



Writer 6.4 Guide

Chapter 14

Mail Merge

Form Letters, Mailing Labels, and Envelopes

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Note

Everything you send to a mailing list, including your email address and any other personal information that is written in the message, is publicly archived and cannot be deleted.

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Note for macOS users

Some keystrokes and menu items are different on macOS from those used in Windows and Linux. The table below gives some common substitutions for the instructions in this book. For a more detailed list, see the application Help.

<i>Windows or Linux</i>	<i>macOS equivalent</i>	<i>Effect</i>
Tools > Options menu selection	LibreOffice > Preferences	Access setup options
Right-click	<i>Control</i> +click and/or right-click depending on computer setup	Open a context menu
<i>Ctrl</i> (Control)	⌘ (Command)	Used with other keys
<i>F11</i>	⌘+T	Open the sidebar Styles deck

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What is mail merge?

Writer's mail merge provides features to create and print multiple copies of one item (such as return address labels, promotional stickers, or t-shirt transfers) or to produce copies that include variable information (for example names, addresses, and amounts due):

- Form letters (a document to send to a list of recipients).
- Mailing labels, labels for physical file folders, and similar purposes.
- Envelopes.

Variable data is typically derived from a data source, as discussed below. If all output is to be the same (for example, return address labels), the merge can use manually entered text or images.

This chapter describes the mail merge process. The steps include:

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

Creating and registering an address data source

An address data source is a database containing the name and address records from which mailing labels and envelopes can be derived. LibreOffice can create the database from spreadsheets, text files including Writer documents, and databases such as MySQL. If the information to be used in the mail merge is currently in a format that LibreOffice cannot access directly, you need to convert it, for example by exporting to a comma-separated values (CSV) file.

For a data source to be directly accessible from within a Writer document, it must be registered. You need to do this only once.

- 1) From within a Writer document, or from the LibreOffice Start Center, choose **File > Wizards > Address Data Source**.
- 2) The choices on the first page of the wizard vary with your operating system. Select the appropriate type of external address book. For a spreadsheet, it is **Other external data source**. Click **Next**.

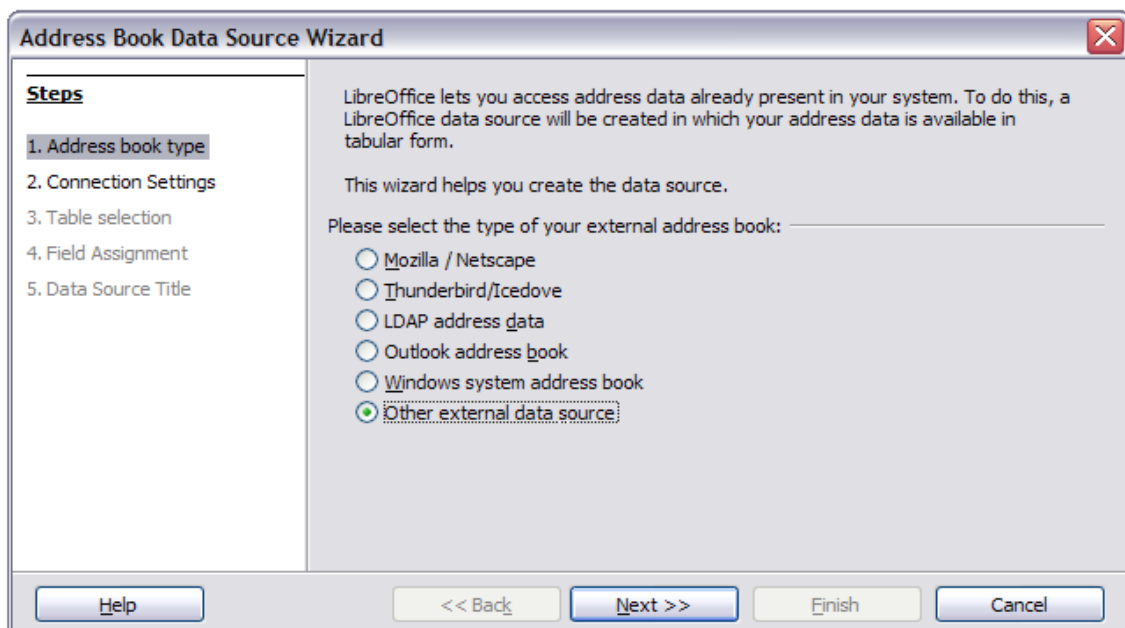


Figure 1: Select type of external address book

- 3) On the next page of the Wizard, click on the **Settings** button.

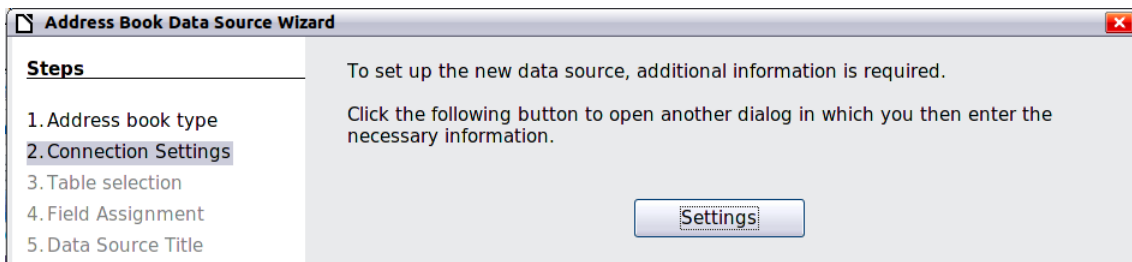


Figure 2: Starting the Settings part of the Wizard

- 4) On the *Data Source Properties* page, select the Database type. In our example, it is **Spreadsheet**. Click **Next**.

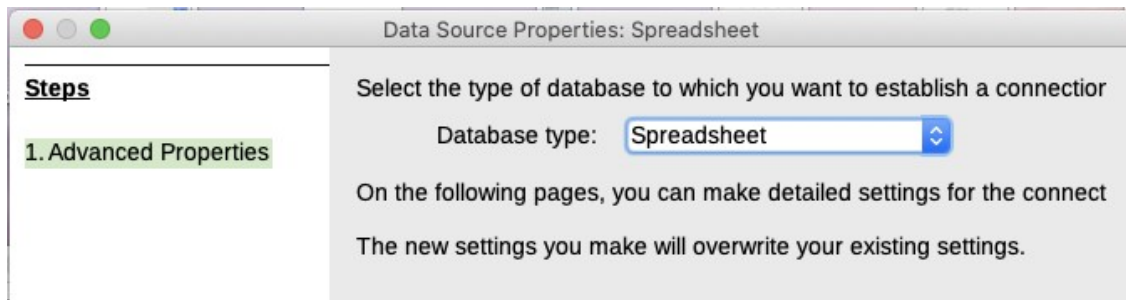


Figure 3: Selecting the database type

- 5) On the next page (Figure 4), click **Browse** and navigate to the spreadsheet that contains the address information. Select the spreadsheet and click **Open** to return to this dialog.

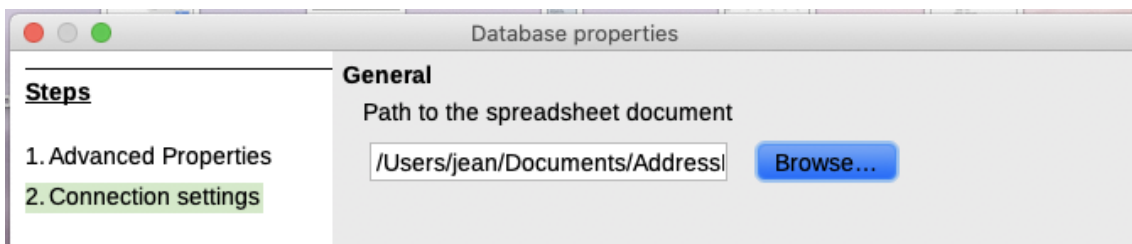


Figure 4: Selecting the spreadsheet document

- 6) To test that the connection has been correctly established, click the **Test Connection** button in the middle of the dialog (not shown in Figure 4). You should get the message "The connection was established successfully"; otherwise, you will get an error message.
- 7) Click **Finish**.
- 8) On the next page, click **Next**. Do **not** click the **Field Assignment** button.

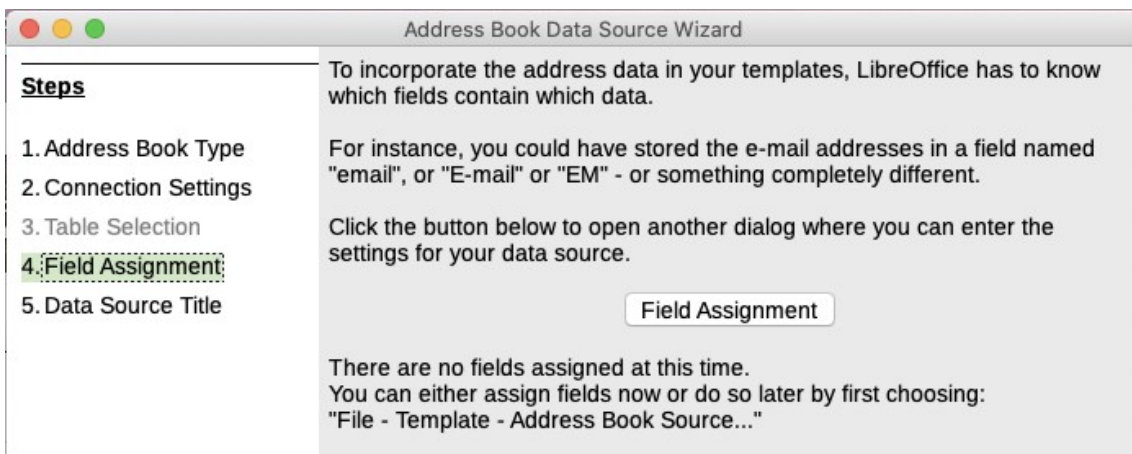


Figure 5: For a spreadsheet, do **not** click the Field Assignment button

- 9) Name the new database (.odb) file in the *Location* field. Optionally change the name in the *Address book name* field; this is the registered name, which LibreOffice displays in data source listings. In our example, the name *Points* was used for both.

