

Writer 5.4 Guide

# Chapter 14 Mail Merge

Form Letters, Mailing Labels, and Envelopes

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### Acknowledgments

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#### Note for Mac users

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

Windows or Linux Mac equivalent		Effect			
Tools > Options menu selection	LibreOffice > Preferences	Access setup options			
Right-click	<i>Control+click</i> or <i>right-click</i> depending on computer setup	Opens a context menu			
Ctrl (Control)	策 (Command)	Used with other keys			
F5	Shift+ #+F5	Open the Navigator			
F11	<b>∺</b> + <i>T</i>	Open the Styles and Formatting window			

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# What is mail merge?

LibreOffice 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 necessary variable address information.

This chapter describes the 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 and registering 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.

LibreOffice can access a wide variety of sources to create the database, 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 LibreOffice 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 start with a spreadsheet with the following column (field) headers: Title, First Name, Last Name, Address, State/County, Country, Post Code, Sex, and Points. A sample of data is shown in Figure 1.

<u>F</u> ile	<u>E</u> dit <u>V</u>	iew <u>I</u> nsert F <u>o</u>	ormat <u>T</u> ools [	<u>D</u> ata <u>W</u> indow <u>H</u> elp					
: 🖻	• 🖻	• 🖬 🖄 🛛	2 🖌 🖶	🛃   🖉 😼   🍃	6 E 🖻 • 🗯	<del>ا</del> (ج) ا	r   🚮	:1 :1	💣 🚺
! <b>-</b>	Defau	lt 💌 I	Liberation Sans	▼ 10 ▼	a <i>a</i> a i [			%	000. <u>−</u> 0 ∟0 000.
E6		▼ <sup>4</sup> / <sub>5</sub>	ξ 🔳 Ε	xshire					
	A	В	С	D	E	F	G	н	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
				2, Bottom Lane					

Figure 1: Spreadsheet data example

After being created as described below, for a data source to be directly accessible from within a Writer document, it must be registered. You only need to do this once; after that, the data source is available to all components of LibreOffice.

- From within any Writer document, or from the LibreOffice Start Center, choose File > Wizards > Address Data Source.
- 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.

Address Book Data Source	Wizard 🔀
Steps 1. Address book type	LibreOffice lets you access address data already present in your system. To do this, a LibreOffice data source will be created in which your address data is available in tabular form.
2. Connection Settings	This wizard helps you create the data source.
3. Table selection	Please select the type of your external address book:
4. Field Assignment	○ Mozilla / Netscape
5. Data Source Title	<ul> <li>Thunderbird/Icedove</li> <li>LDAP address data</li> <li>Outlook address book</li> <li>Windows system address book</li> <li>Other external data source</li> </ul>
Help	<< Back Next >> Einish Cancel

Figure 2: Select type of external address book

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

Address Book Data Source Wiz	rard 🛛 🚺
Steps	To set up the new data source, additional information is required.
1. Address book type 2. Connection Settings	Click the following button to open another dialog in which you then enter the necessary information.
<ol> <li>Table selection</li> <li>Field Assignment</li> <li>Data Source Title</li> </ol>	Settings

Figure 3: Starting the Settings part of the Wizard

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

Data Source Properties	Spreadsheet	
Select the type of data	base to which you want to establish a connection.	
Database <u>t</u> ype	Spreadsheet	
On the following pages	you can make detailed settings for the connection.	
5.5		
The new settings you n	nake will overwrite your existing settings.	

Figure 4: Selecting the database type

5) In the next dialog, 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 (not shown in illustration).

Database properties - Connection settings	×
General	
Path to the spreadsheet document	
/home/jeanweber/Documents/Addresses.ods	Browse

Figure 5: Selecting the spreadsheet document

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

Steps	To incorporate the address data in your templates, LibreOffice has to know which fields contain which data.
1. Address book type	For instance, you could have should the source!! addresses in a field sourced
2. Connection Settings	For instance, you could have stored the e-mail addresses in a field named "email", or "E-mail" or "EM" - or something completely different.
3. Table selection	
4. Field Assignment	Click the button below to open another dialog where you can enter the settings for your data source.
5. Data Source Title	lor your data source.
	Field Assignment
	There are no fields assigned at this time. You can either assign fields now or do so later by first choosing: "File - Template - Address Book Source"

Figure 6: Because this is a spreadsheet, do **not** click Field Assignment

8) A database file will be created. Name the file in the path 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. The name in this field is the registered name, which LibreOffice will display in data source listings. In our example, the name "Points" was used for both.

