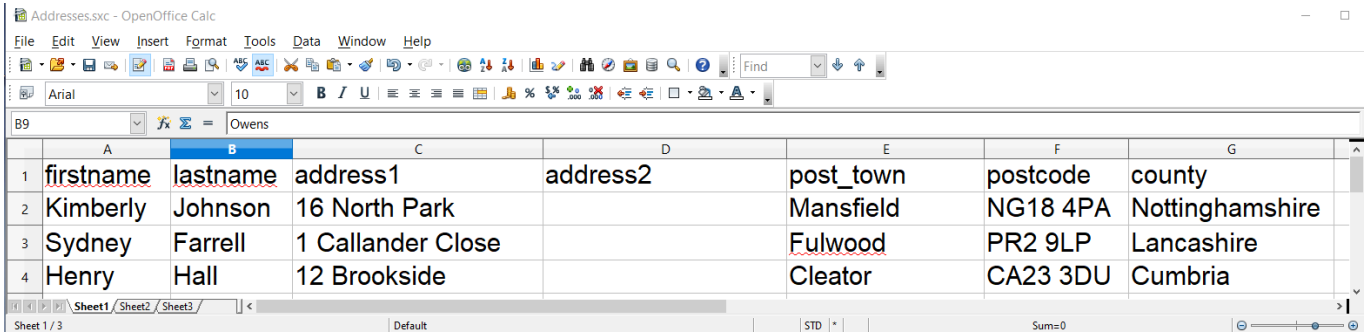
Mail-merge

By Giles Godart-Brown

Mendlesham Computer Club

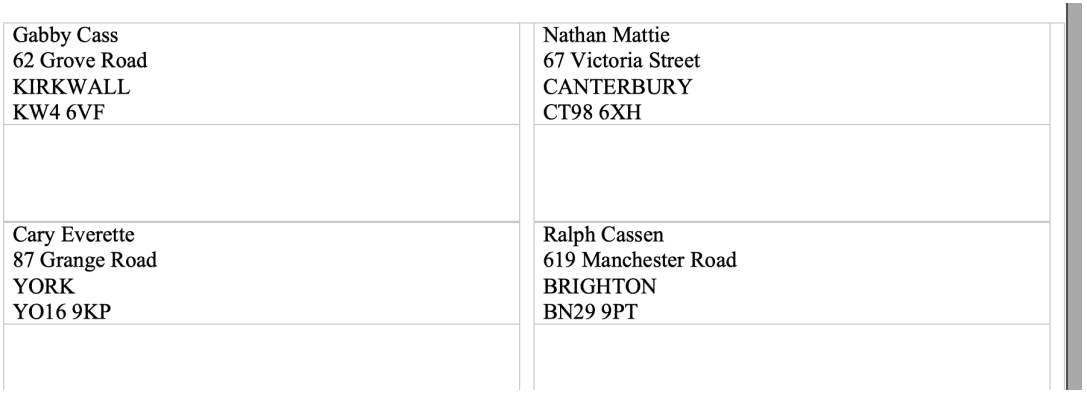
What is mail-merge?

- Mail-merge fills values in a template document with names addresses or other data from a database or list. For example to produce a page of address labels or a standard letter to many recipients.
- From this



	A	B	C	D	E	F	G
1	firstname	lastname	address1	address2	post_town	postcode	county
2	Kimberly	Johnson	16 North Park		Mansfield	NG18 4PA	Nottinghamshire
3	Sydney	Farrell	1 Callander Close		Fulwood	PR2 9LP	Lancashire
4	Henry	Hall	12 Brookside		Cleator	CA23 3DU	Cumbria