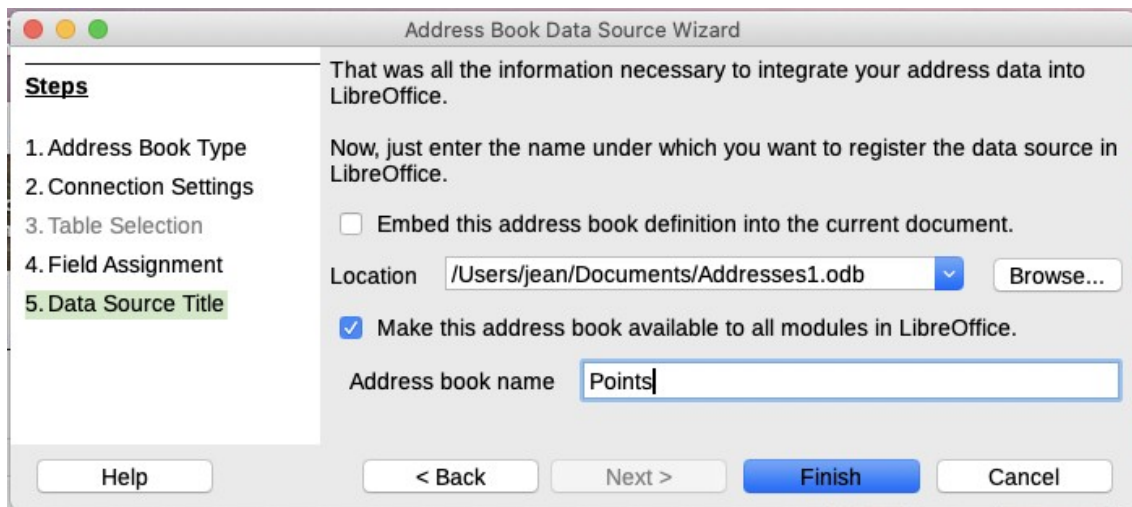


Figure 6: Name the .odb file and the address book

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

Creating a form letter

You can create a form letter manually—the simplest and most comprehensive method, which is described here—or you can use the Mail Merge wizard starting on page 15.

- 1) Create a new Writer 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 *Shift+Ctrl+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.

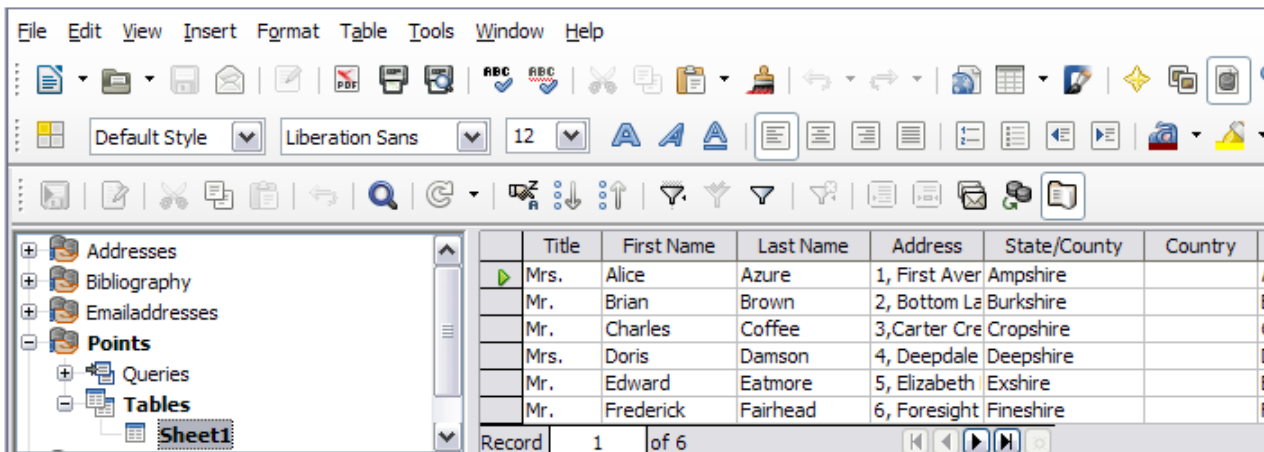


Figure 7: Selecting the data source

- 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.

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.

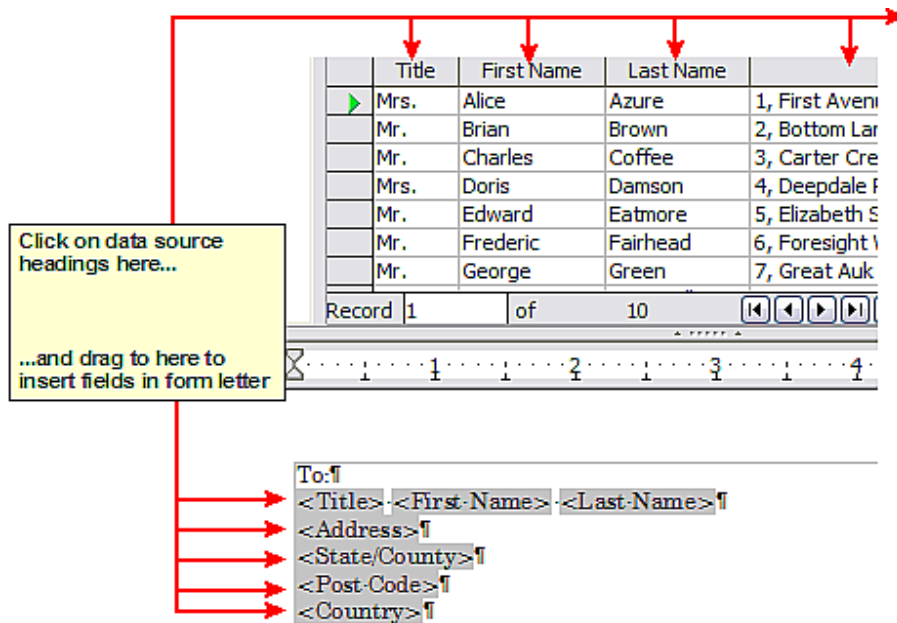


Figure 8: Dragging fields to the body of the form letter

- 5) Continue until you have composed the entire document. At this time you can suppress any blank lines that may appear in the resulting letters (Step 6). Otherwise, go to Step 7.

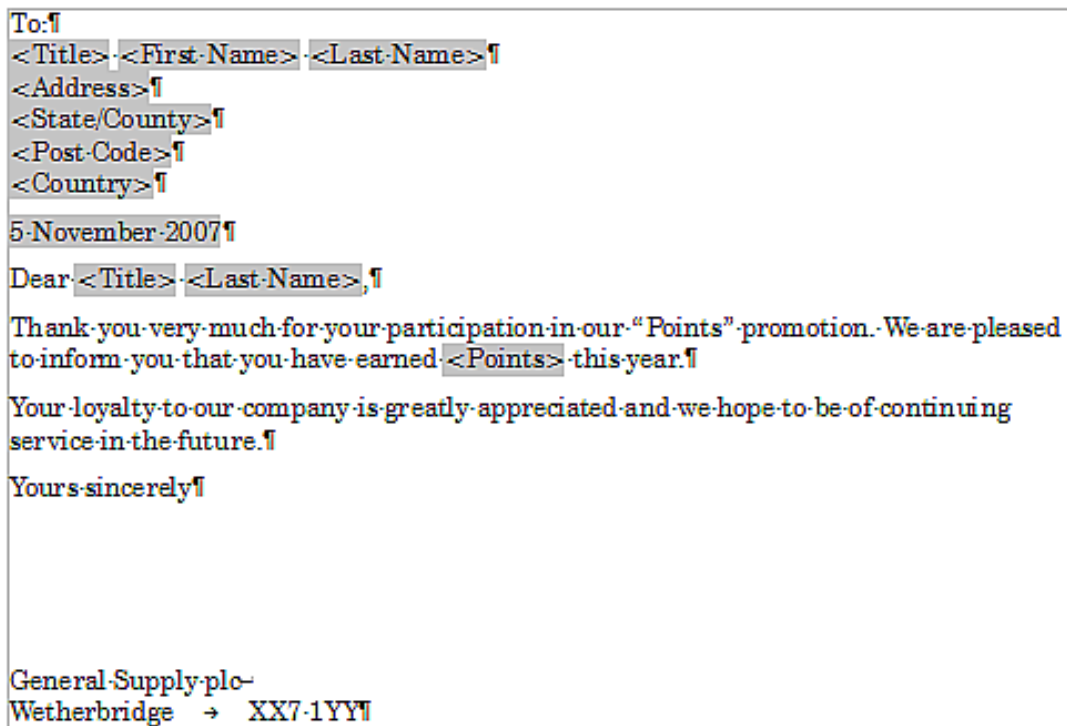


Figure 9: The completed form letter

- 6) If you wish to suppress¹ blank lines, follow this procedure:
 - a) Click at the end of the first paragraph to be suppressed if empty, and then choose **Insert > Field > More Fields** to display the Fields dialog.
 - b) Select the *Functions* tab and then click on **Hidden Paragraph** in the *Type* column.

¹ When using the Mail Merge Wizard, you can select an automatic suppression of blank lines and avoid the work described in this section.

