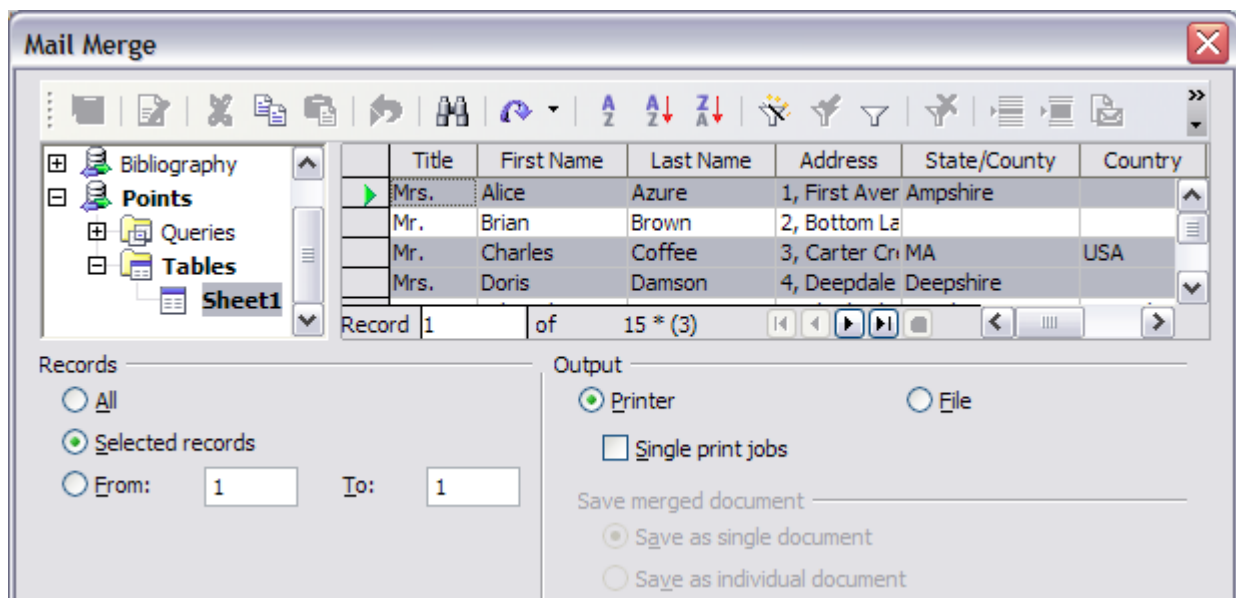


Figure 20: Mail Merge dialog

- 9) Click **OK** to send the labels directly to the printer.

If you prefer to save the labels to a file, perhaps to allow some later editing such as changing the typeface or paragraph format, then you should select **File** in the output section of the Mail Merge dialog, rather than using the default **Printer** selection. This changes the dialog to highlight the *Save merged document* section, where **Save as single document** is pre-selected.

In this case, clicking **OK** brings up the Save as dialog shown in Figure 14, where a file name can be entered for the saved labels.

If you did not save the prototype label fields document (template) in step 6f, then you are prompted to do so now by another Save as dialog.

In either case, whether printing or saving to file, despite there apparently being only one page of labels, the printed or saved output will be expanded to include all of the selected records from the data source.

Editing a saved file of mailing labels

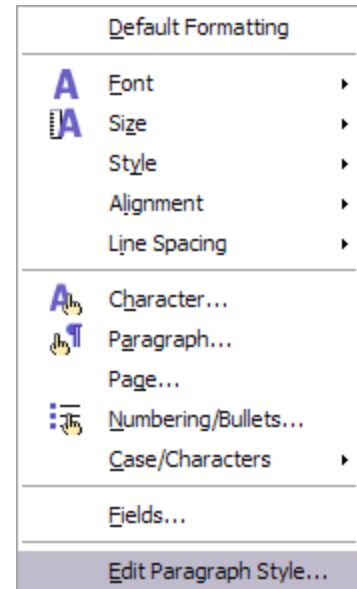
To edit a saved file of mailing labels, open the saved label file in the normal way. You will be prompted as to whether you wish to update all links. Choose **No** for the following reason: The first label on the page is termed the “Master Label” and all other labels are linked to it: if you update the links then all labels will end up containing the same data, which may not be what you want.



You can edit individual records in the normal way, by highlighting and changing the font name, for example.

However, you cannot edit all labels globally (for example, to change the font name for all records) by the technique of selecting the entire document. To achieve this result you have to edit the paragraph style associated with the label records as follows:

- 1) Right-click any correctly spelled word in a label record. Select **Edit Paragraph Style** from the pop-up menu. (Note: If you click on a misspelled word, a different menu appears.)
- 2) Then from the Paragraph Style dialog, you can make changes to the font name, the font size, the indents, and other attributes.



Printing envelopes

Instead of printing mailing labels, you may wish to print directly onto envelopes. There are two basic ways to create envelopes, one where the envelope is embedded within a letter, generally as the first page (**Insert** in the **Envelope** dialog), and another where the envelope is an independent document (**New Doc.** in the dialog). In each case the addressing data may be manually entered, for example by copying and pasting from the letter with which it is associated, or it may originate within an address data source.

This section assumes the use of an address data source and, for convenience, a free-standing envelope.

The production of envelopes involves two steps, set-up and printing, as described in this section.

Setting up envelopes for printing

- 1) Click **Insert > Envelope** from the menu bar.

- 2) In the **Envelope** dialog, select the **Format** tab (Figure 21), where you can select the envelope format to use. You can then arrange the layout of the envelope to suit your requirements, together with the character and paragraph attributes to be used in the Sender and Addressee areas. These attributes are accessed using the **Edit** buttons to the right of the dialog, next to the word *Format*.

Tip At this stage it is not possible to vary the dimensions of the frames that will hold the Sender and Addressee information, but once the envelope has been created this will become possible and you may wish to make some cosmetic adjustments.

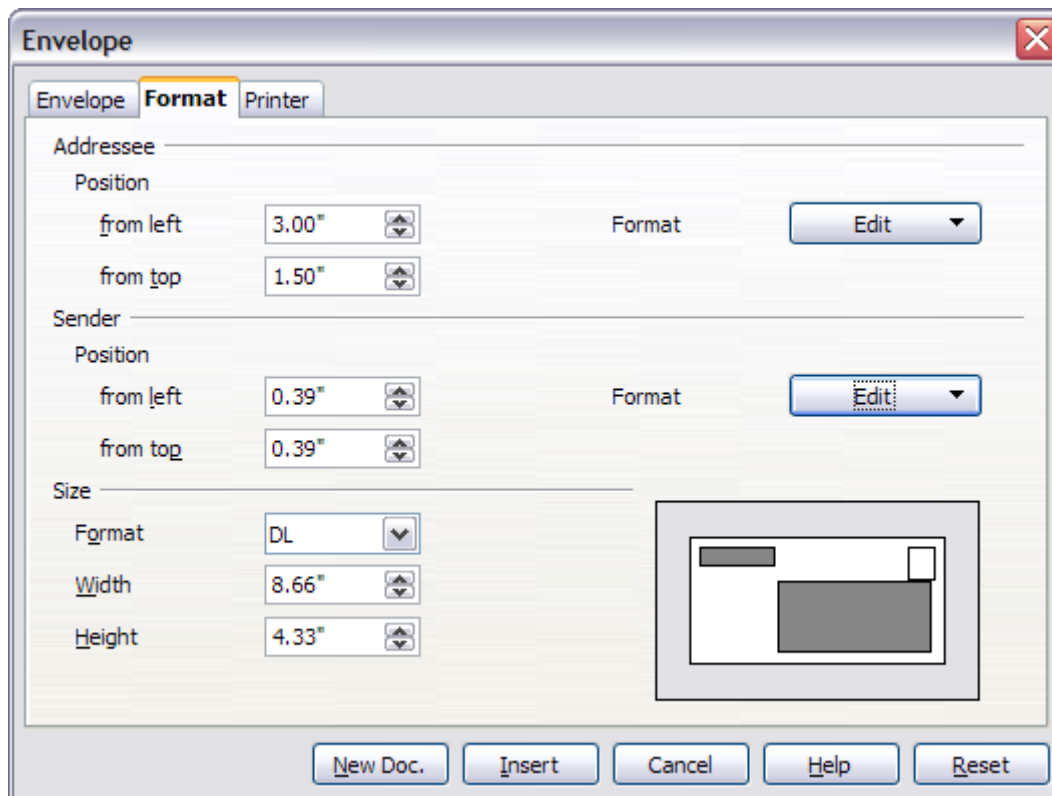


Figure 21: Envelope formatting dialog

- 3) The next step is to select the **Printer** tab (Figure 22), from where you may choose the printer you intend to use, its setup—for example, specification of the tray holding envelopes--and other printer-related options such as envelope orientation and shifting. You may need to experiment with these settings to achieve the best results with your printer.
- 4) You now have the choice of creating the Addressee fields by dragging and dropping from the data source headings (as described in “Creating a form letter” on page 6, and in particular in Figure 10) or using the facilities of the **Envelope** tab.

