Mail Merge Step-by-Step

Definition:

A definition of *mail merge* from www.computeruser.com:

Mail Merge: *A way of using a computer to print customised form letters. The letter will be in one file, and a name and address list in another. Name and address information for each letter to be printed will be inserted at designated merge points. Other custom data can also be inserted at chosen points as specified by the user.*

A mail merge, according to the above definition, requires two files. One with the letter to be sent out; one with the name, address and other details of the people who are to receive the letter. The files are then linked to provide a run of letters.

Steps:

Step 1: Create Name and Address Information File

In OpenOffice click on **File/New/Spreadsheet**. A spreadsheet file is used to store the data as a spreadsheet consists of a grid which can be used to lay out the data in an orderly manner.
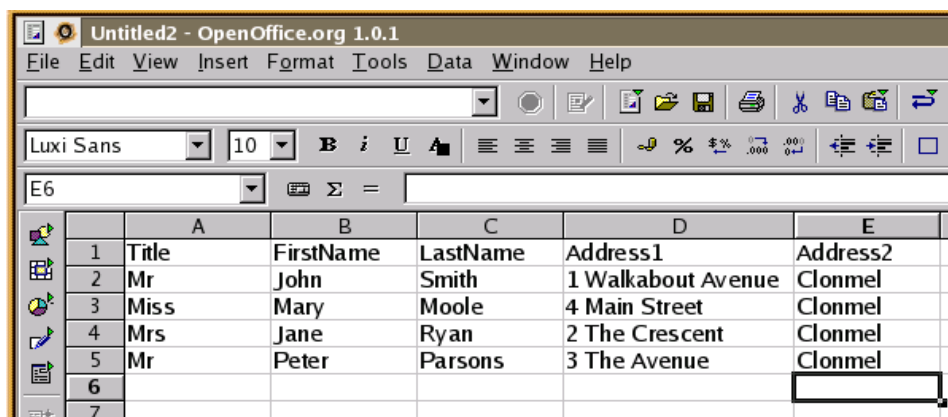
In the first *row* of the spreadsheet enter names for the fields that are to be used. In the example below the fields are

> Title
> FirstName
> LastName
> Address1
> Address2

Choosing suitable field names is recommended. These names should describe what the data is. In the next rows below enter the data. In this case
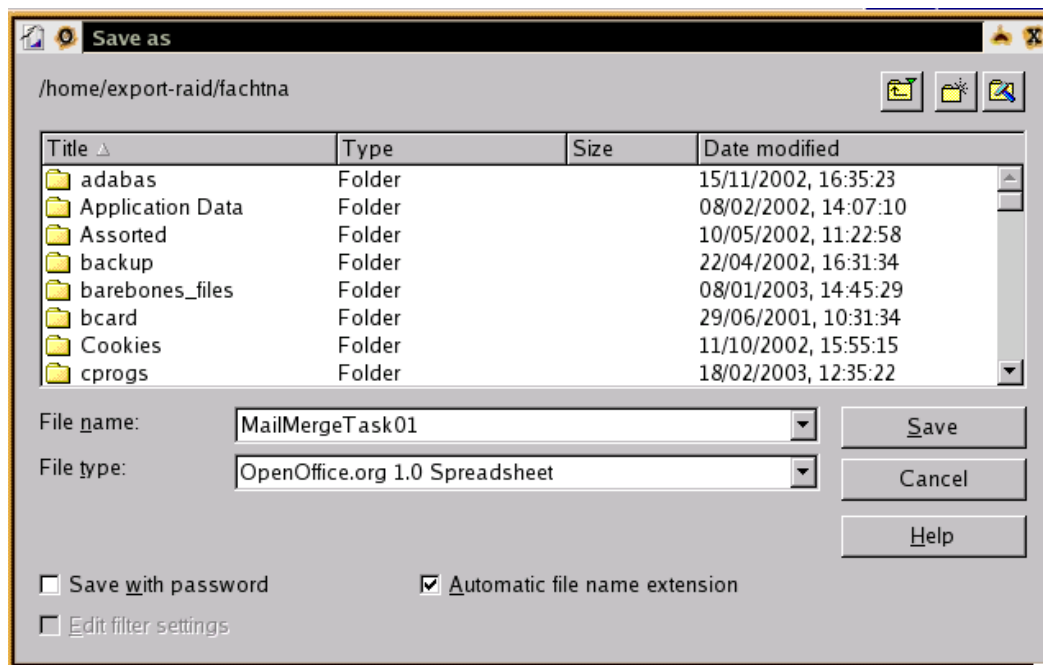
> Mr John Smith
> 1 Walkabout Avenue
> Clonmel

has his details stored in the second row of the spreadsheet. Be sure *not* to add commas or full stops to addresses. If these are required in the letter they can be added at the letter creation stage.