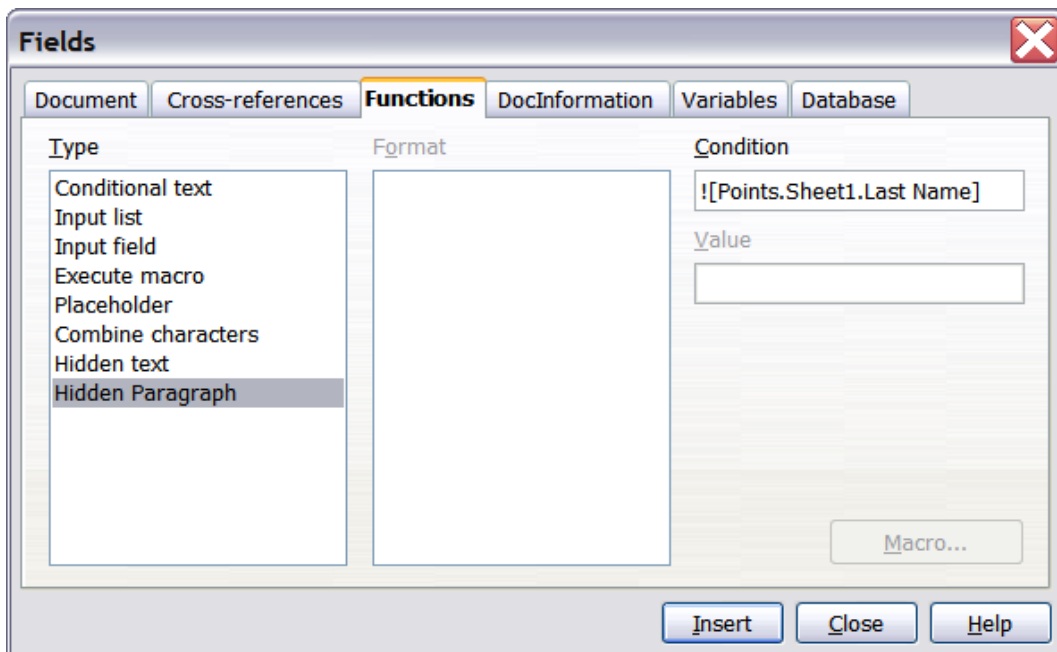


Figure 10: Hidden paragraph insertion

- 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 Last Name field is empty would be:
- ! [Points.Sheet1.Last Name] as illustrated in Figure 10.
- 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]
- d) Click **Insert**, but do not close the dialog until you have amended all the lines that should be suppressed.
- 7) The document is now ready to be printed.
- a) Choose **File > Print** and respond with **Yes** in the message box.

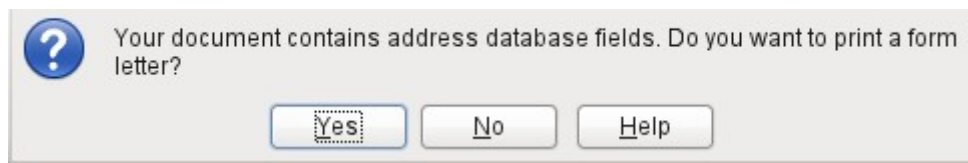


Figure 11: Mail merge confirmation message

- b) In the Mail Merge dialog (Figure 12), in the *Records* section, you can choose to print all records or selected records. To select individual records to be printed, *Ctrl+click* on each one. 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.
- c) Click **OK** to send the letters directly to the printer. Or, you can save the letters to a file for further editing or formatting; see “Editing merged documents” below.

- d) 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 and is highly recommended.

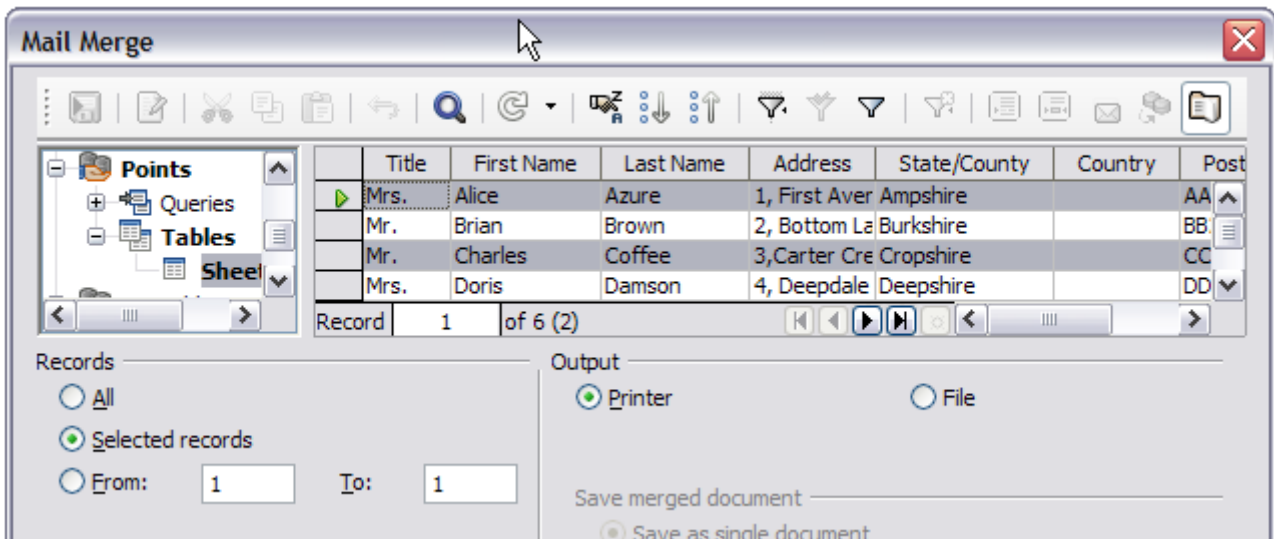


Figure 12: The Mail Merge dialog

Editing merged documents

You may prefer to save the letters to a file, to allow for proofreading or formatting. To do this:

- 1) In the Mail Merge dialog (Figure 12), select **File** in the *Output* section, instead of using the default **Printer** selection. This activates some other choices on the page (Figure 13).
- 2) You can choose whether to save the output as a single document (containing all of the letters) or save the letters as individual documents, and you can specify the name, location, and format of the files.

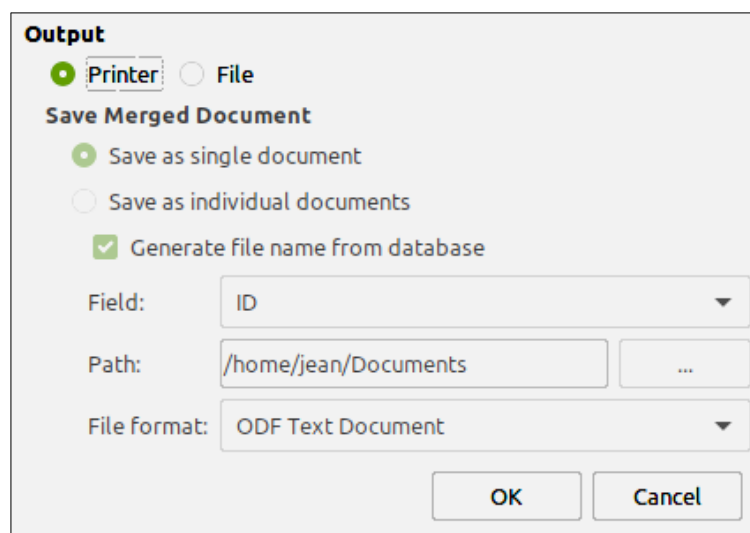


Figure 13: Output to Printer or to File

- 3) Click **OK**. In the Save as dialog, enter a file name for the saved letters and choose a folder in which to save them. The letters will be saved consecutively as separate pages in the single document, or numbered consecutively in individual files if saved as individual documents.

You can now open the letters and edit them individually as you would edit any other document.

Printing mailing labels

Labels are commonly used for printing address lists (where each label shows a different address), but they can also be used for making multiple copies of one label only, for example return-address stickers, or labels for CDs/DVDs or other items.

Before beginning this process, note the brand and type of labels you intend to use. You can also define your own label size; see Step 4.



Tip

If you are printing the same information on each label, you may find the Business Cards dialog useful. Access it through **File > New > Business Cards**. The Labels and Business Cards dialogs are very similar.

Preparing for printing

To prepare mailing labels for printing:

- 1) Choose **File > New > Labels**. The Labels dialog opens.
- 2) On the *Labels* page (Figure 14), select the Database and Table.
- 3) Click the drop-down 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 14.

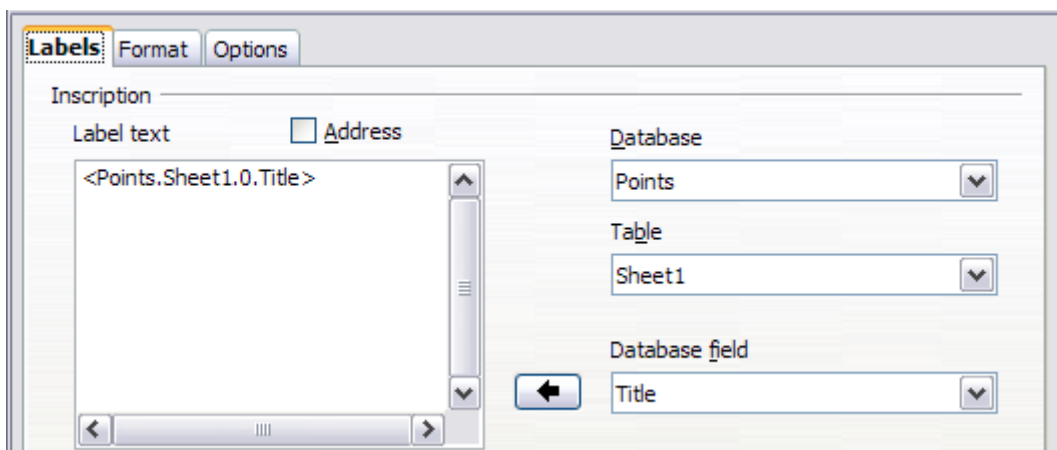


Figure 14: Move fields from Database field list to Label text area

- 4) Continue adding fields and inserting desired punctuation, spaces, and line breaks until the label is composed. Figure 15 shows the completed label.
- 5) Select the label stock in the *Brand* drop-down list. The types for that brand then appear in the *Type* drop-down list. Select the size and type of labels required. Go to Step 7. If your label sheets are not listed, go to Step 6.