If you prefer dragging and dropping, than click **New Doc.**, drag your data source headings into the Addressee area on your new envelope and skip to step 7), otherwise continue with steps 5 and 6.

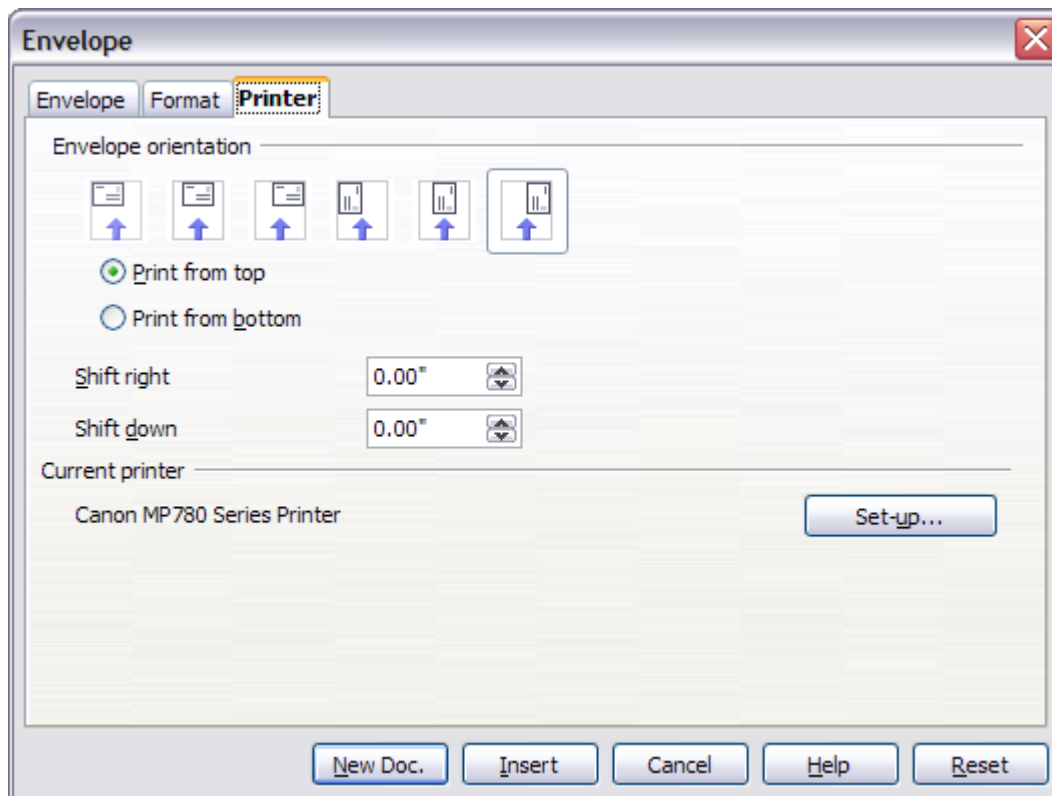


Figure 22: Choosing printer options for an envelope

- 5) Select the **Envelope** tab (Figure 23). Verify, add, or edit the information in the Addressee and Sender boxes (Sender is the “from” on the envelope). You can use the right-hand dropdown lists to select the database and table from which you can access the Addressee information, in a similar fashion to that described for “Printing mailing labels”, paragraphs 3, 4 and 5 on page 10. The similarity of the method with Figure 16 and Figure 17 will be clear.
- 6) When you have finished formatting, click either the **New Doc.** or **Insert** button to finish. As might be expected, **New Doc** creates only the envelope template in a new document, whereas **Insert** inserts the envelope into your current document as page 1.

If you don’t want to proceed with this envelope, click **Cancel** or press the *Esc* key. You can also click **Reset** to remove your changes and return to the original settings extant when the dialog opened.

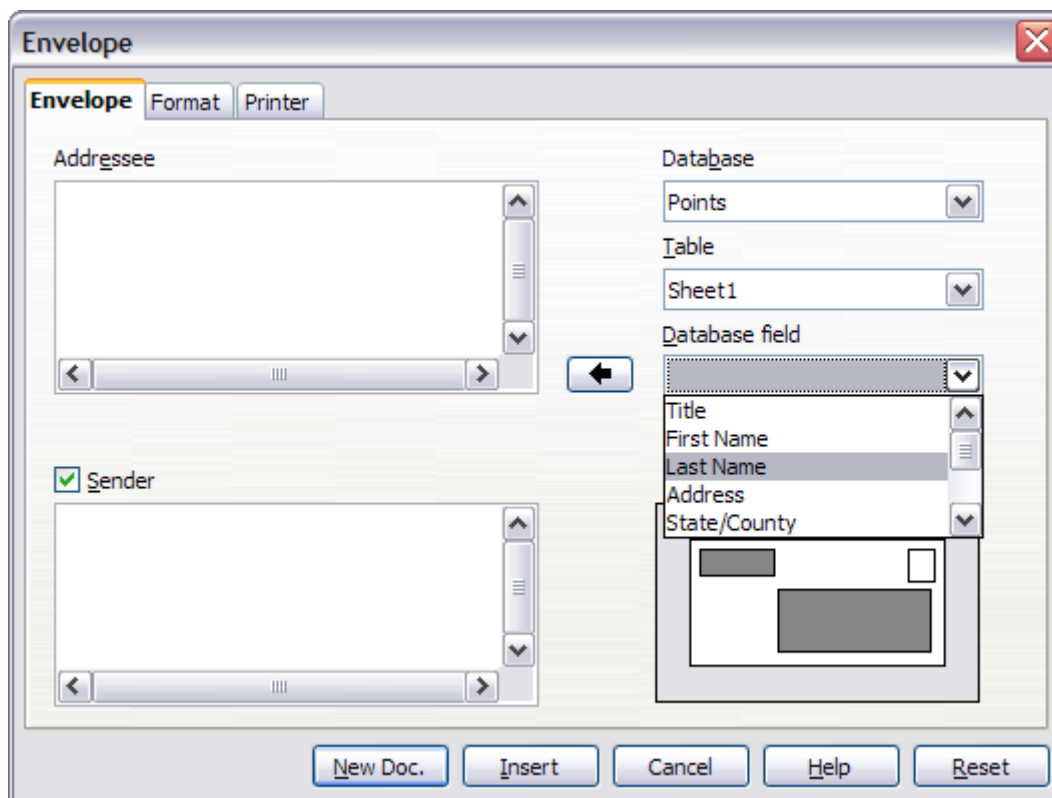


Figure 23: Choosing addressee and sender information for envelopes

- 7) Quite often some of the fields in your address data source will be unused, leading to blank lines in your envelope Addressee area. If this is not important, you can skip the next few paragraphs and go straight to “Merging and printing the envelopes” on page 20, otherwise continue as described here.

Tip The following procedure is very similar to that used for a similar purpose in the section on printing mailing labels. It is reproduced here for purposes of clarity.

- a) First ensure that the envelope is showing the field contents (data source headings), rather than their underlying field names. If this is not the case, then either press *Ctrl+F9* or select **View > Field Names** to toggle the view.
- b) Next, ensure that you can see non-printing characters, such as paragraph marks, line breaks and so on. If these are not already visible, select **View > Nonprinting Characters** from the menu bar, or press *Ctrl+F10*, or click on the large paragraph icon ¶ in the Standard toolbar.

You will now see that address field separation is created by line breaks ↵, rather than paragraphs ¶. As the suppression of blank address fields depends on hiding paragraphs, not lines, you need to replace line breaks with paragraphs as follows.

- c) Click at the end of the first data source address field. Press *Delete* to remove the new line and then press *Return* (or the *Enter* key) to insert a paragraph. Repeat this action for each data source address field.

If the line spacing in the Addressee area is not satisfactory, you may wish to correct this before proceeding, by modifying the paragraph style associated with the address. Unless you have changed it, the address uses the Default style.

Caution The objective of c) above is to replace all line breaks at the end of data source address fields with paragraphs.



- d) Click again at the end of the first paragraph to be suppressed and then select **Insert > Fields > Other**. Select the **Functions** tab and then click on Hidden Paragraph in the **Type** column. Now click in the **Condition** box and enter the details of the condition that defines a blank address field. It has the general form of:

![Database.Table.Database field]

where the '!' (NOT) character indicates the negative case and the square brackets delineate the condition.

For example, in our Points database the condition to test if the Last Name field is empty would be: ![Points.Sheet1.Last Name] as illustrated in Figure 18.

To test for multiple conditions, use the operators *AND* and/or *OR* between the conditional statements, for example:

![Points.Sheet1.Title]AND![Points.Sheet1.Last Name].

Click **Insert**, but do not close the dialog until all lines have been amended.

- e) Repeat for each paragraph to be conditionally suppressed, remembering to advance the cursor to the end of the line in question before changing the last element of the condition and **Inserting** the result.