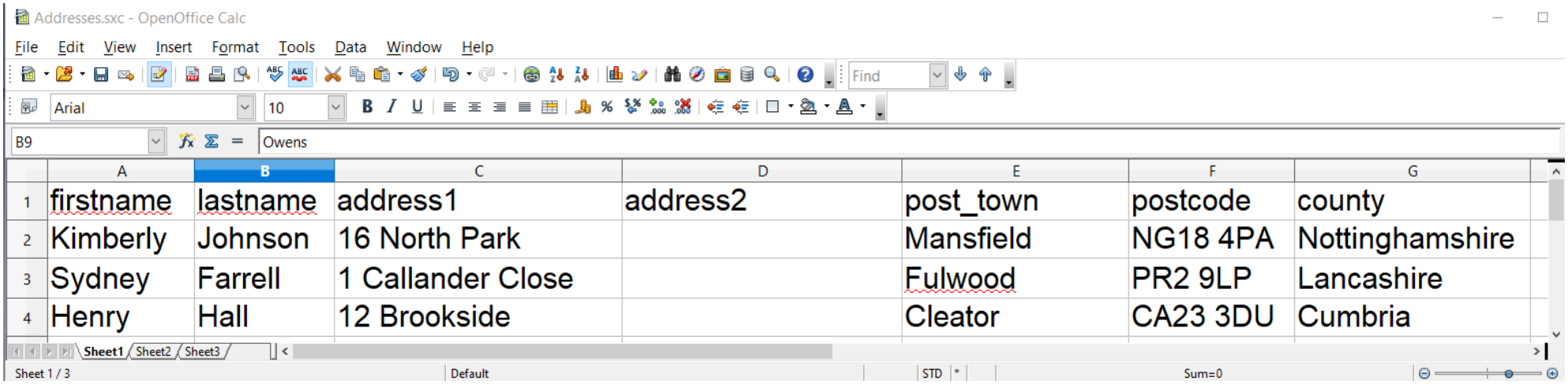
- To this



Gabby Cass 62 Grove Road KIRKWALL KW4 6VF	Nathan Mattie 67 Victoria Street CANTERBURY CT98 6XH
Cary Everette 87 Grange Road YORK YO16 9KP	Ralph Cassen 619 Manchester Road BRIGHTON BN29 9PT

What is mail-merge?

- The simplest database starts with a spreadsheet with the names of the fields in the first row.



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Preparing the data source - 1

	A	B	C	D	E
1	**First_name**	**Last_name**	**Address_1**	**Address_2**	**Postcode**
2	Gabby	Cass	62 Grove Road	KIRKWALL	KW4 6VF

- Create a spreadsheet with the field names as the first row
  - Do not include spaces in fieldnames, use _ instead to make them more readable
  - Do not start them with a number e.g. instead of 1address use address_1
  - Rename the sheet from Sheet1 to something more useful (optional)

