

Word Processor: Mail Merge

4

Learning Scope

Introduction to Mail Merge, Types of documents in Mail Merge, Advantages, Different steps in Mail Merge (Select document type, Select starting document, Select recipients, Write your letters, Complete the merge), Saving merged document

Mail Merge

You want to invite your friends on your birthday, you type or write the same letter of invitation for each and every friend of yours which may become tiring. You can overcome this situation by using a MS Word feature called **Mail Merge**.

Using this feature, you will have to write letter of invitation only once, which is the main document and then mail merge will automatically merge the letter with the list of names and addresses of your friends to form an individual letter for each one of them.

Hence, mail merge allows you to quickly create multiple copies of letters, emails and other such documents that are personalised for each receiver.

There are ^(name the following) two types of documents that you need to create in mail merge. They are:

- (i) **Main Document:** It is the common document that is to be sent to everyone. It can be text or graphics. It is also known as a formal or an official letter.
- (ii) **Data Source:** It is the file that contains the names, addresses and other useful information of different friends or persons. It can be a word document with tables or an Excel file.

The main document and data source are merged to form merged document. The final document formed contains individual names, address or other information. This document can either be printed or can be saved for future use.

Thus, Mail Merge is the process of combining a letter with the contents of a database, usually a name and address list. Each copy of the letter has one entry from the database to make it a complete a letter.

Advantages of Mail Merge

The advantages of mail merge are as follows:

- This feature makes it easy to send the same letter to a large number of people.
- By using mail merge, you don't have to type each recipient's name separately in each letter.
- It is easy to edit the letter, as a single change made in the main letter will be reflected in the letters meant for all other recipients.



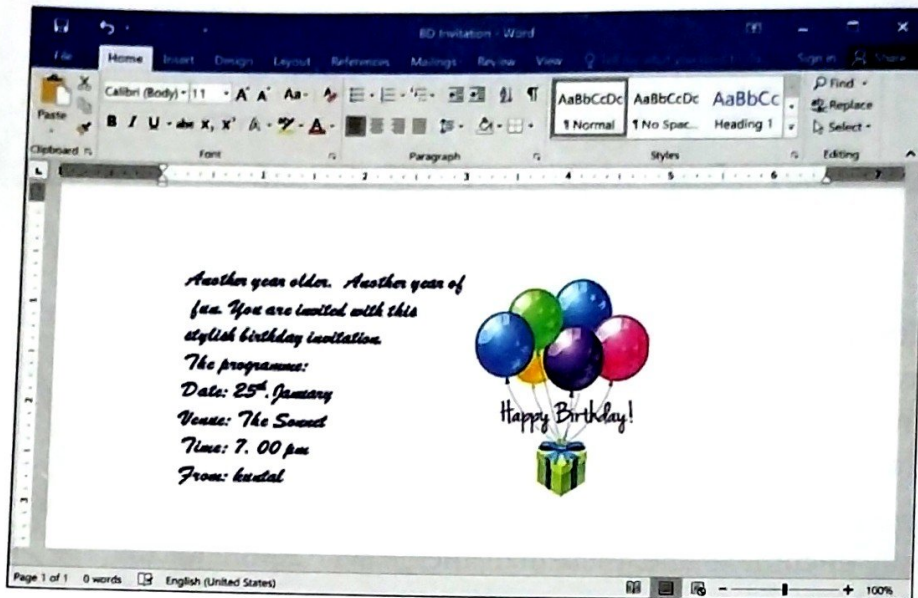
- ✓ It saves a lot of time and is economical as well.
- ✓ It is one of the fastest ways to produce hundreds of personalised letters.

Steps for Mail Merge

Let us make an invitation letter with the help of mail merge. Perform the following steps:

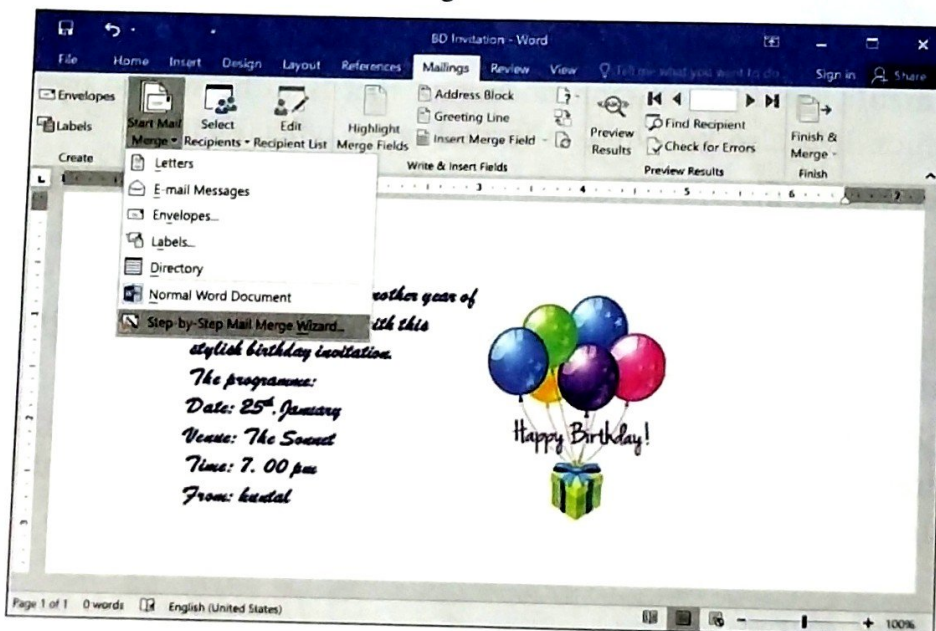
Step 1: Open a blank document in MS Word.

Step 2: Write the main letter that is to be sent and save it with a suitable name.



Step 3: Click the 'Mailings' tab present on the ribbon.

Step 4: In the 'Start Mail Merge' group, click 'Start Mail Merge'. Now, from the drop-down list, select 'Step-by-step Mail Merge Wizard'.



The Mail Merge task pane opens at the right of the window. In the 'Select document type', the 'Letter' option is selected. It also shows other different document

Knowledge Corner

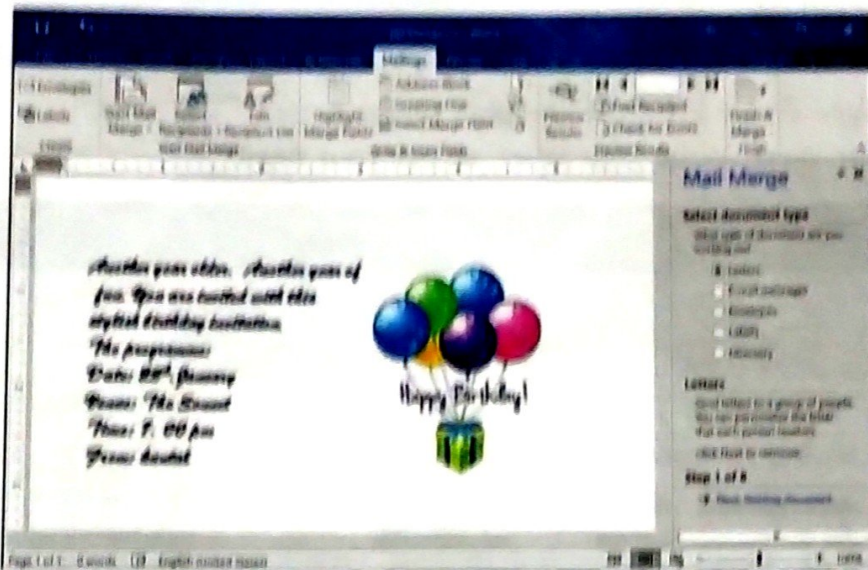


The database document contains the names and addresses of the recipients of formal and informal letters.

types that can be selected. The bottom of the task pane, shows that there are six steps to complete the mail merge process. These steps are explained as follows:

Step 1 of 6: Select document type

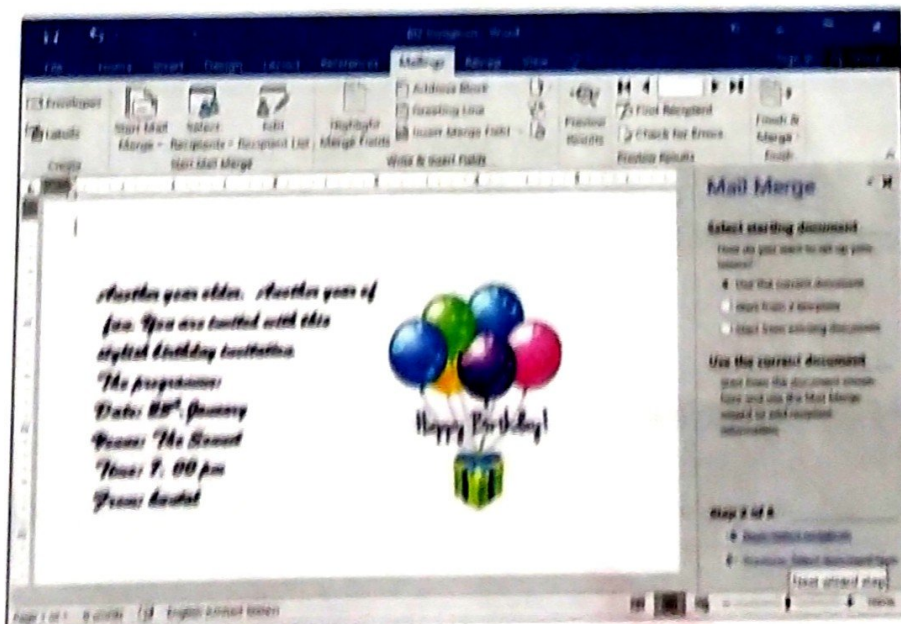
- With the document type, 'Letters' selected, click 'Next: Starting document' at the bottom of the Mail Merge task pane.



Step 2 of 6: Select starting document

In this step, you can select an option from the following as per your requirement.

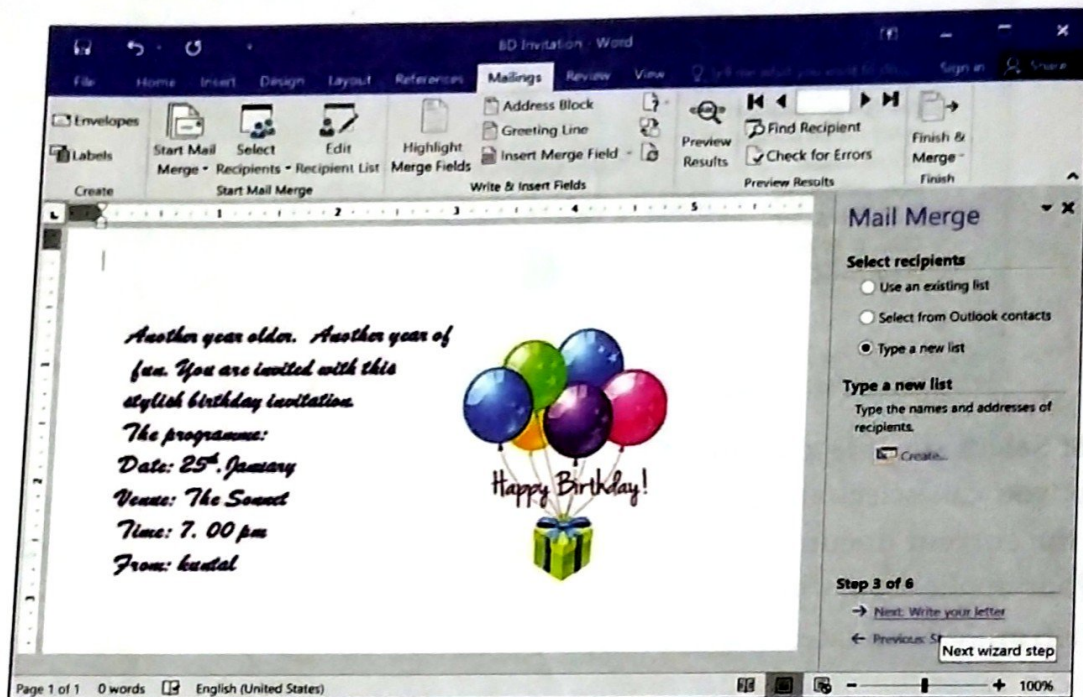
- Use the current document:** Select this option to choose the document currently shown on your application window.
 - Start from a template:** Select this option to choose ready-to-use mail merge template that can be customised as per need.
 - Start from an existing document:** Select this option to choose an existing document on your computer.
- Here, 'Use the current document' is selected. Now, click 'Next: Select recipients' present at the bottom of the mail merge task pane.



