

# Using Mail Merge: How to automate the distribution of a document to different

destinations



Using Mail Merge: How to automate the distribution of a document to Title: different destinations Version: 1.0 First edition: January 2005 First English January 2005 edition:

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#### **Overview**

This document is intended for first-time users of OpenOffice.org. In it, you will learn how to use the Mail Merge feature of Writer.

Practical examples show how to create a document containing fields of a database, and use the Mail Merge feature to create, or print multiple copies of the document, changing the content of the fields in each copy according to the corresponding records of the database.

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#### Feedback

<u>Please direct any comments or suggestions about this document to:</u> <u>dev@documentation.openoffice.org</u>

#### Acknowledgments

Many thanks and congratulations to the developers who provided us with a great product! Thanks to the the community of authors, reviewers and support people for getting the project up and running. This is a great contribution for open software freedom.

#### **Modifications and updates**

Version	Date	Description of Change
1.0	3 January 2005	First published edition

## **Main Menu and Toolbars**

In this document you will find references to Main Menu and various tool bars. The following figure references these objects, showing where they are located.

Untitle	d1 - Oj	penOffice.org 1.1.1			
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Figure 1. Location of menus and toolbars in OpenOffice.org Writer

#### **What Mail Merge Means**

OpenOffice.org Writer provides a very useful feature to create or print multiple copies of a document which must be sent to a list of different addresses.

The Writer document contains a mix of normal text and special text (fields) that reference the fields of a Data Source.

The Mail Merge function leaves the normal text unchanged, and replaces the fields with the data taken from the Data Source.

The following scenario illustrates how Mail Merge works.

## Example: Sending a newsletter to a list of customers

Imagine a business that needs to send a newsletter to all of its customers.

There is already a Data Source containing the list of its customers with all the relative information: Address, Telephone, and so on.

The secretary who writes the newsletter uses OpenOffice.org Writer.

She writes the text of the newsletter, and instead of typing the destination address, inserts a field that references the address field in the Data Source.

At last she starts the Mail Merge function to print as many copies of the document as the number of addresses contained in the Data Source.

Each printed document contains the same text but a different customer name and address.

## **Data Sources for Writer**

To obtain access to data contained in a Data Source, it is necessary to first register the Data Source with OpenOffice.org.

OpenOffice.org can register as a Data Source the following database types:

- ODBC
- MySQL
- Adabas
- dBase
- ADO
- Text
- Spreadsheet
- Address Book

## **Registering a Data Source**

To register a Data Source with OpenOffice.org:

- 1) On the Main Menu, select **Tools > Data Sources**. Figure 2 shows the window that appears.
- 2) In the Name field, type the name that OpenOffice.org uses to identify the Data Source.
- 3) Select the Database type.
- 4) Type the URL (Uniform Resource Locater) of the Data Source.
- 5) Click on the New Data Source button in the window.

Data Source Administration	X
New Data Source	General Tables Queries Links
Bibliography Data source 1 Data source 2 Click here to ADD the new Data Source	Name       Customer List         Connection       Database type         Data source URL       Spreadsheet         Enter here the name of the new Data Source       sdbc:calc: file:///E:/openoffice-doc/Mail Mergetab1.sxc         Enter here the name of the new Data Source       Click here to select the URL of the new Data Source         Enter here the type of the new Data Source       Click here to select the URL of the new Data Source
	OK Apply Cancel Help

Figure 2. Registering a Data Source

## **Practical Example of Mail Merge**

The best way to show how the Mail Merge function works is a practical example.

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.

#### Sequence of operations to do

#### Step 1

Create a Data Source containing all the customers' data.

The easiest way to do that is to create a spreadsheet with OpenOffice.org Calc as shown in Figure 3.

	Address 5" Street 234	ZIP 10440	Town	Ctry	7,000,000	Telephone
Brown	5 <sup>th</sup> Street 234	10440	- E		51553388	
	0 00000204	12442	Somewhere	USA	350	555-3453
Renoir	Rue La Fayette 32	56743	Paris	France	452	555-7862
Rossi '	Via Champion 46	10422	Tavullia	Italy	534	555-3423
R	ossi	ossi Via Champion 46	ossi Via Champion 46 10422	ossi Via Champion 46 10422 Tavullia	ossi Via Champion 46 10422 Tavullia Italy	ossi Via Champion 46 10422 Tavullia Italy 534

Figure 3. Creating a Data Source

The headings of the columns in the first row of the spreadsheet will be used as field names later.

The spreadsheet shown in Figure 3 is saved as: tab1.sxw.

#### Step 2

Register the spreadsheet to OpenOffice.org as described in "Registering a Data Source" on page 3.

Figure 4 shows that the spreadsheet is saved as **Data source 1**.

Name	Data source 1	
Connection		
Database <u>t</u> ype	Spreadsheet	
Data source URL	sdbc:calc: file:///E:/openoffice-doc/Mail Merge/tab1.sxc	

Figure 4. Registration of tab1.sxw

Data source 1 is a spreadsheet database containing the following fields:

Name - 2nd-name - Address - ZIP - Town - Ctry - Points - Telephone

After the registration, it is possible to use OpenOffice.org Writer to create documents that use the database as input.

#### Step 3

Use OpenOffice.org Writer to input the database fields in a document to be mailed to all (or a selection of) the names contained in Data Source 1.