Save the spreadsheet

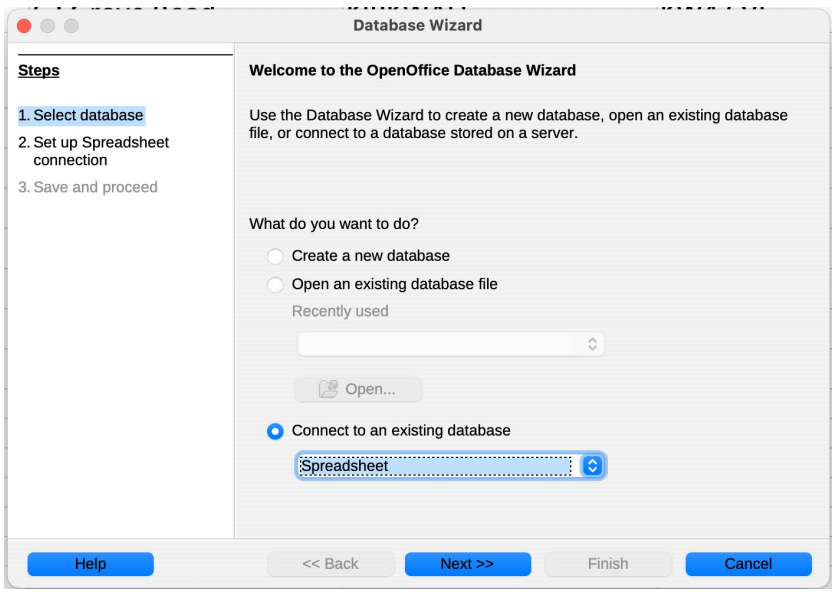
In OpenOffice

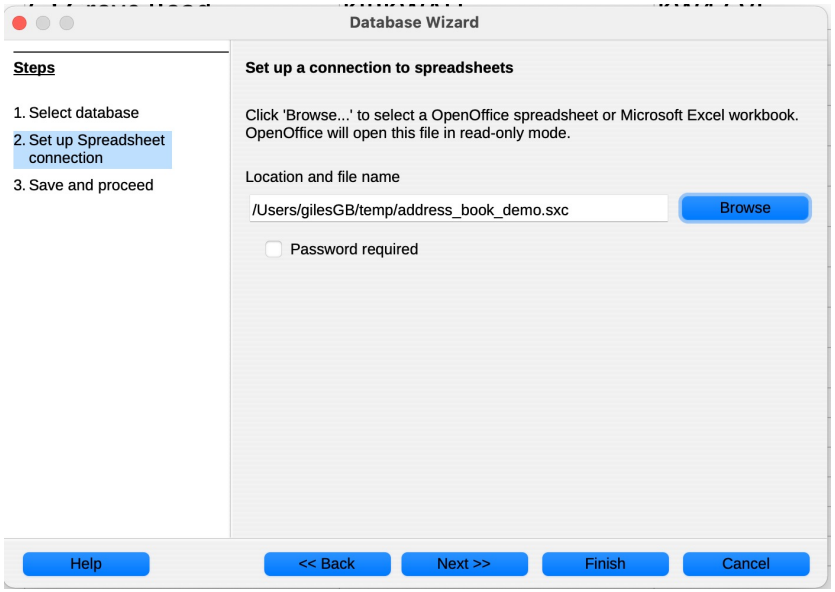
- Save the file as a .sxc format, there is an example here; https://godartbrowncom.ipage.com/MCC/docs/examples/OpenOffice/address_book_demo.sxc

In Microsoft Excel

Open Office instructions

Preparing the data source in OpenOffice

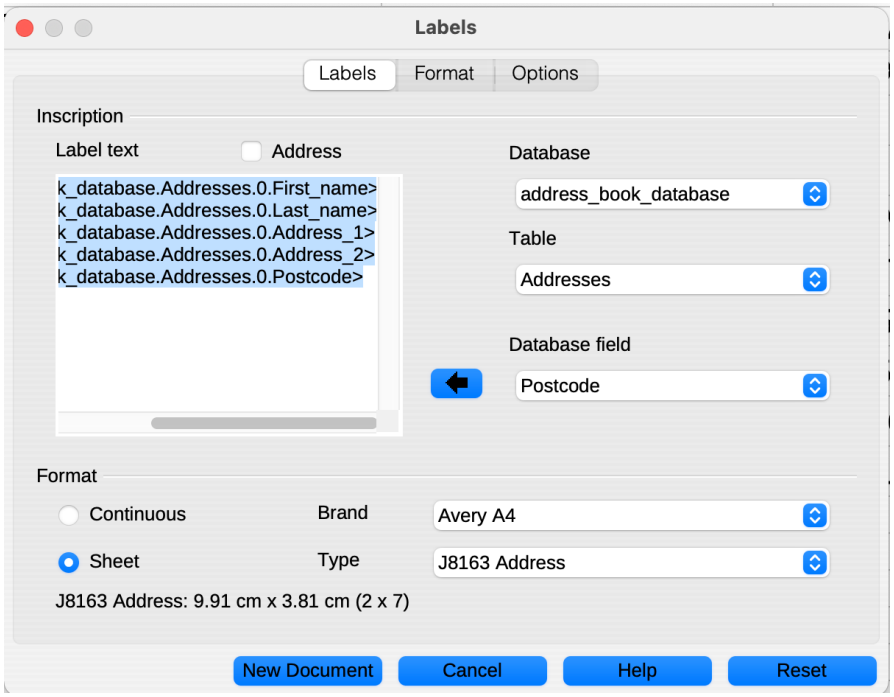




- Turn this into a database that the writer can use as a source
  - Stay in calc and do File>New database
  - Select connect to an existing database and chose spreadsheet
  - Click next and chose the name of the spreadsheet you just created, next, save the file as an .odb and finish
  - You can close the window it then opens

