

# DIGITAL DOCUMENTATION (ADVANCED)

Class X , UNIT 1: DIGITAL DOCUMENTATION (ADVANCED)

(IT #402)

Session 5: IMPLEMENT MAIL MERGE

By: GITASHREE NAYAK

Mob No.:9439656911

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### **DIGITAL DOCUMENTATION (ADVANCED)**

SESSION 1: CREATE AND APPLY STYLES IN THE DOCUMENT

**SESSION 2: INSERT AND USE IMAGES** 

SESSION 3: CREATE AND USE TEMPLATE

SESSION 4: CREATE AND CUSTOMIZE TABLE OF CONTENTS

**SESSION 5: IMPLEMENT MAIL MERGE** 

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Student will able to IMPLEMENT MAIL MERGE

- Demonstrate to print the label using mail merge, do the following to achieve
- Create a main document,
- Create the data source,
- Enter data in the fields,
- Merge the data source with main document,
- Edit individual document,
- Print the letter and address label

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### 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

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### 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.

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### Creating the data source

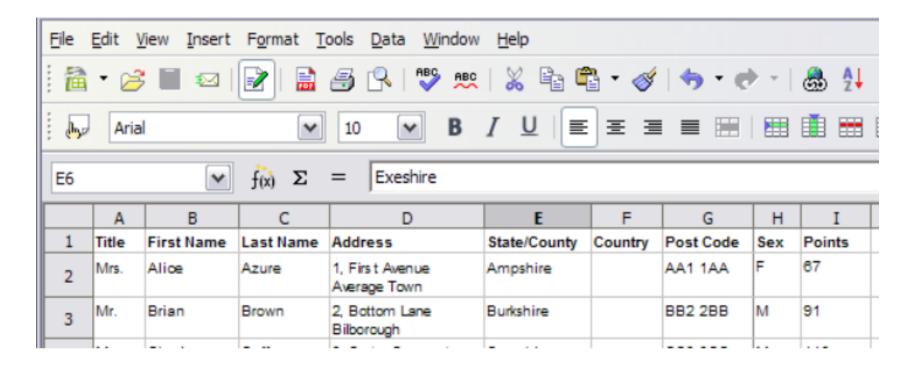


Figure 1: Spreadsheet data source

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For a data source to be directly accessible from within a Writer document, it must first be registered as described below. You only need to do this once; after that, the data source is available to all documents in OpenOffice.org.

1. From within any Openoffice.org document, or from the OpenOffice.org Welcome screen, choose File > Wizards > Address Data Source.

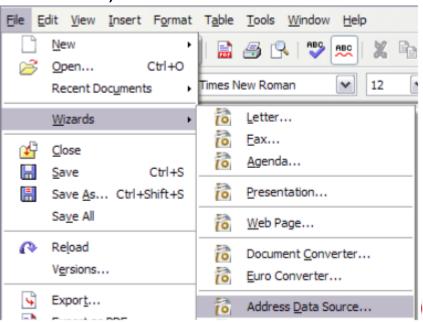


Figure 2: Starting the Address Data
Source wizard

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2. The choices on the first page of the wizard vary with your operating system. Select the appropriate type of external address book. In this example, it is Other external data source. Click Next.



Figure 3: Select type of external address book

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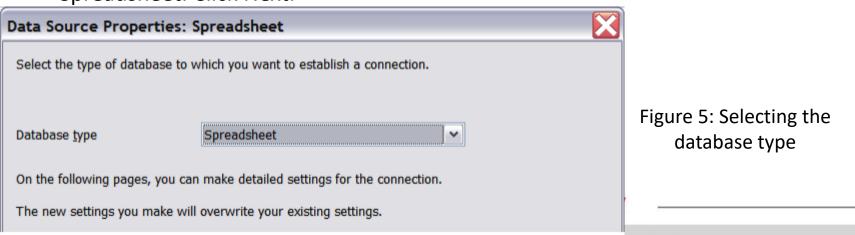


3. On the next page of the Wizard, click the Settings button.



Figure 4: Starting the Settings part of the Wizard

 In the Data Source Properties page, select the Database type. In our example, it is Spreadsheet. Click Next.