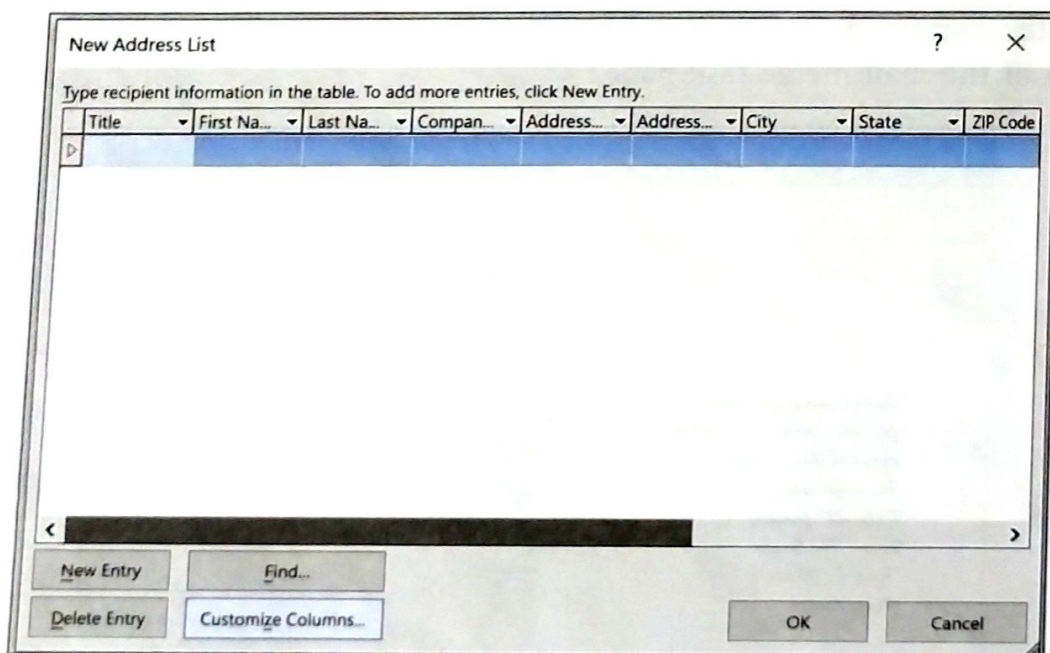
Step 3 of 6: Select recipients

This step involves creating data sources. You can select an option from the following as per your requirement.

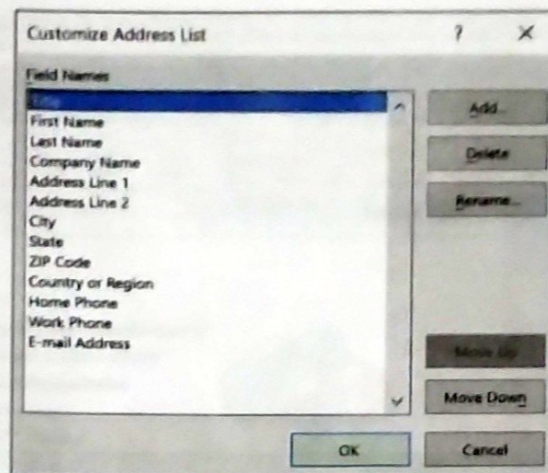
- (i) **Use an existing list:** Select this option to choose an already existing list or database.
 - (ii) **Select from Outlook contacts:** Select this option to choose the e-mail address book in Microsoft Outlook.
 - (iii) **Type a new list:** Select this option to create a new list of names and addresses.
- Here, select 'Type a new list' from the mail merge pane.
 - Click 'Create' or 'Next: Write your letter' as per your need.



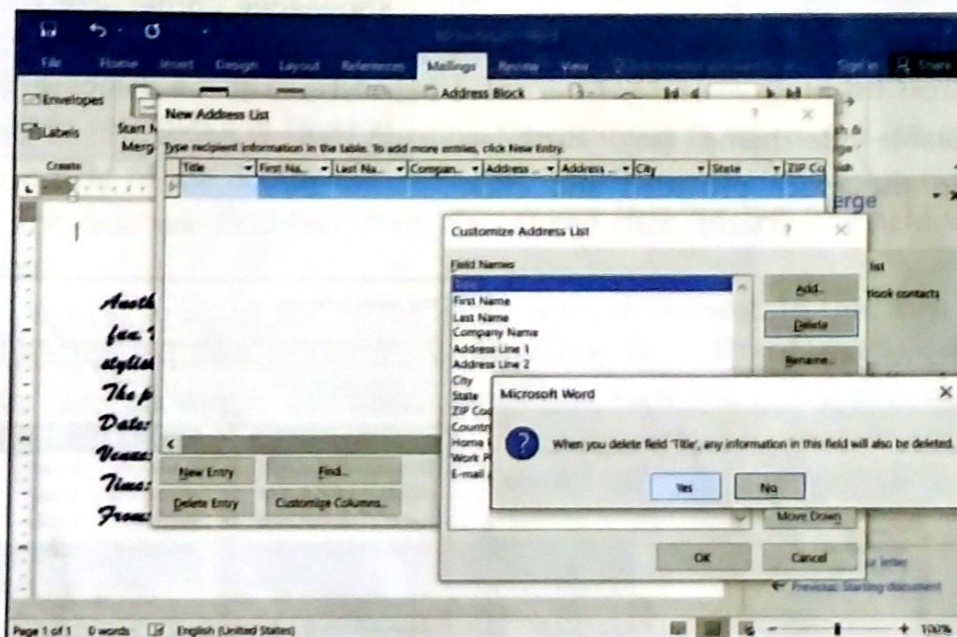
The 'New Address List' dialog box opens on the screen.