Once all the required data is entered save the file. Pay close attention not just to the name given to the file but also *where* it is saved. You'll need to know this when you go to join the letter and data files. In the sample below, a suitable name has been chosen and the file is being stored in the home directory.

Save as				
/home/export-raid/fachtna				
Title △	Type	Size	Date modified	
adabas	Folder		15/11/2002, 16:35:23	
Application Data	Folder		08/02/2002, 14:07:10	
Assorted	Folder		10/05/2002, 11:22:58	
backup	Folder		22/04/2002, 16:31:34	
barebones_files	Folder		08/01/2003, 14:45:29	
bcard	Folder		29/06/2001, 10:31:34	
Cookies	Folder		11/10/2002, 15:55:15	
cprogs	Folder		18/02/2003, 12:35:22	

File name: MailMergeTask01   Save

File type: OpenOffice.org 1.0 Spreadsheet   Cancel

Help

☐ Save with password   ☑ Automatic file name extension

☐ Edit filter settings

Check for and correct any errors. Finally, close the spreadsheet file.

Step 2: The Letter File

Create a new Text Document by clicking on **File/New/Text Document**. Type the master copy of the letter that you wish to send out.

Leave blanks where the merged data is to be placed. You don't need to leave spaces for the blanks. Just type nothing. Merged data includes names and addresses as in the example above.

Make sure to put commas and full stops in the position they'll be required in the finished letters. Allow for spaces *around* the fields to be inserted as they'll be required in the merged document.

Step 3: Linking The Two Files

First thing needed to be done is to specify the 'database' from which the merged data will come. While in the letter click on **Insert/Fields/Other**. The dialog box that appears has a large number of options, broken down into about 6 separate tabs. At first the key one is used to specify the source of our data; click on **Database** then **Browse.** After this you search for your **Spreadsheet** document and click on open.
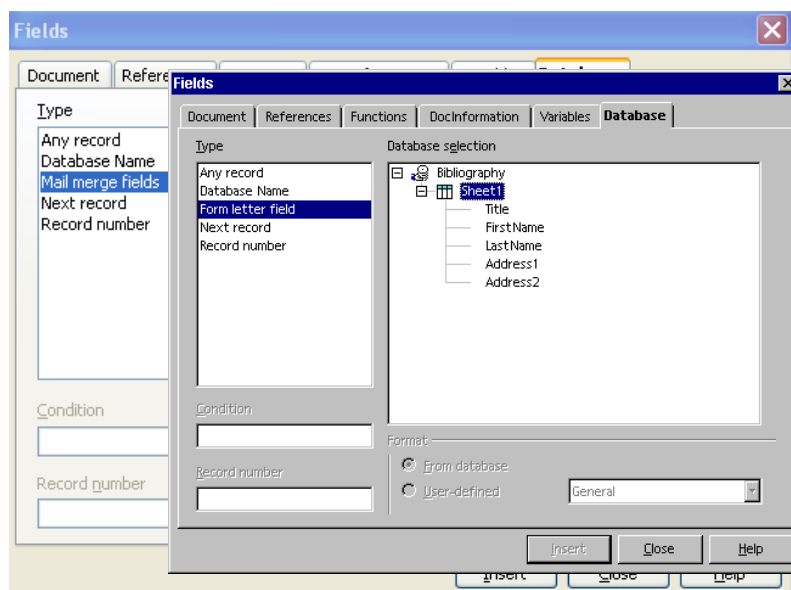
Once this is done your **Spreadsheet** document title will appear in the box something similar to that shown above. Note that the one database/spreadsheet has been added more than once above. Removal of a database that you're finished with is beyond the scope of this document.