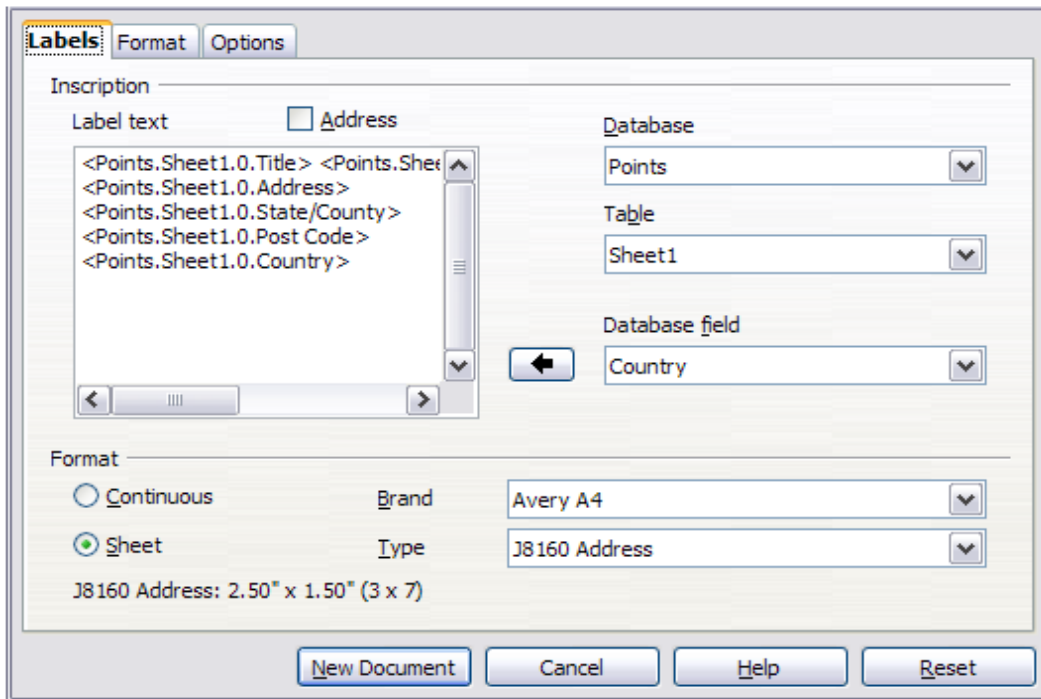


Figure 15: The completed label

- 6) To define labels that are not on the list:
 - a) Select **[User]** in the **Type** box on the *Labels* page. Then, click the *Format* page of the Labels dialog (Figure 16). Measure on your labels those dimensions illustrated and enter them into the respective boxes on the left side.

Horizontal pitch is the distance between the left edges of adjacent labels.

Vertical pitch is the distance between the upper edge of a label and the upper edge of the label directly below.

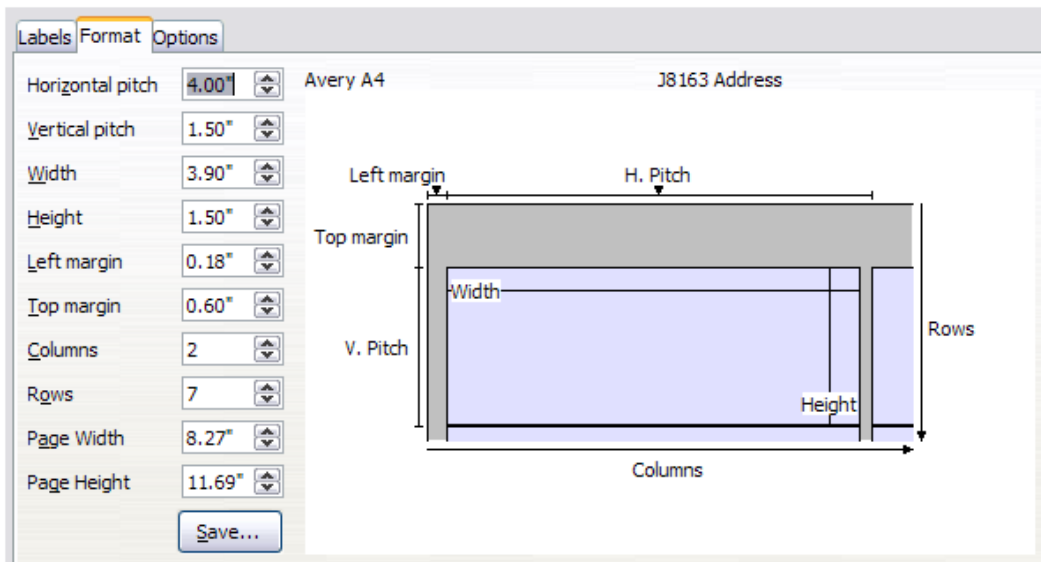


Figure 16: Specify settings, if necessary

- b) You can now save the label template if you are likely to use it again. Click **Save**.
 - c) In the Save Label Format dialog that pops up, enter names for your label Brand and Type. Click **OK**.
- 7) On the *Options* page, select **Synchronize contents**.

- 8) 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, go to “Printing” on page 13; otherwise, continue with “Removing blank lines from labels” below.

Removing blank lines from labels

- 1) 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.
- 2) Next, ensure that you can see non-printing characters, such as paragraph marks and line breaks. If these are not already visible, choose **View > Formatting Marks** from the Menu bar, or press *Ctrl+F10*, or click on the **Toggle Formatting Marks** icon on the Standard toolbar.

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

- 3) 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.



Caution

The objective of Step 3 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.

- 4) Click again at the end of the first paragraph to be conditionally suppressed and then choose **Insert > Fields > More Fields**. 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 Last Name field is empty would be

`![Points.Sheet1.Last Name]` as illustrated in Figure 10.

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.

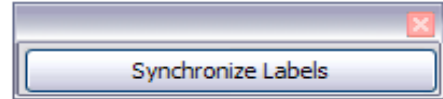
- 5) Repeat for each paragraph to be conditionally suppressed, remembering to place the cursor at the end of the line before changing the last element of the condition and inserting the result.



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); 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. If you omitted this action, you will find that some records have been skipped and are missing from the final output.

- 6) Remembering that we selected **Synchronize contents** earlier, you should now see a small window containing a **Synchronize Labels** button. Click this button and the hidden paragraph fields are propagated to all the labels in your document. (If you do not select Synchronize, then labels can be edited individually.)



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 **File > Templates > Save as Template**.

Printing

- 1) Choose File > Print. The message shown in Figure 11 appears. Click Yes to print.
- 2) In the Mail Merge dialog (Figure 12), 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.



Note

If you prefer to save the labels to a file, perhaps to allow later editing such as changing the typeface or paragraph format, then select **File** in the *Output* section of the Mail Merge dialog, not the default **Printer** selection. This changes the dialog to highlight the *Save merged document* section, where **Save as single document** is preselected.

In this case, clicking **OK** brings up the Save as dialog, where you can enter a file name for the saved labels. If you did not save the prototype label fields document (template) earlier, 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 same way as any other Writer document. You will be prompted to update all links. Choose **No**. (If you select **Synchronize**, all the 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.

Instead, edit the paragraph style associated with the label records:

- 1) Right-click in a label record. Go to **Paragraph > Edit Style** on the context menu.
- 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. By selecting **Insert > Envelope** from the Menu bar, you can select one of two methods for their production: either the envelope is embedded within a letter, generally as the first page (**Insert** in the Envelope dialog), or the envelope is an independent document (**New Document** 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.

The production of envelopes involves two steps, setup and printing. For general instructions on setting up envelopes for printing, see “Printing envelopes” in Chapter 7, Printing, Exporting, E-mailing, and Signing. This section describes the use of an address data source.

Setting up envelopes for printing

- 1) Choose **Insert > Envelope** from the Menu bar.
- 2) On the *Envelope* page of the Envelope dialog (Figure 21), choose whether to add Sender information to the envelope and edit the information in the **Sender** box (Sender is the “from” on the envelope).