In the top part of the document it is better to create a table with transparent borders to position correctly the text that is usually present in a letter (Date, Destination Address, etc.), and then the text as shown in Figure 5.



Figure 5. Example of using a table to position elements of a letter

#### Step 4

Insert the desired fields in the proper positions in the document.

To insert the current date:

- 1) Select the position where to insert the current Date.
- 2) On the main menu select: Insert>Fields>Date (see Figure 6).

Insert	Format Tools Window Help	
	Manual <u>B</u> reak	
	Fiel <u>d</u> s •	<mark>3≱</mark> _ <u>D</u> ate
ж	Special Character	🕞 Time
	<u>S</u> ection <u>Hyperlink</u>	<ul> <li> <u>P</u>age Number <u>₩</u> Page <u>C</u>ount <u>Subject</u> </li> </ul>
	Header • Footer •	"t" Title 【う Author
	Footnote	💆 Other Ctrl+F2

Figure 6. Inserting the current date

To insert the other fields:

- 1) Select the position to insert the Name in the proper cell of the table (refer to Figure 5 on page 5).
- 2) Press *Control+F2* (or select: **Insert > Fields > Other** on the Main Menu.
- 3) Double-click on "Data Source 1" and on "Sheet1" to display the window shown in Figure 7.

Fields		×
Document References Fu	nctions DocInformation Va	riables Database
Type	Database selection	
Any record Database Name Mail merge fields Next record Record number	<ul> <li>Bibliography</li> <li>□</li> <li>□</li></ul>	
Condition		
Record <u>n</u> umber	Format	Standard
	Inse	rt <u>C</u> lose <u>H</u> elp

Figure 7. Display the fields in the database

- 4) Click on the "Name" field and then on the Insert button and press the Space bar.
- 5) Click on "2nd-name" and the Insert button and press Enter key to select a new line.
- 6) Click on "ZIP" and the Insert button and press the **Space bar**.
- 7) Click on "Address" and the Insert button and press Enter key to select a new line.
- 8) Click on "Town" and the Insert button and press the **Space bar**.
- 9) Type an open bracket "(", click on "Ctry" and the Insert button, and type a close bracket ")".
- 10)Select the point where to insert the Points field within the text, click on "Points" and the Insert button.

The result obtained so far is shown in Figure 8.

Computer Suppliers 123 Somewhere St. 22030 New York	
	<name> &lt;2nd-name&gt;</name>
	<ZIP $>$ $<$ Address>
/12/04	<town> (<ctry>)</ctry></town>
Dear Customer;	STOMIS (SCRÀS)
We are, etc. etc. xxxx xxx	
During this year you collected can use	d <points> bonus points, which</points>

Figure 8. Name and address fields inserted in the proper position

#### Step 5

When all the required fields have been inserted, the document is ready for the Mail Merge function.

It is possible to start this function in two ways:

- Select Tools>Mail Merge on the Main Menu.
- Select File>Print on the Main Menu.

Figure 9 shows the messages that these methods produce.

C From a template	
Trom a tentante	Cancel
	Help
1	
dress database fields. Do you w	ant to print a form lett
	dress database fields. Do you w

Figure 9. Messages produced when starting Mail Merge

Clicking on **OK** in the first message, or **Yes** in the second, displays the window shown in Figure 10.

Mail Merge									×
	<i>₹</i>	<b>15</b>   <b>27 10</b>		• C					ок
🕀 🥵 Bibliography 🖉	Name	2nd-name	Address	ZIP	Town	Ctry	Points	Telepho	
🖯 🕀 Data source 1	Charlie	Brown	5th Street 23	12442	Somewhe	USA	350	655-3453	Cancel
🕀 🗗 Links	Jean	Renoir	Rue La Faye	56743	Paris	France	452	555-7862	ii
⊕ ⊕ Queries	Valentino	Rossi	Via Champior	10422	Tavullia	Italy	634	655-3423	Help
Records All Sciected records Erom: I I I I I I I I I I I I I		Output Prir Bath Genera	3 11 Iter ale print jobs ate file name fr Database field Manual setting	om	ffice-doc\M		<b>A</b>		

Figure 10. Mail Merge options

In this window you may specify which records to print:

- All
- Selected records (select the records first in the list of records)
- From record number to record number.

If the selected output is Printer, Mail Merge starts to print as many documents there are records selected.

If the selected output is File, you must specify a path to a folder, where Mail Merge will create one file for each selected record.

The file names depend on the Database field that you select. For example, in Figure 10 the selected field is Name.

If there are multiple fields with the same content, a number is added to the filename.

For example:

The Name in the first record of the Database is Charlie; therefore the filename generated automatically by Mail Merge is Charlie0.sxw.

If there were more records with the same name, the generated files would have been: Charlie0, Charlie1, Charlie2, and so on.

Figure 11 shows the printout of the file Charlie0.sxw produced by Mail Merge.

Computer Suppliers	
123 Somewhere St.	
22030 New York	
	Charlie Brown
	12442 5th Street 234
01/12/04	Somewhere (USA)
Dear Customer;	
We are, etc. etc. xxxx xxx	
During this year you collecte use	d350 bonus points, which you ca

Figure 11. Printout of the first letter