Merging and printing the envelopes

To merge addresses and print the envelopes:

- 1) Choose **File > Print**. The following dialog appears. Click **Yes**.

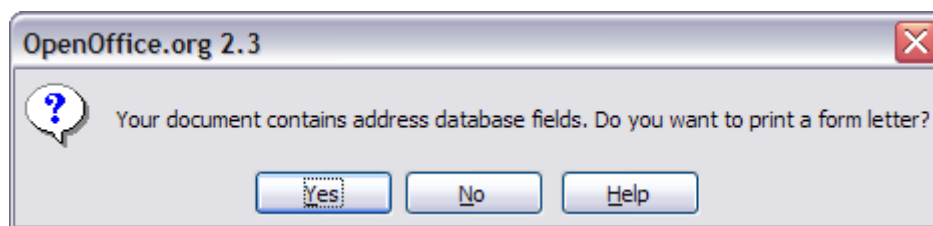


Figure 24: Confirmation dialog for merging database fields

- 2) The Mail Merge dialog (Figure 25) appears. As with form letters and mailing labels, you can choose to print envelopes for one, several or all address records in the database.

- 3) Make your selections and then click **OK** to print direct to the printer. If you wish to check the envelopes before printing them, see Step 9) of “Creating a form letter” on page 9 for instructions.

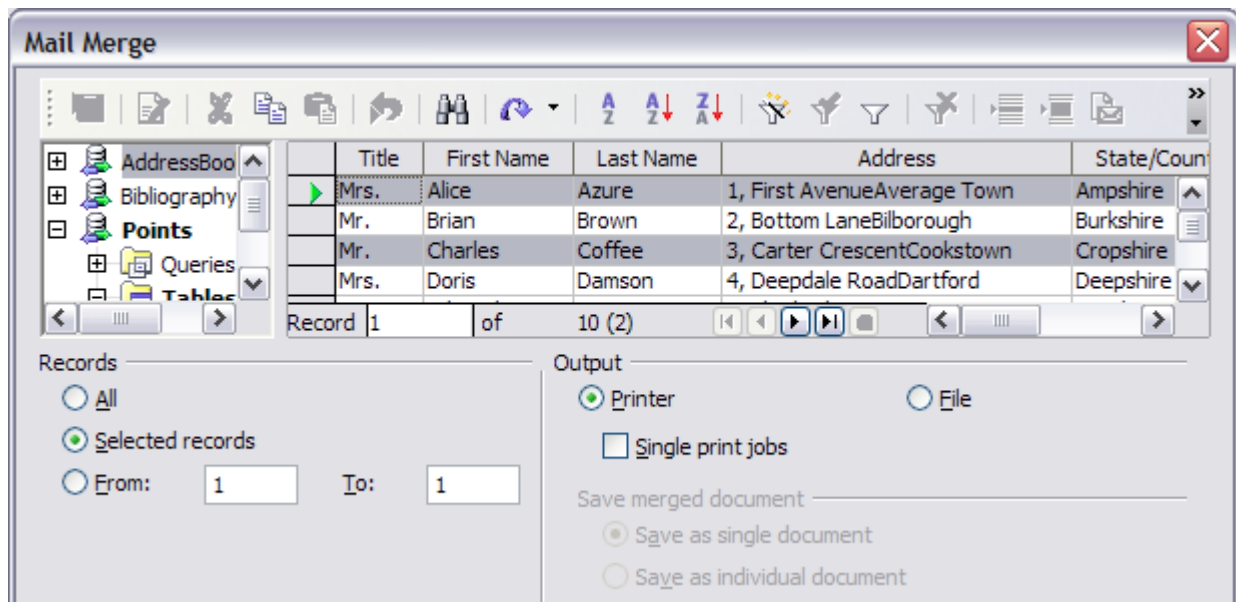


Figure 25: Choosing records to use when printing envelopes

Using the Mail Merge Wizard to create a form letter

The recommended way to create a form letter is the manual method described in “Creating a form letter” on page 6. If however you prefer to use the Mail Merge wizard, the technique is described below.

Before starting you should note the following limitations, current in OOo V2.3:

- In Step 4 creating the salutation will only allow the sex-related Mr. and Mrs. It makes no allowance for Miss, nor does it permit sexless addressing such as Dr., or The Right Honourable.
- Still in Step 4, it is possible to bodge something like Dr. Crippen, but only by creating an impossible trigger for recognising a female recipient, such that the merge defaults to male. Of course one cannot have a prefix such as ‘Dear’ in this case and it has to be manually entered in Step 6.
- Again in Step 4, the General salutation is not editable and the default values are somewhat limited.
- In Step 5 the layout is idiosyncratic, with paragraph marks all over the place so as to space the address block frame and salutation. To create a professional looking document will require significant editing.

If the above limitations are not a hindrance to you, then open a new document with **File > New > Text Document** and start the Mail Merge wizard using **Tools > Mail Merge Wizard**. The wizard opens, as shown in Figure 26.

Step 1: Select starting document

The wizard gives various options to select your starting document:

- Use the current document.
- Create a new document.
- Use a template.
- Use an existing document.

For the purposes of this description we assume that you opened a new text document. This will ensure that all the steps in the wizard are fully explored, although with experience you may find it more practical to use a draft you prepared earlier, which will allow skipping some steps.

Select **Use the current document** and click **Next**.

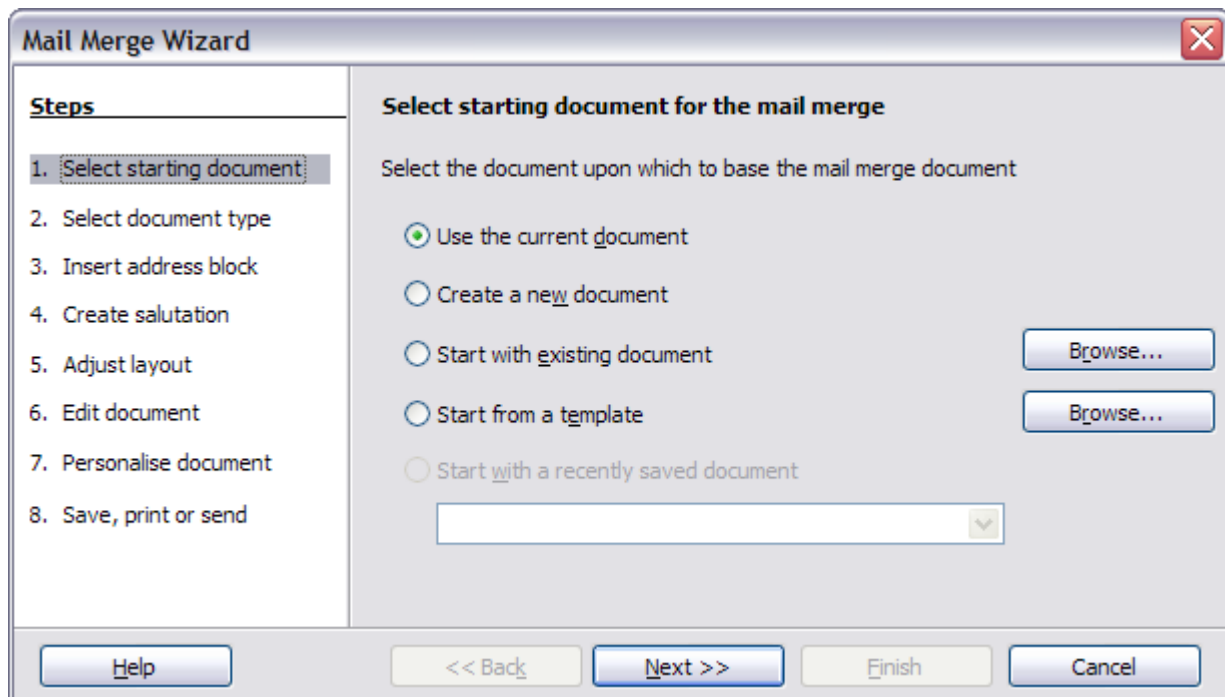


Figure 26: Select starting document

Step 2: Select document type

The wizard can produce letters or, if a Java Mail connection exists, email messages. You can see these options in Figure 27. In this example, we are producing a letter. Select **Letter** and click **Next**.