- Click 'Customize Columns'. The 'Customize Address List' dialog box appears on the screen.
- A list of 'Field Names' appears in this dialog box. You can add or delete the fields as per your need.

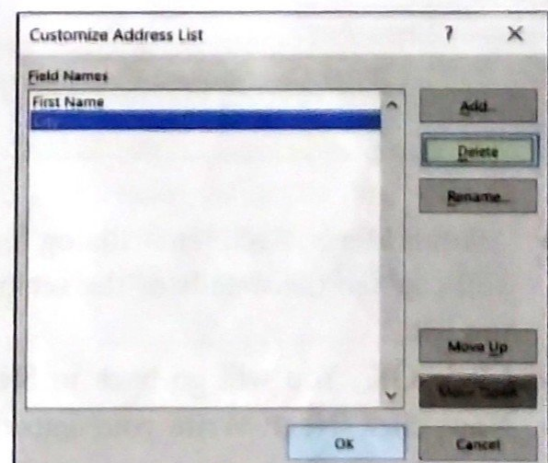


- Select the field name which you do not require (say, 'Last Name') and click the 'Delete' option. However, the system asks for a confirmation from the user before deleting the field name from the list.

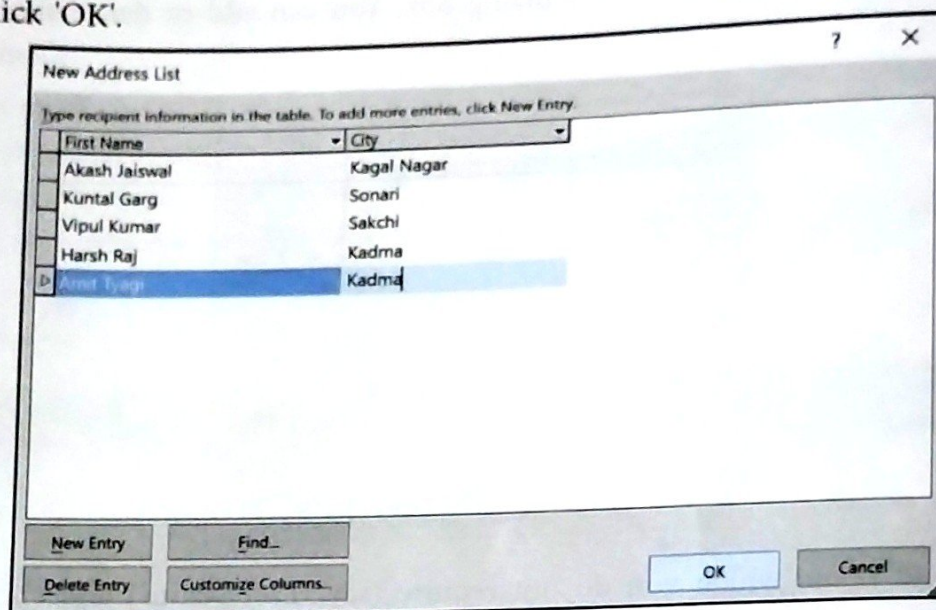


Click 'Yes' to delete the selected field. Repeat the process to remove unwanted fields from the address list. The fields that are required for invitations will remain in the customised address list (say, First Name and City here).