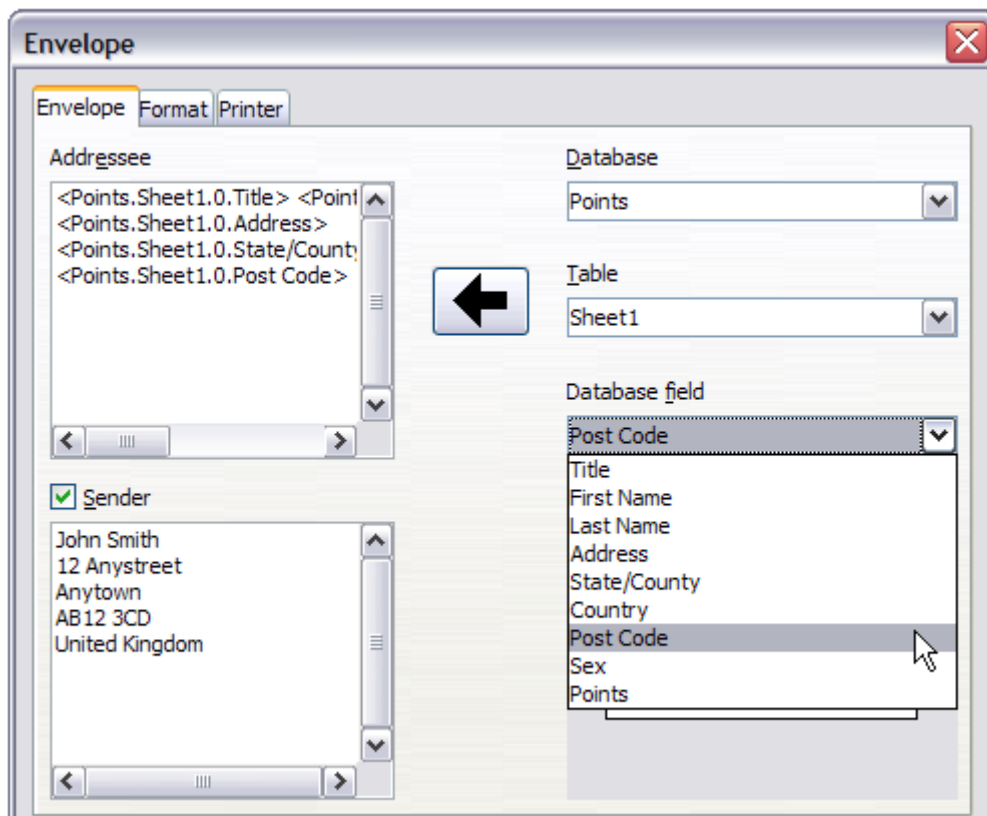


Figure 17: Choosing addressee and sender information for envelopes

- 3) Create 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 8) or by using the facilities of the *Envelope* tab.
- 4) If you prefer dragging and dropping, then click **New Document**, drag your data source headings into the **Addressee** box on your new envelope and skip to step 10), otherwise continue with the next step.
- 5) Verify, add, or edit the information in the **Addressee** box. You can use the right-hand drop-down 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” on page 10.

- 6) When you have finished formatting, click either the New Document or Insert button to finish. **New Document** creates only the envelope template in a new document, whereas Insert inserts the envelope into your current document as page 1.
- 7) Quite often some of the fields in your address data source will be unused, leading to blank lines in the envelope Addressee area. If this is not important, go straight to “Merging and printing the envelopes” below, otherwise continue as described in “Removing blank lines from labels” on page 12.

Merging and printing the envelopes

To merge addresses and print the envelopes:

- 1) Choose **File > Print**. A message box appears. Click **Yes**.
- 2) The Mail Merge dialog (Figure 12) 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. To check the envelopes before printing them, see “Editing merged documents” on page 9 for instructions.

Creating an envelope template

When your envelope layout and fields are complete to your satisfaction, you can save the result as a template.

- 1) Choose **File > Templates > Save As Template**.
- 2) In the Templates dialog, type a name and choose a template category.
- 3) Click **Save** to save the template.

Using the Mail Merge Wizard to create a form letter

The manual method of creating a form letter described in “Creating a form letter” on page 6 provides the most control over the result and is therefore recommended. If you prefer to use the Mail Merge wizard, the technique is described below.

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.

Step 1: Select starting document

The wizard gives several options for the starting document:

- Use the current document.
- Create a new document.
- Start from existing document.
- Start from a template.

For the purposes of this example, we assume that you opened a new text document.

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

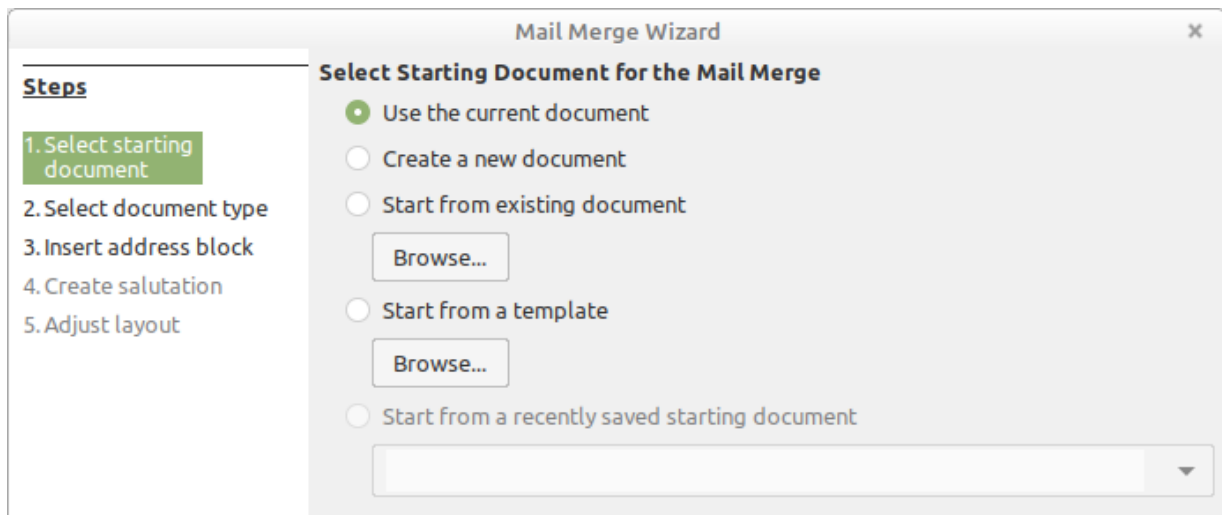


Figure 18: Select starting document

Step 2: Select document type

The wizard can produce letters or email messages. In this example, we are producing a letter. Select Letter and click Next.

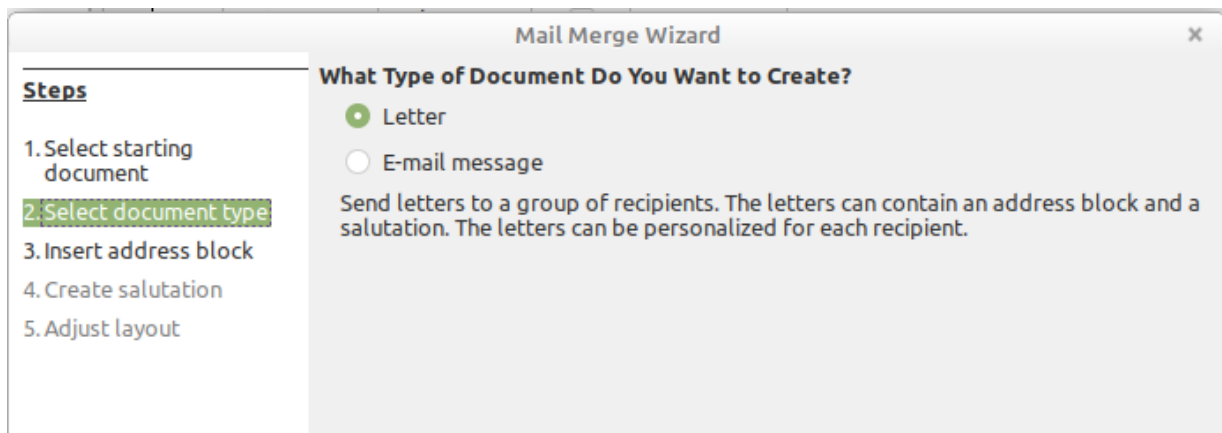


Figure 19: Choose document type

Step 3: Insert address block

This is the most complex step in the wizard. In this step (Figure 20) you will do three things:

- 1) Tell the wizard which data source to use. The data source must be an existing file.
- 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 UK English version of the wizard has a field called <Surname>. If your spreadsheet has a column called “Last Name”, you need to tell the wizard that <Surname> and “Last Name” are equivalent. This is described in “Matching the fields” on page 19.

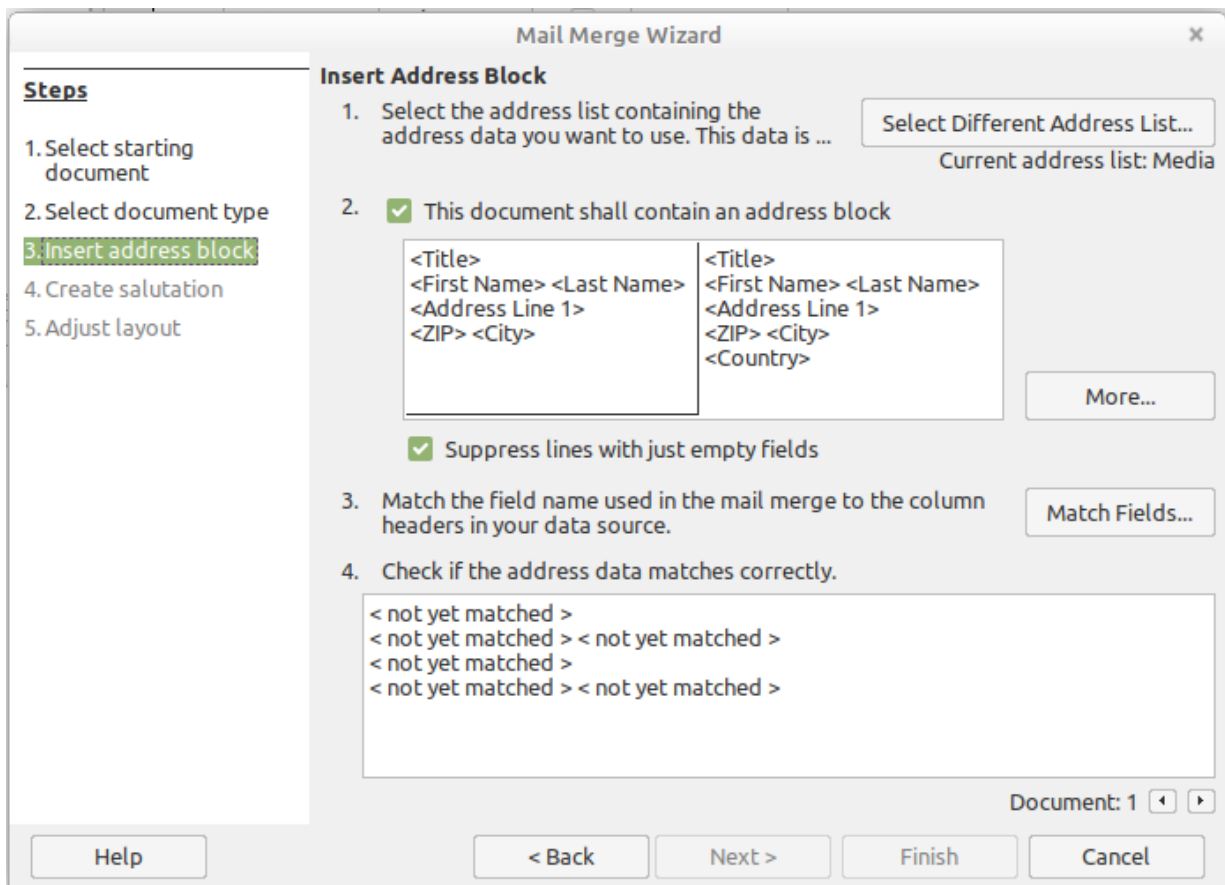


Figure 20: Insert address block

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 21) for choosing a data source.

