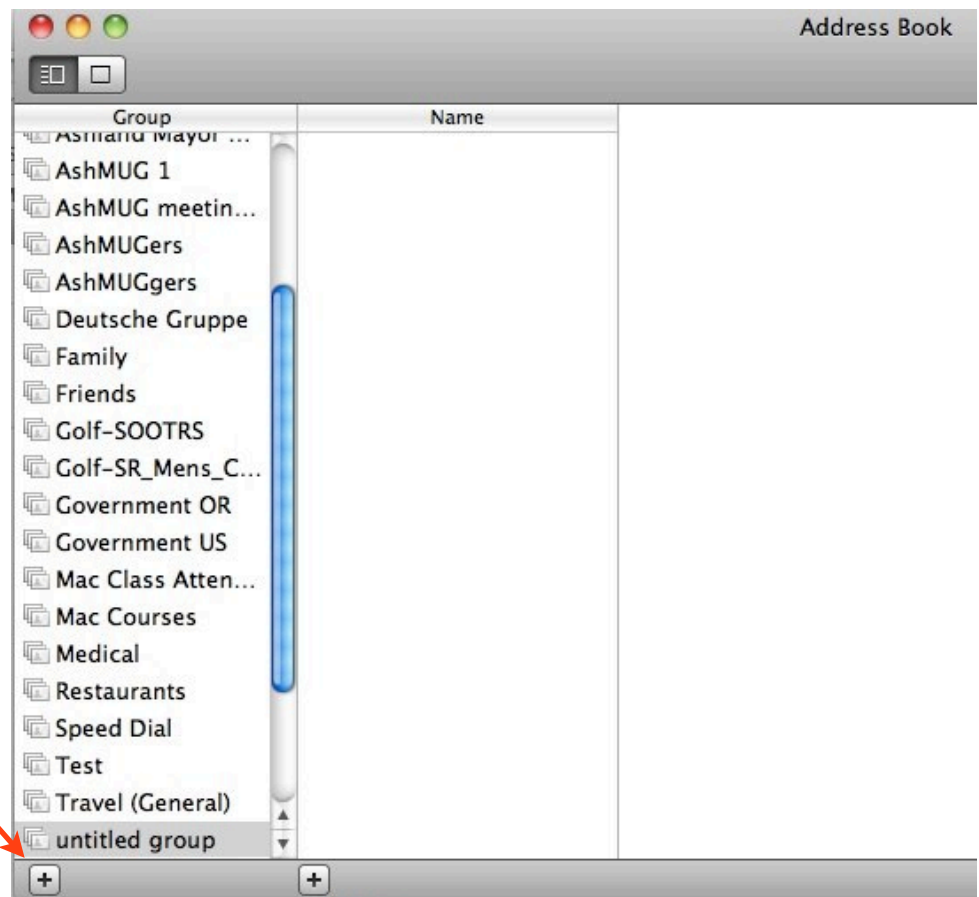


Personalizing a Holiday Letter
With the Mail Merge Capabilities of Pages and Address Book
&
Addressing the Holiday Card Envelopes with Address Book

Instead of sending out the same generic “Dear Friends...” Holiday Newsletter to everyone, let’s personalize the greeting and add a personalized paragraph to the standard family news for some of our friends.

Here is how you do it with Pages ’09 (Ver 4.0.x) and Address Book (Ver 5.0.x). You may be able to do it with earlier versions too. There is also an alternate method using Pages and Numbers, which is described in the appendix starting on p. 14.

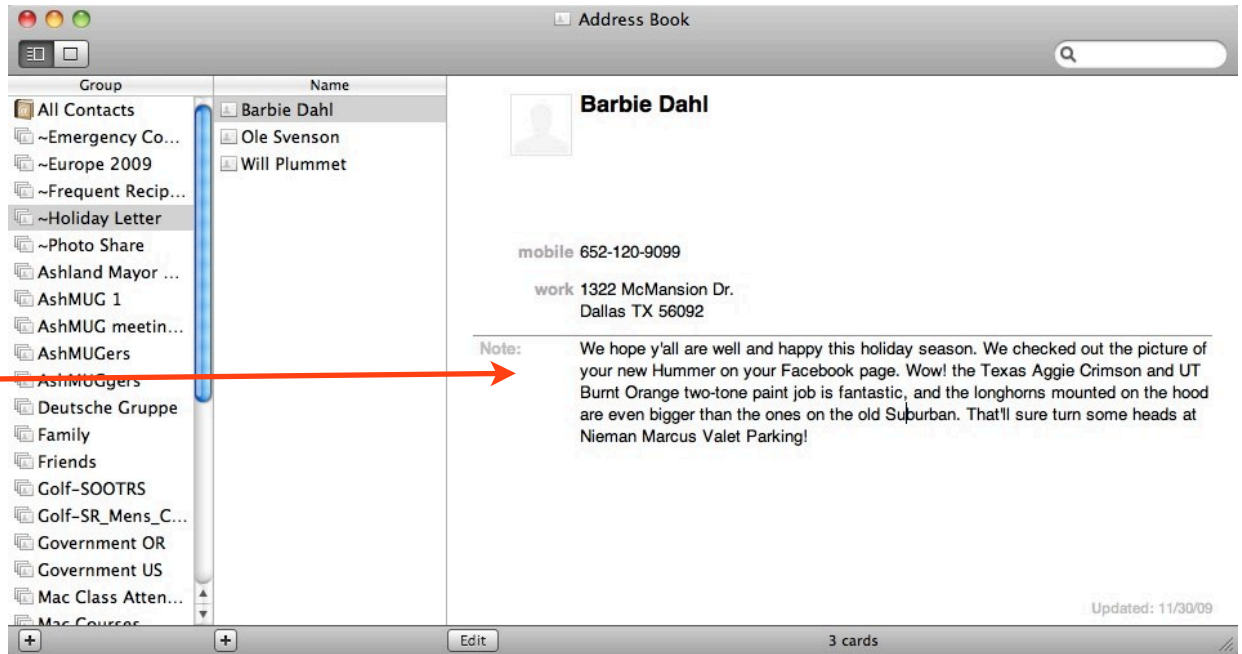
First we need to create a Group for our holiday letter and card recipients. Click on the + sign at the bottom of the list of Address Book Groups, then rename the “untitled group” appropriately.



I chose the name ~Holiday Letter for mine.

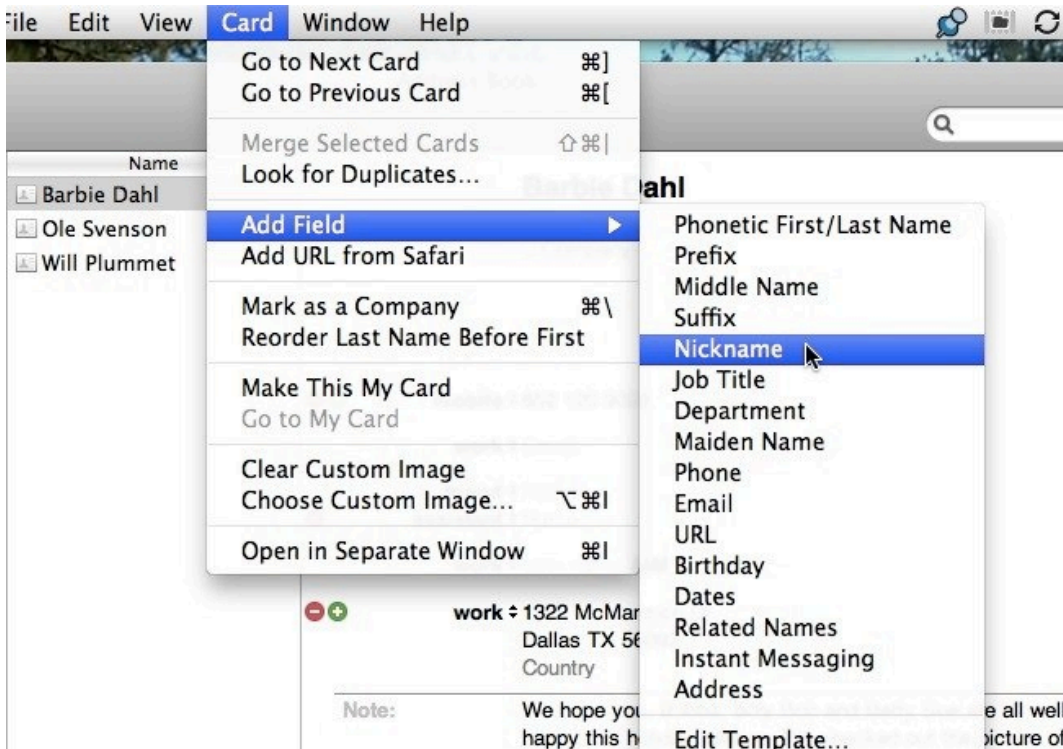
Next, Click on All Contacts at the top of the Group list, select the names of the recipients and drag them to your new Group. Here are all three of my friends.

We are going to use the Notes field for our personalized paragraph.* Type in the personal paragraph that you want to add to the holiday letter here.