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5. In the next dialog box, click Browse and navigate to the spreadsheet that contains the address information. Select the spreadsheet and click Open to return to this dialog box. At this time you may wish to test that the connection has been correctly established by clicking on the Test Connection button (not shown in illustration).

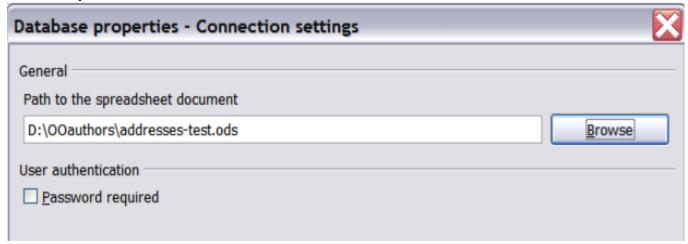


Figure 6: Selecting the spreadsheet document

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- 6. Click Finish.
- 7. On the following page, click Next. Because this is a spreadsheet, do not click Field Assignment.



this is a spreadsheet, do not click Field Assignment.

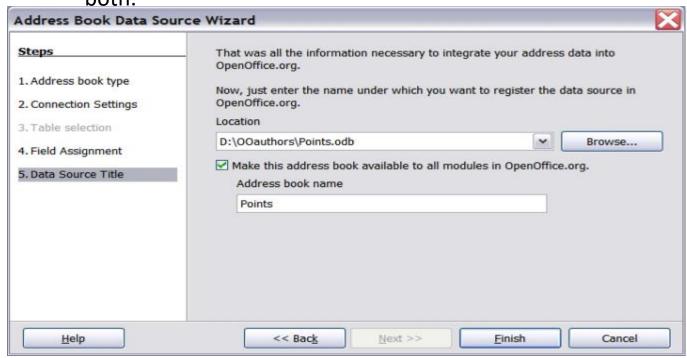
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8. Name the file in the Location field. The default is ...\Addresses.odb; but you may replace Addresses with another name if you wish. You may also change the name in the "Address book name" field. In our example, the name "Points" was used for both.



.odb file and the address book.

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

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#### 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". If you select to use the wizard, pay close attention to its current 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.

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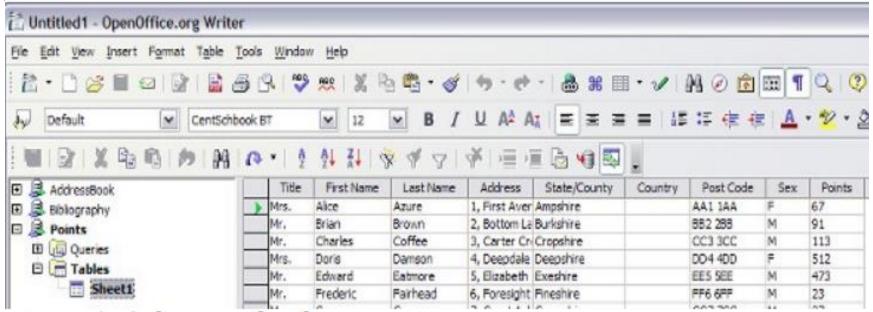


Figure 9: Selecting the data source.

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4. Now create or modify the form letter by typing in the text, punctuation, line breaks, and so on that will be present in all of the letters. To add the mail-merge fields where needed (such as names and addresses), click in the field heading and drag it 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 step.