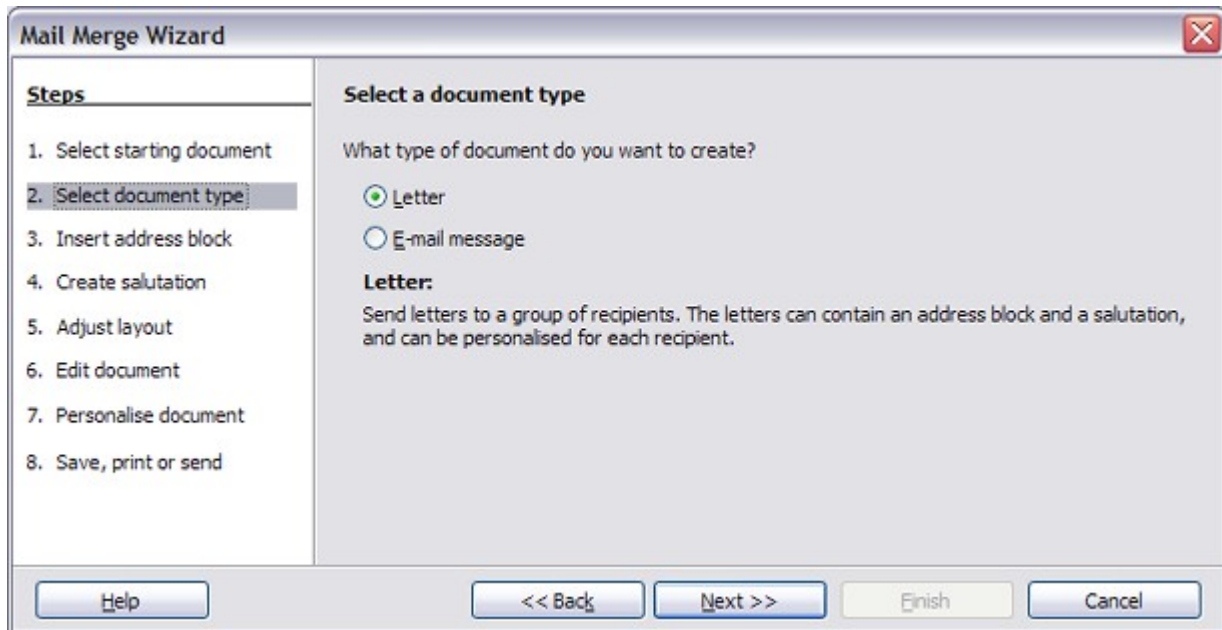


Figure 27: Choose document type

Step 3: Insert address block

This is the most complex step in the wizard. In this step (Figure 28) you will do three things:

- 1) Tell the wizard which data source to use. The data source must be an existing file; in this example it is the “Points” spreadsheet created earlier.
- 2) Select the address block to use in the document. This means choosing which fields appear (for example, whether the country is included) and how they look.
- 3) Make sure that the fields all match correctly. This is very important. For example, the wizard has a field called <Last Name>. If your spreadsheet has a column called “Surname”, you need to tell the wizard that <Last Name> and “Surname” are equivalent. This is described in “Matching the fields” on page 27.

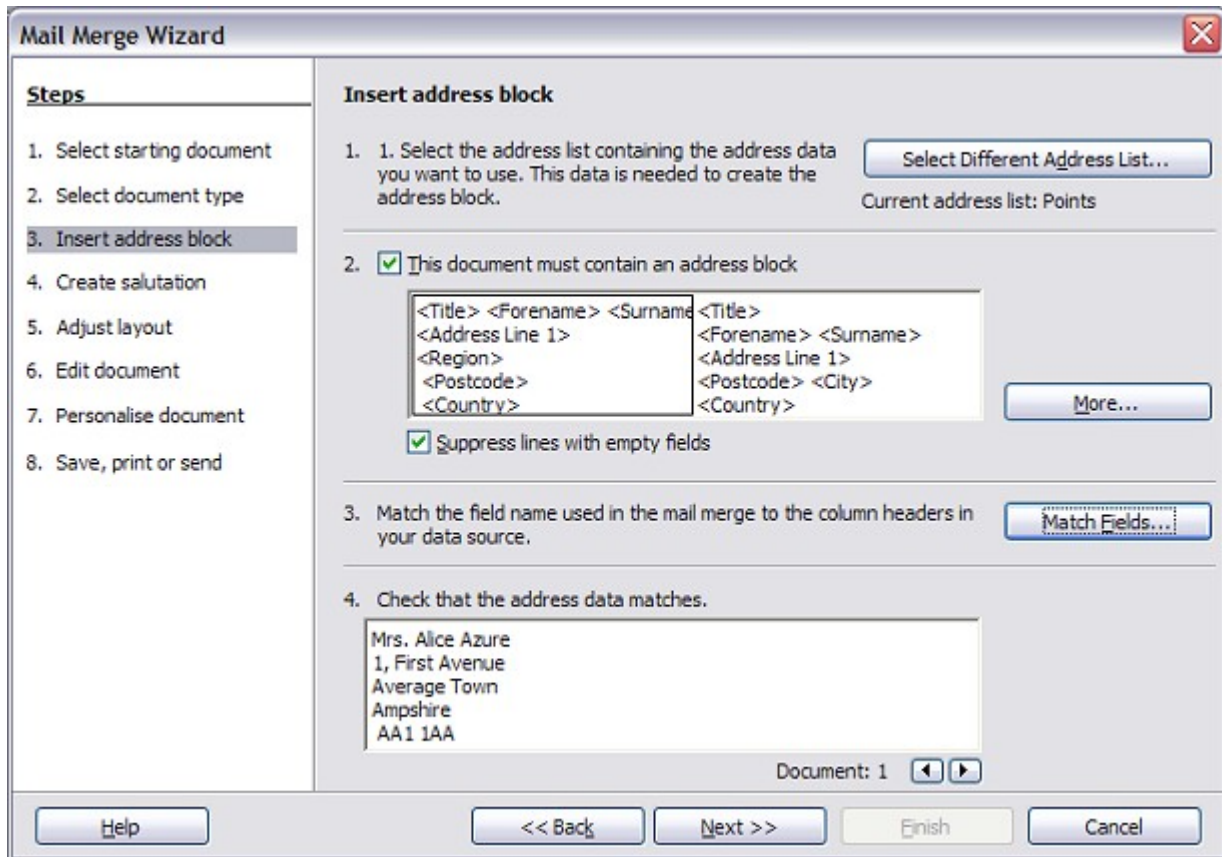


Figure 28: Insert address block

Selecting the data source (address list)

- 1) If the current address list, identified beneath the “**Select Different Address List...**” button in section 1, is not the one you wish to use click the button to open the Select Address List dialog (Figure 29) for choosing a data source.
- 2) If you have not already created the address list, you may click **Create** to do so now. This step will allow you to create a CSV (Comma Separated Values) file with a new list of address records.

If you already have an address list, as we have in the “Points” spreadsheet example, but which is not the one you wish to use, click **Add** and select the file in which it resides.

In each of the above cases a new data source will be created and registered.

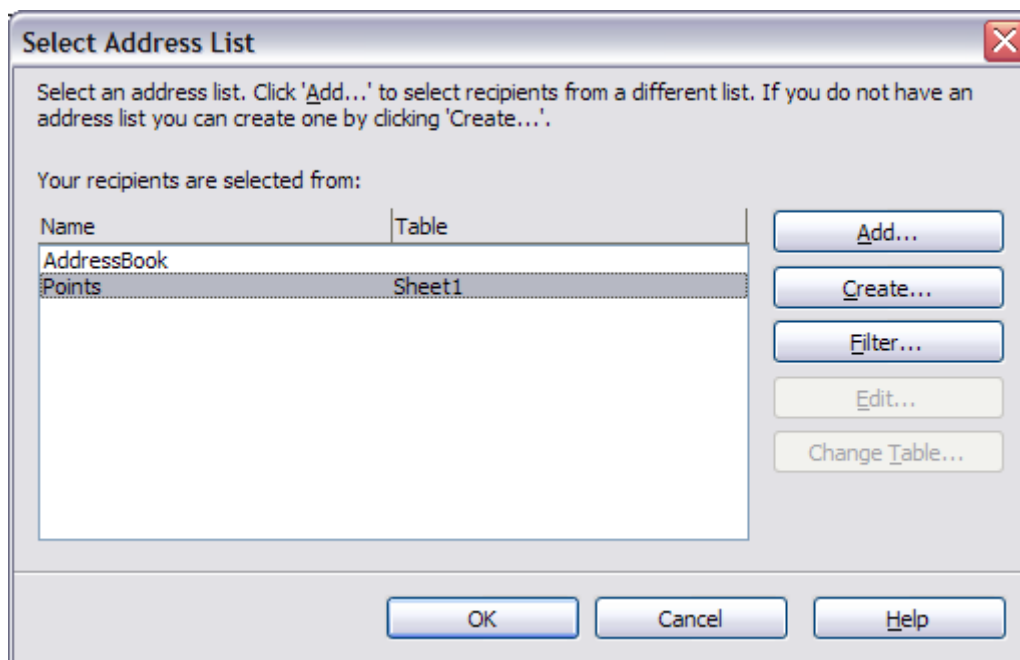


Figure 29: Select address list dialog

- 3) Select the address list and click **OK** to return to step 3 of the wizard. For this example, the preceding steps are all you need to do. The wizard can also exclude certain records; click **Filter** to choose them.