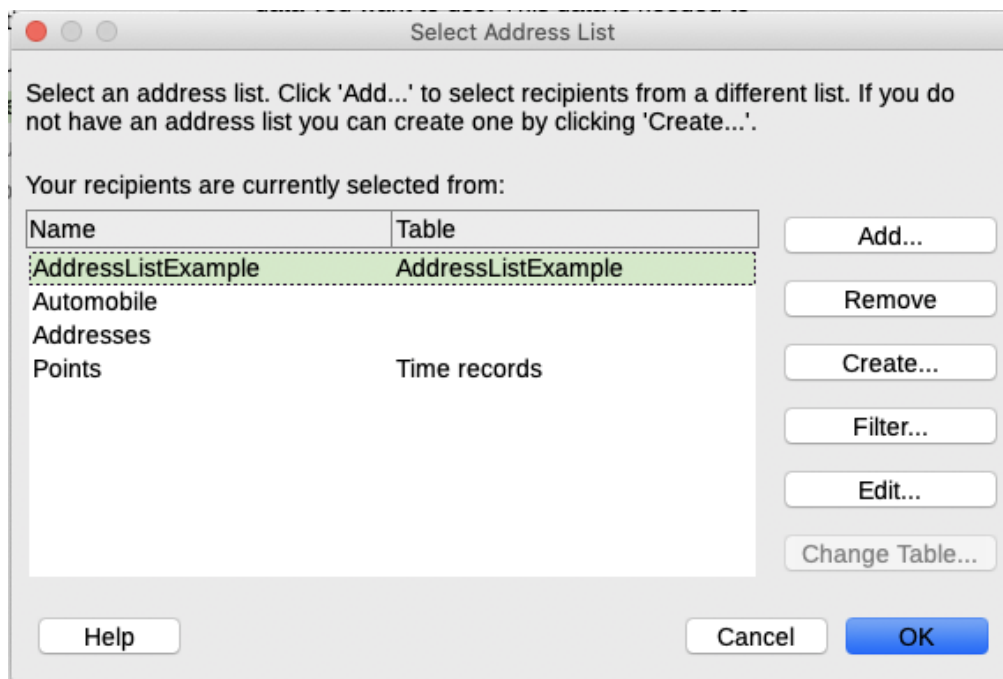


Figure 21: Select address list dialog

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 have an address list that is not registered in LibreOffice, but which you wish to use, click **Add** and select the file from the location in which it is saved.

In each of these cases a new data source (.odb file) will be created and registered.

- 2) Select the address list and click **OK** to return to the Insert Address Block dialog. We retain "Points" as our address book for this example. The wizard can also exclude certain records; click **Filter** to choose them.

Selecting and optionally editing the address block

- 1) In section 2 (shown in Figure 20), select the address block to appear on the letter, define its appearance, and choose the fields it contains. The main page gives two choices. Click **More** to open the Select Address Block dialog for more choices.
- 2) The Select Address Block dialog (Figure 22) displays the original two blocks plus other choices for the format of the address block (you may need to scroll down to see all of the choices). You can also optionally include or exclude the country (for example, only include the country if it is not England) in the *Address Block Settings* section. The 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 Edit Address Block dialog.

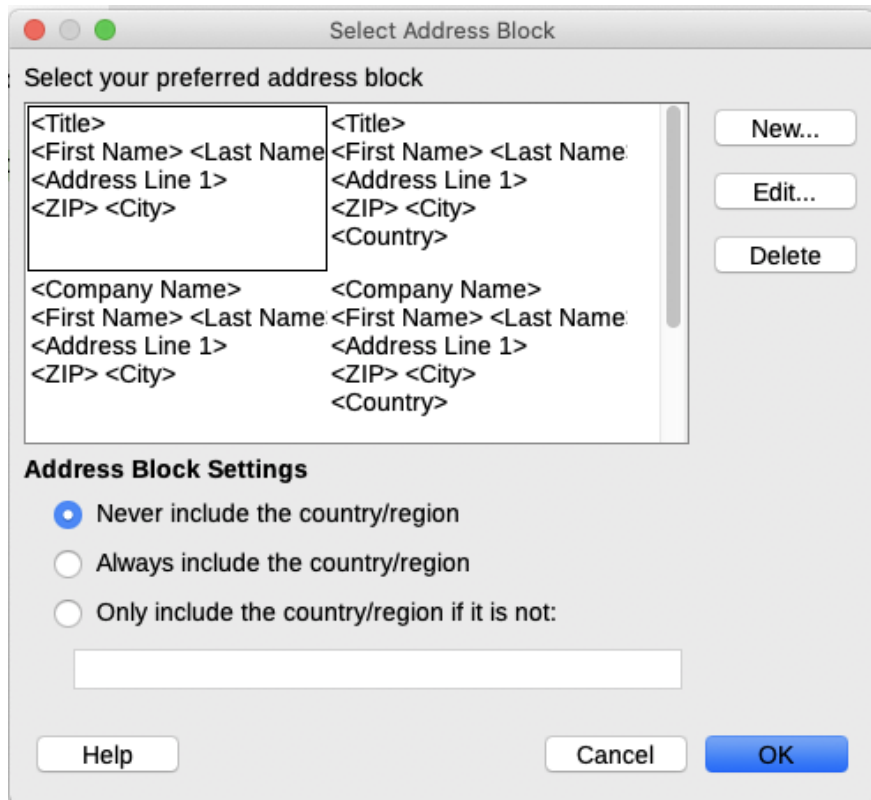


Figure 22: Select address block

- 3) In the Edit Address Block dialog (Figure 23), you can add or delete address elements using the arrow buttons between the boxes. To move elements around, use the arrow buttons on the right. For example, to add an extra space between the first and the last names in Figure 23, click **<Last Name>** and then click the **Move right** arrow button on the right-hand side.
- 4) Click **OK** to close the Edit Address Block dialog, then click **OK** on the Select Address Block dialog to save your changes and return to the Mail Merge Wizard.

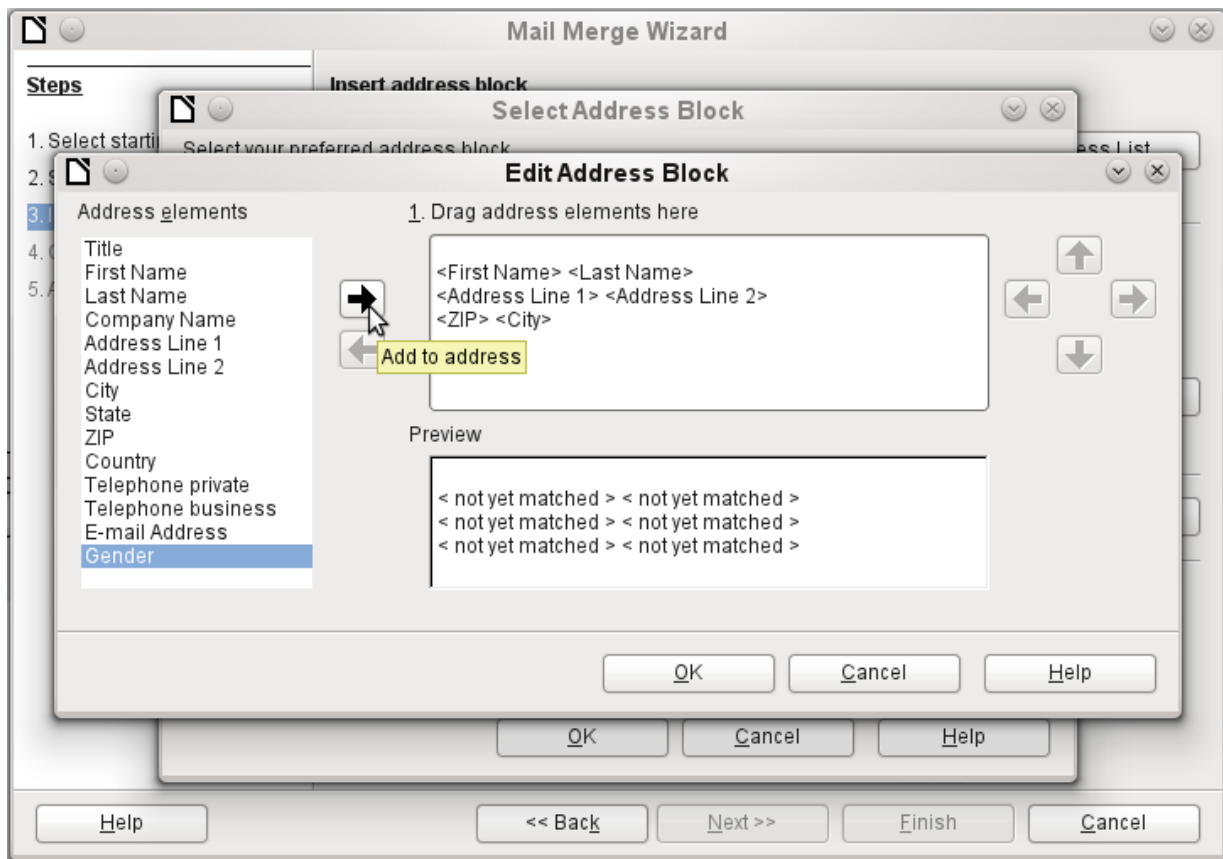


Figure 23: Edit address block

Matching the fields

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

- 1) Look at section 3 of the wizard (shown in Figure 20 on page 17). The box at the bottom displays one record at a time, using the address block format you specified. 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.
- 2) If the addresses do not display correctly, click **Match Fields**.
The Match Fields dialog (Figure 24) 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.
- 3) When you have matched all the fields, click **OK** to return to the Insert Address Block dialog. 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 the next step.