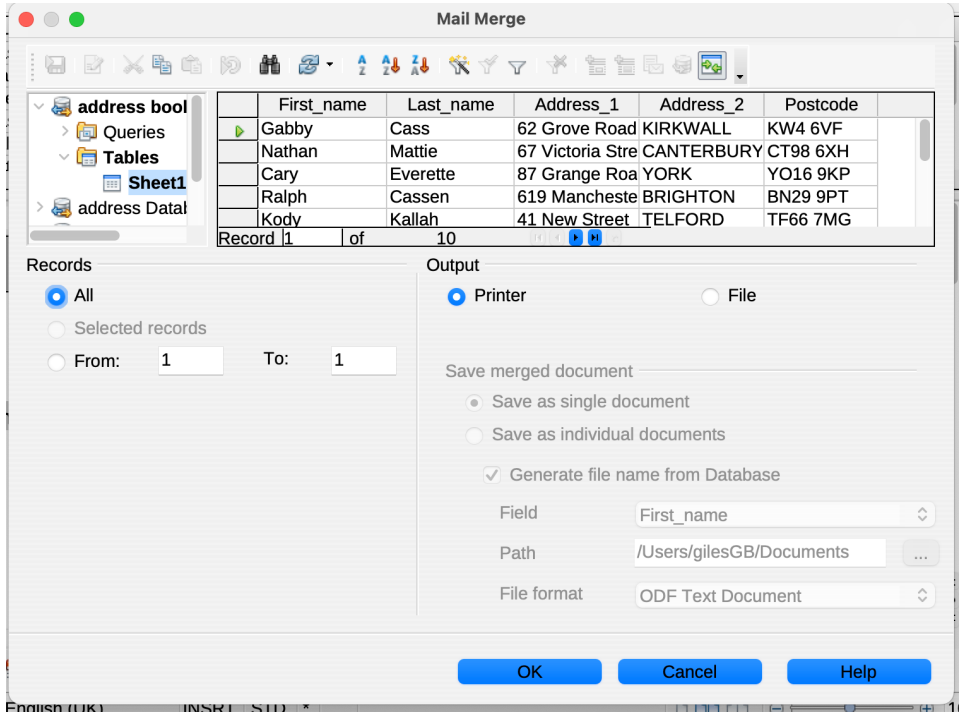
Merging the source into labels in OpenOffice

- Open OpenOffice writer and select File->New->Labels
- On the Labels tab
  - Select the database you just created and the table name (the name of the workbook – default is Sheet1)
  - For each database field you want on the label, click the arrow to copy it over to the label text box, don't forget to add spaces, returns and other text
  - Check synchronise labels on the ***Options*** page as before
  - Click on New document
  - You wont see the actual data, only the field names
  - Then edit as before and hit print
  - Select yes when it asks if you are printing a form letter



Printing the labels in OpenOffice

- On the popup that appears
  - Select All if you want all of the addresses included, otherwise just chose the rows you want
  - Select file to create a new document containing all of the labels, otherwise select printer and they will print to your printer