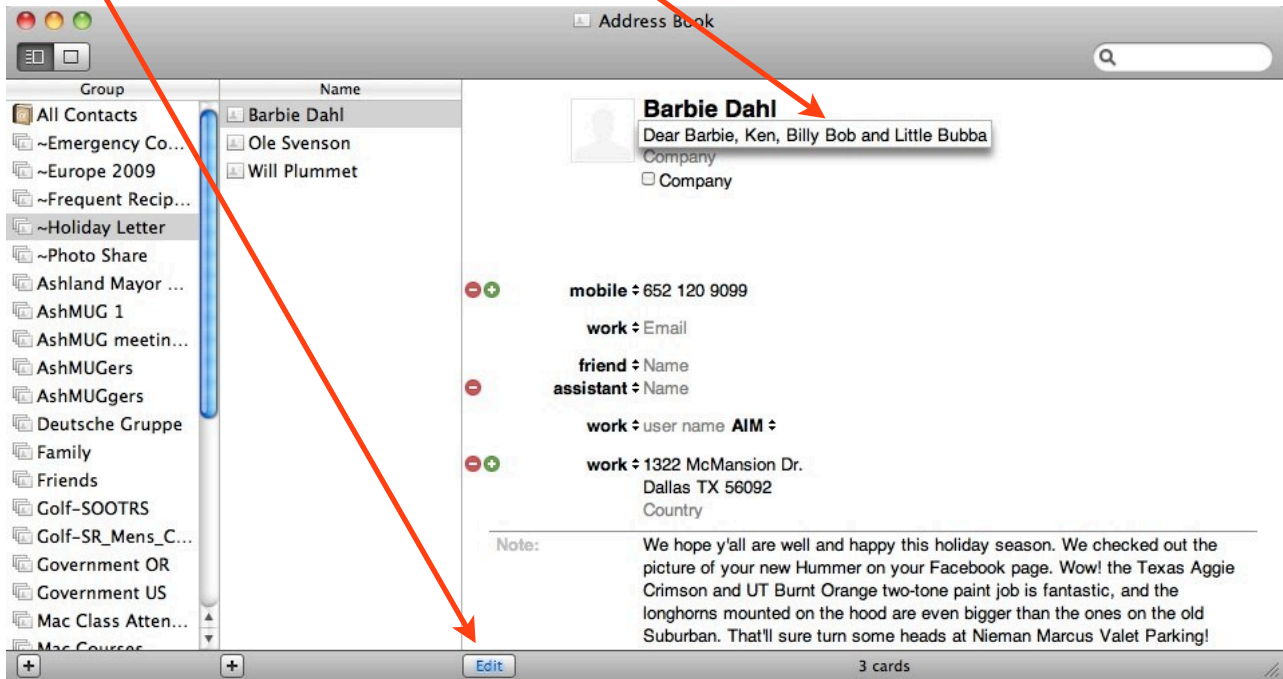
*If your contact already has important stuff in the Notes Field, make a duplicate address card (select the card, Edit/Copy, then Edit/Paste) and use the copy in your Holiday Letter Group.

We are going to use a field called Nickname for our personalized greeting. You probably don't have this field in your address cards, so we will add it.

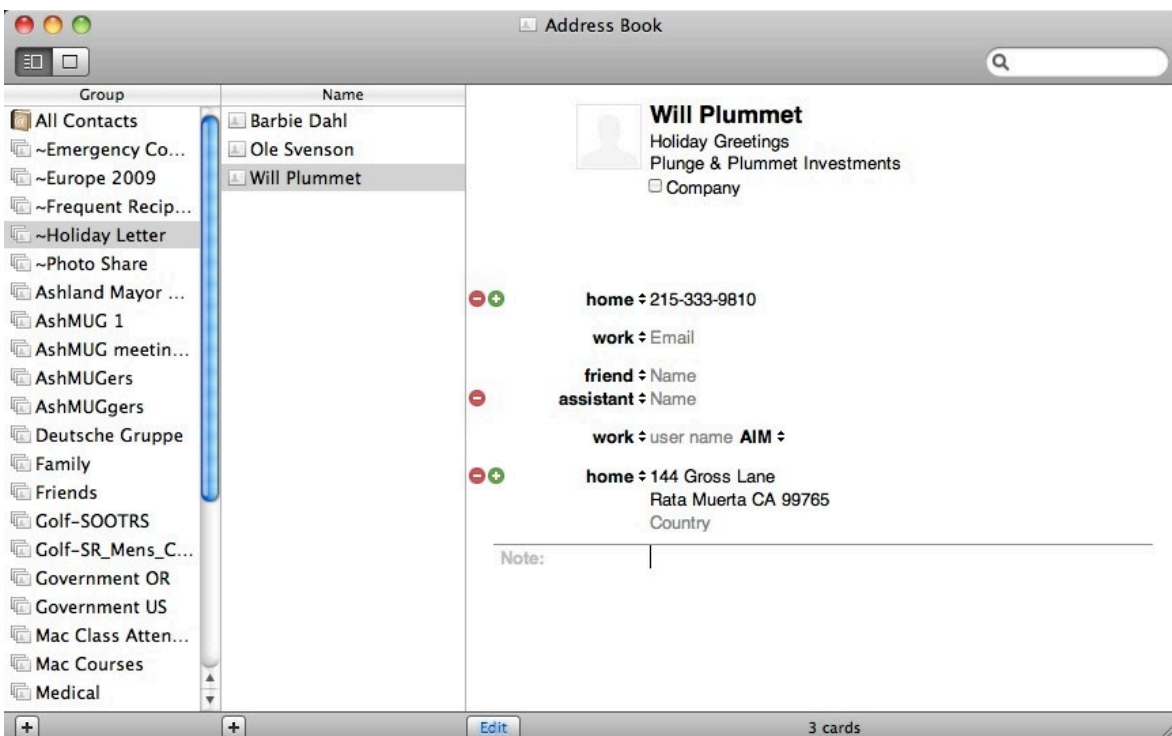


In the Address Book Window, Click on Card/ Add Field/Nickname

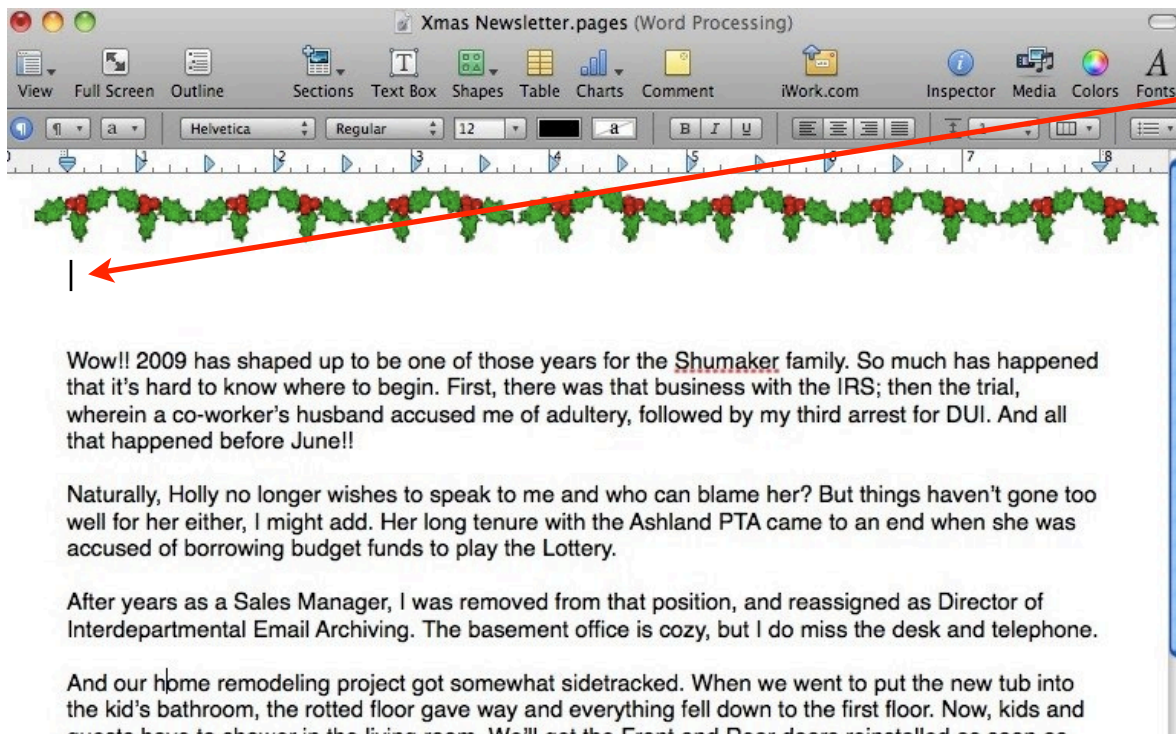
Click on **Edit** and you will see the Nickname field just below the Name. Type in your greeting.



Do the same thing for the rest of the cards. Here is an example of one where I just wanted to send a “generic” greeting and newsletter and skip the personal paragraph. I just put “Holiday Greetings” in the Nickname field. You could also leave out the Nickname field and put “Holiday Greetings” in the Notes field, since it is going to come right below the Nickname field content.



Now we open the Pages document with the layout and “stock” text that we want in all the letters.



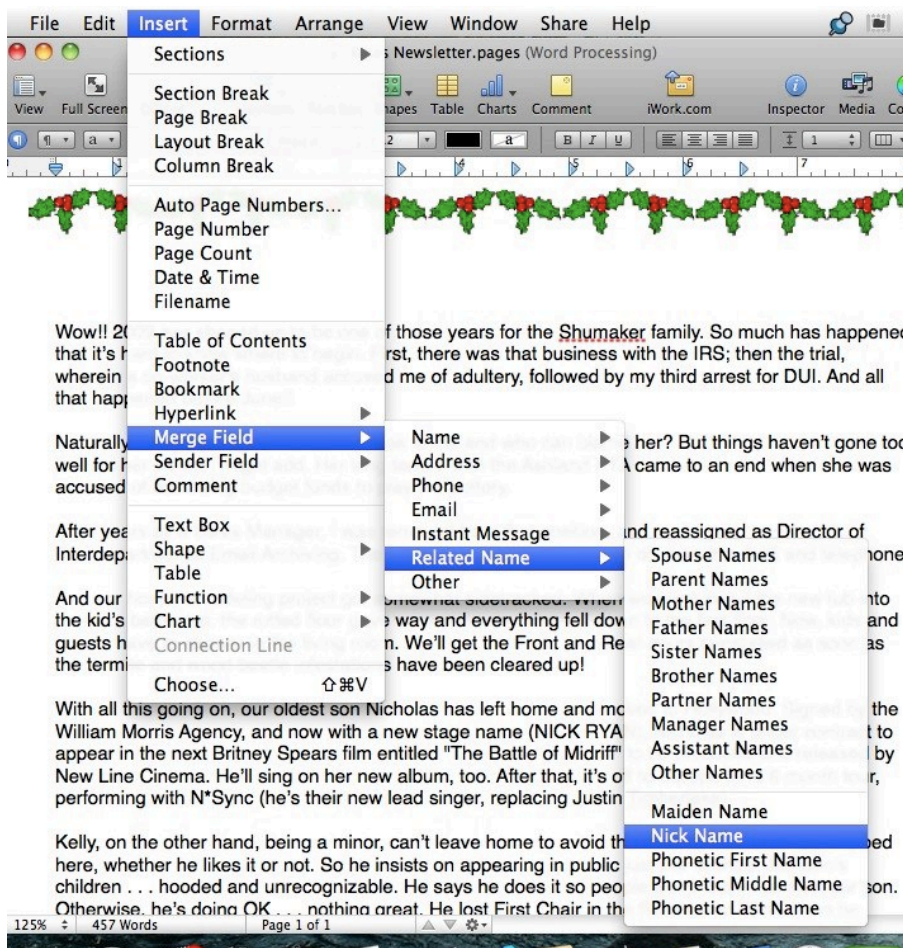
We position the cursor where we want the greeting...