🗋 Address Book Data Source Wiz	zard
Steps	That was all the information necessary to integrate your address data into LibreOffice.
1.Address book type 2.Connection Settings	Now, just enter the name under which you want to register the data source in LibreOffice.
3. Table selection 4. Field Assignment	Location       \home\jeanweber\Documents\Points.odb <ul> <li>Browse</li> <li>Browse</li> </ul>
5. Data Source Title	<ul> <li>Make this address book available to all modules in LibreOffice.</li> <li>Address book name</li> </ul>
	Points

Figure 7: Name the .odb file and the address book

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

# Deregistering a data source

To remove a registered data source from LibreOffice so it is no longer available for use, as for example an obsolete address list, do the following:

- Open the Data sources window (by selecting View > Data Sources from the Menu bar, or by pressing *F4*, or by selecting the Data Sources icon on the Standard toolbar).
- 2) In the left pane, the Data source explorer, right-click a data source.
- 3) Select **Registered databases** from the context menu.
- 4) In the Registered databases dialog, select the data source to be removed.
- 5) Click **Delete**, then click **Yes** in the confirmation box which opens.
- 6) Repeat steps 4) and 5) as required.
- 7) Click **OK** to close the Registered databases dialog.

This does not delete the database from your system. It can be registered again using the methods outlined below.

# **Re-registering an existing data source**

To re-register an existing database file (.odt) of addresses, do the following:

- 1) Open the Data sources window.
- 2) In the left pane, the Data source explorer, right-click a data source.
- 3) Select Registered databases from the context menu.
- 4) In the Registered databases dialog, click the **New** button.
- 5) In the Create Database Link dialog, click the **Browse** button, and navigate to the database file location and select it. Click **Open** to return to the Create Database Link dialog.
- 6) Change the Registered name if required.
- 7) Click **OK** to exit this dialog.
- 8) Click **OK** to exit the Registered databases dialog.

# **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 20. If you elect 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.

<u>File E</u> dit <u>V</u> iew Insert Format Table To	ols	<u>W</u> ind	low <u>H</u> el	р				
🖹 • 🖿 • 🗟 🖄   🕅   📓 🖶	3	ABC Ø		x 🗄 💼 •	_≜   ⇔ +	e •   🚮	- 🗊 - 📝   🤞	• 🖬 📄 (
Default Style 💌 Liberation Sans			12 💌	a <i>a</i> a				🙇 • 🔏 •
E Addresses			Title	First Name	Last Name	Address	State/County	Country
🕀 🐻 Bibliography			Mrs.	Alice	Azure	1, First Aver	Ampshire	1
🕀 📴 Emailaddresses			Mr.	Brian	Brown	2, Bottom La	Burkshire	E
Points	≣		Mr.	Charles	Coffee	3,Carter Cre	Cropshire	(
			Mrs.	Doris	Damson	4, Deepdale	Deepshire	[
⊕ 4 🖶 Queries			Mr.	Edward	Eatmore	5, Elizabeth	Exshire	E
😑 🖳 Tables			Mr.	Frederick	Fairhead	6, Foresight	Fineshire	F
Sheet1	<b>~</b>	Rec	ord	1 of 6				

Figure 8: 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.

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.

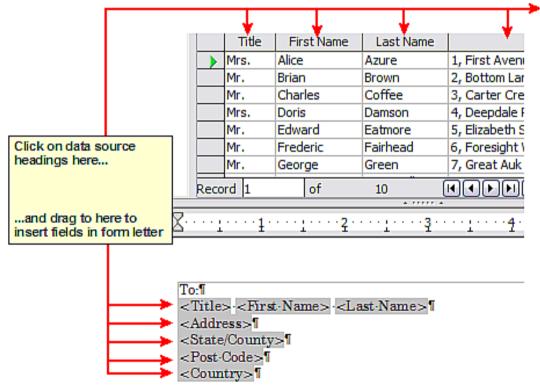


Figure 9: Dragging fields to the body of the form letter

5) Continue until you have composed the entire document. 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¶

General Supply plo-Wetherbridge → XX7·1YY Figure 10: The completed form letter

- 6) To suppress blank lines:
  - 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.