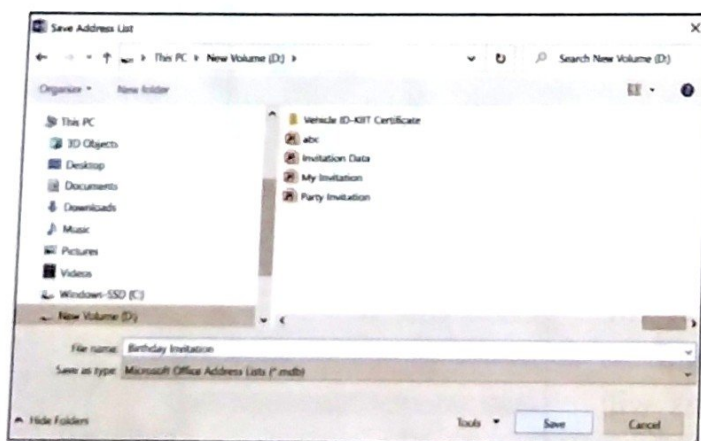
- Finally, click 'OK'.
A customised address list is ready with the desired fields.
- Now, enter the name and city in the space provided in the 'New Address List'.



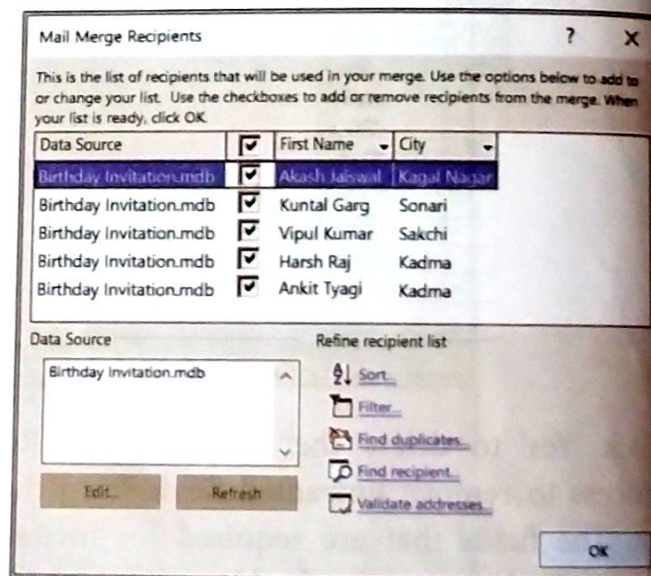
- Click the 'New Entry' option to add another option.
- Finally, click 'OK'.



- The 'Save Address List' dialog box appears on the screen.
- Select the drive (Say, D:) where you want to save the address list.
- Enter a suitable file name (say, Birthday Invitation) in the space provided and click 'Save'.



- A 'Mail Merge Recipients' dialog box opens on the screen. You can see the details of the recipients and can also edit the list.
- Click 'OK'. You will go back to Step 3 of 6.
- Now, click 'Next: Write your letter'.



Knowledge Corner



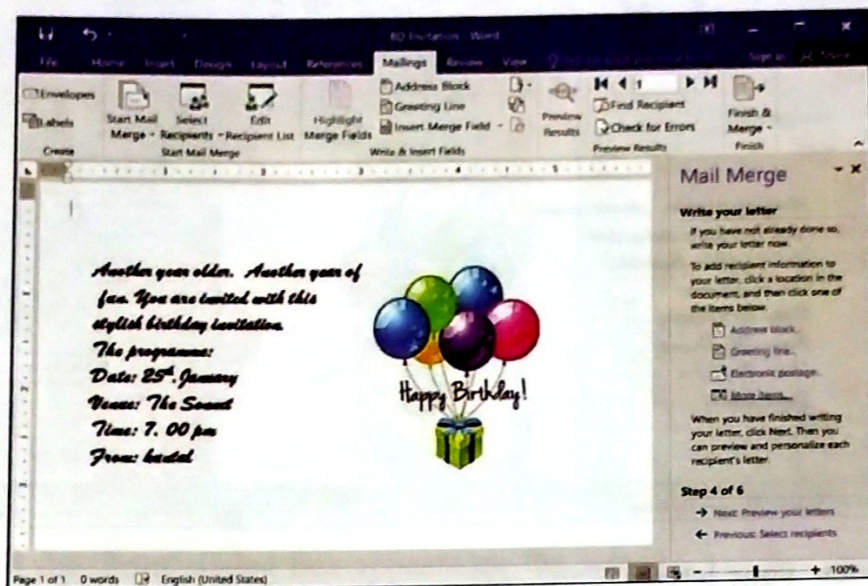
Find out!

The extension of your database file that is saved under the Address List.

Step 4 of 6: Write your letters

Here, you can not set the database fields in your document by indicating the position of the cursor.

