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Introduction to Mail-merge Printer

The following instructions assume a basic working knowledge of the Psion Series 3 computer. Many of the features of the application (E.g. the menus, dialog boxes, control keys) are very similar to those found on the Series 3. In fact, two of the main steps used in creating a mail-merge letter use Series 3 built-in applications in one form or other. This has been done for two main reasons. Firstly, to keep the cost of the application down. This is due to the fact that many of the features needed by any mail-merge application exist already on the Series 3 so duplication of these features would be needlessly time consuming and expensive. Secondly, many users will already be experienced in using the Word and Data applications on the Series 3 so there will be little learning to do to get well on your way to producing a mail-merge letter.

You have probably found yourself in the position of having to send a copy of a letter to many different people and that, apart from the personal details such as address and name, the text of the letter is the same. It would be fairly simple to have to type a letter into the Word application with one persons details, print it, change the details and then print it again. Imagine, however, having to do this 20 times. This is where 'Mail-merge Printer' can make your life easier.

There are three main steps to producing a complete mail-merge using this application:

- Write a standard letter which contains the main text but no specific personal details. This is done using the Series 3 Word application.

- Create a merge data-file which contains personal details. This is done using the MergeEd application. (MergeEd is a contraction of **Merge**-file **E**ditor).

- Use the 'MergePr' application to combine the two together into a number of similar letters with different personal details. (MergePr is a contraction of Mail-**merge P**rinter).

- **Definitions**

- An *application* is a program or group of programs which perform a specific task. Examples of an application are this Mail-merge application or those built into the Series 3 such as Agenda or Calc.

- A *program* is a word used generally to described a set of procedures which can be run. In the main, people will use the terms application and program interchangeably.

- A *procedure* is a single programming unit. A program will generally be built up of a number of individual procedures. With this product, you will be unaware of individual procedures.
- A *standard letter* is a file which contains the main text of your letter but which has, in place of specific personal details, symbols to be replaced when the letter is actually printed.
- A *symbol* is fairly self explanatory. It is a label which temporarily takes the place of a personal detail but which will not actually appear in the final printed version of the letter. In a standard letter, symbols are differentiated from normal words by being enclosed in the chevron characters: "«" and "»". (E.g. «town»)
- A *merge data-file* is a file which contains personal details such as name, address, postcode, etc. This file will be used as the source of the replacements for the symbols in the standard letter.
- A *mail-merge* is a generic term used to describe the whole process of writing a letter, creating a merge data-file and actually printing all of the resultant letters.

Getting Started

The Mail-merge Printer is supplied on an SSD which fits into either of the two SSD slots on your Series 3. The Mail-merge Printer SSD need only be in place when you are actually using it. If you are not using the application you can remove the SSD. It is important to note that if you are actually running the 'Mail-merge Printer' you must not remove the SSD on which it is stored. You can tell if you are actually running the 'Mail-merge Printer' as, if it is in the foreground, you will see it on the screen. If the program is in the background, its name will appear on the Series 3 System Screen in bold letters. You can stop the application running in one of two ways:

- Highlight the name of the application you wish to stop (at the System Screen) and press <Delete>. The program should then stop and its name will revert to single strike letters (not bold). If for any reason the application cannot stop (it might be waiting for you to press a key in response to a question), you must follow the second step detailed here.

- Enter the program by highlighting its name in the System Screen and pressing <Enter>. Then follow the prompts until you are back at the opening screen and either select 'Exit' from the appropriate menu using the menu button or press the <Psion> key and <X> together.

The SSD can now be removed with no problems.

For the purposes of these instructions, it is assumed that the Mail-merge Printer will be used from the SSD on which it was originally supplied. If you wish to copy this application onto another disk (or even the internal disk of the Series 3 itself) read the instructions in Appendix A.

Installing the applications

As mentioned briefly above, the Mail-merge Printer actually consists of two programs:

- MergeEd

This is the application which you use to create and edit the data-files containing personal details to be replaced. This program is installed in the following manner (assuming the SSD is in the 'A' slot - if yours is in 'B', simply read 'B' for 'A'):

- Move to the System Screen and position the highlight at the place you wish the icon to be installed (unless you specify 'First' or

'Last', the icon will be installed to the left of the application currently highlighted).

- Press the <Psion> key and the letter <I>. You will be presented with an 'Install application' dialog. Move to the 'Disk' line of this dialog and change it to 'A' (using the arrow keys). The name 'Mergeed.als' will appear in the 'File: Name' line. Press <Enter>.

- An new icon will appear on the System Screen like this:

MERGEED.PCX;0.5";0.5";PCX

- MergePr

This is the application which you use to bring the two files together into the final letters. This program is installed in the following manner (again assuming the SSD is in the 'A' slot - if yours is in 'B', simply read 'B' for 'A'):

- Move to the System Screen and position the highlight at the place you wish the icon to be installed (unless you specify 'First' or 'Last', the icon will be installed to the left of the application currently highlighted).

