

Using Computers

Word Processing Module

Task 10

What is mail merge?

Mail merge involves the use of two files – a main document such as a letter in Word and a data source such as an Access database.

The main document contains the text and other items you want to be identical in each version of the merged document. The data sources contains information which varies such as the names, address etc. When both documents are merged Word replaces the fields in the main document with the appropriate information from the data source ie database. Most unions have access to an already made database for their union. But for the purpose of this course we will create a basic database in Word.

Lets see how this works!

Task

Your union branch official has asked you to create a database on members in your branch. In the database he asks for you to put the following information:

Surname	First Name	Address1	Address2	Town	Postcode
Babbage	Frank	10 Forecourt Crescent	Knutsford Road	Hull	HU8 4BG
Buzzard	Laura	24 Albert Avenue		Hull	HU5 90R
Powers	Tyrone	78 Grosmont Close	National Avenue	Hull	HU5 8RD

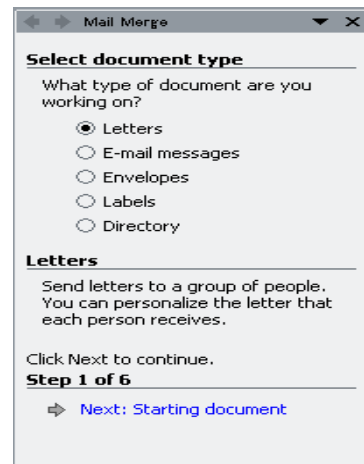
You are then asked to write to your members to invite them to the AGM meeting on Monday (please insert date) evening. Ask them to reply and to let you know if there any issues they would like raising?

Methodology

Before you start your letter we will need to create a database.

Step 1: Select Tools+ Letters and Mailings + Mail Merge Wizard. A Wizard is a guide which will take you through to achieving your goal. A task panel should then be displayed on the right hand side, like this →

If the task pane step 1 does not appear, right click on Format and select Task Pane.



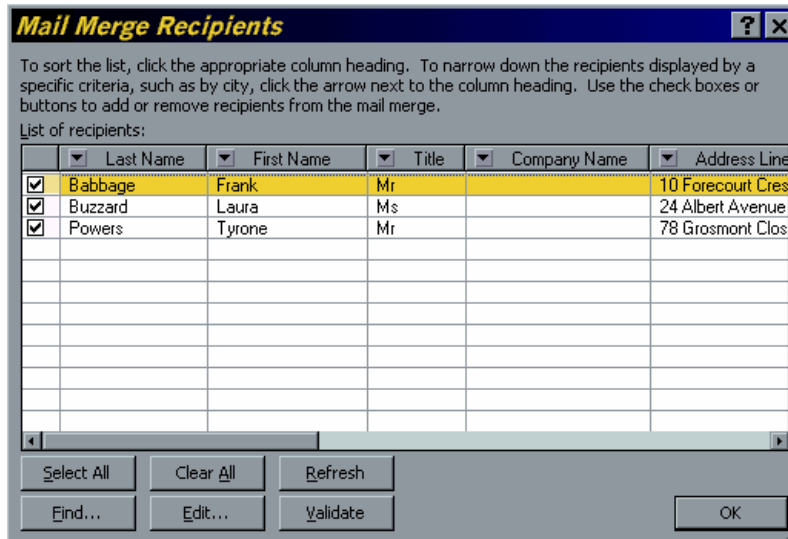
In this task pane step 1, select letters. Then lower down the screen click Next: starting document.

Step 2: Select the current document and then select Next: Select recipients.

Step 3: Select Type a new list and then click onto create. An address list panel will appear. Enter the information from the front page of this task.

If you need to retrieve this list in the future (ie the following week/month), when you are step 3 click Browse. You then tell the computer where your data is stored. The Select Data Source window will appear on your screen. Here tell the computer where your data is stored.

Next to the Look in: box, click the downward arrow and select 3 ½ floppy (A). Further down click the downward arrow box to the right of the File of type: All Data Source. Select it and click Open. A Mail Merge Recipients panel appears showing a list of names, address's etc of where the letter is going to be sent. Click on Select All and then OK.



Word has now made a link and is ready to start producing your letter.

Step 4: Producing the letter

There are several ways of producing the letter, either

- continuing with the task pane within Word or
- using the mail merge toolbar that should appear at the top of the screen.

Since Office XP has introduced a task pane, I hope you don't mind, but I will take you through it. Once mastered, have a go at using the toolbar on another query.

Start your letter by putting your name and address at the top right hand side of the paper

Producing the letter

Start the letter by putting your name and address at the top right hand side of the paper. When you come to putting the recipients name and address in select more items



A panel like this will appear →



This gives you a list of all of the fields available. Select title first. Then click either double click or click insert. Notice how the field name comes into the document like this: <<Title>>. Press space and then repeat the process for the first name and then the surname field. Now press Enter to drop onto the next line and then click onto more items from the task pane. Continue this for all of the address fields. It should look something like this:-

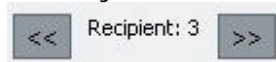
```
<<Title>> <<First_Name>> <<Surname>>  
<<Address_Line_1>>  
<<Address_Line_2>>  
<<Town>>  
<<County>>
```

You can use these fields anywhere within your document. Continue with your letter and save it as task 10

When you have finished your letter, click Next: Preview your letter.

Step 5: Preview your letter

On the main screen you will see that the data and your fields have been merged. Using you can then view the individual letters.



When your letter is ready for printing, move to step 6.

Step 6: Complete the merge

In the task pane click Print. Make sure that there is a dot against All and then click OK.

Note: If you ever need to refer to any of the sections within the task pane use the ← or → arrows in that window.