Selecting the address block

- 1) In step 3 of the wizard (shown in Figure 28), look at section 2. This is where you select the address block to appear on the letter, and define its appearance and the fields it contains. The main page gives two examples. If neither of those is exactly what you want, click **More** to see more choices, in the Select Address Block dialog (shown in Figure 30).
- 2) The Select Address Block dialog offers six choices for the format of the address block (scroll down to see the last two choices). You can also optionally include or exclude the country (for example, only include the country if it is not England). The six formats provided are relatively common, but they might not exactly match your preference. If this is the case, select the address block that is closest to what you want and click **Edit**, which opens the New Address Block dialog.

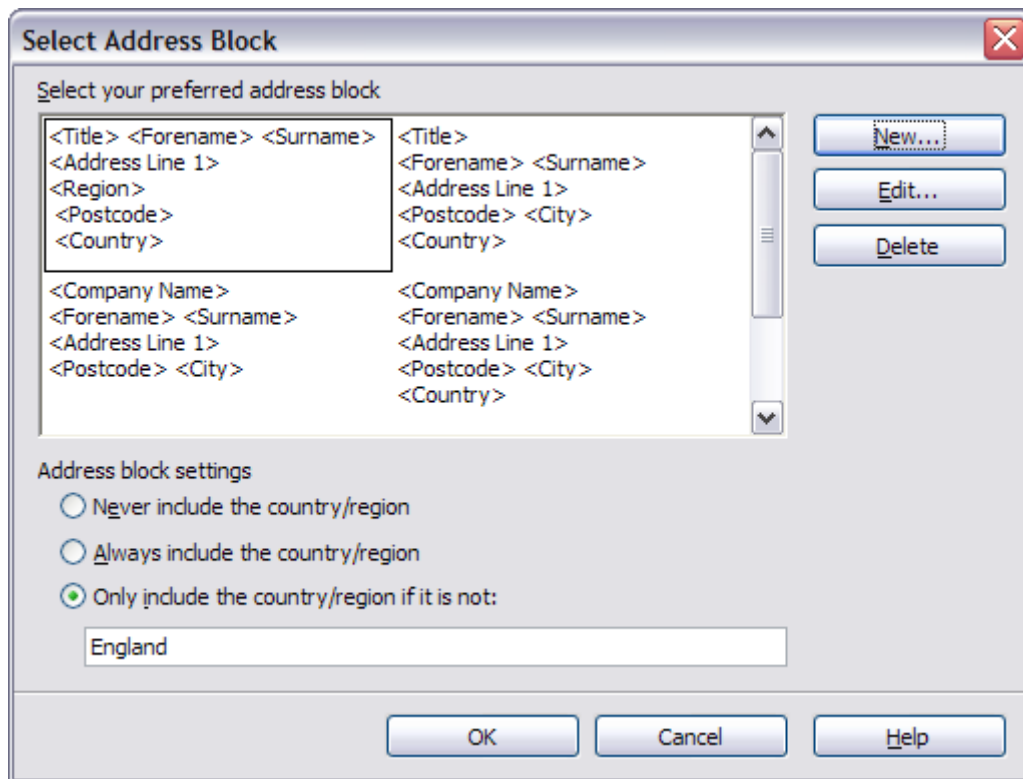


Figure 30: Select address block

- 3) In the New Address Block dialog (Figure 31), you can add or delete address elements using the arrow buttons on the left. To move elements around, use the arrow buttons on the right. For example, to add an extra space between first and last names in Figure 31, click <Last Name> and then click the right arrow button.

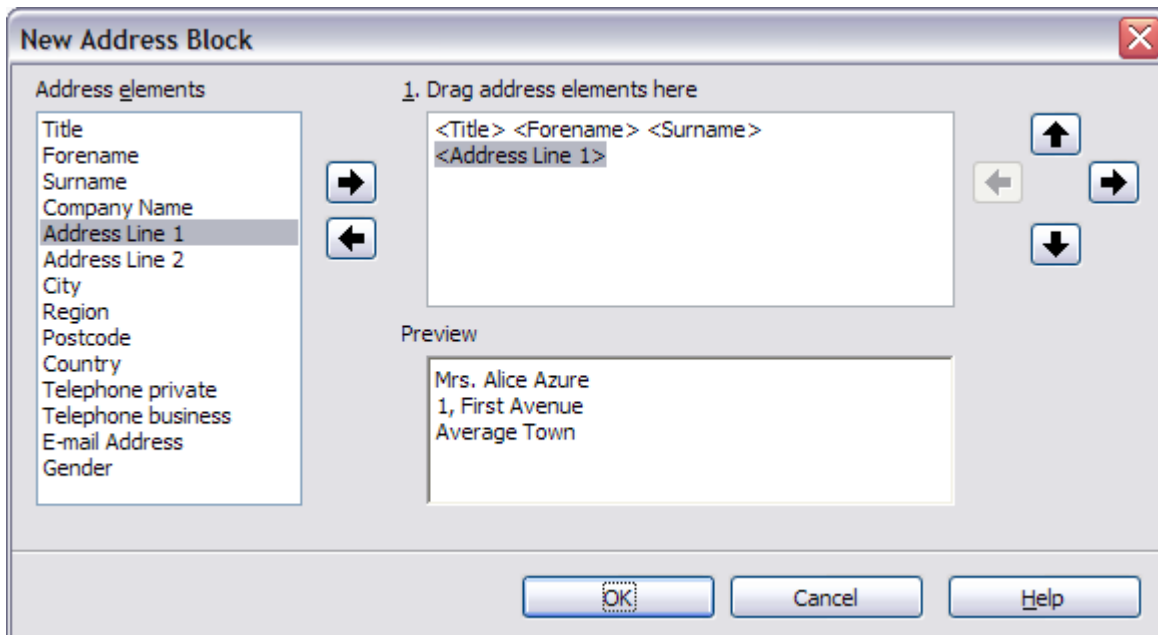


Figure 31: New address block

Matching the fields

Finally, it is time to match the wizard's fields with the spreadsheet fields, so that items like <Last Name> and "Surname" match correctly.

- 1) Look at section 3 of step 3 of the wizard (shown in Figure 28 on page 24). The box at the bottom displays one record at a time, using the address block format you selected. Use the right and left arrow buttons below that address box to step through the addresses, checking that they display correctly. Do not assume that all the records display correctly, just because one or two do. Check them all if you can, or at least a good proportion.
- 2) If the addresses do not display correctly (and they probably will not right away), click **Match Fields**. The Match Fields dialog opens, as shown in Figure 32.

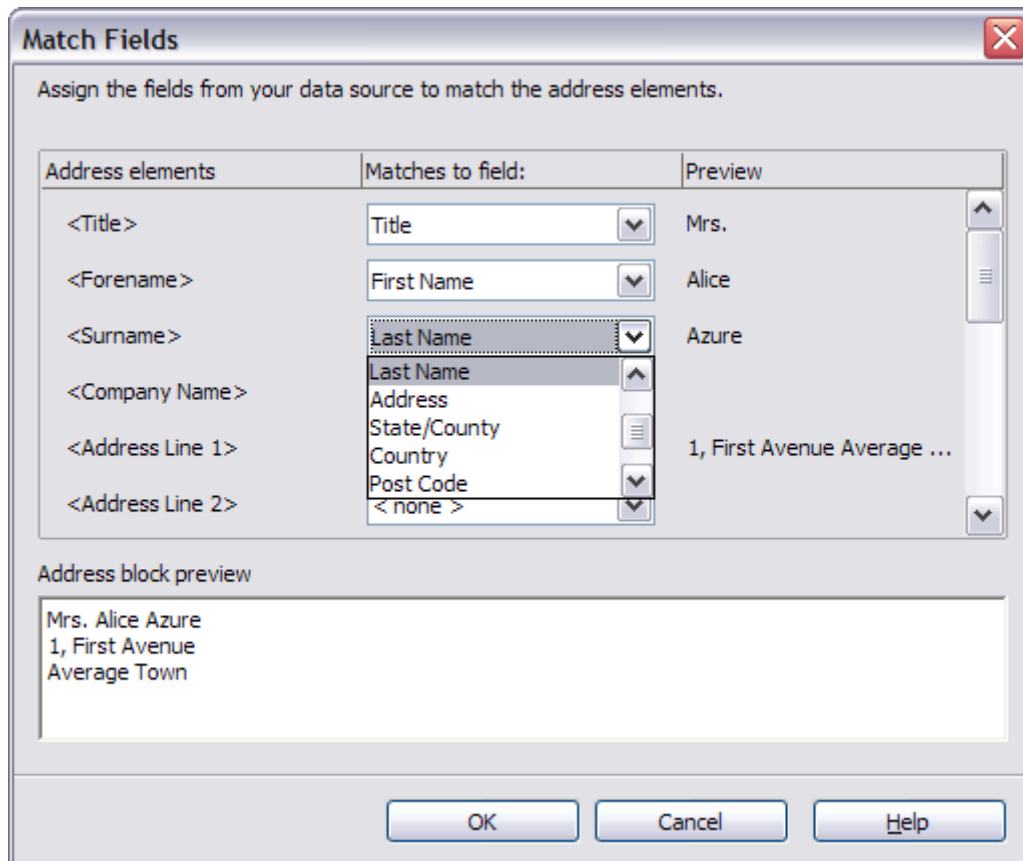


Figure 32: Match fields dialog

The Match Fields dialog has three columns.