Wow!! 2009 has shaped up to be one of those years for the Shumaker family. So much has happened that it's hard to know where to begin. First, there was that business with the IRS; then the trial, wherein a co-worker's husband accused me of adultery, followed by my third arrest for DUI. And all that happened before June!!

Naturally, Holly no longer wishes to speak to me and who can blame her? But things haven't gone too well for her either, I might add. Her long tenure with the Ashland PTA came to an end when she was accused of borrowing budget funds to play the Lottery.

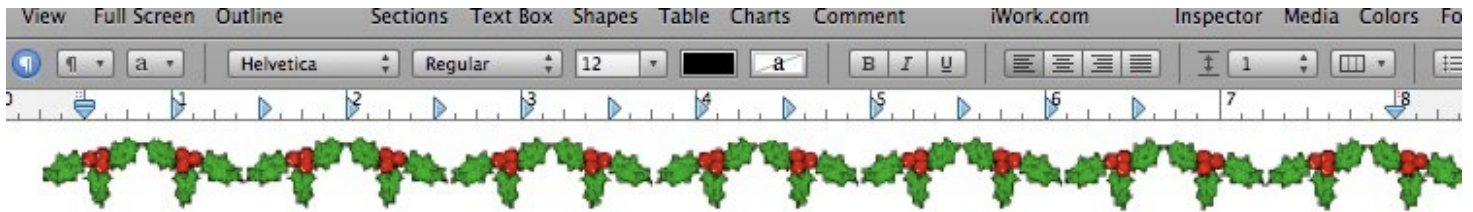
After years as a Sales Manager, I was removed from that position, and reassigned as Director of Interdepartmental Email Archiving. The basement office is cozy, but I do miss the desk and telephone.

And our home remodeling project got somewhat sidetracked. When we went to put the new tub into the kid's bathroom, the rotted floor gave way and everything fell down to the first floor. Now, kids and guests have to shower in the living room. We'll get the Front and Rear doors reinstalled as soon as



Next we are going to insert the Nickname field as a Merge Field at the cursor position.

Then we move the cursor to below the Nickname and do the same as above to insert the Note field as the next Merge Field via Insert/Merge Field/Other/Note. This is what the document now looks like.

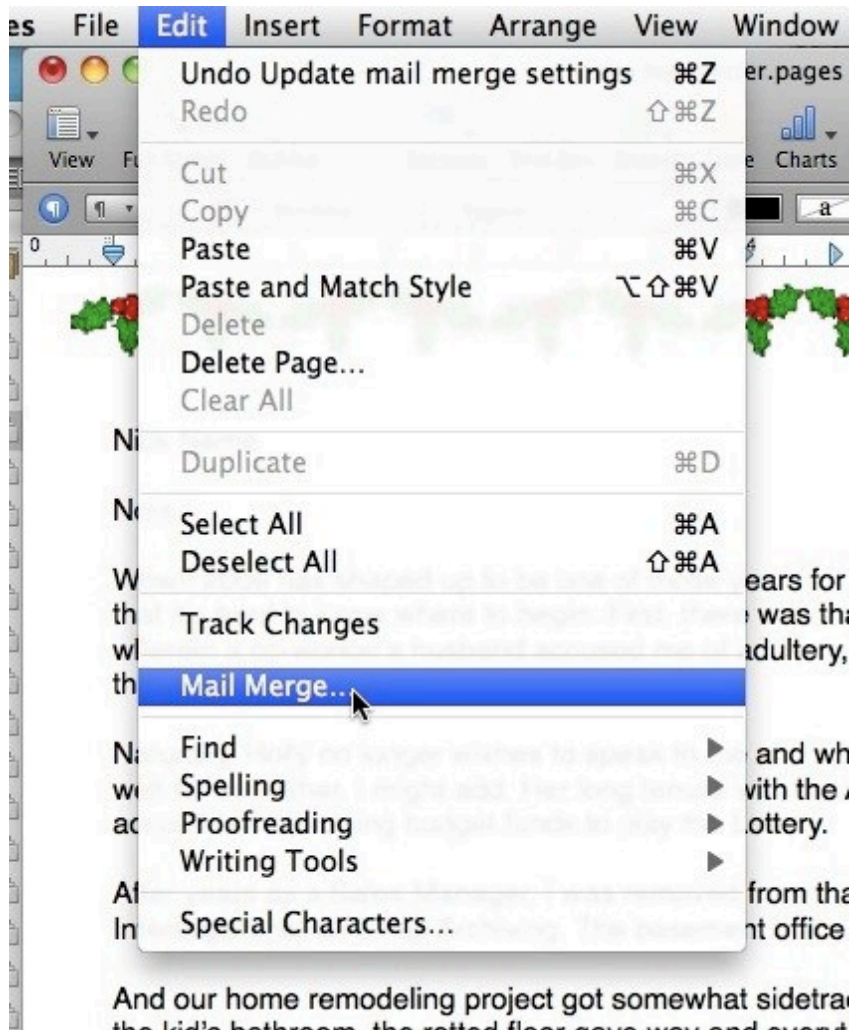


Nick Name

Note

Wow!! 2009 has shaped up to be one of those years for the Shumaker family. So much has happened that it's hard to know where to begin. First, there was that business with the IRS; then the trial, wherein a co-worker's husband accused me of adultery, followed by my third arrest for DUI. And all

The next step is to link the data in address book to the Merge Fields in Pages. We start by clicking on Edit/Mail Merge in the Pages menu.



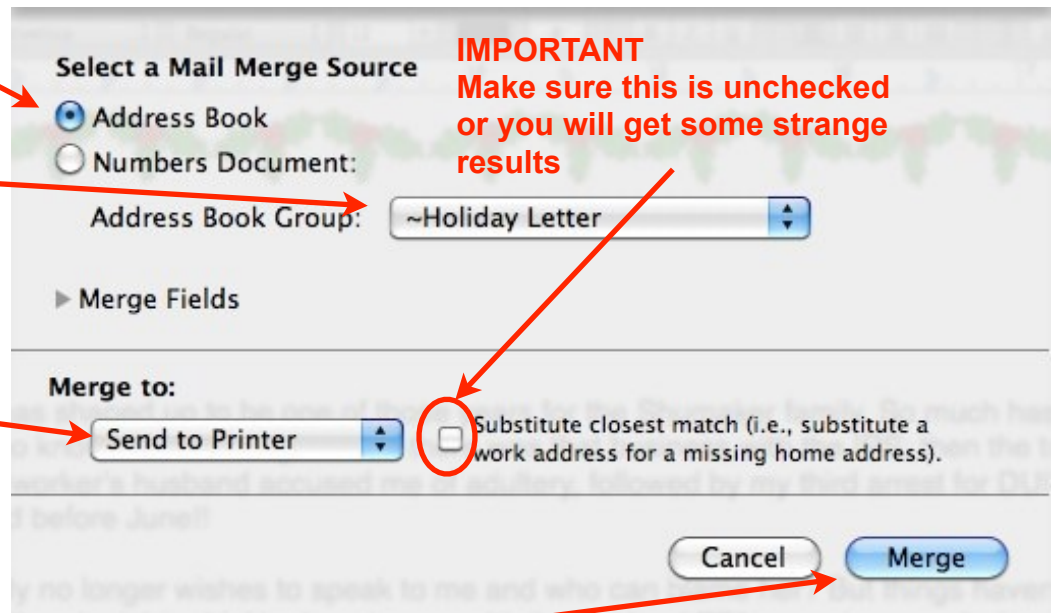
And our home remodeling project got somewhat sidetracked when the kid's bathroom, the rotted floor gave way and event

This brings up the following window.