Microsoft Office instructions

Create labels and attach your spreadsheet to the document

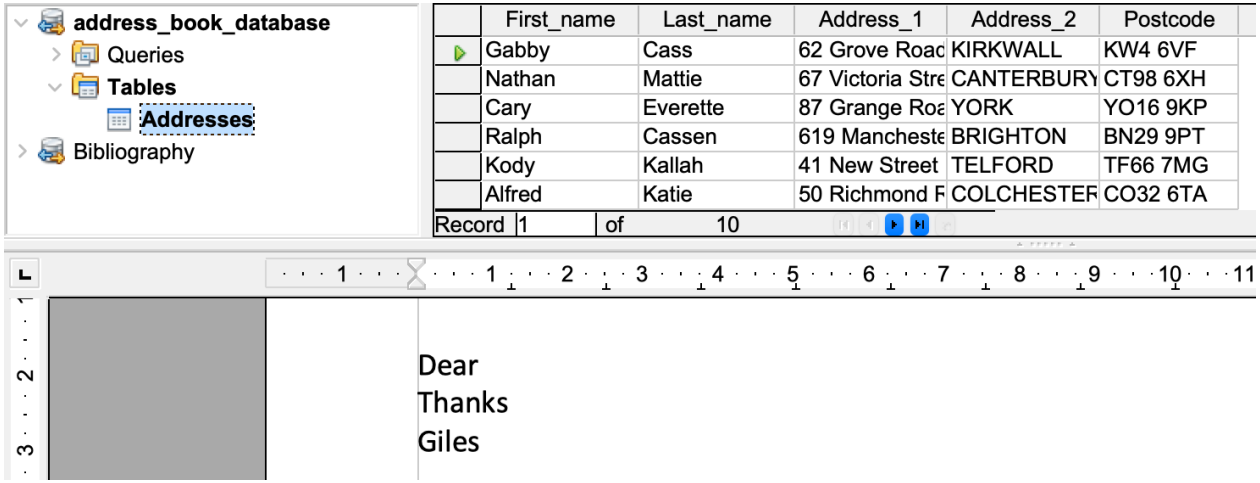
- Save your spreadsheet as usual
- Create a new document in Word
- Select Mailings>Labels
- Chose the correct label format (Avery A4/A5 J8163) and click OK
- Chose Select recipients>Use an existing list and browse to your spreadsheet and click Open
- Don’t worry that all the cells contain <<next record>> except the first one
- Put your cursor in the top left box and click on Insert Merge field to copy the field you want to the page, add any spaces or returns and repeat for all of the fields you want, then add any formatting you need.
- Click on Update labels to copy the formatted fields to the remaining cells
- Click on Preview Results to see what it will look like with the data filled in
- When its OK, click on Finish and merge to either print directly or create a file containing the final document.

Mail-merge letter in OpenOffice

Create a mail-merge letter in OpenOffice - 1

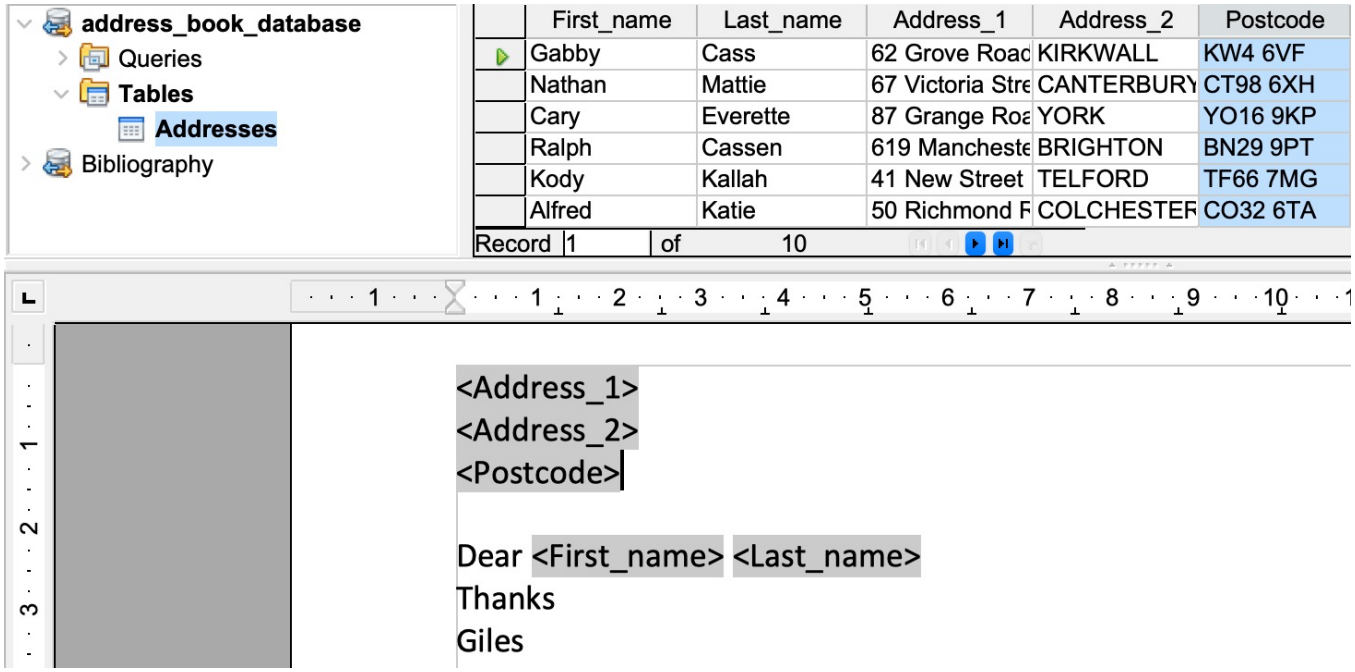
There is a Mail-merge wizard, but OpenOffice does not recommend you use it, instead follow the steps below.

