

Mail Merge – Letters Made Easier

SUMMARY:

During my junior year in Programming and Web Development, I acquired the skills necessary for the creation of a mail merged letter. In order to perform this task, the user must make a data source and use the information located inside of the file to conveniently add different fields to a letter. With a merged letter, the user can use a letter template and using a data source, use different records to forge multiple versions of the same document with little to no effort.

BACKGROUND:

Before starting this project, there were a few different projects that helped me prepare for the task. Before any assignments, I needed to know how to format a business letter. By knowing this, I could create a professional look to my documents. Also, I learned the parts of the letter and how to create a custom letter head in order to get a better understanding of how to write business letters efficiently. Forging magazine subscription letters, two Mad Libs (Thanksgiving and Christmas related), a holiday letter and mailing labels were the assignments given to me. By accomplishing these tasks with minimal error, I comprehended the concept of basic mail merge requests.

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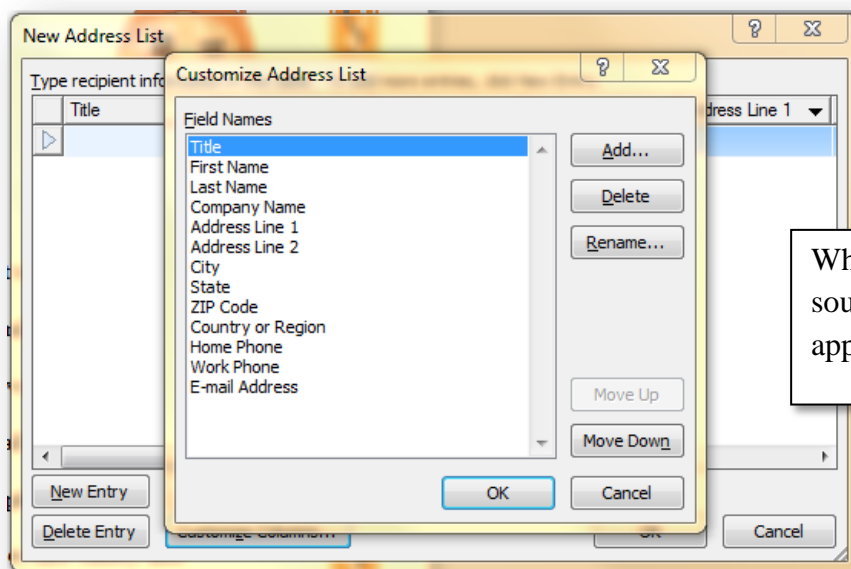
This is an example of a school letter head I made for a document.

SOFTWARE:

- Microsoft Office Word 2010
 - Mailings Tab located on the ribbon
 - Start Mail Merge located in the Task Pane

PROCEDURE:

To begin the exercise, the data source file must be formed and manipulated. This is where all of the information for the mail merge will be located. To get started, open a word document and left click the “Mailings” tab in the ribbon of the software. You will be introduced to five sections in the task pane with a bunch of different tasks available. Click “Select Recipients” in the “Start Mail Merge” section. A dropdown menu will appear. Press the “Type New List” button from the given options (or “Use Existing List” if you already have a data source and find the file from its directory). A dialog box will pop up titled “New Address List”. The data source comes with default columns, otherwise known as fields. In order to change these, click the “Customize Columns” button near the bottom left of the box. Another box should pop up with a list of the field names. From here, you can now start formatting what information that will be kept track of.



When making a new data source file, these dialog boxes appear to help you get started.