- *Address Elements* are the terms the wizard uses for each field, such as <First Name> and <Last Name>.
- The *Matches to Field* column allows you to select, for each address element, the field from your data source that matches it.
- The *Preview* column shows what will be shown for this field from the selected address block, so you can double-check that the match is correct.

- 3) When you have matched all the fields, click **OK** to return to step 3 of the wizard. Now, when you use the arrow buttons to look at all the addresses, they should all look correct. If not, go back and change anything you're not happy with, before clicking **Next** to move to step 4.

Note that you will not be able to continue until you have correctly matched all the fields in your chosen address block. If you see <not available> in a field position it indicates that the field in question is not correctly matched.

Step 4: Create salutation

The salutation is the initial greeting, for example, *Dear Mr Jones*. In step 4, select the salutation that will appear in the letter.

The screenshot shows the 'Mail Merge Wizard' dialog box at step 4, 'Create a salutation'. On the left, a 'Steps' list shows '4. Create salutation' as the current step. The main area has two checked checkboxes: 'This document should contain a salutation' and 'Insert personalised salutation'. Below these are two rows for gender-specific salutations: 'Female' with a dropdown showing 'Dear Mrs. <Surname>' and a 'New...' button; and 'Male' with a dropdown showing 'Dear Mr. <Surname>' and a 'New...' button. The 'Address list field indicating a female recipient' section has a 'Field name' dropdown set to 'Sex' and a 'Field value' dropdown set to 'F'. The 'General salutation' dropdown is set to 'To whom it may concern'. A 'Preview' window shows two lines: 'Dear Mrs. Azure,' and 'Dear Mr. Azure,'. A 'Match fields...' button is to the right of the preview. At the bottom, there are buttons for '<< Back', 'Next >>', 'Finish', 'Cancel', and 'Help'. The status bar at the bottom right says 'Document: 1' with left and right arrow buttons.

Figure 33: Create a salutation

You can use a different greeting for men and women. To do this, Writer must have some way of knowing whether a person is male or female. In our spreadsheet we had a column called *Sex*. In the section **Address list field indicating a female recipient**, set the field name to *Sex* and the field value to *F*. The male salutation is then printed for all men and the female salutation for all women.

Note You do not need to tell OOO who is a male, because it assumes that all non-female records are males.

If you do not select **Insert Personalized Salutation**, you can use a more general salutation without referring to the recipient directly, such as “To whom it may concern”.

As in step 3, step 4 of the wizard has a preview pane at the bottom. You should check more than one record to ensure that other records look the way you expect.

Step 5: Adjust layout

In step 5, you can adjust the position of the address block and salutation on the page. You can place the address block anywhere on the page. The salutation is always on the left, but you can move it up and down the page. Use the buttons shown in Figure 34 to move the elements.

A point to note here is that the address block positional dimensions are shown in the Metric system, irrespective of the chosen measurement system in the rest of OOo. This is a reported error in V2.3.

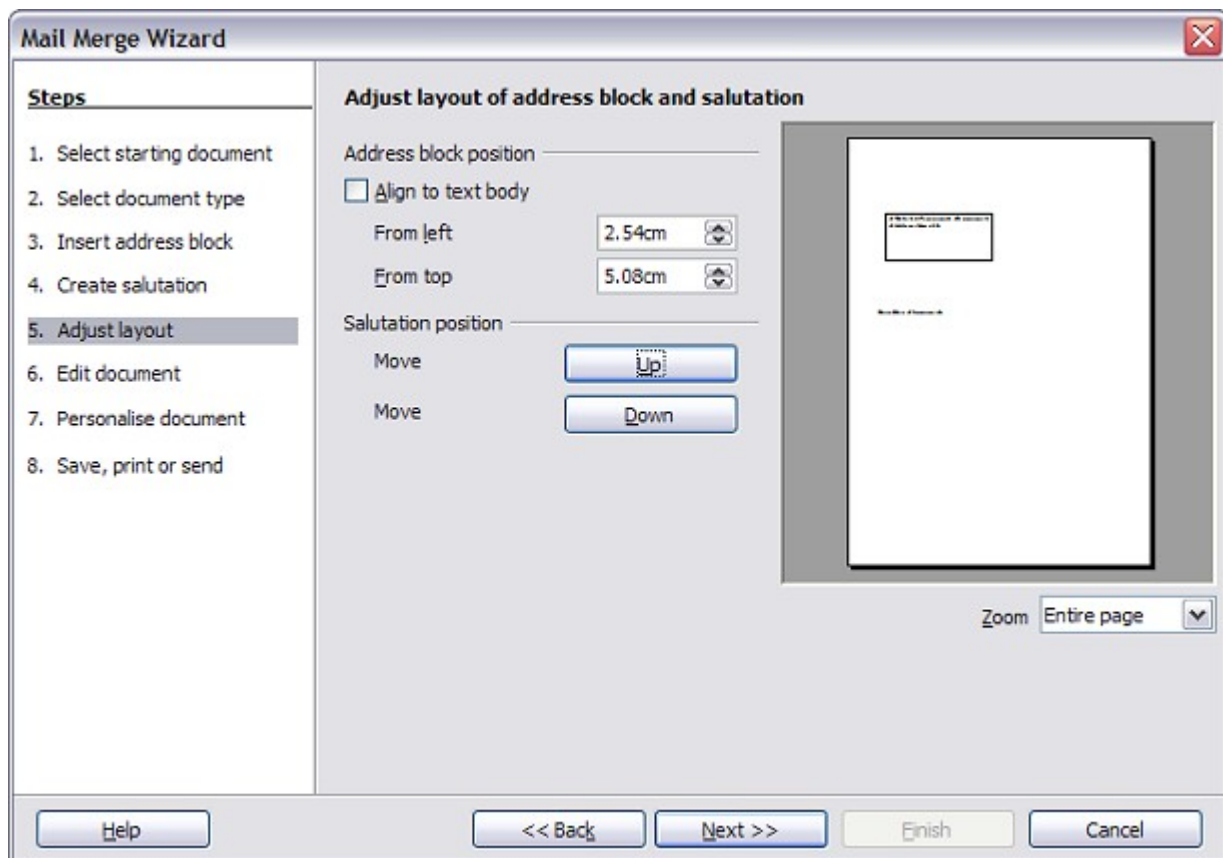


Figure 34: Adjust layout

Step 6: Edit document and insert extra fields

In step 6 you have another opportunity to exclude particular recipients from the mail merge, as shown in Figure 35.

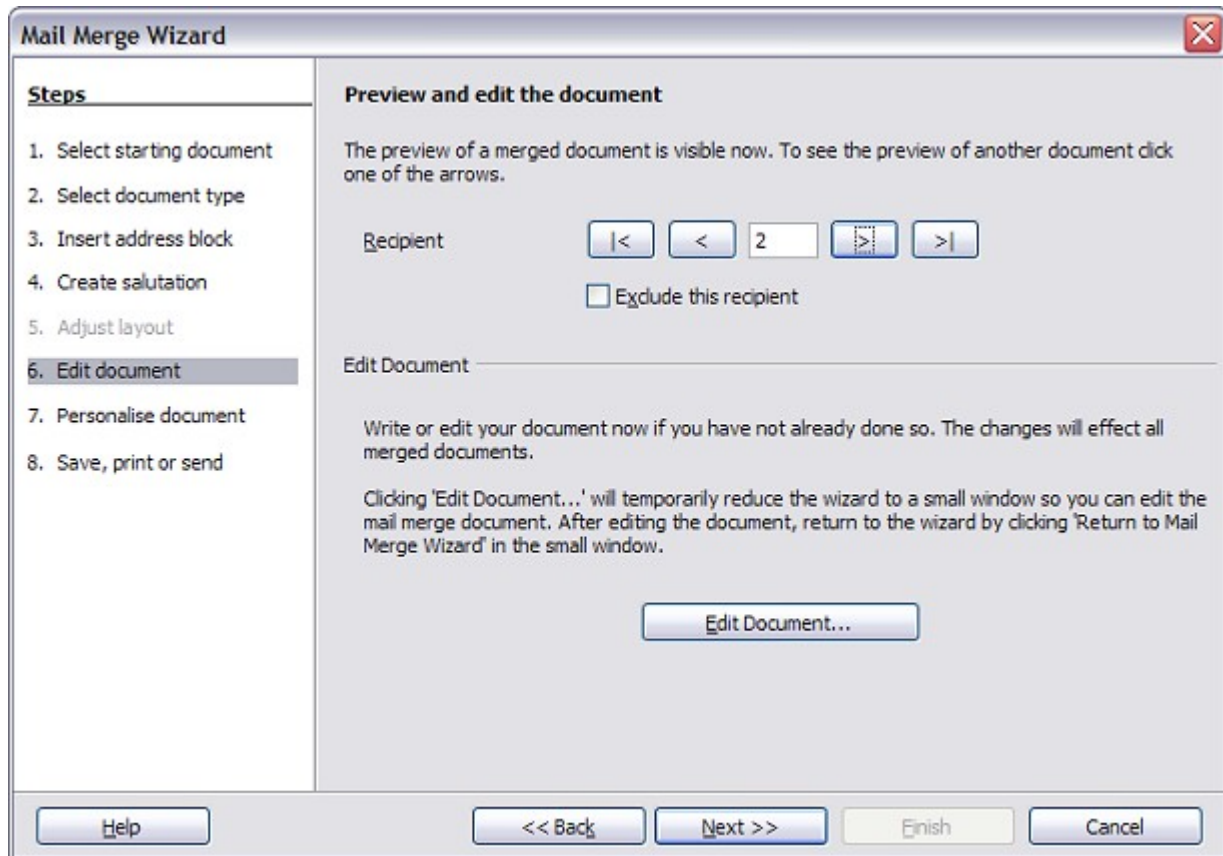


Figure 35: Edit document

You can also edit the body of the document. If you started with a blank document, you can write the whole letter in this step. Click **Edit Document** to shrink the wizard to a small window (Figure 36) so you can easily edit the letter.