Select the source

and Group

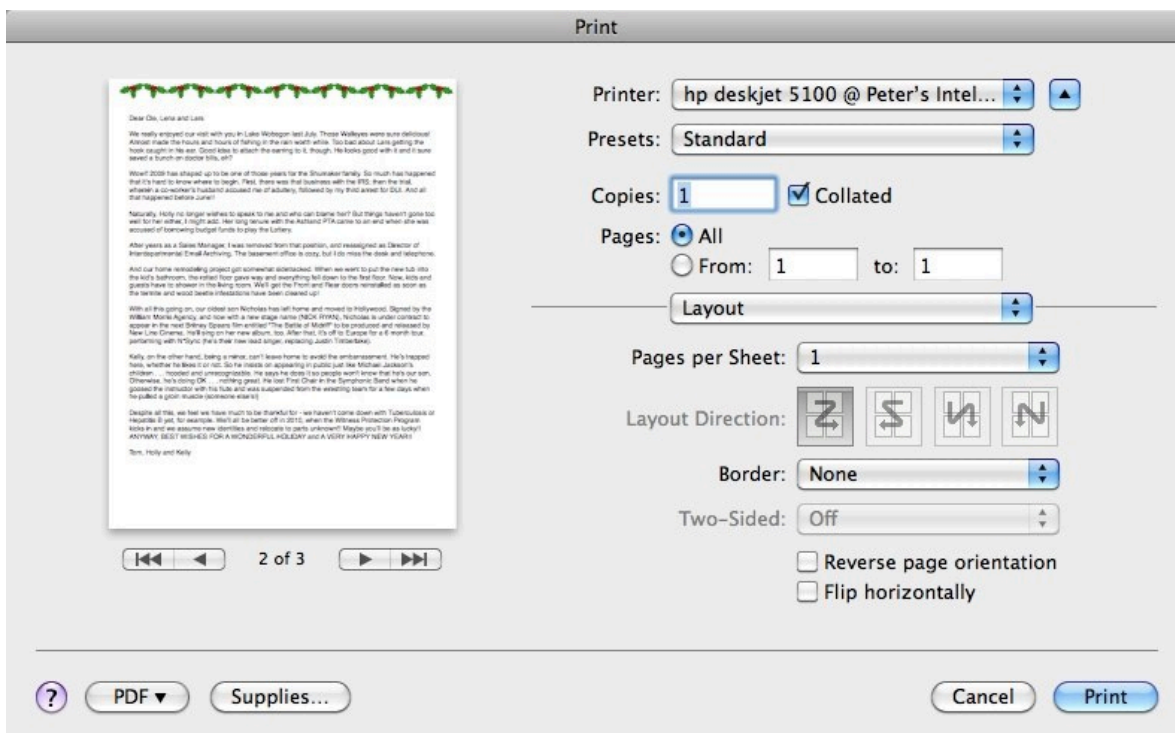
and output



Then click Merge

This will bring up the Print dialog box.

There will be 3 pages printed, each a newsletter customized with the personalized greeting and note.



Here is an example of one of them.



Dear Ole, Lena and Lars

We really enjoyed our visit with you in Lake Wobegon last July. Those Walleyes were sure delicious! Almost made the hours and hours of fishing in the rain worth while. Too bad about Lars getting the hook caught in his ear. Good idea to attach the earring to it, though. He looks real good with it and it sure saved a bunch on doctor bills, eh?

Wow!! 2009 has shaped up to be one of those years for the Shumaker family. So much has happened that it's hard to know where to begin. First, there was that business with the IRS; then the trial, wherein a co-worker's husband accused me of adultery, followed by my third arrest for DUI. And all that happened before June!!

Naturally, Holly no longer wishes to speak to me and who can blame her? But things haven't gone too well for her either, I might add. Her long tenure with the Ashland PTA came to an end when she was accused of borrowing budget funds to play the Lottery.

After years as a Sales Manager, I was removed from that position, and reassigned as Director of Interdepartmental Email Archiving. The basement office is cozy, but I do miss the desk and telephone.

And our home remodeling project got somewhat sidetracked. When we went to put the new tub into the kid's bathroom, the rotted floor gave way and everything fell down to the first floor. Now, kids and guests have to shower in the living room. We'll get the Front and Rear doors reinstalled as soon as the termite and wood beetle infestations have been cleared up!

With all this going on, our oldest son Nicholas has left home and moved to Hollywood. Signed by the William Morris Agency, and now with a new stage name (NICK RYAN), Nicholas is under contract to appear in the next Britney Spears film entitled "The Battle of Midriff" to be produced and released by New Line Cinema. He'll sing on her new album, too. After that, it's off to Europe for a 6 month tour, performing with N*Sync (he's their new lead singer, replacing Justin Timberlake).

Kelly, on the other hand, being a minor, can't leave home to avoid the embarrassment. He's trapped here, whether he likes it or not. So he insists on appearing in public just like Michael Jackson's children . . . hooded and unrecognizable. He says he does it so people won't know that he's our son. Otherwise, he's doing OK . . . nothing great. He lost First Chair in the Symphonic Band when he goosed the instructor with his flute and was suspended from the wrestling team for a few days when he pulled a groin muscle (someone else's!)

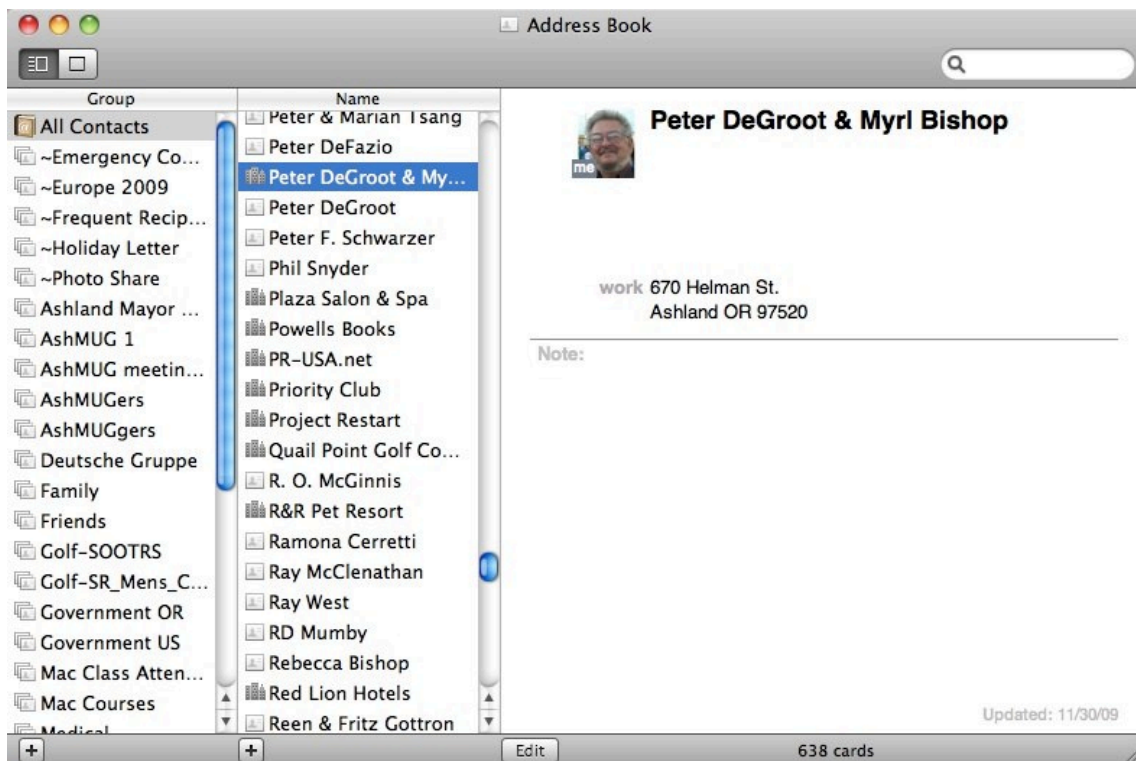
Despite all this, we feel we have much to be thankful for - we haven't come down with Tuberculosis or Hepatitis B yet, for example. We'll all be better off in 2010, when the Witness Protection Program kicks in and we assume new identities and relocate to parts unknown!! Maybe you'll be as lucky!! ANYWAY, BEST WISHES FOR A WONDERFUL HOLIDAY and A VERY HAPPY NEW YEAR!!

Addressing the Holiday Card Envelopes with Address Book

I will use the same Address Book Group that we used for merging the personalized greeting and paragraph into the newsletter for another holiday task, addressing the holiday greeting cards.

First of all, Address Book is going to use “your” address card for the return address. Usually this is a card set up automatically when you install or set up OS X. It may or may not be suitable. You can see what it is by going to Card/Go to My Card in the Address Book top menu bar.

If it is not suitable you can edit it, select a different one or create a suitable one. In my case, my wife and I have different surnames so the standard “First Name” Last Name” card doesn’t work very well. What I did was create a new card.



Actually, I left the first and last name fields empty and put both of our names in the Company field. It just worked better.

You can designate your new card as “My Card” by selecting it, then going to Card/Make This My Card.

Next you need to set up your printer for the cards you are using.