Fields				
Document Cross-references	Functions	DocInformation	Variables	Database
<u>Т</u> уре	F <u>o</u> rmat		Condition	
Conditional text Input list Input field Execute macro Placeholder Combine characters Hidden text Hidden Paragraph			![Points.!]         Value	Sheet1.Last Name]
		(	Insert	Close Help

Figure 11: 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 11.

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 12: Mail merge confirmation message

- b) 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.
- 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 in the future and is highly recommended.

Mail Merge		$\searrow$					
	Ê   5   (	<b>)</b>   C -   1	📲 🏭 👬	V V V	•   %	9 🛛 🖗	
😑 📵 Points 🛛 🔺	Title	First Name	Last Name	Address	State/County	Country	Post
🗄 📲 Queries	Mrs.	Alice	Azure	1, First Aver	Ampshire		AA 🔨
- Tables	Mr.	Brian	Brown	2, Bottom La	Burkshire		BB:
Sheet v	Mr.	Charles	Coffee	3,Carter Cre	Cropshire		CC
snee v	Mrs.	Doris	Damson	4, Deepdale	Deepshire		DD 🗸
	Record	1 of 6 (2)					>
Records		Outr	out				
			) Printer		🔘 File		
○ Erom: 1	<u>T</u> o: 1	Sa	ave merged doo	ument			
			Save as sin	ale document			

Figure 13: The Mail Merge dialog

### **Editing merged documents**

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

- 1) In the Mail Merge dialog (Figure 13), select **File** in the output section, instead of using the default Printer selection.
- 2) This changes the dialog to display the *Save merged document* section, where Save as single document is preselected. You can choose to save each letter as an individual document instead.

Save merged document	
Save as single document	
$\bigcirc$ Sa <u>v</u> e as individual documents	

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**

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

### **Preparing for printing**

To prepare mailing labels for printing:

- 1) Choose File > New > Labels.
- 2) On the *Options* page, ensure that **Synchronize contents** is selected.
- 3) On the **Labels** page (Figure 15), select the Database and Table. Select the Brand of labels to be used, and then select the Type of label.
- 4) If you are unable to identify your label product in the list, then you can define the labels you have.
  - a) Select the User setting in the Type selection box. Click on the *Format* tab of the Labels dialog. Measure on your labels those dimensions illustrated in Figure 14, and enter them into the respective boxes on the left side.

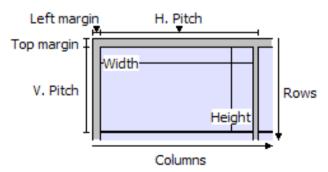


Figure 14: Required information for label set-up

Inscription			
Label text	Address	Database	
	<b>^</b>	Points	~
		Table	
			*
	≡		
		Database <u>fi</u> eld	
	~	•	~
<	>		
Format			
O Continuous	Brand	Avery A4	~
⊙ <u>S</u> heet	<u>T</u> ype	J8160 Address	~
J8160 Address: 2.50">	(1.50" (3 x 7)		

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

Labels			×
Labels Format Op	otions		
Horizontal pitch	4.00" 🗢	Avery A4	[User]
Vertical pitch	1.50" 🚖		
Width	3.90" 🔹	Left margi	n H. Pitch
<u>H</u> eight	1.50"	Top margin	
Left margin	0.18" 🔹	-	
Top margin	0.60" 🚖		Width
<u>C</u> olumns	2 🔹	V. Pitch	Rows
Rows	7 🕏		Height
Page Width	8.27" 🚖	1	
Page Height	11.69" 🚖		Columns
	<u>S</u> ave		

Figure 16: Specify settings, if necessary

- b) You can now save your label template if you are likely to use it again. Click **Save**.
- c) In the Save Label Format dialog (Figure 17), enter names for your label Brand and Type. Click **OK**.

Save Label Fo	rmat		
Options			ОК
Brand	Generic 1	~	
Туре	7x2sheet		Cancel
			Help

Figure 17: Name and save the label template.