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 yet matched> in a field position it indicates that the field in question is not correctly matched.

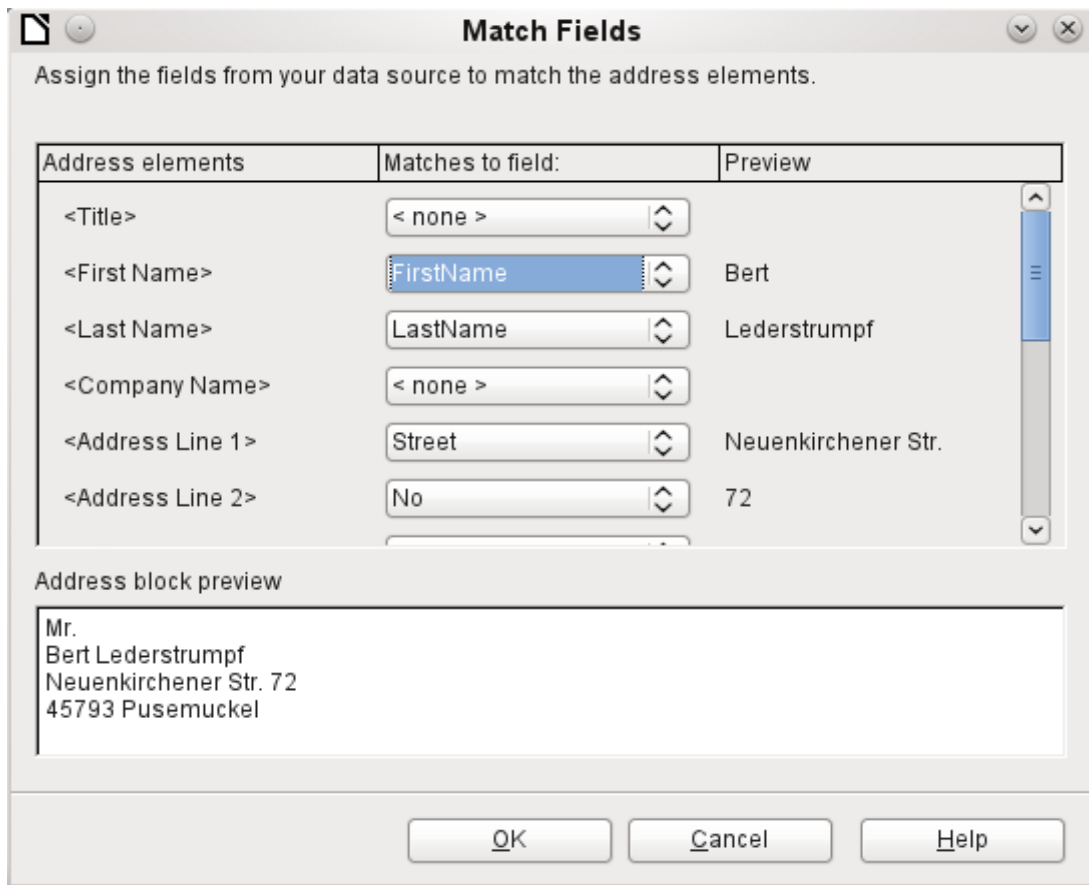


Figure 24: Match fields dialog

- 4) Notice the option for **Suppress lines with empty fields** in section 2 of Figure 20. Using the Wizard, you do not have to create your own conditional suppression fields.

Step 4: Create salutation

It is possible to create just about any salutation you want in this step (see Figure 25).

Select **This document should contain a salutation** to enable the *General salutation* list box. Some general texts are available in the list box, or you can enter your own text. A preview pane displays your choice.

Select **Insert personalized salutation** to enable further salutation constructs.

You can, for example, 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 a spreadsheet, you might have a column called Gender. In the section *Address list field indicating a female recipient*, set the **Field name** to Gender and the **Field value** to F. The Male salutation is then printed for all men and the Female salutation for all women. Unfortunately, LibreOffice does not provide for other genders; however, you can use a non-gendered salutation.

If you do not have such a column in your spreadsheet, or if you do not need to distinguish between genders in the salutation, then you can leave the **Field name** and **Field value** boxes empty and use the customized content of the *Male* list box for the salutation to all recipients.

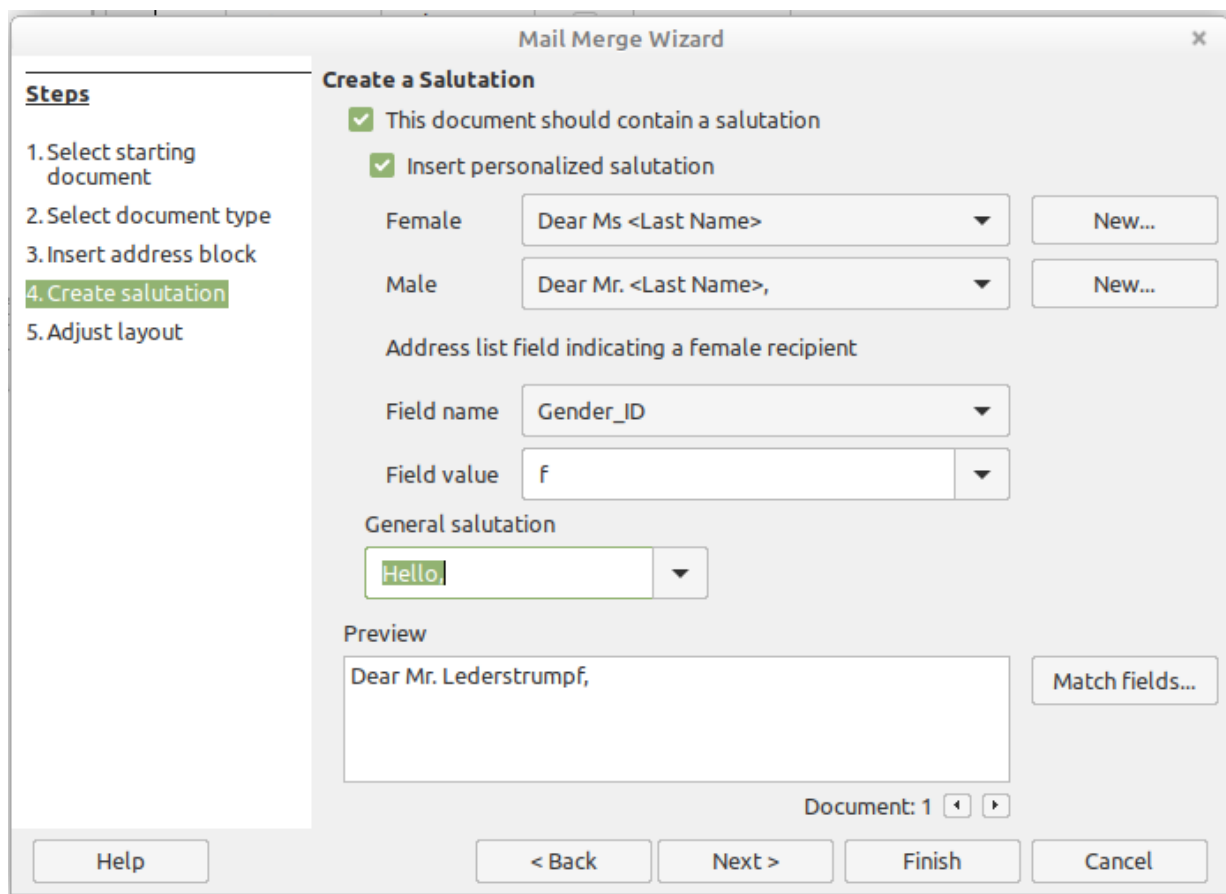


Figure 25: Create a salutation

As an example:

- 1) Click the **New** button alongside the *Male* list box. The Custom Salutation (Male Recipients) dialog opens (see Figure 26).
- 2) Select **Salutation** in the *Salutation elements* list on the right and drag it into box 1 on the right.
- 3) In the *Customize salutation* box, select an appropriate greeting or type your own text into the box. Edit it as needed.
- 4) Select and move **First Name** from the *Salutation elements* list into box 1, using either the Add to salutation arrow button or by dragging it. Then click the **Move right** arrow button on the right-hand side to add space between the salutation and the first name.
- 5) Select and move **Last Name** from the *Salutation elements* list into box 1, then click the **Move right** arrow button to add space between the first and the last names.
- 6) Finally, move Punctuation Mark across and select the comma from the choices in the *Customize salutation* box.
- 7) The construct is shown in the **Preview** box.
- 8) Carry out any final editing. Click **OK**.