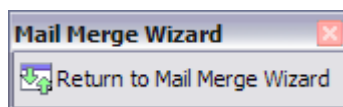


Figure 36: Minimized mail merge wizard

You need to perform another important task in this step. The wizard only inserts information from the name and address fields, but you may wish to add additional data. In our example, we want to tell each person how many points they had accumulated during the year; that information is in the spreadsheet.

To do this:

- 1) Click **Edit Document** in step 6 of the wizard.
- 2) Select **Insert > Fields > Other**. The Fields dialog opens, as shown in Figure 37.

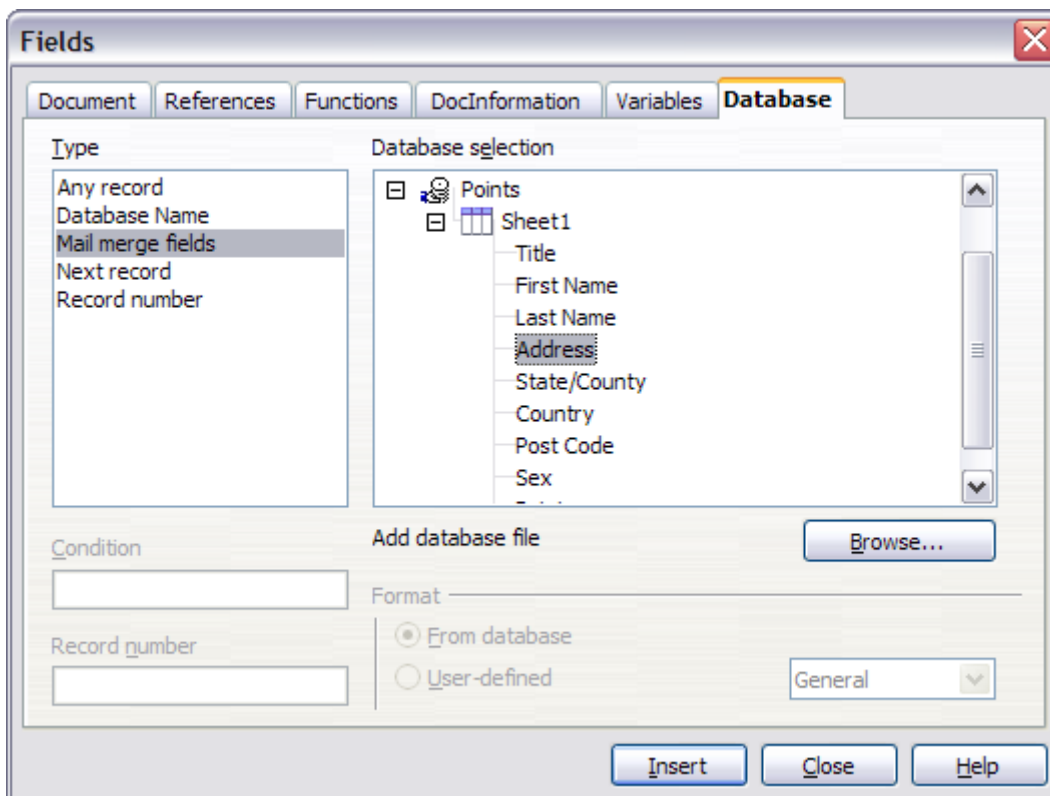


Figure 37: Insert mail merge fields dialog

- 3) Click the **Database** tab.
- 4) On the left hand side, select **Mail merge fields**.
- 5) Under **Database selection** find your data source (in this example, it is a spreadsheet). Expand it to see the fields.
- 6) Click the field you want to insert, then click **Insert** to insert the field.

You can insert any number of fields any number of times into your mail merge document.

- 7) Click **Close** when you are done.

Note The **Database selection** lists the data source you selected in step 3. All the information you need for the letter must be contained in that data source.

Step 7: Personalize documents

In step 7, OOo creates all your letters, one per recipient.

Clicking the **Edit individual Document** button here is similar to step 6. The difference is that you now edit a long file containing all of the letters, so you can make changes to a particular letter to one person. In this step of the Mail Merge wizard (Figure 38), click **Find** to open a dialog that allows searches within the document, perhaps for an individual addressee.

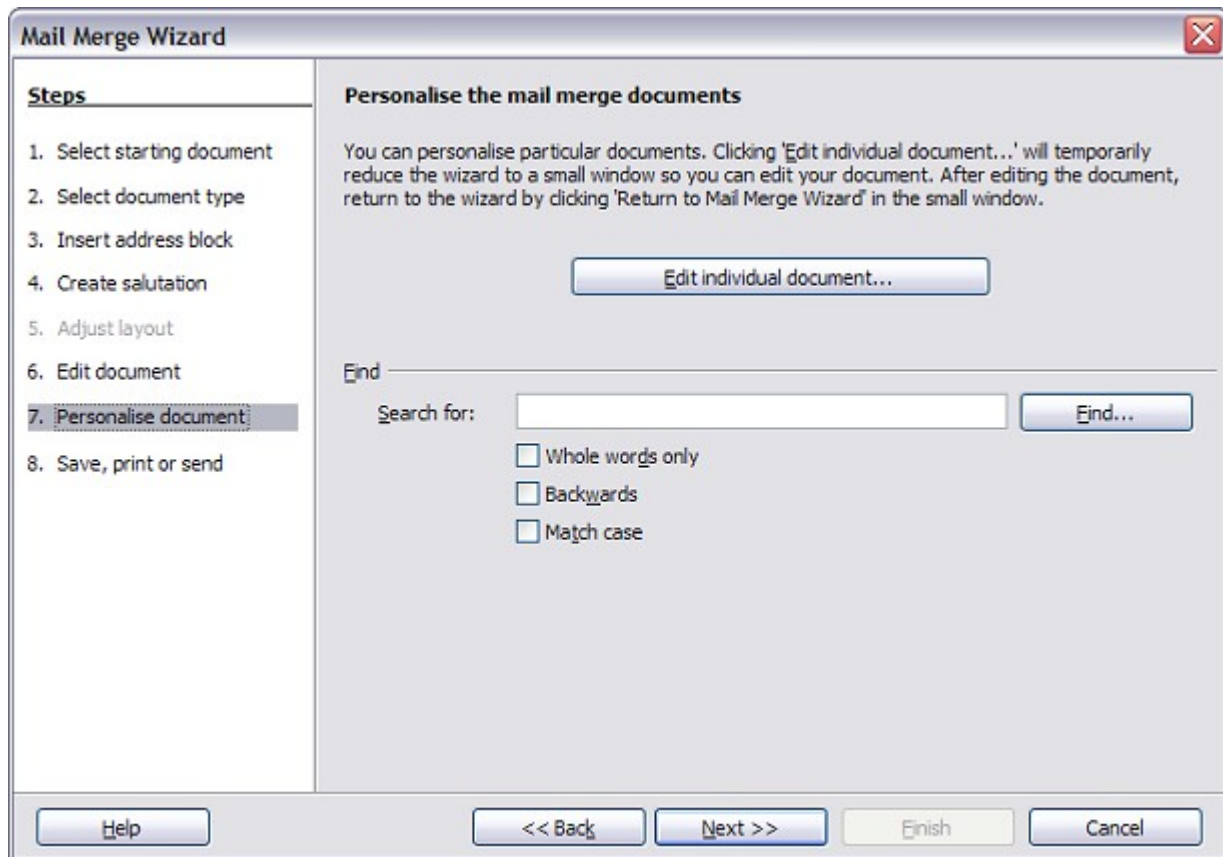


Figure 38: Personalize document

As with step 6, when editing the document, the wizard shrinks to small window. Click on this window (see Figure 36 on page 30) to expand the wizard to its full size.