5) Click the *Labels* tab. 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 18.

nscription Label text	Address	Database	
<points.sheet1.0.title< td=""><td>e&gt; 🔨</td><td>Points</td><td>~</td></points.sheet1.0.title<>	e> 🔨	Points	~
		Ta <u>b</u> le	
	≡	Sheet1	~
		Database <u>fi</u> eld	
	~	Title	~

Figure 18: Move fields from Database field list to Label text area

6) Continue adding fields and inserting desired punctuation, spaces, and line breaks until the label is composed. Figure 19 shows the completed label.

Label text	Address	Database	
<points.sheet1.0.title< th=""><th></th><th>Points</th><th>~</th></points.sheet1.0.title<>		Points	~
<points.sheet1.0.add <points.sheet1.0.stat< td=""><td></td><td>Table</td><td></td></points.sheet1.0.stat<></points.sheet1.0.add 		Table	
<points.sheet1.0.post< td=""><td>Code&gt;</td><td></td><td>~</td></points.sheet1.0.post<>	Code>		~
<points.sheet1.0.cou< th=""><th>ntry&gt;</th><th>breet</th><th>Ľ</th></points.sheet1.0.cou<>	ntry>	breet	Ľ
		Database <u>fi</u> eld	
	~	Country	~
	>		
ormat			1
Continuous	Brand	Avery A4	~
	Type	J8160 Address	~
J8160 Address: 2.50" x	1.50" (3 x 7)		

Figure 19: The completed label

7) 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 15; otherwise, continue with "Removing blank lines from labels".

### **Removing blank lines from labels**

- 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, line breaks and so on. If these are not already visible, choose **View > Formatting Marks** from

the Menu bar, or press Ctrl+F10, or click on the **Formatting Marks** icon ( $\square$ ) on the Standard toolbar.

You will now see that address field separation is created by line breaks ( $\stackrel{\leftarrow}{1}$ ), rather than paragraphs ( $\P$ ). As the suppression of blank address fields depends on hiding paragraphs, not lines, you need to replace line breaks with paragraphs as follows.

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 11.

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 advance the cursor to the end of the line in question before changing the last element of the condition and Inserting the result.



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.

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

	×
Synchronize Labels	

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** to save it as an Open Document Text Template (.ott).

#### **Printing**

- 1) Choose **File > Print.** The message shown in Figure 12 appears. Click **Yes** to print.
- 2) 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.
- 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 some later editing such as changing the typeface or paragraph format, then select File in the output section of the Mail Merge dialog, noy 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 a file name can be entered for the saved labels.

If you did not save the prototype label fields document (template) in Step 6 of the Removing blank lines from documents paragraph, 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** 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 context 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. By selecting **Insert** > **Envelope** from the Menu bar, you can select one of two methods for their production. The first is where the envelope is embedded within a letter, generally as the first page (Insert in the Envelope dialog), and the second is where 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.

This section assumes the use of an address data source and, for convenience, a free-standing envelope. The production of envelopes involves two steps, setup and printing.

### Setting up envelopes for printing

- 1) Choose **Insert > Envelope** from the Menu bar.
- 2) In the Envelope dialog, select the *Format* tab (Figure 20), 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.

### Note

If the list of envelope formats in the Size section of this dialog does not include the size you need, choose User Defined (at the bottom of the list) and specify the envelope size using the Width and Height boxes.

# Тір

At this stage it is only possible to vary the position of the origin points (upper left corners) of the frames that will hold the Sender and Addressee information, but once the envelope has been created, full adjustment of size and position will become possible and you may wish to make some cosmetic adjustments.

Envelope	
Envelope Forma	t Printer
Addressee	
Position	
from left	4.33" 😨 Eormat Edit 🔻
from top	2.17"
Sender	
Position	
from left	0.39" 😨 Form <u>a</u> t Edit 🔻
from top	0.39" 🚖
Size	
Format	DL Envelope
Width	8.66"
<u>H</u> eight	4.33"
New Documen	t Insert Cancel Help Reset

Figure 20: Envelope formatting dialog

3) The next step is to select the *Printer* tab (Figure 21), from where you can 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.