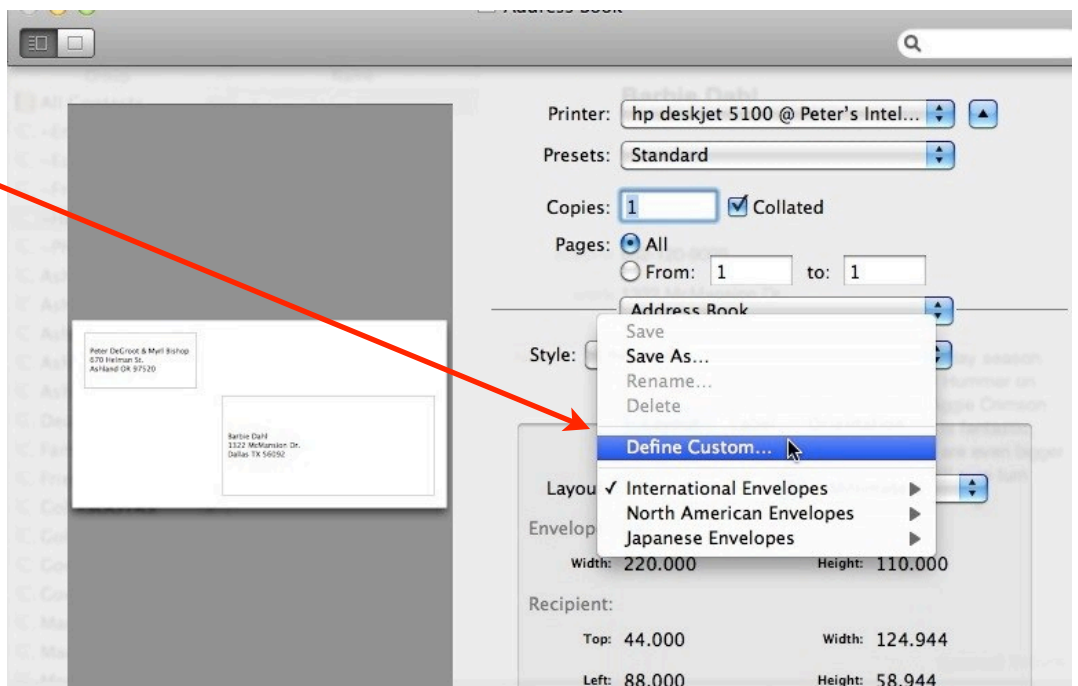
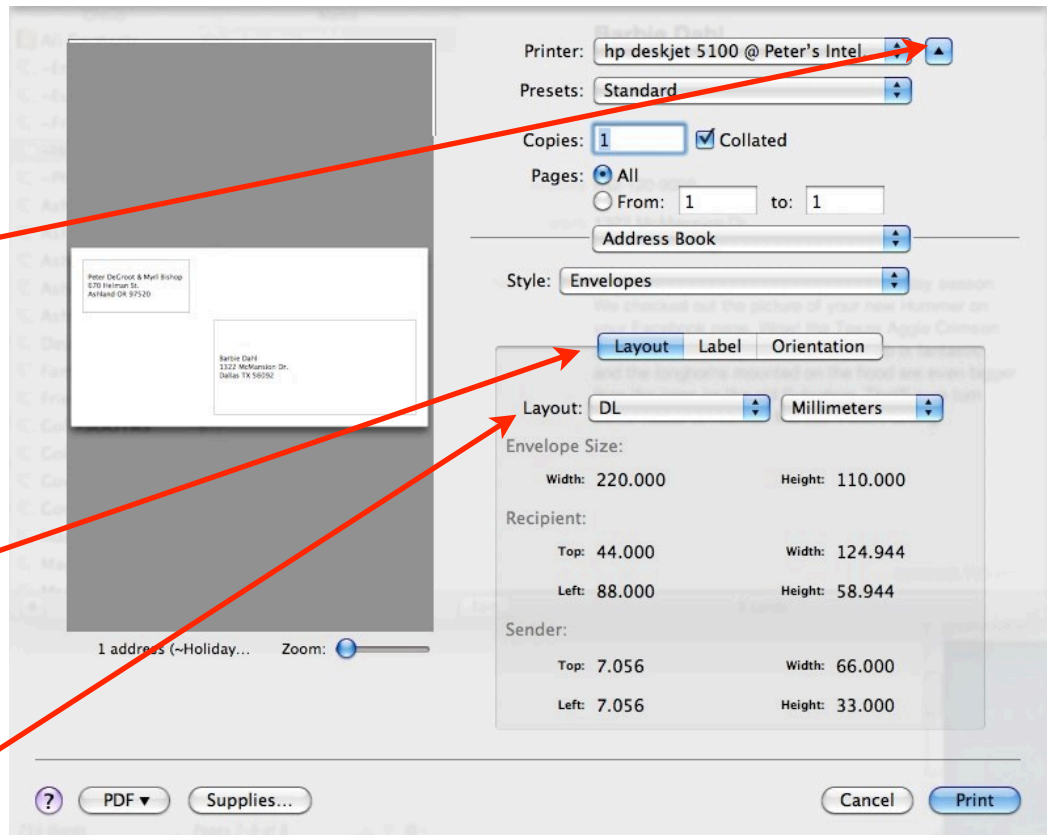
Select one of your recipients, and click on File/Print

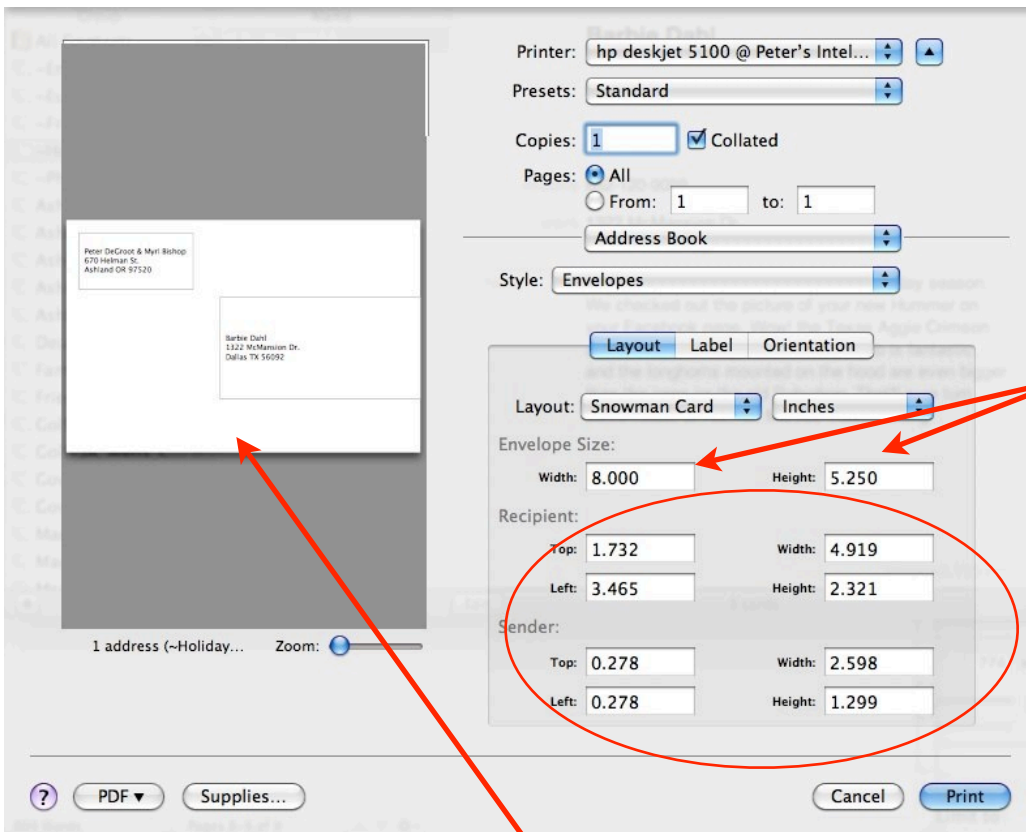
You should get a print dialog box like this. If you don't see the full window like this, click on the arrow here

There will probably be a default Layout for some type of business envelope.

Click on the Layout pull down menu...

...and select Define Custom





You will be asked to name the custom layout. If you are using more than one size of card, you will have to define a custom layout for each.

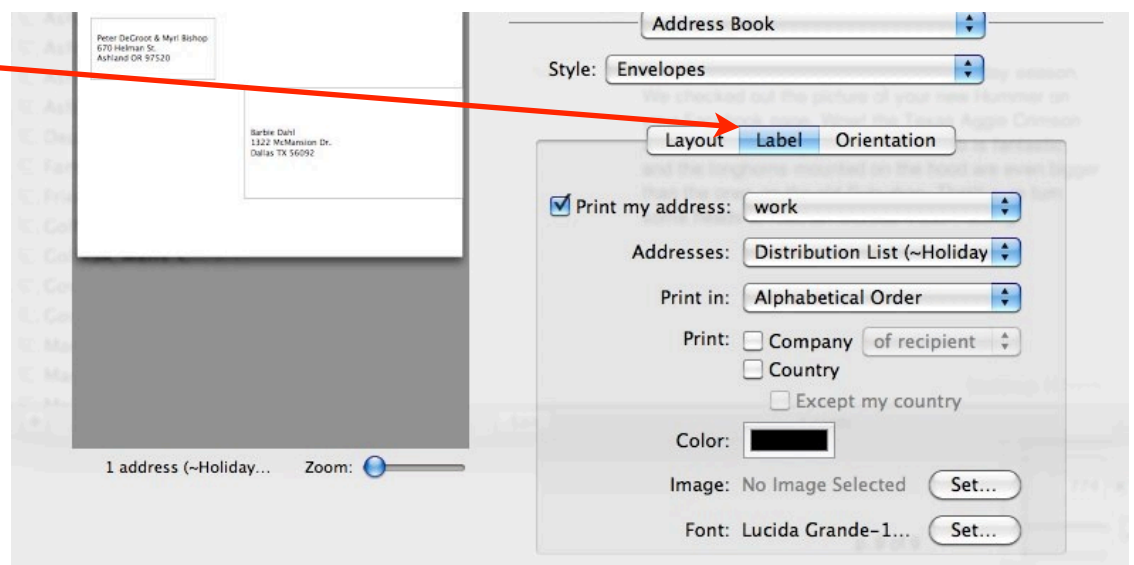
Measure the envelope and enter the data here

You can play with these numbers to reposition the address and return address.

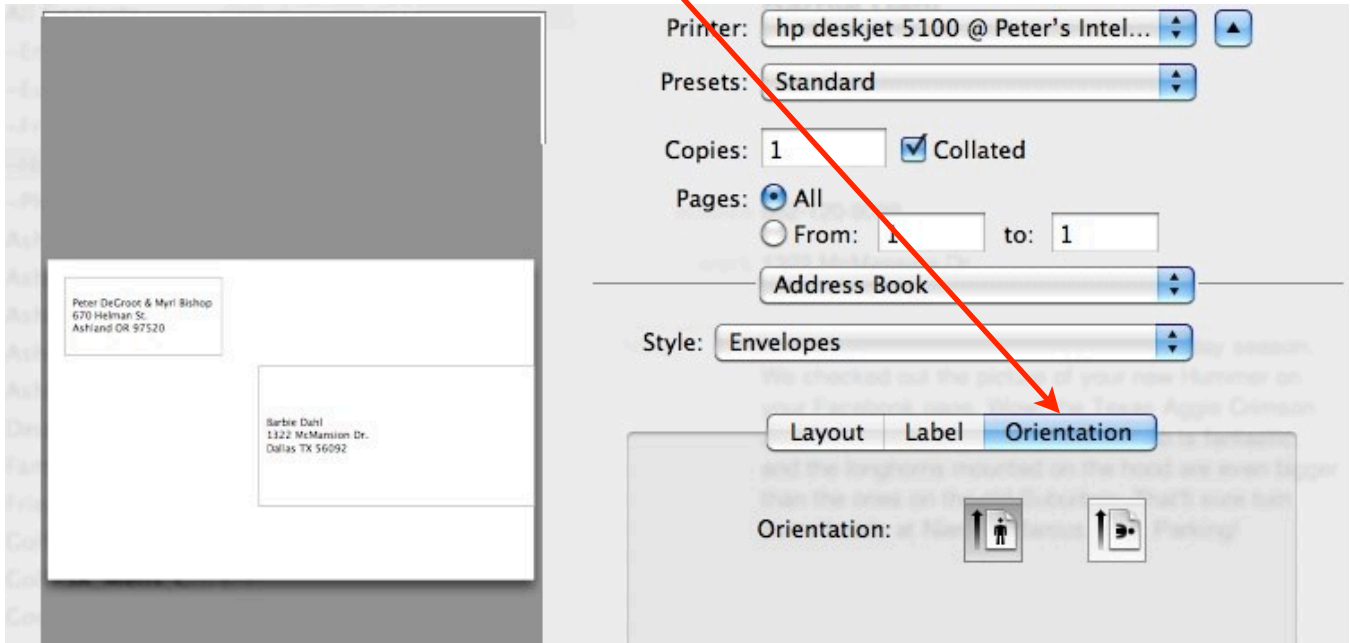
NOTE: sometimes nothing changes in the display here when you make changes in the dimensions. If that happens, click Cancel, the click File/Print again and you should get an accurate display of the layout. This bug has appeared in OS 10.6 (Snow Leopard), at least.

