

Personalize Your Form Letters

by Kris Fong and Rod Lawton



WHAT YOU NEED

- AppleWorks (\$79, free with consumer Macs, www.apple.com)

Which letter would you rather read—one that starts off “To whom it may concern” or one that opens with “Dear Homer”? When you need to send a snail-mail letter to a lengthy list of people, how you address your recipient can become the deciding factor on whether that person reads your letter or turns it into a two-point shot into the circular file. Rather than start off your message with a generic “Hello” or “Dear Sir/Madam” you can set up your word processor to give your form letter a personal touch—automatically.

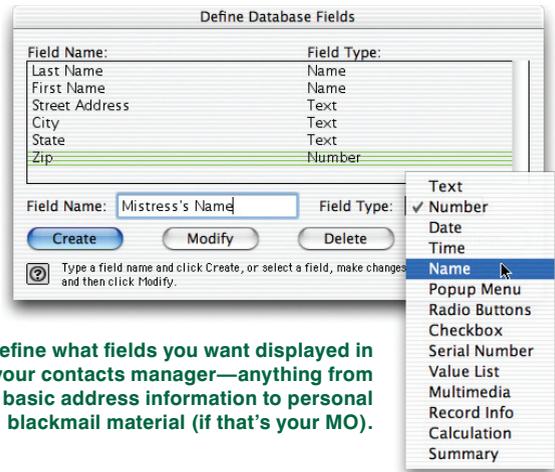
Luckily for you, Apple’s AppleWorks contains a feature called *mail merge*, which lets you automatically address a letter to individual people as well as pepper it with other personal references, like the last time you and your client spoke, the product or services he or she last purchased from you, and more—even though you’re sending the same basic letter to everyone. All you need are two files: a form letter and a contact database. Here’s how to set it all up.

1 Drum Up Some Contacts You’ll need to create an AppleWorks contacts database from scratch if you don’t already have one, or import tab-delimited data from another database like FileMaker Pro or Entourage. Launch AppleWorks and click Database in the Starting Points palette. In the resulting dialog, define the fields you want the database to display, such as first name, last name, phone, and so on (if you’re importing tab-delimited data, make sure to keep the field names the same as those in your older database). Type a corresponding name in the Field Name field, select the Field Type from the drop-down menu (Text, Date, Name, and so on), and click Create. For more personalization, add fields such as the date you and the client last spoke, the product last purchased, and the name of the client’s significant other. When finished, click Done to create the database.

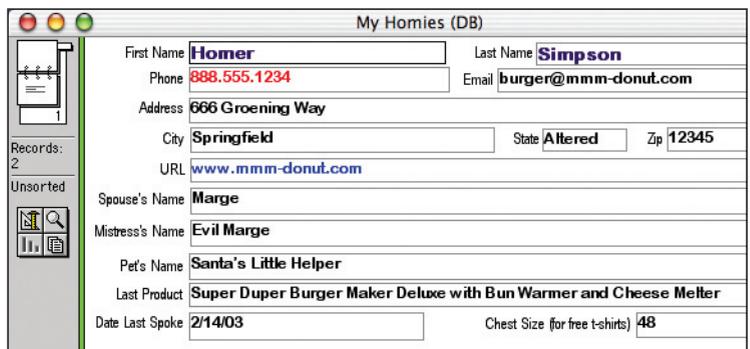
2 Finesse and Fill the Database As it stands, your database displays names and fields in the order in which you created them. If you want to alter this look, select Layout from the Layout menu and move content around, change fonts and colors, extend or shorten fields, add additional fields, or do whatever else you want. If you’re importing data, at this point skip to step 3. Otherwise select Browse from the Layout menu, and then enter your contact data or paste in information from other contact software (Apple Address Book, Microsoft Outlook Express, and the like). Press the Tab key to jump between fields, and press Command-R to start a new record. Save your database when finished.



Form letters are so unfriendly, but with AppleWorks’ mail-merge feature, you can disguise generic mailings as more-personal letters.



Define what fields you want displayed in your contacts manager—anything from basic address information to personal blackmail material (if that’s your MO).



The more fields in your contact manager, the more personal content you can merge into a form letter.