Envelope			$\overline{\mathbf{X}}$
Envelope Format Printer			
Envelope orientation			
1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	<u></u> ₽	<b>P</b>	
Print from top			
O Print from <u>b</u> ottom			
<u>S</u> hift right	0.00"		
Shift <u>d</u> own	0.00"		
Current Printer			
EPSON Stylus DX8400 Se	eries		Setup

Figure 21: Choosing printer options for an envelope

- 4) Select the *Envelope* tab (Figure 22).
- 5) Choose whether or not to add Sender information to the envelope by selecting or deselecting the Sender option. If wanted, edit the information in the Sender box (Sender is the "from" on the envelope).
- 6) 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 7, and in particular in Figure 9) or using the facilities of the Envelope tab.
- 7) If you prefer dragging and dropping, then click New Document, drag your data source headings into the Addressee area on your new envelope and skip to step 10), otherwise continue with the next step.
- Verify, add, or edit the information in the Addressee box. 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. The similarity of the method with Figures 18 and 19 will be clear.

Envelope		×
Envelope Format Printer		
Addr <u>e</u> ssee	<u>D</u> atabase	
<points.sheet1.0.title> <point <p=""><points.sheet1.0.address></points.sheet1.0.address></point></points.sheet1.0.title>	Points	~
<points.sheet1.0.state county<br=""><points.sheet1.0.post code=""></points.sheet1.0.post></points.sheet1.0.state>		
	Sheet1	~
~	Database <u>fi</u> eld	
	Post Code	
▼ <u>S</u> ender	Title First Name	
John Smith	Last Name Address	
	State/County	
	Country Post Code	
	Sex	4
	Points	

Figure 22: Choosing addressee and sender information for envelopes

9) When you have finished formatting, click either the **New Document** or **Insert** button to finish. As might be expected, New Document 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.

You can now modify the placement of the frames containing the sender and addressee information, or make further changes to the character and paragraph attributes (for example, the font) or add a logo or other graphic to the envelope.



If you frequently print envelopes from the same database onto the same size envelopes, at this point you may wish to create a template from this setup. See "Creating an envelope template" on page 20.

10) 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.



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 ease of reference.

- 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 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 > Formatting Marks**

from the menu bar, or press Ctrl+F10, or click the **Formatting Marks** icon (1) on the Standard toolbar.

You will now see that address field separation is created by line breaks ( $\stackrel{\leftarrow}{1}$ ), rather than paragraphs ( $\P$ ). 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 last data source address field in the first line of the envelope. Press *Delete* to remove the new line character and then press Return (or the Enter key) to insert a paragraph. Repeat this action for each line of the envelope.

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.

d) Click again at the end of the first paragraph to be conditionally suppressed and then choose Insert > Field > Other 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 11.

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. A message box appears. Click Yes.
- 2) The Mail Merge dialog (Figure 13) 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 11 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, click Save.
- 3) Enter a name in the text input box and click **OK** 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 7 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 23.

### **Step 1: Select starting document**

The wizard gives several options for your starting document:

- Use the current document.
- Create a new document.
- Start with an 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.

	Mail Merge Wizard	
Steps	Select Starting Document for the Mail Merge	
Steps	<ul> <li>Use the current document</li> </ul>	
1. Select starting document	Create a new document	
2. Select document type	<ul> <li>Start from existing document</li> </ul>	
3. Insert address block	Browse	
4. Create salutation	browse	
5. Adjust layout	<ul> <li>Start from a template</li> </ul>	
	Browse	
	<ul> <li>Start from a recently saved starting document</li> </ul>	
		٥

Figure 23: 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**.

<u>Steps</u>	What type of document do you want to create?
1. Select starting document	⊙ <u>L</u> etter
2. Select document type	○ <u>E</u> -mail message
3. Insert address block	Send letters to a group of recipients. The letters can contain an address block and a salutati
4. Create salutation	The letters can be personalized for each recipient.
5. Adjust layout	

Figure 24: Choose document type

### **Step 3: Insert address block**

This is the most complex step in the wizard. In this step (Figure 25) 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 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 23.