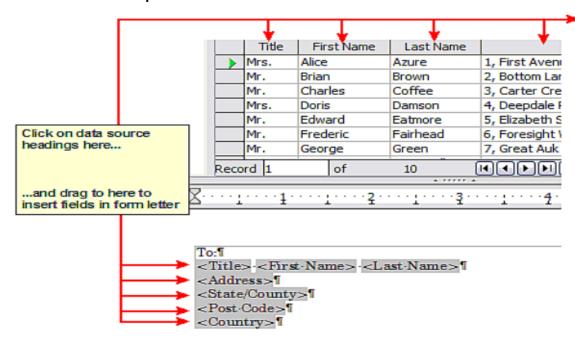


Figure 10: Dragging fields to the body of the form letter

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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.

```
To:¶

<Title> <First-Name> <Last-Name>¶

<Address>¶

<State/County>¶

<Post-Code>¶

<Country>¶

5·November ·2007¶

Dear <Title> <Last-Name>,¶

Thank-you-very-much-for-your-participation-in-our-"Points"-promotion.-We-are-pleased to-inform-you-that-you-have-earned <Points> this-year.¶

Your-loyalty-to-our-company-is-greatly-appreciated-and-we-hope-to-be-of-continuing service-in-the-future.¶

Yours-sincerely¶
```

Figure 11: The completed form letter.

General-Supply-plo-Wetherbridge → XX7-1YY

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#### 6. To suppress blank lines:

- a) Click at the end of the first paragraph to be suppressed and then choose **Insert > Fields > Other**.
- b) Select the Functions tab and then click on **Hidden Paragraph** in the *Type* column.
- c) 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 indicate the condition. For example, in our Points database the condition to test if the Company field is empty would be: ![Points.Sheet1.Company] as illustrated in Figure 12.
- d) Click Insert, but do not close the dialog box until you have amended all the lines that should be suppressed.

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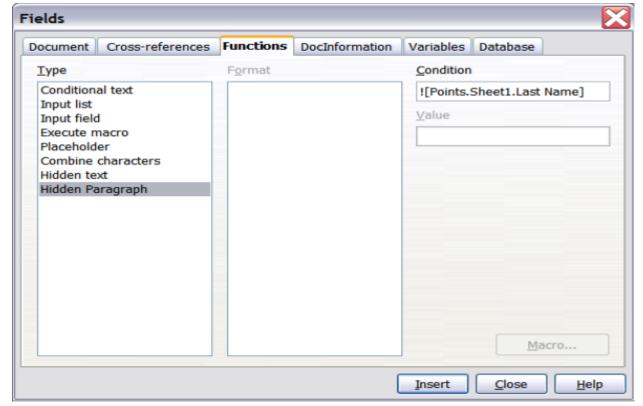


Figure 12: Hidden paragraph insertion

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]

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The document is now ready to be printed.

1) Choose **File > Print** and respond with **Yes** in the message box.



Figure 13: Confirmation message for merging database fields

2) In the Mail Merge dialog box, 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.



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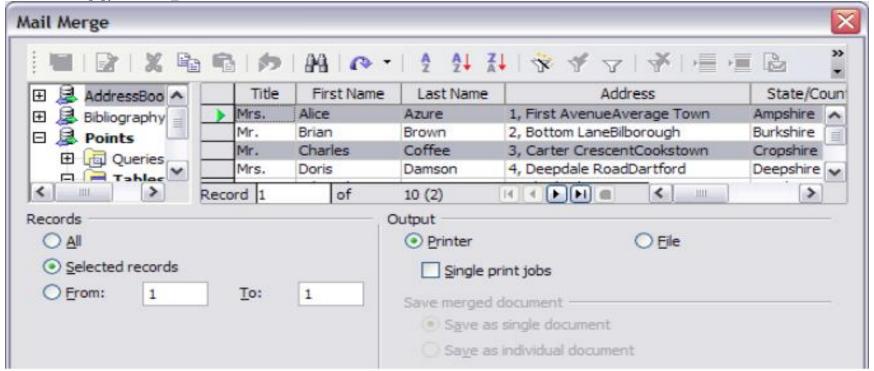


Figure 14: The Mail Merge dialog box

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- 3) 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 formatting, select File in the output section of the Mail Merge dialog box, instead of using the default Printer selection. This changes the dialog box 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 box. Enter a file name for the saved letters. They will be saved consecutively in the single document, or numbered consecutively in individual files if saved as single documents.
- 4) If you have not saved the original, prototype form letter document (template) previously, then you should do so now. Having a form letter template could greatly simplify the creation of other form letters in the future and is highly recommended.