- Press the <Psion> key and the letter <I>. You will be presented with an 'Install application' dialog. Move to the 'Disk' line of this dialog and change it to 'A' (using the arrow keys). The name 'Mergepr.opa' will appear in the 'File: Name' line. Press <Enter>.

- An new icon will appear on the System Screen like this:

MERGEPR.PCX;0.5";0.5";PCX

Once you have successfully installed the two applications as described above, you are ready to prepare a mail-merge.

Writing a standard letter

■ Note this well - Merge input file

Before you embark on the composition of your epistle, ensure that you do the following:

■ At the System Screen, press the <Psion> key and the letter <P>. This will produce a "Printer configuration" dialog.

■ **Regardless** of the type of printer you have connected (or intend to use), set the 'Printer device' field to 'File'.

■ Enter the name of any file you like into the 'File: Name' field. You are recommended to give the file the extension '.lis' and a name which you will remember (such as 'merge.lis').

■ Set the 'Units' field according to your preference.

■ Press <Enter> to save these settings.

■ Series 3 Word

If you are not familiar with the Series 3 Word application, you would be well advised to refer to the Series 3 User Guide and to familiarise yourself with the application. This is due to the fact that, as mentioned earlier, the standard letter is entered using this built-in application. You can get going quickly by positioning the highlight in the System Screen under the Word icon, pressing <Psion><N>, selecting a name for your new file and pressing <Enter>. The Word application will then be run.

For the purposes of explanation, the following (very simple) example may help. Suppose you would like to send the following three letters:

Ms. M. Mouse,
Disneyland.

Dear Minnie,

How is life in America these days ? Is your postcode still DL01 7MM ? I must go now.

All the best,
Pluto

Mr. G. Bush,

Washington.

Dear George,

How is life in America these days ? Is your postcode still WH15 2CH ? I must go now.

All the best,
Pluto

Mr. J. Major,
London.

Dear John,

How is life in Britain these days ? Is your postcode still SW1 1XX ? I must go now.

All the best,
Pluto

You will probably have noticed that, apart from the name, country, etc. these letters are exactly the same. About this time you will probably be wondering "When does this get easier ?". The answer is now. A mail-merge program would help us print these letters much more easily and efficiently as we would only have to type the basic letter once. Consider the following which bears a close resemblance to the above:

«title». «initial». «surname»,
«town».

Dear «first_name»,

How is life in «country» these days ? Is your postcode still «postcode» ? I must go now.

All the best,
Pluto

If we then had a data file entered somewhere else which contained the following:

Title	First Surname	Town	Country	Postcode
Ms	Minnie Mouse	Disneyland	America	DL01 7MM
Mr	George Bush	Washington	America	WH15 2CH
Mr	John Major	London	Britain	SW1 1XX

We could use a mail-merge program to do all the hard work for us. Well, that is exactly what MergePr does. Once you have decided on the main text of the standard letter, you simply enter all of the symbols which you wish to be replaced.

Which symbols can I use ?

The following is a list of valid symbols which can be entered into your standard letter for later replacement. This table shows the symbol to be used. These must be spelt correctly and must be enclosed in the characters "«" & "»"¹. Further, the table shows what these values will be replaced with when the letter is actually printed. Most of these correspond exactly with labels in the MergeEd application which we will read about next.

Symbol	Replacement	Example
title	Title	Mrs
initial	initial of first name	A
fname	First name	Richard
sname	Surname	Jones
add1	1st line of address	Top Flat
add2	2nd line of address	15 London Road
add3	3rd line of address	
town	Town/city	Durham
county	County	Middlesex
postcode	Postcode	AB12 3CD
country	Country	France
date	current date	Fri 25 Sep

Certain of these symbols have special features associated with them.

■ «initial»

This field will automatically be filled in using the first letter of the replacement for the fname symbol. As such, you need not (as will be described later) explicitly enter the initial as a field in the merge data-file.

■ «date»

This field will automatically be replaced with the current date (taken

¹ These characters can be entered in one of two ways:

from the Series system clock) in the form ddd nn mmm. So for Tuesday 19 August the replacement would be Tue 19 Aug.

Standard letter is now complete - what next ?

Now that you have entered the text of your letter and have entered all of the symbols to be replaced there is a little more to be done in preparation - you knew there would be a catch. Don't worry, this should not be too difficult.

There are three small steps left before you go on to produce your merge data-file.

■ Get the document layout right

Before you quit from the Word application, ensure that you have used the menu options such as 'Styles', 'Emphases' and, most importantly 'Print set-up' to reflect your wishes about such things as fonts to use, text effects, page size, margins, page numbers, etc. When doing this, you should keep in mind the printer which you will eventually want to print all of the mail-merge letters on.