Mail Merge Wizard	
Steps	Insert address block
<ol> <li>Select starting document</li> <li>Select document type</li> </ol>	1. 1. Select the address list containing the address data you want to use. This data is needed to create the address block.       Select Different Address List         Current address list: Points
<ol> <li>Insert address block</li> <li>Create salutation</li> <li>Adjust layout</li> <li>Edit document</li> <li>Personalise document</li> <li>Save, print or send</li> </ol>	2. ♥ This document must contain an address block
	your data source.  4. Check that the address data matches.  Mrs. Alce Azure 1, First Avenue Average Town Ampshire AA1 1AA  Document: 1
Help	<< Back Next >> Einish Cancel

Figure 25: 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 26) for choosing a data source.
- 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 the above cases a new data source (.odb file) will be created and registered.

 Select the address list and click OK to return to step 3 of the wizard. We retain "Points" as our address book for this example. The wizard can also exclude certain records; click Filter to choose them.

Select Address Lis	t	$\overline{\mathbf{X}}$	
Select an address list. Click ' <u>A</u> dd' to select recipients from a different list. If you do not have an address list you can create one by clicking 'Create'.			
Your recipients are se	ected from:		
Name	Table	<u>A</u> dd	
AddressBook			
Points	Sheet1	<u><u>C</u>reate</u>	
		<u> </u>	
		<u>E</u> dit	
		Change <u>T</u> able	
	ОК	Cancel <u>H</u> elp	

Figure 26: Select address list dialog

#### Selecting the address block

- 1) In section 2 (shown in Figure 25), 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 27) 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. 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.

elect your preferred address block			
<title> &lt;Forename&gt; &lt;Surname&gt;&lt;br&gt;&lt;Address Line 1&gt;&lt;br&gt;&lt;Region&gt;&lt;br&gt;&lt;Postcode&gt;&lt;br&gt;&lt;Country&gt;&lt;/th&gt;&lt;th&gt;&lt;Title&gt;&lt;br&gt;&lt;Forename&gt; &lt;Surname&gt;&lt;br&gt;&lt;Address Line 1&gt;&lt;br&gt;&lt;Postcode&gt; &lt;City&gt;&lt;br&gt;&lt;Country&gt;&lt;/th&gt;&lt;th&gt;&lt;/th&gt;&lt;th&gt;New&lt;/th&gt;&lt;/tr&gt;&lt;tr&gt;&lt;td&gt;&lt;Company Name&gt;&lt;br&gt;&lt;Forename&gt; &lt;Surname&gt;&lt;br&gt;&lt;Address Line 1&gt;&lt;br&gt;&lt;Postcode&gt; &lt;City&gt;&lt;/td&gt;&lt;td&gt;&lt;Company Name&gt;&lt;br&gt;&lt;Forename&gt; &lt;Surname&gt;&lt;br&gt;&lt;Address Line 1&gt;&lt;br&gt;&lt;Postcode&gt; &lt;City&gt;&lt;br&gt;&lt;Country&gt;&lt;/td&gt;&lt;td&gt;~&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;/tr&gt;&lt;tr&gt;&lt;td&gt;ddress block settings&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;/tr&gt;&lt;tr&gt;&lt;td&gt;O Never include the country/regi&lt;/td&gt;&lt;td&gt;on&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;/tr&gt;&lt;tr&gt;&lt;td&gt;O Always include the country/reg&lt;/td&gt;&lt;td&gt;gion&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;/tr&gt;&lt;tr&gt;&lt;td&gt;&lt;ul&gt;     &lt;li&gt;Only include the country/regio&lt;/li&gt; &lt;/ul&gt;&lt;/td&gt;&lt;td&gt;n if it is not:&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;/tr&gt;&lt;/tbody&gt;&lt;/table&gt;</title>			

Figure 27: Select address block

3) In the Edit Address Block dialog, 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 forename and surname in Figure 28, click <Surname> and then click the right arrow button.

Address elements <u>1</u> . Drag address eleme	ents here
Title <title> &lt;Forename&lt;/td&gt;         Surname          Company Name          Address Line 1          Address Line 2          City          Region       Postcode         Country       Telephone private         Telephone business          E-mail Address       Gender&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;/tr&gt;&lt;/tbody&gt;&lt;/table&gt;</title>	

Figure 28: 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.