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#### To print mailing labels:

- 1. Choose File > New > Labels.
- 2. On the Options tab, ensure that the Synchronize 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.

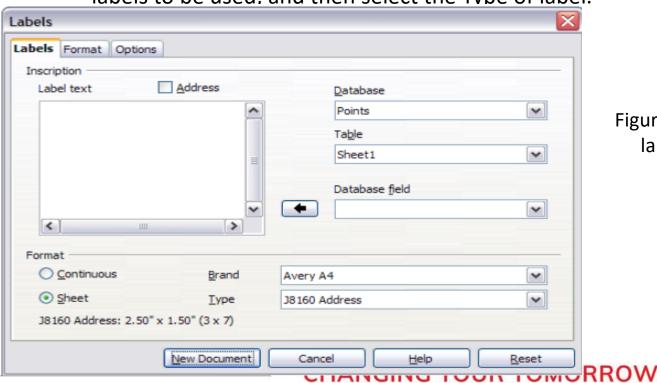


Figure 15: Select Database, Table, label Brand, and label Type.

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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, as shown in Figure 16.

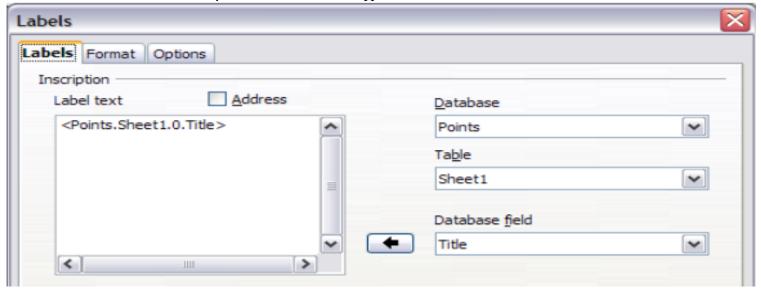


Figure 16: Move fields from Database field list to Label text area.

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

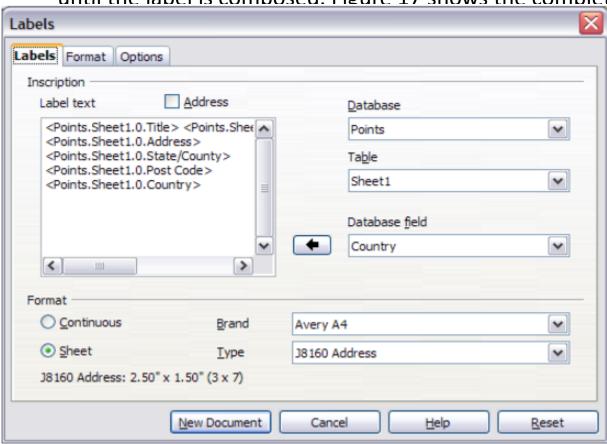


Figure 17: The completed label.

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- 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 choose 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, choose **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  $\leftarrow$ , 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 last data source address field in the first line of the label. Press Delete to remove the new line character and then press Return (or the Enter key) to insert a paragraph marker. Repeat this action for each line in the address. 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.

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d) Click again at the end of the first paragraph to be conditionally suppressed and then choose 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 indicate the condition. For example, in our Points database the condition to test if the Company field is empty would be ![Points.Sheet1.Company] as illustrated in Figure 12. 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 box 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.

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f) Remembering that we selected **Synchronize contents** earlier, you should now be able to see a small window containing a button labelled **Synchronize 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.