Next click on Label. This is where you can choose the font, text size, text color, etc.

You can also add an image (it goes to the left of the return address), **but be careful**. Although you can select a new image, I haven't found a way of deleting an image other than deleting the layout and starting over.



You may have to change the Orientation and/or try some test envelopes to determine how to feed them into your printer so things come out right.



Finally, unless you are certain that your printer feeds stacks of envelopes reliably (none of mine do) you probably want to select and print the addresses one envelope at a time.

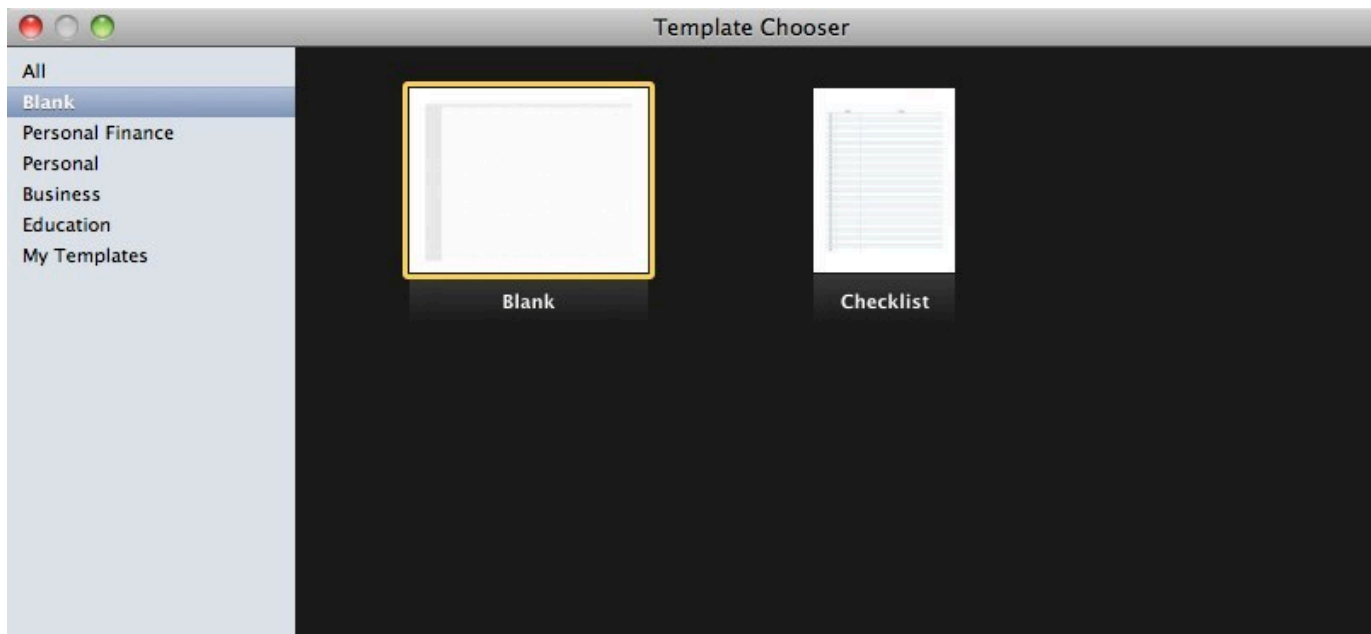
Appendix

Alternate Method - Merging Data into Pages from a Numbers Spreadsheet

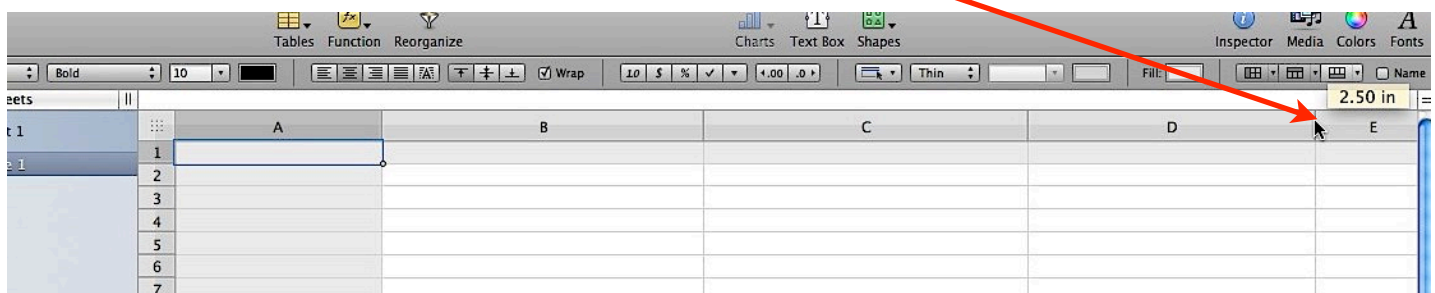
This is actually a more flexible, and in my opinion, easier method. The reason I used Address Book as the merge source earlier is that more people are familiar with Address Book than with Numbers. In fact, many people seem to be intimidated by the assumed complexity of spreadsheets, although when used simply to store data as in this example, they are really easy.

This alternate method uses the Link Inspector in Pages to set up the merge fields. The Link Inspector could also have been used to set up the Address Book merge fields rather than the Menu items that we used (pp. 4-5).

First we need to create a simple spreadsheet (Numbers Document, if that sounds less intimidating) to hold our data. Launch Numbers and double click on the Blank template in the Template Chooser.



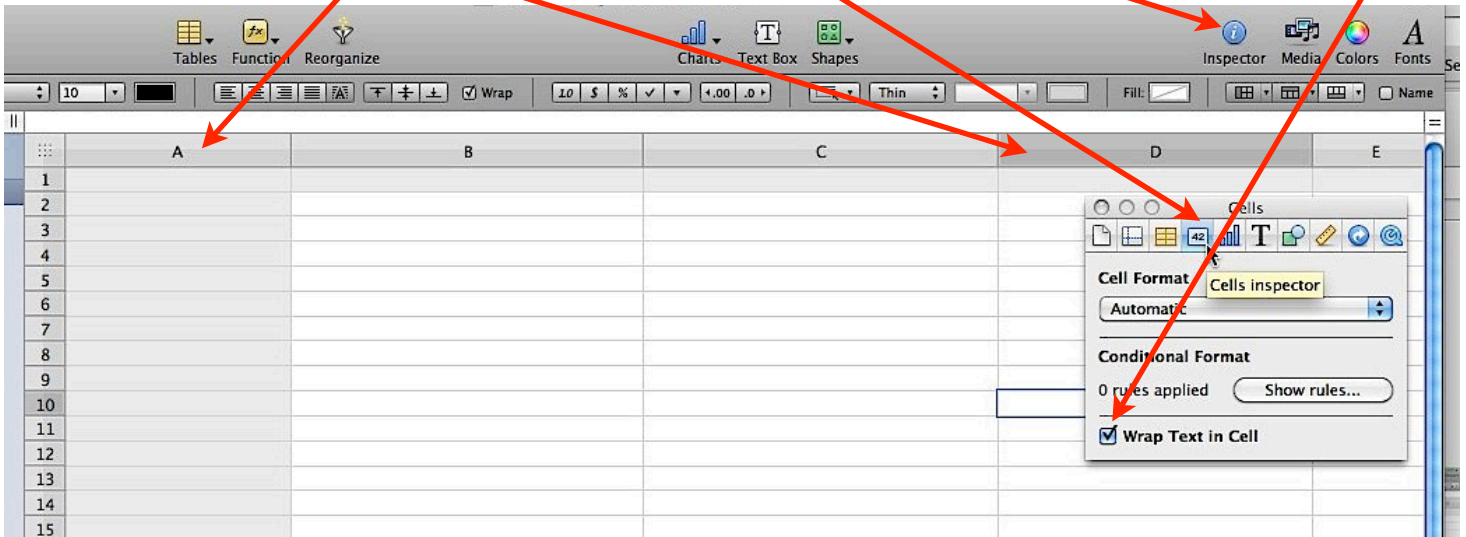
In the resulting spreadsheet, click and drag the divider at the right ends of the A, B, C and D columns to make them wider. The exact width isn't critical, this is just to make things more readable.



Click on the top of column A, then Shift-click on the top of column D to select all 4 columns

Next click on Inspector, then on the Cells Inspector.

Finally, click on Wrap Text in Cell (Should have a check mark, not a dash)



You may be wondering why we are using 4 columns when we only have 2 Merge Fields we want to insert. The A column is a Title column, just used to identify the entry. It will not be selectable as a Merge Field. The B column will hold our Greetings. The C and D columns will hold our personalized Paragraph.

Why 2 columns for this? *Unfortunately there is an undocumented character limit when merging data from a Numbers document to Pages.* If there are 255 or fewer characters in the spreadsheet table cell it merges correctly, 256 or more and the merge field in pages ends up blank after the mail merge. This isn't the case for Address Book merges to Pages, at least for the Notes field.

