Lesson 11

Performing Mail Merges

# Learning Objectives

Students will learn to:

* Set up Mail Merge
* Execute Mail Merge
* Merge a document with different file formats
* Create envelopes and labels

# MOS Skills

There are no MOS skills for this lesson. You may skip lesson if you choose too; but we’ve included it because many courses want to cover mail merge in a first Word course.

# Lesson Summary — Lecture Notes

Lesson 11 focuses on how to perform a mail merge in a Word document and using other file formats.

Begin by covering how to create a mail merge document. Students should become familiar with commands on the Mailings tab. There are several steps in the mail merge process. Students must first set up a main document, and then select recipients for the mailing, prepare merge fields, preview the merged letters, and finally complete the mail merge. Students can choose the Step by Step Mail Merge Wizard option or begin the process manually. Demonstrate the steps used in the wizard to ensure that students understand the various options available within each step. Ensure that students understand that the main document can be set up as a letter, E-mail message, envelope, labels or as a directory. When adding recipients, students can choose from a newly typed data source list, an existing list, or Outlook contacts. Make sure they understand that when the merge is complete, the letters can be saved as a separate file. For this lesson, students will be using existing data sources.

Students can perform a mail merge by using the individual commands found on the Mailing tab. Discuss the process used when adding the mail merge fields to the main document—compare the wizard to using the commands on the Ribbon. Explain that these fields will automatically fill with information from the data source file when the merge is performed. When merge fields are inserted, each field is surrounded by chevrons (<<‑>>). Ensure that students know that these will not display in the merged documents. Make sure students understand that when saving the main document, the chevrons will display in the document. If the first recipient is showing in the document, click the Preview button to display field codes.

In Lesson 6, students learned to create tables. Discuss that tables can also be used as a data source and merged with a main document (letter, envelope or label). If your students have worked with Excel, review how adding headings and entering data can be merged with a main document in Word. Word allows users to create a recipient list in the New Address List which is the data source. This is very similar to the Access application—the only difference, is how it was created. Students who are familiar in creating a simply database can merge with the main document in Word. For this lesson, students will be using existing data sources.

Finally, emphasize that the same data source can be used to merge with letter, envelopes, or labels.

# Key Terms

**chevrons** In a mail merge, the symbols (<< and >>) that surround the field name in the merged document.

**data source** A file that contains information to be merged in the main document during a mail merge.

**database** A collection of information that is organized so that a user can retrieve information quickly.

**field names** In a mail merge, the description for the specific data, such as a person’s first name, last name, address, city, state, and zip code, to be merged from the data source.

**main document** In a mail merge, the document that contains the text and graphics that are the same for each version of the merged document.