This method allows you to use gender neutral titles such as Doctor (Dr) and Reverend (Rev), or titles such as Ms, or omit titles.

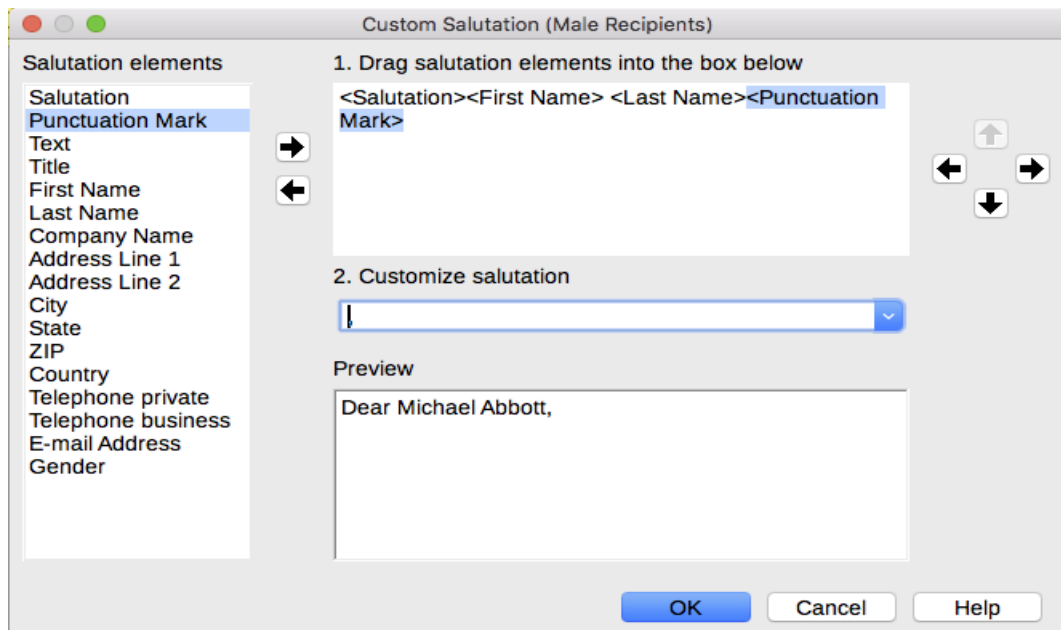


Figure 26: Customizing the salutation

Step 5: Adjust layout

In step 5: Adjust layout, 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 27 to move the elements.

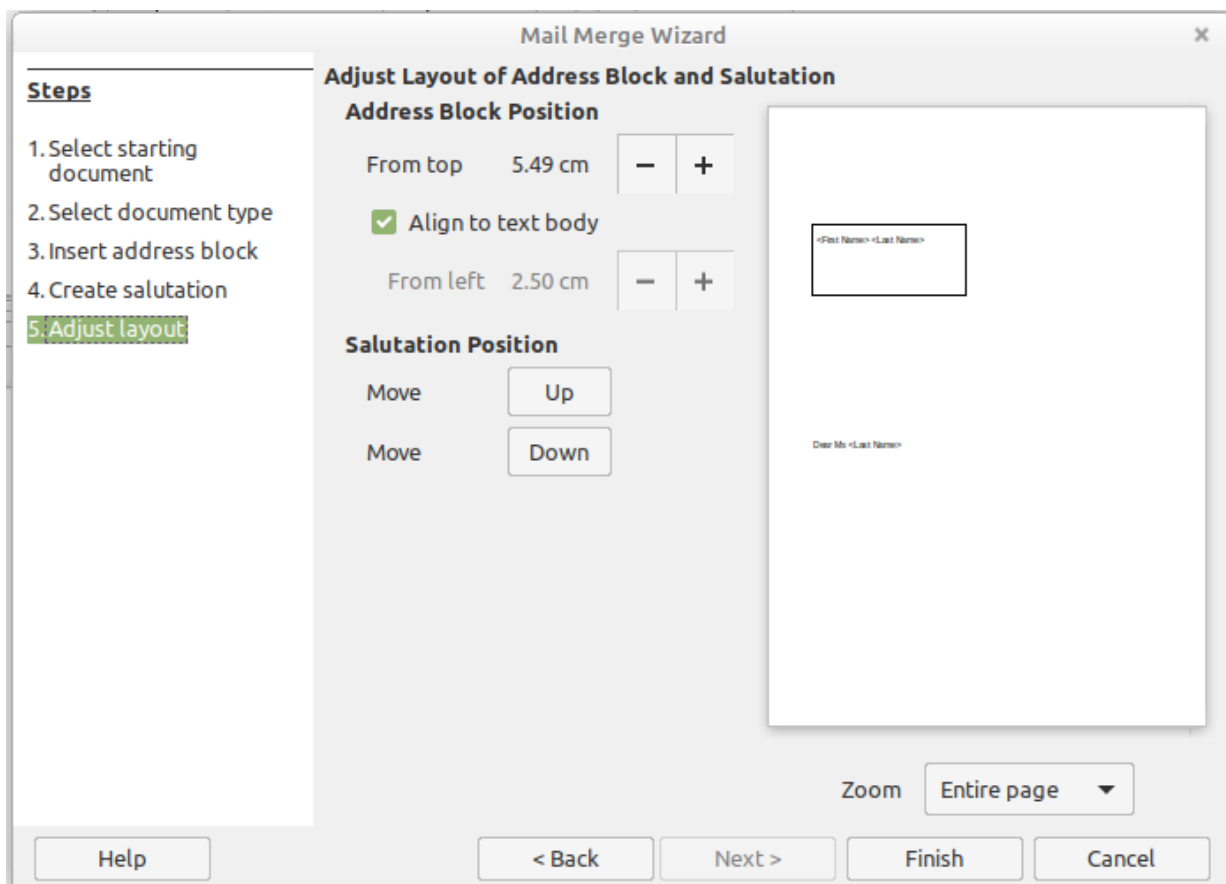


Figure 27: Adjust layout

You now have a Writer document into which you can type the contents of the letter. To merge the fields and print the letters, choose **File > Print** from the Menu bar. A message pops up, asking if you want to print a form letter. Click **Yes**.

The Mail Merge dialog (Figure 28) is now displayed, where you can optionally select records to include or exclude (in the top section) and, in the *Output* section, choose to print the letters immediately (**Printer**) or save them (**File**) for further editing or printing at a later time.

If you choose **File**, you can then choose whether to save the output as a single document (containing all of the letters) or save the letters as individual documents, and you can specify the name, location, and format of the files. Click **OK** to save the letters.

You can now open the letters and edit them individually as you would edit any other document.

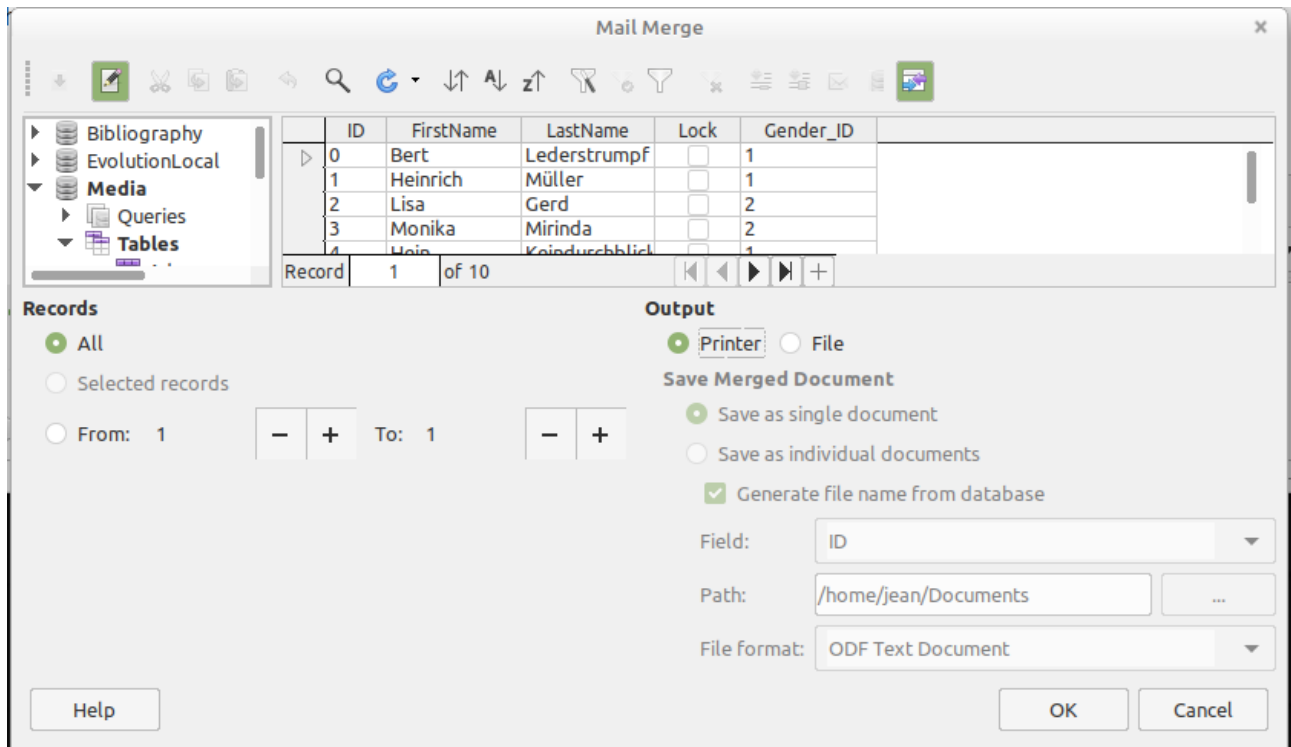


Figure 28: Mail Merge dialog