Once you have done this, press <Psion> and <P>. Choose the options you wish, bearing in mind that, at this stage, if you set 'Copies' to more than one, you will, when the mail-merge is complete, have this number of copies per person. So if you have 50 records in your merge data-file and you select 5 for copies, you will eventually produce 250 letters. Further, if the standard letter is two pages long, you will use 500 pages of A4 and the mail-merge will take some time to complete.

Once you have selected your options for 'Whole document', 'Pages' and 'Copies', press <Enter>. The standard letter will then be dumped into a large binary file which you specified earlier in the "Note this well - setting the merge input file" section. Unless you have typed a very large letter, this process should finish fairly quickly. You are now ready to prepare the merge-data file.

Creating a merge data-file

MergeEd and Series 3 data

If you are not familiar with the Series 3 Data application, you are advised to refer to the Series 3 User Guide and also to experiment with that application as before. This is because, as mentioned earlier, the merge data-file is entered using the built-in Data application, albeit a version which has, for the time being, put on a disguise. You can get going quickly by positioning the highlight in the System Screen under the MergeEd icon, pressing <Psion><N>, selecting a name for your new file and pressing <Enter>. The MergeEd application will then be run.

You will notice that, apart from the little icon which appears in the Status Window to the right of the screen, the screen looks very familiar. There is a slight con going on here - this is basically the Series 3 Data application in disguise. You should see, down the left hand side of the screen, a list of labels which bear a very close resemblance to the symbols which can be replaced in the Word application. These labels leave very little required in the way of explanation. You should simply enter the appropriate details against the labels as you would in the normal Data application:

- You can enter a new record by pressing <PSION><E>.
- You can edit an existing record by pressing <PSION><U>.
- You can delete an existing record by pressing <PSION><D>.

■ Things to watch out for

If you do not enter a piece of text against a label, when you invoke the mail-merge, the symbol referring to that field will not be printed. If however, you have spaces (or even one space) in a field, it will be printed but may give puzzling results in the final letters.

■ Group codes

This is really the only area where the Mail-merge Printer differs slightly from the existing applications. If you have, for example, a number of records which you will enter into your merge data-file which belong to a particular group (E.g. say you knew a great many Driving Instructors or French people), you can enter into the 'Group code' field a unique key which identifies this record as belonging to that group (such as DRIVERS or FRENCH). You can enter the key in any case (even mixed - fReNCh) but the key must be less than or equal to eight letters. If it exceeds this limit, a letter will not be

printed for this record.

■ Can I use my existing data files

If you wish to use your existing datafiles as the merge data-file, you needn't alter your labels to reflect those listed above. However, the fields in your files will require to be entered specifically according to the order noted above - simply altering your labels to reflect those suggested (assuming your fields are 'out of order') will not cause the MergePr application to select the correct information. Further, other fields entered in your own fields after those listed above, will happily be ignored.

Performing a mail-merge print

Print set-up

You should recall that, before writing the standard letter, you were instructed to set the Series 3 print device to 'File' (See page 6). This required to be done so that MergePr could operate in the correct manner. Having created the standard letter and printed it to a file and having entered data into your merge data-file, you now wish to merge the two together into the final run of standard letters. It is at this stage that you choose the printer options which actually apply to the device you wish to print to. The Print Setup option is broken down into 3 main sub-options:

■ Serial

This should be chosen if you have your Series 3 attached to a serial printer using the Psion 3-Link(Serial). If you choose this option and the printer is not actually present, when you attempt to print, an error message will be presented because the Series 3 is trying to send data to a printer which does not exist.

Having selected 'Serial', you will need to adjust a number of other parameters such as 'Baud rate', 'Parity', 'Data bits', etc. which define exactly how the Series 3 talks to the serial printer. Do not worry if you do not understand these terms - all that you need to know is what settings your printer requires and set them on the Series 3 accordingly. Your printer documentation (or the Technical Support Department of the printer manufacturer) will be able to suggest which settings to use. If it is possible to select from a range of, say, baud rates on the printer, it doesn't really matter which one you choose as long as the Series 3 is using the same (i.e. if your printer is configured to use 4800 baud, you must choose 4800 baud in the Series 3 dialog).

■ Parallel

This should be chosen if you have your Series 3 attached to a parallel printer using the Psion 3-Link(Parallel). As with the serial printer, if you choose this option and the printer is not actually present, when you attempt to print, an error message will be presented.

Having selected 'Parallel', you need only press <Enter> to return to the MergePr main screen - parallel printing has the advantage of being less involved than serial printing.

■ File

This may well confuse you as you will be saying 'I've already printed the standard letter to a file once (see page 8). Well that is true but the print file you produced then was used as one of the input files for the mail-merge. The picture in Appendix B may help you to see this.