3 Make a List and Check It Twice

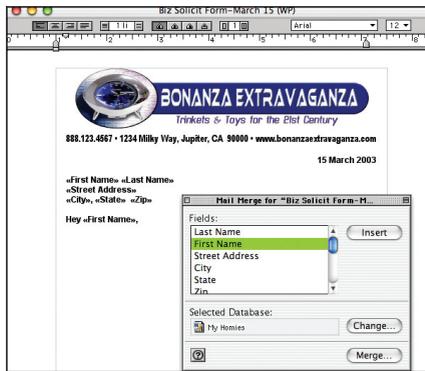
For easier eyeballing, change the view to list multiple contacts. From the Layout menu, select List, which displays each record in a single row and the fields in columns. If you're importing data, drag and drop the exported tab-delimited file into the AppleWorks database to add the contacts. If you want to change the order of the displayed fields, click a field name in the top row and drag it to another location in the row. To avoid cutting off words in a column, click and drag any separation line between columns to widen the space. To extend rows, click and drag any separation line between rows in the first (blank) column. To alphabetize contacts by last name, select Sort Records from the Organize menu, select Last Name from the Field List column, click Move, and then click OK. When finished, save your database.



To get an overview of your VIPs, change the database layout to List view.

4 Say Hello

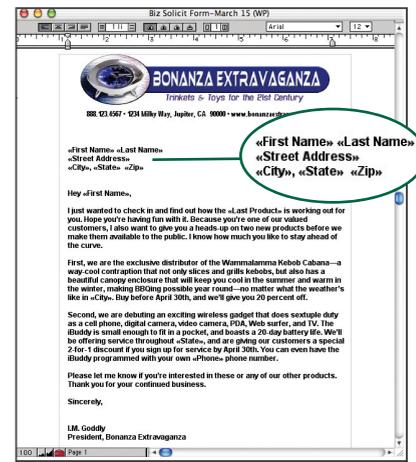
Next up is addressing your form letter. From the File menu, select New, then Word Processing to open a blank document (if you have your own AppleWorks letterhead template, open this file instead). To begin the greeting, type *Dear, Hello,* or something similar; type a space; and then select Mail Merge from the File menu. In the resulting dialog, navigate to and select your new contacts database file, and click Open. In the resulting Mail Merge palette, select First Name (or whatever you named the field with this info) from the Fields column, click Insert, and type a comma (,). The field name appears inside double angle brackets («») in the text. If you created a title field to designate Mr., Mrs., Miss, Ms., or Dr., insert it after *Dear,* press the space bar, and then insert Last Name (or whatever you named the field with this info) for a more formal greeting. For quicker mail handling when it ultimately comes time to stuff envelopes, insert a name and address prior to the greeting.



We prefaced our greeting with our recipient's address by using mail merge and the appropriate fields in our database.

5 Write Your Blah, Blah, Blahs

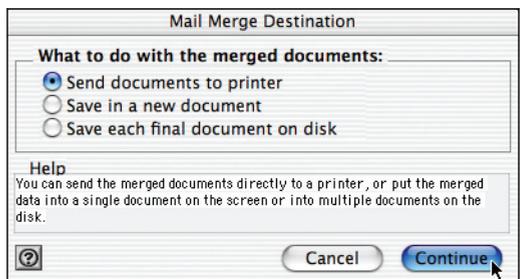
Now write your letter. For more personalization, compose your letter in a *Mad Libs*-style layout, choosing appropriate fields to insert from the Mail Merge palette. For example, you can write something like "I hope you're having fun with the «Last Product»,» referring to the Last Product field in your database. Choose fields wisely—if you mail-merge a field you've left blank in some database contacts, the merged insertion point will show nothing in these folks' letters. Make sure the cursor in your document is at the exact point where you want to insert a field, and type the appropriate space, punctuation, or carriage return to keep your letter formatted correctly. Then save the file.



Here's our completed form letter. Personalized content will replace the corresponding fields displayed inside double angle brackets.

6 Print It Out

If you want to, say, send letters only to clients in Hawaii, press Command-F (Find) in your database, type *HI* in your State field, and press Return to display only Hawaii-residing clients. Otherwise, make sure all clients are displayed (select Show All Records from the Organize menu), and then click Merge in the word processor's Mail Merge palette. The resulting dialog gives you three output choices. Select Send Documents To Printer to print one personalized copy of your form letter for each contact. Select Save In A New Document to have the application create a single multipage word processor file, containing every letter. Or select Save Each Final Document On Disk to save each personalized letter as a separate file. Pick your preference and click Continue. Depending on your choice, either click Print in the resulting Print dialog, or save the file or files to a desired location for later printing.



AppleWorks lets you choose what to do with your merged mail—we chose to print our bevy of letters.

 Dear «Name», We hope you enjoy this article but will hunt you down in «City» if you use mail merge for spamming purposes. Sincerely, Kris and Rod