The labels are now ready to be printed.

- 1. Choose **File > Print**. The message shown in Figure 13 appears. Click **Yes**.
- 2. In the Mail Merge dialog box (Figure 14), 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.
- 3. 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 box, rather than using the default **Printer** selection. This changes the dialog box to highlight the Save merged document section, where **Save as single document** is preselected.

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In this case, clicking **OK** brings up the Save as dialog box, 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 box.

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.

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# EDUCATIONAL GROUP 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 box, you can make changes to the font name, the font size, the indents, and other attributes.

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# Using the Mail Merge Wizard to create a form letter

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 18.

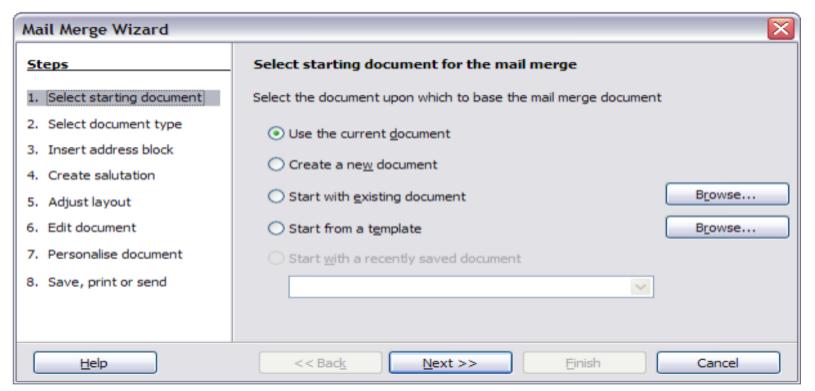


Figure 18:Select starting document

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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.

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### 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 19. In this example, we are producing a letter.
 Select Letter and click Next.



Figure 19: Choose document type

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### Step 3: Insert address block

This is the most complex step in the wizard. In this step 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 . If your spreadsheet has a column called "Surname", you need to tell the wizard that and "Surname" are equivalent. This is described in "Matching the fields"

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# Step 3: Insert address block

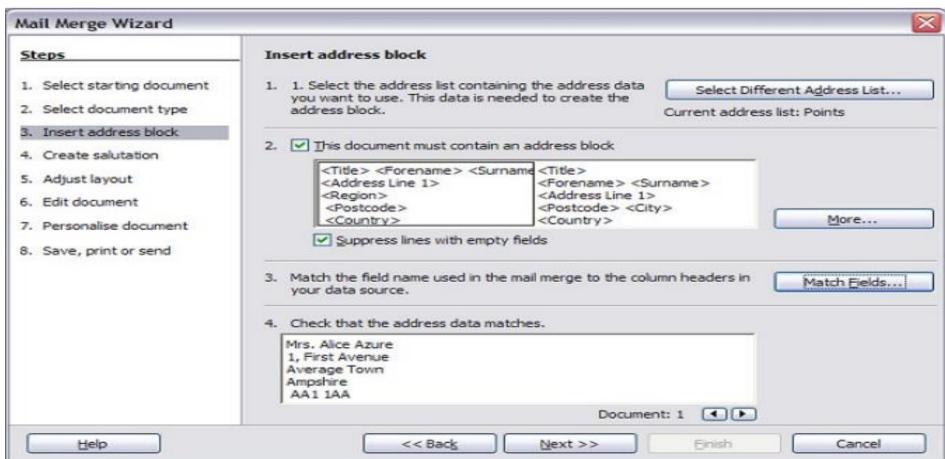


Figure 20: Insert address block

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### EDUCATIONAL GROUP 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 box 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.