It is possible that, given that a mail-merge can take a while to complete, you might want to go through the motions of generating the mail-merge but you don't have immediate access to the printer you are going to use. If this is the case, you can use MergePr to combine the input files into another (correspondingly large) temporary dump file which could then be copied onto, say, a PC to be printed to a printer.

N.B. If you choose 'File' as the print device at this stage and actually produce a temporary dump file, you **cannot** use the Series 3 to subsequently print that file to a printer. You would have to copy the file to another machine (usually a PC) to be printed (E.g from the DOS prompt by typing: "COPY dump.lis LPT1<Enter>").

If you do decide to print the mail-merge to a temporary file, you will be asked to name that file. Common sense dictates that this file cannot have the same name as the merge data-file, the standard letter or the input print file. If the file you choose exists already, the Series 3 will ask you if you wish to overwrite it. If you say yes at this point, the existing file of that name will be deleted and the new temporary dump file will replace it. If you answer no, you will have to choose a different file name.

Printing

Well it did take a while to get here, but we have arrived at last. Once you have done all of the above you should be back at the MergePr opening screen. Pressing <Psion><P> (or selecting 'Print' from the menu) will start the mail-merge. If you have not carried out a printer set-up correctly, you will be informed of this and you will have to do that before proceeding.

The Series 3 will ask you to enter a group code. If you wish to print letters to only a selection of people whose details you have stored in the merge data-file, you should at this stage, enter the code which appears in the 'Group Code' field of these records in your merge data-file. If you wish to print to all of the records in one file, simply leave this box blank. Once you have typed the group code (or not). press <Enter>. All being well, a box will appear telling you the progress of the print. The counter will update every time a complete letter is printed.

If you wish to abandon the print at any stage just press the letter <Q>. The MergePr application will stop immediately. However, if you are printing directly to a printer, it is possible that the printer will have data stored in its own memory so the printer **may** take a little longer to

stop printing. Abandoning the mail-merge will not harm your input print file or merge data-file in any way. However, if you were printing to a temporary dump file, you should delete it as it will not be correctly formatted and is of no practical use.

Exiting

You can exit from the MergePr application in three ways:

- At the MergePr opening screen, press the <Menu> key and select 'Exit' from the 'Special' menu.
- At the MergePr opening screen, press the <Psion> key and <X> together.

You will, in both these cases be presented with a dialog box asking you to confirm this choice. If you subsequently press 'Y', the MergePr application will then stop and you will return to the Series 3 System Screen

- At the System Screen, highlight the name 'MergePr' (which is in bold) under the MergePr icon and press <Delete>. If the MergePr application is able to quit, the application will then stop and 'MergePr' will revert from being in bold letters to being not bold. If the application cannot quit for any reason (for example it may be waiting for you to select a menu option), you will be told that 'MergePr is busy'. You should then highlight the name 'MergePr' (which is in bold) under the MergePr icon and press <Enter>. This will bring the MergePr application into the foreground and you can then quit from the application in one of the other two ways described above.

On-line help using MergePr

Pressing the <Help> key at the MergePr opening screen:

OPENL.PCX;3.64";1.35";PCX

will cause the "Help" screen to appear. The help available to you is split into [n] categories which offer specific help on a particular subject area.

About MergePr

Pressing <Psion><A> at the MergePr opening screen (or pressing <Menu> and selecting 'About') will present a small window containing information about the current version of the application which you are using together with the name of the author.

If you have a problem with the application which you are unable to solve, you should have the version number of the application ready when you contact the supplier for technical support. It is highly likely that this product will continue to be developed and, as such, the version number quickly enables you to establish if you are using an out-dated version of the software.

Status

Pressing <Psion><S> at the MergePr opening screen (or pressing <Menu> and selecting 'Status') will present a small window containing information about your current input print file, merge data-file and printer device (if any, in the case of all three).

Appendix A - Copying to other devices
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Appendix B - Pictorial representation of the application

APPDESC.PCX;5";5";PCX

The above picture represents, at a simple level, the different applications used to produce a mail-merge.

Appendix C - The relationship between symbols and fields

The current version of the MergePr application supports the following symbols. They are shown below with their corresponding MergeEd labels:

<u>Symbol</u>	<u>Label</u>	<u>Comment</u>
«title»	Title	E.g. Mr., Mrs.
«fname»	First Name	E.g. John
«sname»	Surname	E.g. Smith
«add1»	Address 1	First line of address
«add2»	Address 2	Second line of address
«add3»	Address 3	Third line of address
«town»	Town	E.g. Birmingham
«county»	County	E.g. Surrey
«postcode»	Postcode	E.g. NW8 8NQ
«country»	Country	E.g. United Kingdom
«date»	N/A	Replaced by current date
«initial»	N/A	replaced by first character of Title field (capitalised)
N/A	Group Code	Used as basis of selective print

Appendix D - Trouble-shooting
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