You must then choose which data should be selected and where it should be placed in the letter. Click on the plus sign beside your data source, select your fields as required and then choose **insert.**

When inserting make sure you have the cursor in the correct position. The document remains accessible even though you have another window (the database dialog) open on top of it. You can select the required fields and insert them easily - it helps if you make sure you have the cursor correctly positioned before inserting, however. When finished, click on **Close**.

When you do this the merge will be complete and you will see something like shown below.

Dear Mr O'Reilly,

This is what you will see when you have the **View Field Names** activated.

Step 4: Printing The Complete File

At this stage you are ready to print your complete file. In order to do this you will need to go to **File/Print.** When you do this a dialog box *should* appear looking like the one shown below.
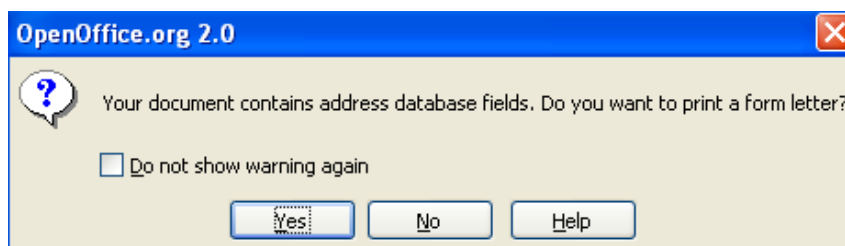
You need to click on **Yes** and another dialog box will appear in this box all you need to do is click

OK as shown below if you want *all* records printed. If you only want specific record printed use the dialog box shown here to select those that you want before clicking on **OK**.
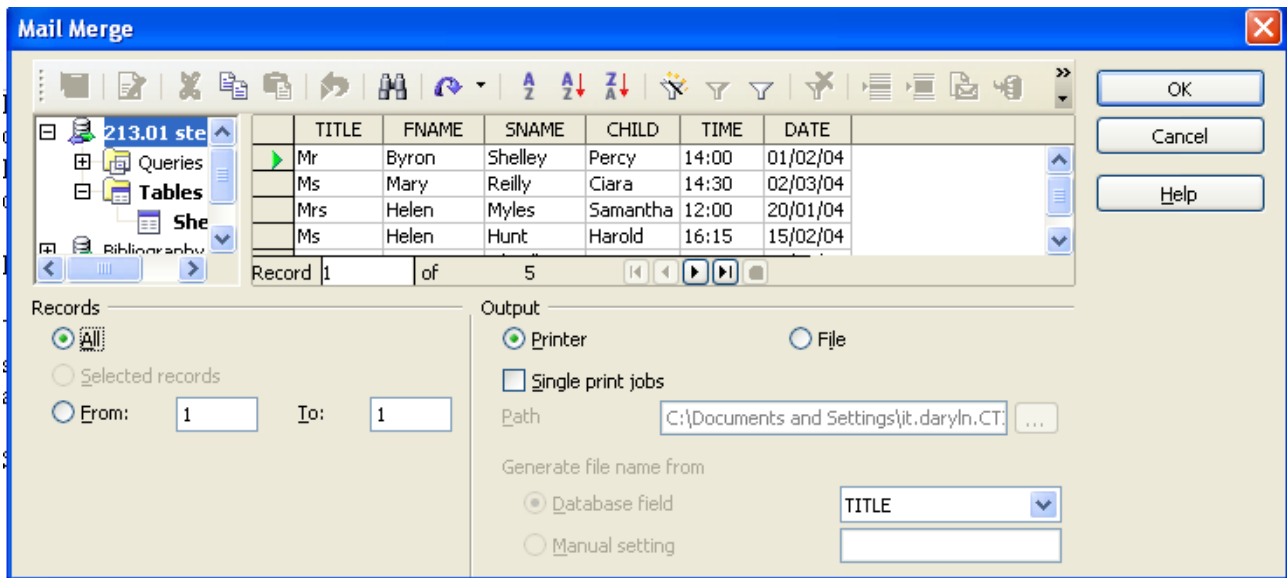
Hopefully, that is it; a mail merge successfully completed. In the event of errors, go back and check your steps and retry the sequence.

You should hopefully have a document with both fixed and variable parts in place awaiting the merge. For example:

Dear <TITLE> <LNAME>,   will eventually become   Dear Mr Smith,