Step 8: Save, print or send

You have now completed the mail merge process. The last step is to do something with it. In step 8, you can save the original sample letter, save the merged document, print the letters right away or, if you created email messages, send them.

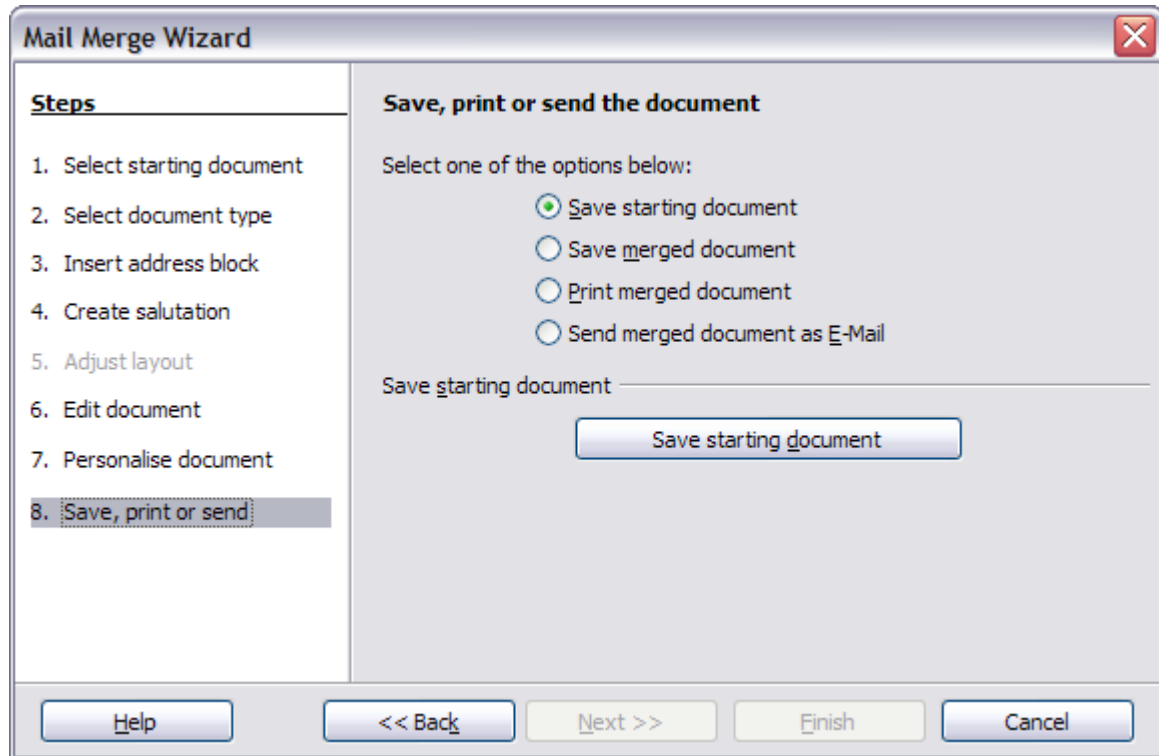


Figure 39: Save, print or send

You probably want to save the starting (prototype) document and the merged document. To do this, select **Save starting document** to reveal the **Save starting document** section containing the **Save starting document** button. This button will be active only if the document has not already been saved. Clicking on this button brings up the standard Save as dialog. Once you have named and saved the document you return to the Step 8 dialog as shown in Figure 40.

The merged document can now be saved by selection of **Save merged document**. This will reveal the **Save merged document settings** section, from which you can select to save either as one large file containing all the individual, generated letters or as a separate file for each letter.

When you have saved the merged document, you can print the final letters now or later; and you can still manually check and edit the letters if necessary. If you elect to print at this stage, the dialog shown in Figure 41 appears; it should be self-explanatory.

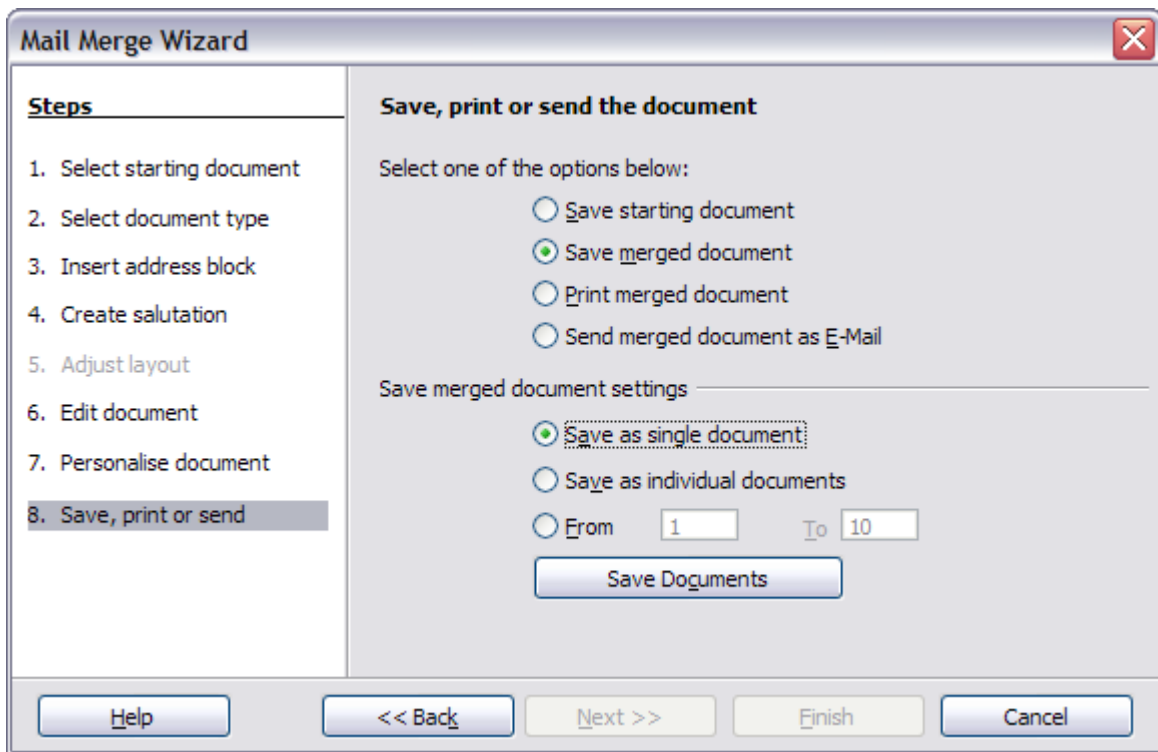


Figure 40: Step 8: Save, print or send

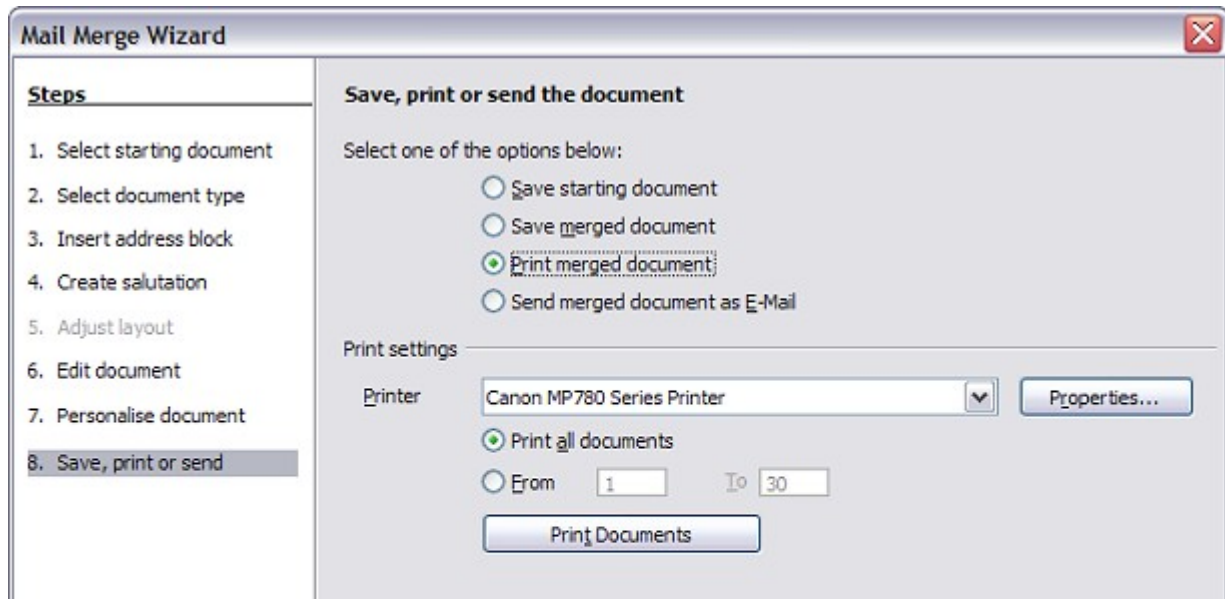


Figure 41: Printing the merged document