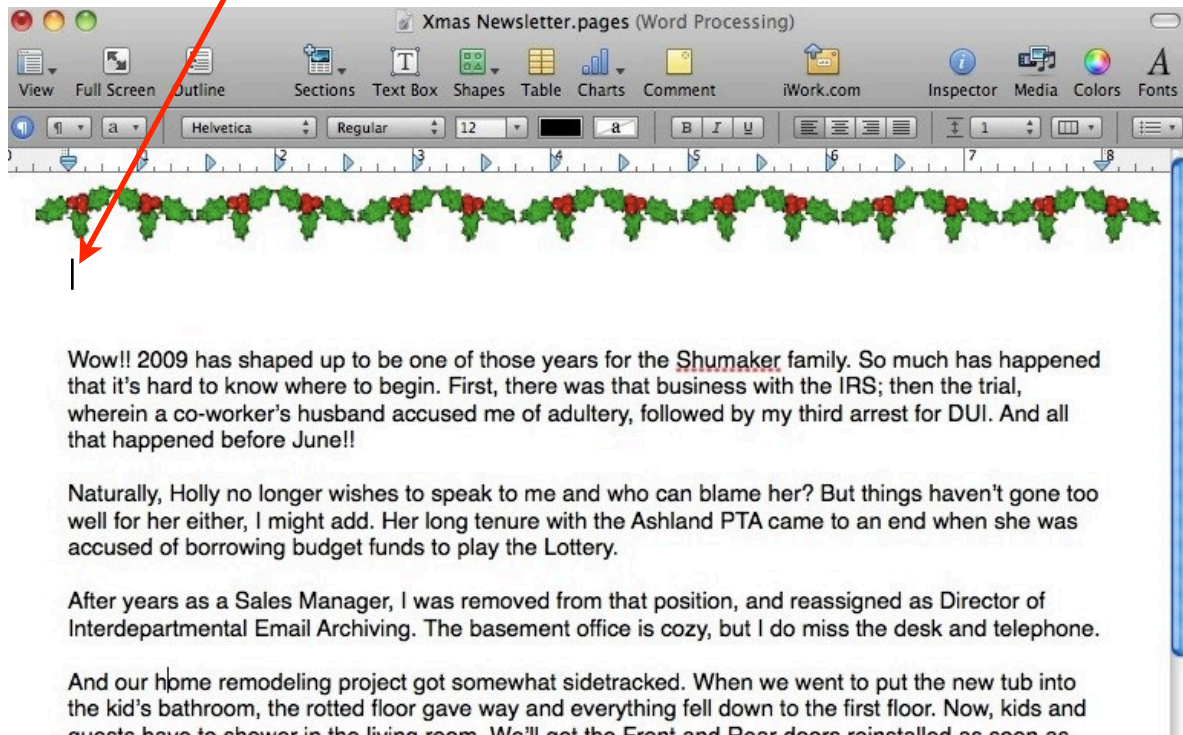
The work-around for the character limit from Numbers to Pages is to split long entries into 2 or more cells in the same row and treat them as separate merge fields, placing them one after the other in the Pages document. You have to leave a space between the merge links in the Pages document or this doesn't work.

In Row 1, enter names for the Merge Fields, and in Rows 2 and on down, enter the recipient name in column A, greeting in Column B, and personalized paragraph, split in two, in Columns C and D, as below.

	A	B	C	D
1	Name	Greeting	Paragraph1	Paragraph2
2	Barbie Dahl	Dear Barbie, Ken, Billy Bob and Little Bubba	We hope y'all are well and happy this holiday season. We checked out the picture of your new Hummer on your Facebook page. Wow! the Texas Aggie Crimson and UT Burnt Orange	two-tone paint job is fantastic, and the longhorns mounted on the hood are even bigger than the ones on the old Suburban. That'll sure turn some heads at Nieman Marcus Valet Parking!
3	Ole Svenson	Dear Ole, Lena and Lars	We really enjoyed our visit with you in Lake Wobegon last July. Those Walleyes were sure delicious! Almost made the hours and hours of fishing in the rain worth while. Too bad	about Lars getting the hook caught in his ear. Good idea to attach the earring to it, though. He looks real good with it and it sure saved a bunch on doctor bills, eh?
4	Will Plummet	Holiday Greetings!		

Save the document in a convenient location. I've saved this one as Holiday Merge Data.

Now we open the Pages document with the layout and “stock” text again and position the cursor where we want the greeting.

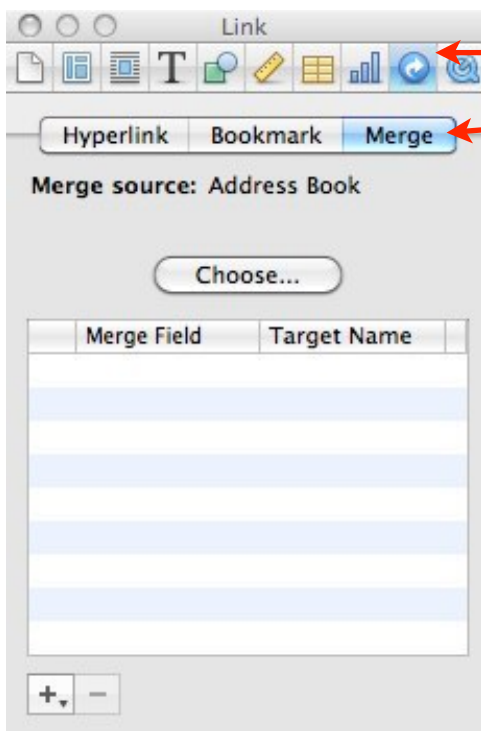


Wow!! 2009 has shaped up to be one of those years for the Shumaker family. So much has happened that it's hard to know where to begin. First, there was that business with the IRS; then the trial, wherein a co-worker's husband accused me of adultery, followed by my third arrest for DUI. And all that happened before June!!

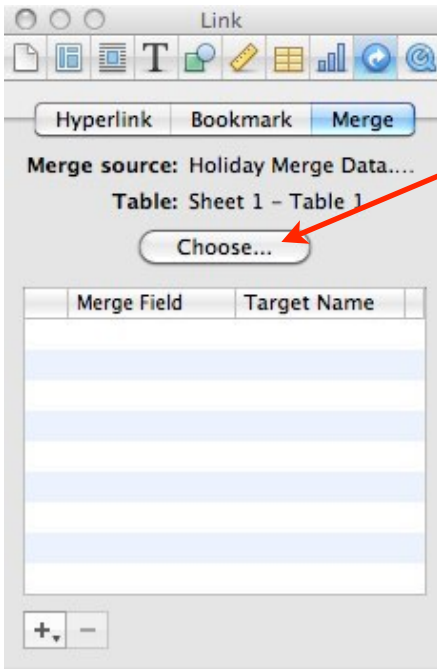
Naturally, Holly no longer wishes to speak to me and who can blame her? But things haven't gone too well for her either, I might add. Her long tenure with the Ashland PTA came to an end when she was accused of borrowing budget funds to play the Lottery.

After years as a Sales Manager, I was removed from that position, and reassigned as Director of Interdepartmental Email Archiving. The basement office is cozy, but I do miss the desk and telephone.

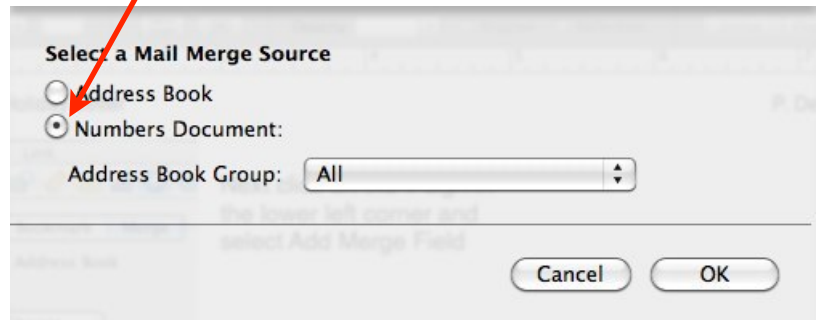
And our home remodeling project got somewhat sidetracked. When we went to put the new tub into the kid's bathroom, the rotted floor gave way and everything fell down to the first floor. Now, kids and guests have to shower in the living room. We'll get the Front and Back doors reinstalled as soon as



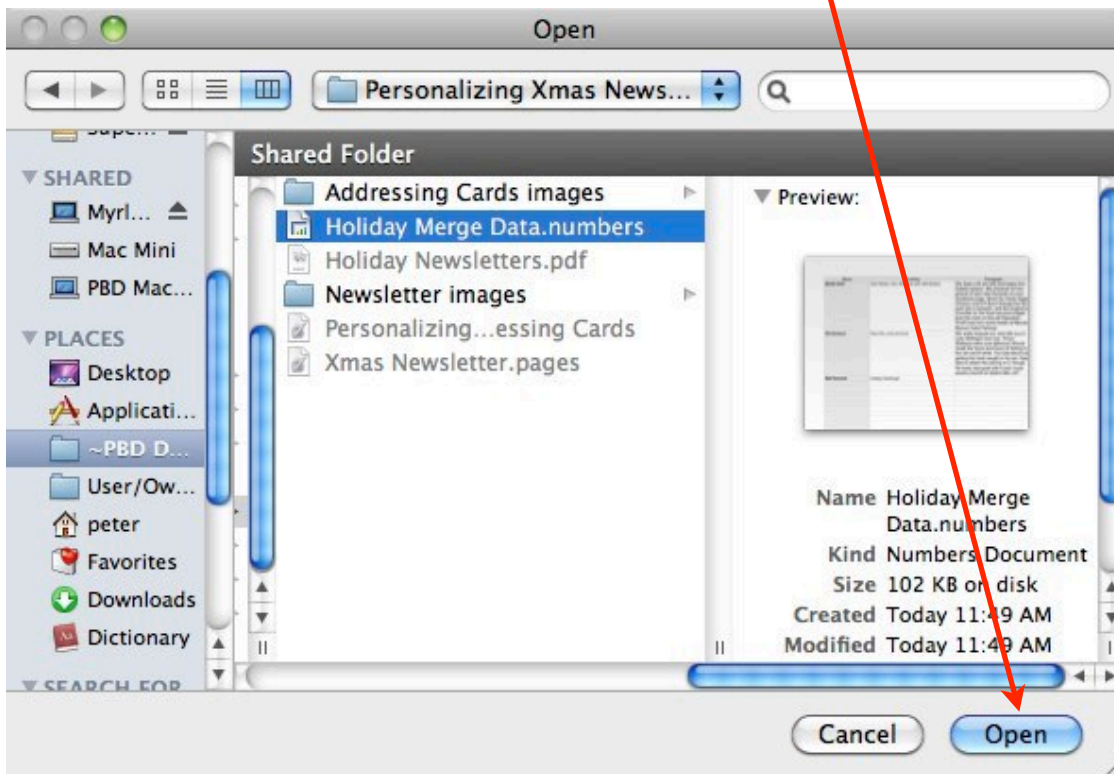
Now open the Inspector and click on the Link Inspector and then on Merge.



