

DEVELOP YOUR SKILLS

Resource Metadata

Level	Undergraduate
Duration	1 practical (approx. 1.5 hours)
Software Required	Microsoft Word

Learning Outcome

Upon completion of this unit, students will be able to create and manage comprehensive mail merge operations by establishing data sources with custom field names, designing professional main documents with merge field codes, and executing complete mail merge processes to generate personalized documents for multiple recipients. Students will demonstrate proficiency in database management within Word by creating structured data sources, inserting merge fields strategically throughout documents, and utilizing mail merge toolbars to automate document production.

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MAIL MERGE PRACTICE

Step 1: Create a Data Source

Create a data source to store the following records:

Field Name			
Salutation	Mr	Ms	Mr
First Name	G	F	S
Last Name	Langur	Bryan	Obsorne
Address1	24 Bird St	30 Anderson Rd	476 Tyner Cres
Address2	BANKSTOWN 2200	BLACKTOWN 2148	REDFERN 2024
Account No	12345	23456	34567
Balance	460.00	255.50	620.75
Today's date	To be completed	To be completed	To be completed

How to create the data source:

- Look for → Start Mail Merge
- Select "Letters"
- Choose "Get Data" → Create Data Source (a new list)
- Add only the field names above (remove the other field names) and enter the customer data

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Step 2: Create the Main Document

Type the following letter, excluding any text enclosed in angle brackets (e.g., <<Today's Date>>). Ensure the letter is properly formatted.

Mail Merge Benefits:

- Save time when sending similar documents to multiple recipients
- Reduce errors by using a centralized data source
- Maintain consistency across all documents
- Easy to update and modify for future use

Note: Use <<Insert>> to insert merge field codes from the Mail Merge Toolbar at appropriate locations in this document.

<<Today's Date>>

<<Salutation>> <<First_Name>><<Last_Name>>
<<Address1>>
<<Address2>>

Dear <<Salutation>> <<Last_Name>>

Re: Overdue Account Notice

According to our records, your account balance (A/c No. <<Account_No>>) is currently 30 days overdue.

Most of our customers appreciate a friendly reminder of an overdue account because they understand the importance of maintaining a good credit record.

Please give this matter your prompt attention by arranging payment of your account balance of \$<<Balance>>.

Please disregard this notice if you have made payment.

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Step 3: Mail Merge Process

1. Complete the Mail Merge:

Mail merge the data source with the main document so that a formatted letter is printed for each three customers.

Steps to complete merge:

1. Click "Merge to New Document" from Mail Merge toolbar
2. Select "All" records
3. Click OK to generate individual letters
4. Review each letter before printing
5. Print or save the merged documents