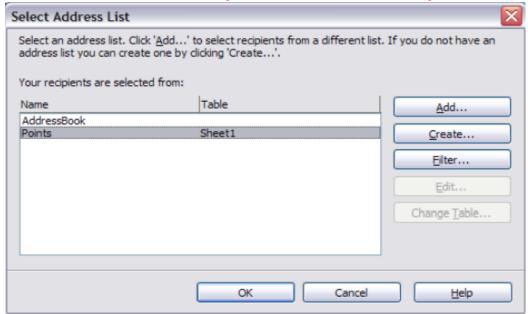


Figure 21: Select address list dialog box

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.

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### Selecting the address block

- 1. In step 3 of the wizard (shown in Figure 20), 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 box (shown in Figure 22).
- 2. The Select Address Block dialog box 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 box.

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# Selecting the address block

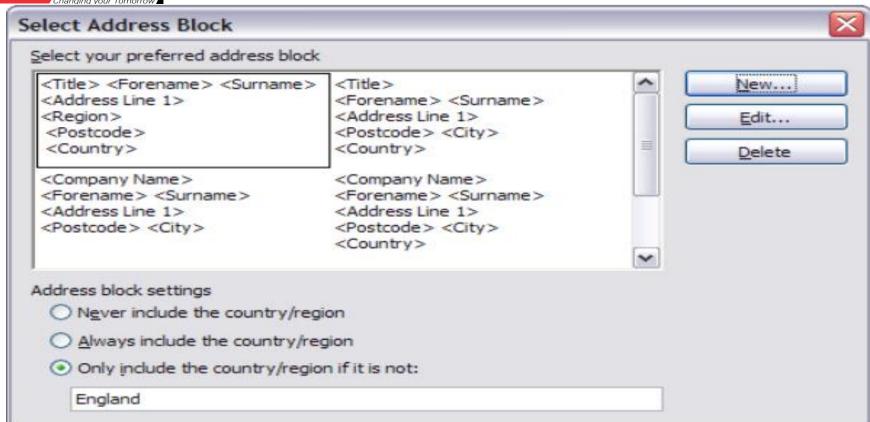


Figure 22: Select address block

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# Selecting the address block

3. In the New Address Block dialog box (Figure 23), 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 6, click and then click the right arrow button.

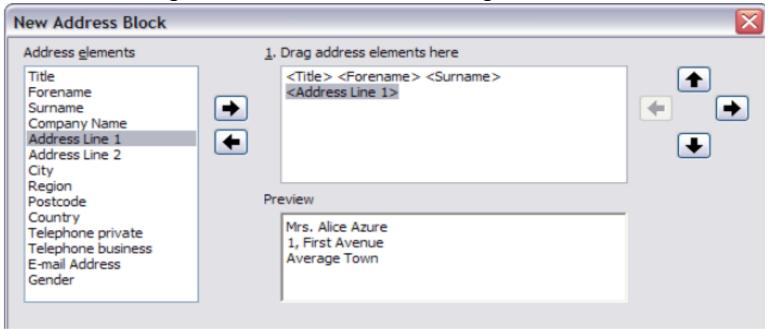


Figure 23: New address block

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# Matching the fields

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

- 1) Look at section 3 of step 3 of the wizard (shown in Figure 20). 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.

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## Matching the fields



The Match Fields dialog box has three columns:

- ❖ Address Elements are the terms the wizard uses for each field, such as <First Name> and <Last Name>.
- Use the Matches to Field column 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.

Figure 24: Match fields dialog box

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# Matching the fields

- 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 in a field position it indicates that the field in question is not correctly matched.
- 4. Notice the option for Suppress lines with empty fields. Using the Wizard, you do not have to create your own conditional suppression fields.

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# 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.