1. Prepare the database as before
2. Start to create your document with gaps for the fields you have in your database
3. Select View>Data sources and select the database and table you created earlier



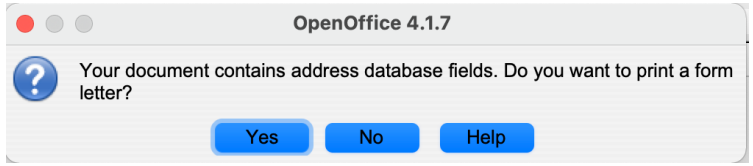
Create a mail-merge letter in OpenOffice - 2

4. Drag and drop the column headings to where you want them to appear on your letter

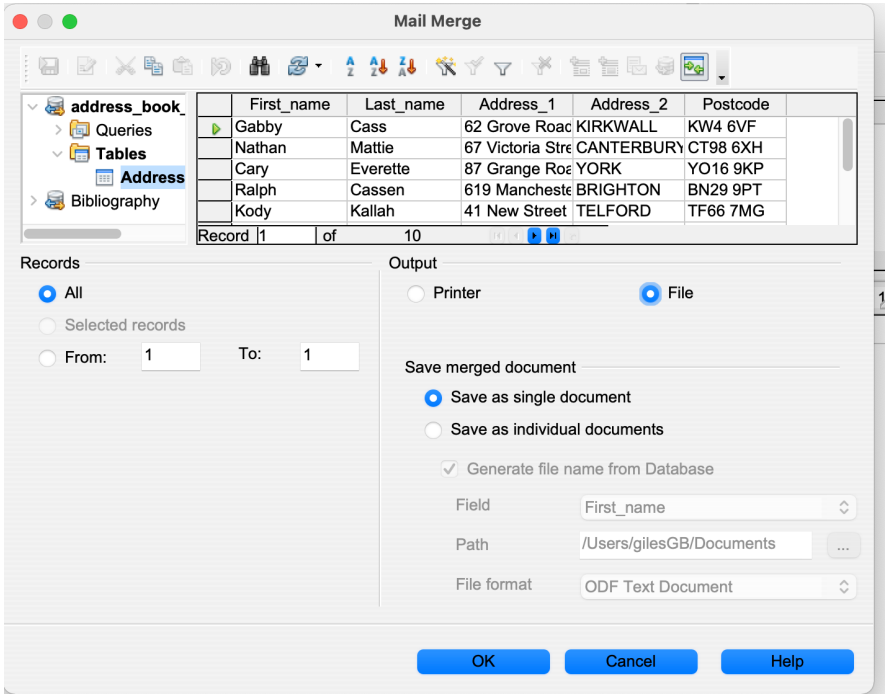


Create a mail-merge letter in OpenOffice - 3

5. Select File>Print to either print the document or create a new document containing the merged information – you will see a warning that the document contains database fields, click Yes.



6. If you select file, you can create a single file containing all of the letters or one containing them all



Mail-merge letter in Microsoft Office