

Mail Merge

Mail merge is the process of combining a list of names, addresses and other information automatically into a letter so that they do not have to be typed individually.

To create mail merged letters you need;

A text file to copy and paste into a Word document to create the letter.

A text file of recipients (addresses and other data)

For Functional Skills ICT assessment tasks you will be provided with a text file for the letter and a file for the data source.

Step One: Creating the Main Document

1. Open a new blank MS Word document.
2. Open the text file Main then copy and paste the text into your Word document.
3. Save the Word document with the name main into your Evidence Folder
4. Leave the document open.

For most Functional Skills ICT assessment tasks you will be provided with a text file where you will be required to copy and paste the contents into a new document.

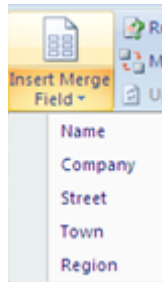
Step Two: Selecting Recipients

1. Make sure the document main is still open
2. Click the Mailings tab, then Select Recipients on the Mail Merge ribbon
3. Click Use Existing List
4. Find the data file Client. Then click Open.

Step Three: Inserting the Merge Fields

The Merge Fields can now be inserted into the Main document.

1. Add 2 blank lines at the top of the main document.
2. Place the cursor at the top of the document and click the drop down arrow on the Insert Merge Field.



3. Delete and replace the place markers such as (Company) with the merge fields. To do this select Company from the Fields list. The field is added to the letter, <<Company>>.
4. Move to the next line
5. Click the Insert Merge Field button. Click Street
6. Delete and replace the remaining fields as below.

<<Company >>

<<Street>>

<<Town>>

<<Region>>

7. After Dear in the main part of the document, insert a space then the Name field. Make sure all the round bracket place markers are deleted.
8. Save the document under the same name, main and leave it open.

Step Four: Finish & Merge

1. Click Preview Results to check the document before finishing & merging.
2. If the layout and merged fields are correct you can complete the merge
3. Click Finish and Merge
4. To merge all documents, click Edit Individual Documents
5. Select All and click OK. A document is opened containing all the individual letters produced by the merge.
6. Save the file as merge and close all documents, saving any changes if prompted.

Exercise 1

1. Use the two files 'Internet' and 'Accounts' you have been given to create letters to Internet customers.
2. Replace the bracketed marker words with the appropriate merge fields.
3. Save a copy of the unmerged letter (Internet Letter Main) showing all the merge fields into your Evidence Folder.
4. Save a copy of your merged letters (Internet Letters Merged) into your Evidence Folder.

Exercise 2

1. Use the two files 'Explorers' and 'Shipping List' you have been given to create invitations.
2. Replace the bracketed place markers by inserting the appropriate Merge Fields
3. Save the document as 'explorers_main_letter'.
4. Merge to a new document; add your name to the Footer.
5. Cut and Paste the first three merged invoices so that they fit on a single page.
6. Save the merged documents as 'explorers_letter_merged'.

Exercise 3

1. You have been given two files 'Invoice' and 'Customers' to produce invoices for only the customers who have paid.
2. To include only customers who have paid, you will need to Edit Recipient List. Then untick those who should not be included in the mail merge.
3. Make sure your name is in the Footer of the main invoice.
4. Save the main invoice and the merged invoices into your Evidence Folder.