This document sho				
✓ This document should contain a salutation				
✓ Insert personalised salutation				
<u>F</u> emale	Dear Mrs. <surname>,</surname>	~	<u>N</u> ew	
tion Male Dear Mr. <surname>,</surname>	Dear Mr. <surname>,</surname>	~	New	
Address list field indicating a female recipient				
Fiel <u>d</u> name	Sex	~		
Field value	F	~		
General salutation				
To whom it may concern,		~		
Preview				
Dear Mrs. Azure, Dear Mr. Azure,			atch fields	
	Document: 1	· ·		
	Female  Male  Address list field Field name Field value  General salutation To whom it may co	Female Dear Mrs. <surname>,  Male Dear Mr. <surname>,  Address list field indicating a female recipient  Field name Sex  Field value F  General salutation  To whom it may concern,  Preview  Dear Mrs. Azure, Dear Mr. Azure, Dear Mr. Azure,</surname></surname>	Emale Dear Mrs. <surname>,  Male Dear Mr. <surname>,  Address list field indicating a female recipient  Field name Sex  Field yalue F  General salutation  To whom it may concern,  Preview  Dear Mrs. Azure,</surname></surname>	

Figure 25: Create a salutation

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# Step 4: Create 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.

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# 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 9 to move the elements.

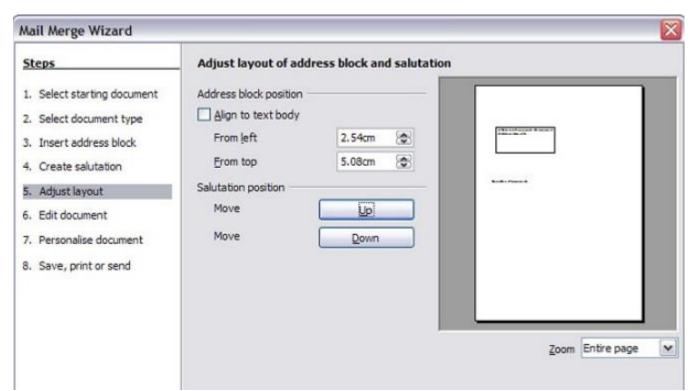


Figure 26: Adjust layout

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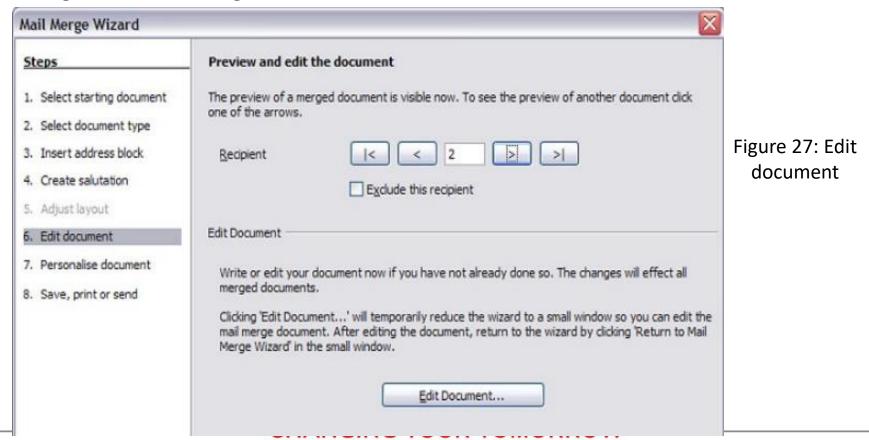
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# Step 6: Edit document and insert extra fields

In step 6 you have another opportunity to exclude particular recipients from the mail merge, as shown in Figure 27.



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# Step 6: Edit document and insert extra fields

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 27) so you can easily edit the letter.



Figure 28: 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:

- Click Edit Document in step 6 of the wizard.
- Choose Insert > Fields > Other. The Fields dialog box opens.
- Click the Database tab.
- 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.
- 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.
- Click Close when you are done.