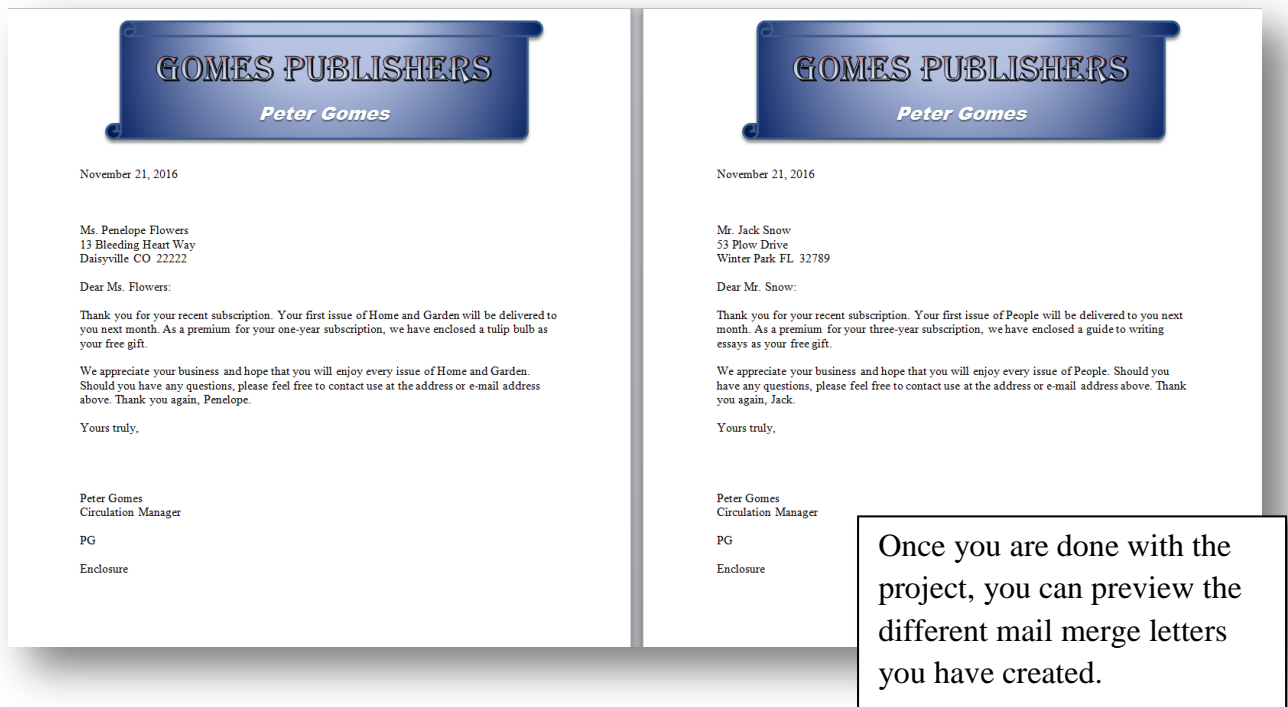
Next, you must change the field and start filling in the entries with records. With the dialog box named “Customize Address List”, you may perform many different options. The “Add” button fixes a new column to the existing fields that you already have. In order to use this function properly, click the “Add” button and enter your desired name for the column. The “Delete” button eliminates an existing column from the array of field names present. To perform this action, select the field you want to get rid of and press the button. Finally, the “Rename” button appends a new name to existing fields by clicking the field you want to change and pressing the corresponding button. In addition to these functions, the “Move Up” and “Move Down” buttons organize the position of each row accordingly. Once all of the fields are set to your liking, click “OK” to exit the “Customize Address List” dialog box. In the “New Address List” box from before, you can start adding records depending on the fields you made. To add a new row of data, be sure to press the “New Entry” button in the bottom right. If deleting a row is required, the “Delete Entry” button obliterates the entry highlighted. After you cease to add more information, click the “OK” button and save your data source file. It will save as a Microsoft Access file, so if you need to make a quick fix, you may do so in Access. It’s just a matter of preference.

Last Name ▼	First Name ▼	Title ▼	Address Line 1 ▼
Flowers	Penelope	Ms.	13 Bleeding Heart Way
Snow	Jack	Mr.	53 Plow Drive
Mama	Motorcycle	Ms.	13 Shovelhe
Dad	Grand	Mr.	9 Flintstone
Gasai	Yuno	Ms.	618 Survival

These are examples of records that you could add to your data source. The field names are shown on top.

The final and most important step to mail merge is to start add the fields to your document. Begin the creation of your document. Whenever you have a place in your document that you need to insert a field, you may do so by directing yourself to the “Mailings” tab and clicking on “Insert Merge Field” in the “Write & Insert Fields” section. A dropdown should appear, and select the desired field that you would like to incorporate to the file. To finalize the

project, go to the “Mailings” tab and select “Finish & Merge” in the “Finish” section. This should now complete the process of mail merging.



I also needed to create mailing labels for each record. The directions below describe step by step on how to do so.

- Mailings
 - Start Mail Merge
 - Labels
 - Select correct labels **Avery US Letter 5160**
- Select Recipients
- Use Existing List
 - Address Block
 - OK
- Update Labels
- Finish & Merge
 - Edit Individual Documents

- CTRL+A
- No Spacing
- Times New Roman 12 pt

RESULTS:

What to expect from the assignment is multiple letters with different records of data entered based on the entries given. This certainly reduces the time of typing multiple documents.

CONCLUSION:

All in all, when the tasks were completed, you should have multiple merged letters that can be easily tampered with just by editing a data source or a single document. This activity was used to teach how mail merge can be applied, how to set up your own data source file, and how to incorporate the fields into the Word document. With mail merge, you do not need to make one thousand files for each individual record. You can do it all with one file in a matter of minutes.