The Working Writer v3.0 Mail-Merge Tutorial

This tutorial is designed to walk you through the mail-merge function of The Working Writer.

It is important to understand exactly what a form letter is, and how you can use it to your advantage. A form letter is simply a document you want to send to one or more people. This letter has exactly the same format for each recipient. You require changing only the name and mailing address of the recipient.

This valuable time-saving function actually makes you more productive.

For example, you have researched your potential markets and have found seven suitable publications, all accepting simultaneous submissions. Instead of writing seven different letters, write one form letter and send it to them all. Then print mailing labels for them all, and you're done.

So, before using this function, you must enter Publication or Literary Agents information into the system. Otherwise, there is nothing to merge.

Using the internal word processor, open the document "Agents_Mail_Merge_Template.RTF". This is located in the default documents directory. This template demonstrates many of the steps mentioned in this document, along with some other useful information.

Use the following steps to create and perform your mail-merge:

1. Open the internal word processor by clicking on the word processor button of the toolbar, or by selecting Modules, then Internal Word Processor from the main menu. Write the body your document.

You can do this using the word processor in the actual mail-merge screen itself, however it does not include as many features for creating your document.

2. Save your document template.

3. Click the Mail-Merge button from the toolbar, or select Print, then Mail-Merge from the main menu.

4. Select which database you want to use for the current merge operation, either Publications or Agents.

5. Select which records you want to use from the selected database. You can use all available records, or only those which you have "tagged".

6. Click the File Open button of the toolbar on the Mail-Merge Template page of the Mail Merge Screen and select the file you created. Note: The mail merge screen will always open the last template you used to perform a merge.

7. Using your mouse, place the cursor where you want to insert the first data field.

8. To the right of the actual template there is a panel displaying all the available data fields for your selected database. Add the first data field by selecting the field with your mouse and clicking the Add Field To Template button. Alternately, you can simply double-click on the name of the field in the list. Either method accomplishes the same result.

9. Repeat steps 7 and 8 until you have added all the desired fields to your merge template.

10. Make sure your document contains the END OF PAGE marker. This is an invisible marker that makes sure your document, when merged, will appear as a separate page for each merge operation.

To add this marker to your document, make sure the cursor is on a blank line at the very end of your document. Then press the <CTRL> key, and with that key held down, press the <ENTER> key. It will appear that you now have an additional blank page to your document. Ignore this, as it will not end up that way after the merge process.

11. When your document contains all the data fields you require, and you have made any other changes required, save your changes by selecting the Save button from the toolbar.

12. Start the mail-merge process by clicking the Perform Merge button at the bottom of the screen. A progress bar is displayed to give you a visual clue to how the merge is progressing.

13. Once the process is complete, scroll through the document to make sure it looks correct. You should not have to make any changes at this point, but it is a good idea to double-check. You may, for example, want to make minor changes to the page(s) for a specific recipient.

14. To print the resulting document, click the Print Merged Doc button. The complete document will be printed in your default printer.

Things To Note:

1. If you select "Tagged" records for your merge, and no records in the selected database are tagged, the merge process is aborted.

2. To perform a second or subsequent mail-merge, you must close the screen and start over from Step 1 of the tutorial.

3. When you close the Mail-Merge Screen, you will be asked if you want to save the resulting merge document. If yes, the Save As dialog appears and you will be asked to name the document prior to saving.

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