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# Step 6: Edit document and insert extra fields

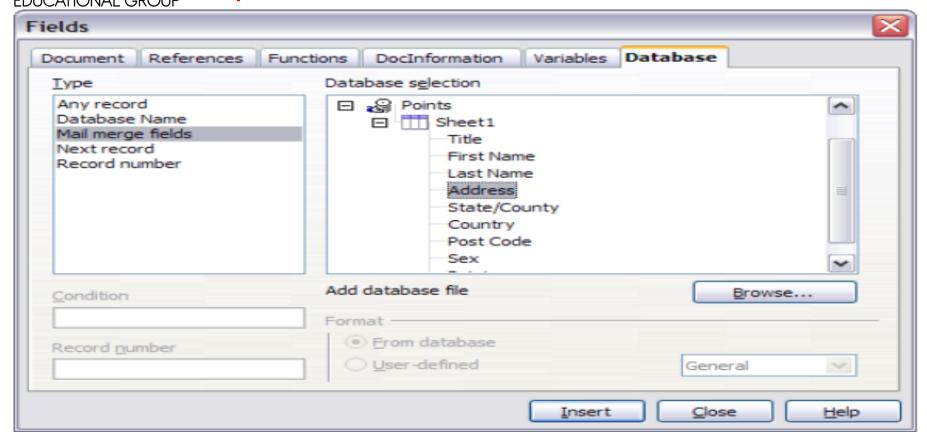


Figure 29: Insert mail merge fields dialog box

#### 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.

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## **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 30), click Find to open a dialog box that allows searches within the document, perhaps for an individual addressee.

Mail Merge Wizard				
Steps	Personalise the mail merge documents			
Select starting document     Select document type     Insert address block     Create salutation     Adjust layout     Edit document	You can personalise particular documents. Clicking 'Edit individual document' will temporarily reduce the wizard to a small window so you can edit your document. After editing the document, return to the wizard by clicking 'Return to Mail Merge Wizard' in the small window.  Edit individual document			
7. Personalise document 8. Save, print or send	Search for:  Whole words only Backwards Match case			

As with step 6, when editing the document, the wizard shrinks to a small window (Figure 28). Click on this window to expand the wizard to its full size.

Figure 30: Personalize document

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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.

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 box. Once you have named and saved the document you return to the Step 8 dialog box as shown in Figure 28.

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 box shown in Figure 32 appears; it should be self-explanatory.

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Mail Merge Wizard	
Steps	Save, print or send the document
1. Select starting document	Select one of the options below:
2. Select document type	Save starting document
3. Insert address block	O Save merged document
4. Create salutation	Print merged document     Send merged document as E-Mail
5. Adjust layout	
6. Edit document	Save starting document
7. Personalise document	Save starting <u>d</u> ocument
8. Save, print or send	

Figure 31: Step 8: Save, print or send

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Steps	Save, print or send the document			
Select starting document	Select one of the options below:			
2. Select document type	○ <u>Save starting document</u>			
3. Insert address block	<ul> <li>Save merged document</li> </ul>			
Create salutation	Print merged document			
5. Adjust layout	Send merged document as E-Mail			
6. Edit document	Save merged document settings  Save as single document			
7. Personalise document	Saye as individual documents			
8. Save, print or send	O From 1 To 10			
	Save Doguments			

Figure 32: Saving a merged document

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Mail Merge Wizard				×
Steps	Save, print	or send the document		
Select starting document     Select document type     Insert address block     Create salutation	Select one of	the options below:  Save starting document  Save merged document  Print merged document  Send merged document as E-Mail		
Adjust layout     Edit document     Personalise document	Print settings Printer	Canon MP780 Series Printer	~ (	Properties
8. Save, print or send		Print all documents     Erom 1 10 30      Print Documents		

Figure 33: Printing the merged document

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### Home Assignment

#### PRACTICAL ACTIVITY

- 1. Open the Word Processing software and prepare the following labels for
  - Schools to invite parents for annual function
  - A Tech Magazine who wants to send flyers to its clients

#### **QUESTIONS**

- Explain Mail Merge.
- 2. What are advantages of Mail Merge?
- 3. Give examples of databases in which the Data Source can be created.

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