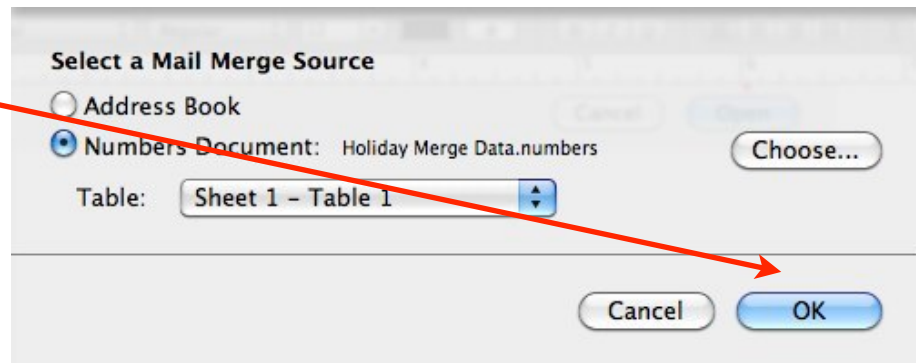
Then click Choose... and in the resulting pop-up window click on Numbers Document



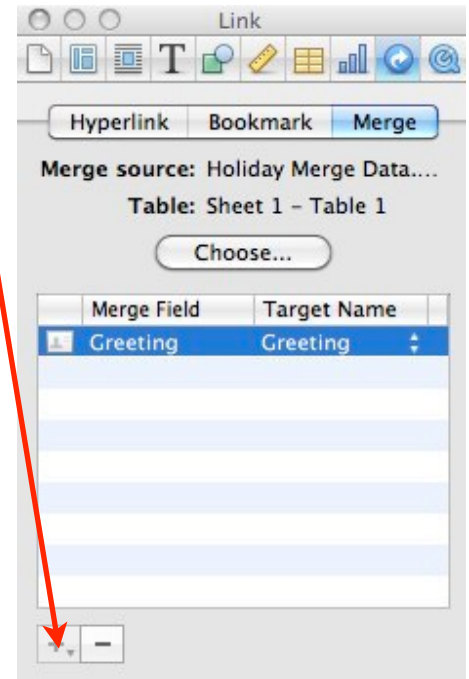
Click OK and navigate to your data file, select it, and click Open.



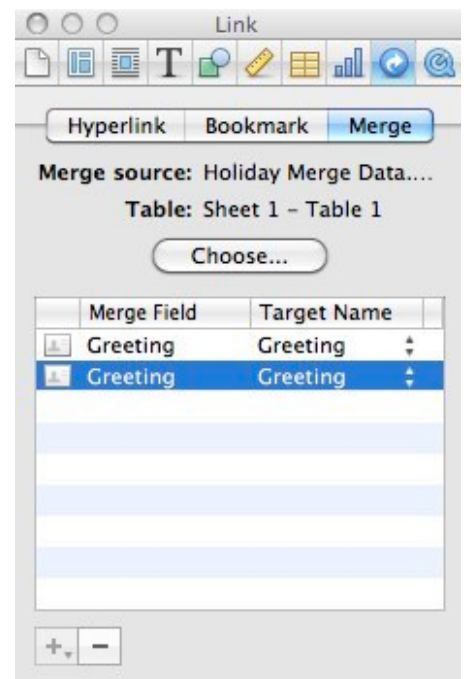
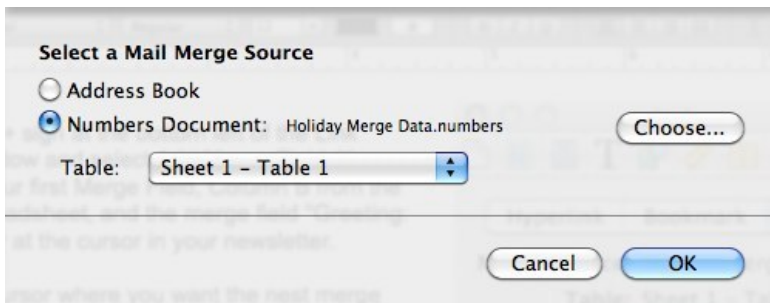
Now you will see this window. Click OK.



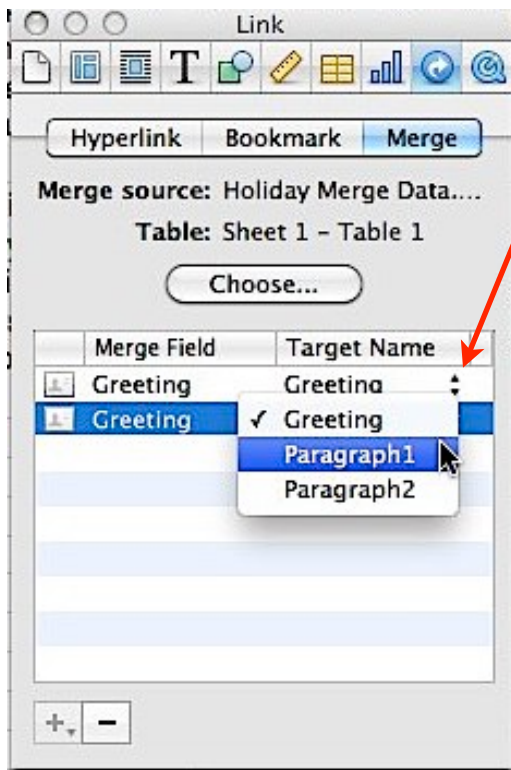
Next click the + sign at the bottom left of the Link Inspector window and select Add Merge Field. You should see your first Merge Field, "Greeting" Column B from the Numbers spreadsheet, and the merge field "Greeting" should also appear at the cursor in your newsletter.



Position the cursor where you want the next merge field, Paragraph1, to be, then click Choose again in the Link Inspector window. The window below will pop up again and you could Choose a different spreadsheet for the next merge field if you wanted to, but we want to use the same one, so just click OK.



A new highlighted Merge Field will appear in the Link Inspector window. and it will also appear in your newsletter (note that it is highlighted there too). Unfortunately, it wants to use the same "Greeting" field again, so we need to change it.

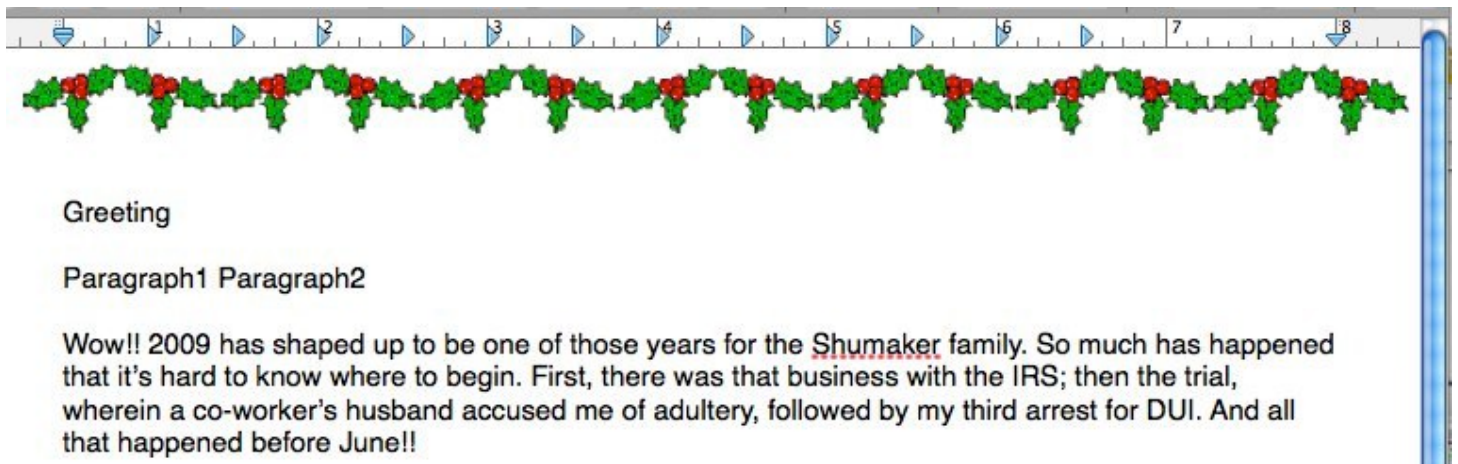


Click on the up-down arrows to the right of the target name

Then choose the correct field, Paragraph1, from the list.

Position the cursor one space after the Paragraph1 Merge Field link in the newsletter. Click Choose again in the Link Inspector window, then OK in the next window. Click the up-down arrows to the right of the new target name and choose Paragraph2 from the list.

You are done. Your newsletter should look like this,



and you can now go to "The next step is to link the data..." on page 5 and continue on to printing your personalized newsletters. Of course you need to select "A Numbers Document" rather than Address Book as the source on page 6.

By the way- You can copy, paste, change font, style and color, move around or even delete the Merge Field links just like any other text. The changes will be applied to the merged text.