 Look at section 3 of the wizard (shown in Figure 25 on page 21). 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. 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 (Figure 29) has three columns:

- Address Elements are the terms the wizard uses for each field, such as <Forename> and <Surname>.
- 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 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 yet matched> in a field position it indicates that the field in question is not correctly matched.

ddress elements	Matches to field:	Pre	view	
<title>&lt;/td&gt;&lt;td&gt;Title&lt;/td&gt;&lt;td&gt;Mr:&lt;/td&gt;&lt;td&gt;5.&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;/tr&gt;&lt;tr&gt;&lt;td&gt;&lt;Forename&gt;&lt;/td&gt;&lt;td&gt;First Name&lt;/td&gt;&lt;td&gt;✓ Alic&lt;/td&gt;&lt;td&gt;e&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;/tr&gt;&lt;tr&gt;&lt;td&gt;&lt;Surname&gt;&lt;/td&gt;&lt;td&gt;Last Name&lt;/td&gt;&lt;td&gt;Azı&lt;/td&gt;&lt;td&gt;ıre&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;/tr&gt;&lt;tr&gt;&lt;th&gt;&lt;Company Name&gt;&lt;/th&gt;&lt;th&gt;Last Name&lt;br&gt;Address&lt;/th&gt;&lt;th&gt;^&lt;/th&gt;&lt;th&gt;&lt;/th&gt;&lt;th&gt;&lt;/th&gt;&lt;/tr&gt;&lt;tr&gt;&lt;td&gt;&lt;Address Line 1&gt;&lt;/td&gt;&lt;td&gt;State/County&lt;br&gt;Country&lt;/td&gt;&lt;td&gt;1,1&lt;/td&gt;&lt;td&gt;First Avenue Average .&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;/tr&gt;&lt;tr&gt;&lt;td&gt;&lt;Address Line 2&gt;&lt;/td&gt;&lt;td&gt;Post Code&lt;br&gt;&lt; none &gt;&lt;/td&gt;&lt;td&gt;×&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;td&gt;ſ&lt;/td&gt;&lt;/tr&gt;&lt;tr&gt;&lt;td&gt;dress block preview&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;/tr&gt;&lt;tr&gt;&lt;td&gt;lrs. Alice Azure&lt;br&gt;, First Avenue&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;/tr&gt;&lt;tr&gt;&lt;td&gt;verage Town&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;/tr&gt;&lt;/tbody&gt;&lt;/table&gt;</title>				

Figure 29: Match fields dialog

4) Notice the option for Suppress lines with empty fields in section 2 of Figure 25. 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.

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.



Note

You do not need to tell LibreOffice who is a male, because it assumes that all nonfemale records are males.

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.

• • •	Mail Merge Wizard
Steps	Create a Salutation
	This document should contain a salutation
1. Select starting document	☑ Insert personalized salutation
2. Select document type	Female New
3. Insert address block	
4. Create salutation	Male Dear <first name=""> <last name=""> 🗘 New</last></first>
5. Adjust layout	
	Address list field indicating a female recipient
	Field name
	Field value
	General salutation
	To whom it may concern,
	Preview
	Dear Michael Abbott Match fields
	Match helds
	Document: 1 🔳 🕨
Help	<pre>&lt;&lt; Back Next &gt;&gt; Finish Cancel</pre>

Figure 30: 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 31).
- 2) Select Salutation in the Salutation elements listings.
- Click the arrow button to add it to box 1. 3)
- 4) Open the list box choices for box 2, select an appropriate greeting or type your own text into the list box. Edit it as needed.
- 5) Select and move across First Name from the Salutation elements listings into box 1.
- 6) Type a space and then move Last Name across.

- 7) Finally, move Punctuation Mark across and select the comma from the choices in box 2.
- 8) The construct is shown in the Preview box.
- 9) Carry out any final editing. Click OK.

	Custom Salutation (Male Recipients)	
Salutation elements Salutation Punctuation Mark Text Title First Name Last Name Company Name	<ul> <li>1. Drag salutation elements into the box below</li> <li><salutation><first name=""> <last name=""> <punctuation< li=""> <li>Mark&gt;</li> </punctuation<></last></first></salutation></li></ul>	<ul> <li></li> <li></li></ul>
Address Line 1 Address Line 2 City State ZIP Country Telephone private Telephone business E-mail Address Gender	2. Customize salutation Preview Dear Michael Abbott,	
	OK Cancel	Help

Figure 31: Customizing the salutation

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

#### 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 32 to move the elements.

Mail Merge Wizard	erge Wizard			
Steps	Adjust layout of address block and salutation			
<ol> <li>Select starting document</li> <li>Select document type</li> <li>Insert address block</li> <li>Create salutation</li> <li>Adjust layout</li> <li>Edit document</li> <li>Personalise document</li> <li>Save, print or send</li> </ol>	Address block position   Adjign to text body   From left   Prom top   Salutation position   Move   Down			
Figure 32: 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 33.

<u>Steps</u>	Preview and edit the document	
1. Select starting document	The preview of a merged document is visible now. To see the preview of another document dick one of the arrows.	
2. Select document type		
3. Insert address block	Recipient I< < 2 2 >	
4. Create salutation	Exclude this recipient	
5. Adjust layout		
6. Edit document	Edit Document	
7. Personalise document	Write or edit your document now if you have not already done so. The changes will effect all	
8. Save, print or send	merged documents.	
	Clicking 'Edit Document' will temporarily reduce the wizard to a small window so you can edit the mail merge document. After editing the document, return to the wizard by clicking 'Return to Mail Merge Wizard' in the small window.	
	Edit Document	

Figure 33: 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 34) so you can easily edit the letter.



Figure 34: 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 database. To do this:

- 1) Click Edit Document in step 6 of the wizard.
- 2) Choose Insert > Fields > Other Fields. The Fields dialog opens.
- 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 Points). Expand it to see the fields.
- 6) Click the field you want to insert (Points), then click Insert to insert the field.
- 7) You can insert any number of fields any number of times into your mail merge document.
- 8) 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.

ields	s Functions DocInformation Variables	Database
Type	Database selection	
Any record Database Name Mail merge fields Next record Record number	Sheet1     Title     First Name     Last Name     Address     State/County     Country     Postcode     Sex     Points	
Condition	Add database file	Browse
	Format	
<u>R</u> ecord number	<u>From</u> database <u>U</u> ser-defined	General
	Insert	<u>C</u> lose <u>H</u> elp

Figure 35: Insert mail merge fields dialog

### **Step 7: Personalize documents**

This step 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, click **Find** to open a dialog that allows searches within the document, perhaps for an individual addressee.

<u>51</u>	eps	Personalise the mail merge documents	
1.	Select starting document	You can personalise particular documents. Clicking ' <u>E</u> dit individual document' will temporarily reduce the wizard to a small window so you can edit your document. After editing the document,	
2.	Select document type	return to the wizard by clicking 'Return to Mail Merge Wizard' in the small window.	
3.	Insert address block		
4.	Create salutation	Edit individual document	
5.	Adjust layout		
6.	Edit document	Eind	
7.	Personalise document	Search for:	
8.	Save, print or send	Whole words only	
		Back <u>w</u> ards	
		Match case	

Figure 36: Personalize document

As with step 6, when editing the document, the wizard shrinks to a small window (Figure 34). Click on this window 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.

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 38.

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

Figure 37: Step 8: Save, print or send

The merged document can now be saved by selecting 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.

Save, print or send the document
Select one of the options below:
○ Save starting document
<ul> <li>Save merged document</li> </ul>
O Print merged document
Send merged document as <u>E</u> -Mail
Save merged document settings
Save as single document
Save as individual documents
○ <u>F</u> rom 1 <u>T</u> o 10
Save Do <u>c</u> uments

Figure 38: Saving a merged document

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 39 appears; it should be self-explanatory.

Mail Merge Wizard		
Steps	Save, print or send the document	
<ol> <li>Select starting document</li> <li>Select document type</li> <li>Insert address block</li> <li>Create salutation</li> <li>Adjust layout</li> <li>Edit document</li> </ol>	Select one of the options below: <ul> <li>Save starting document</li> <li>Save merged document</li> <li>Print merged document</li> <li>Send merged document as E-Mail</li> </ul> Print settings	
<ol> <li>Personalise document</li> <li>Save, print or send</li> </ol>	Printer       Properties         Print all documents       Erom         From       I         Io       30	

Figure 39: Printing the merged document