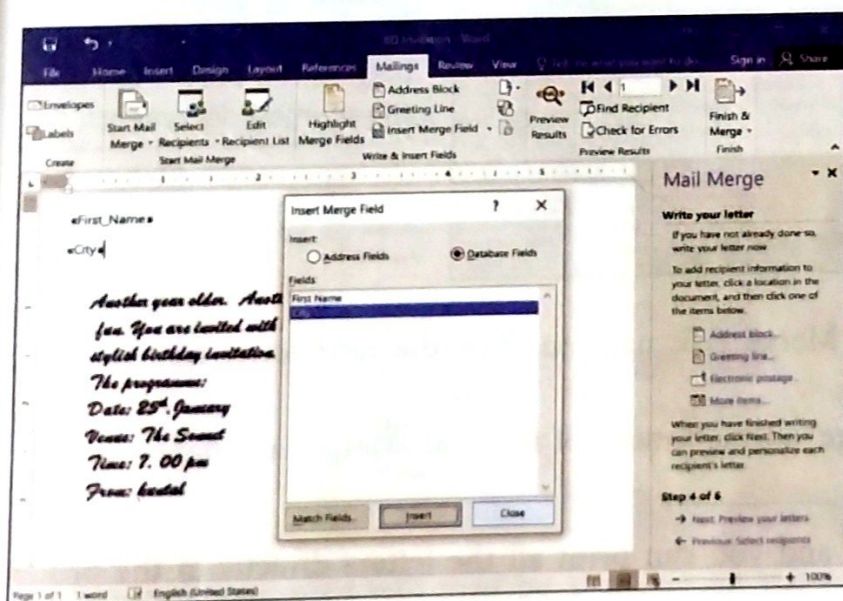
- Click 'More items' in the mail merge pane.



- An 'Insert Merge Field' dialog box appears on the screen. By default, the 'Database Fields' is selected that contains all the selected fields.
 - Now set the cursor at the desired position (here cursor is set to, top left corner) to insert the database field in the document.
 - Select the first database field (say, First Name) and click 'Insert'. The field will be added to the document.
 - Repeat the process to insert rest of the fields in the document. In this way, all the database fields are inserted but they appear in the same line as: <<First Name>><<City>>
- Using 'Enter' key, place only one database field on each line in the document as:

<<First Name>>

<<City>>

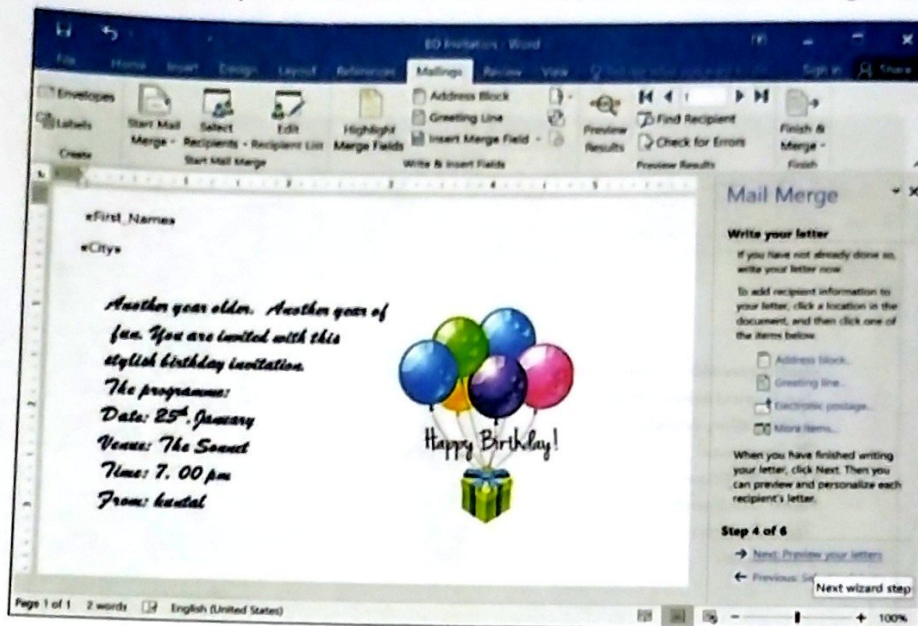


Knowledge Corner



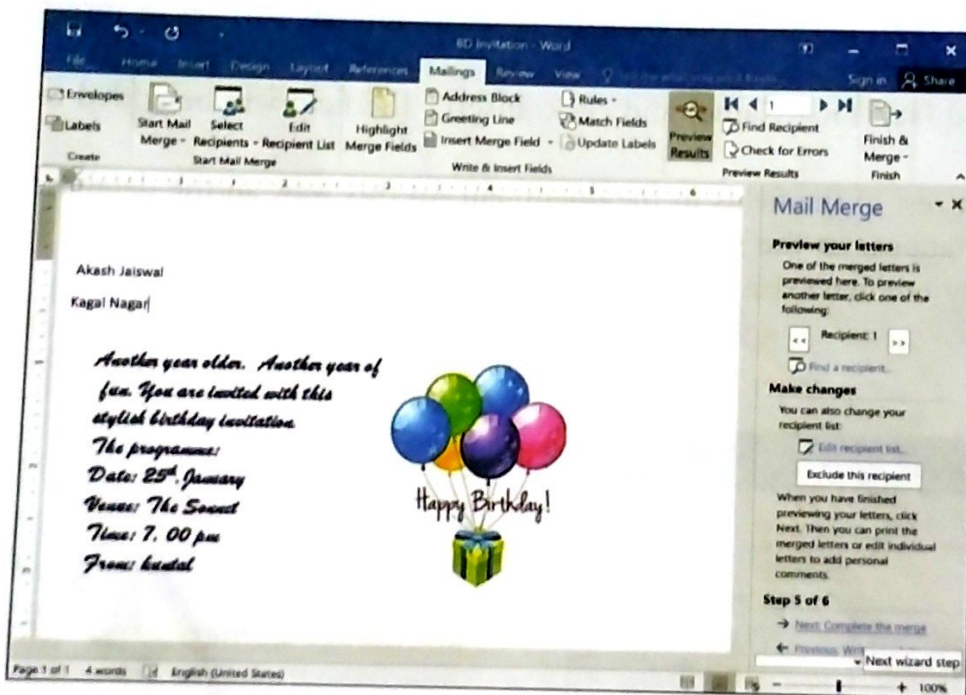
When you insert a database field value in the main document, it is indicated within the << field name >> sign.

- Finally, click the 'Close' button.
- Now, click 'Next: Preview your letters' at the bottom of the Mail Merge task pane.



Step 5 of 6: Preview your letters

Now, you can preview your individual letters along with the specified fields at the desired location.



Knowledge Corner

Preview all your letters by using the (>>) button or the (<<) button before printing the merged documents.

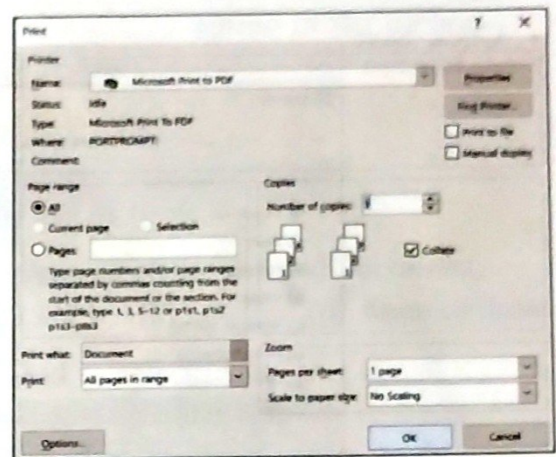
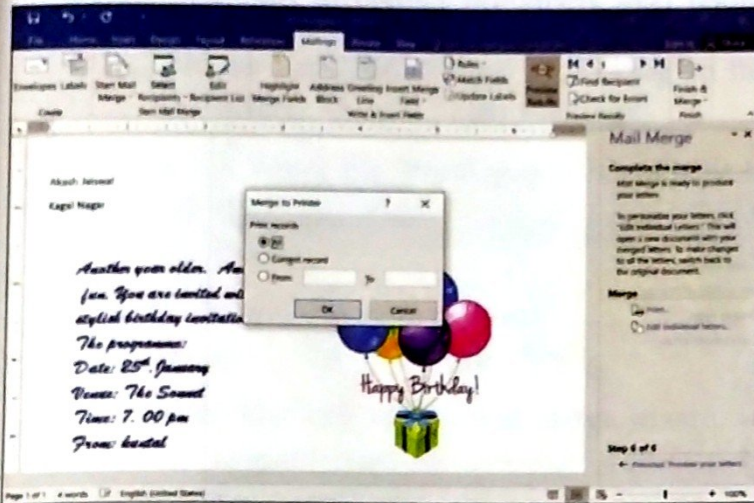
- Use the (>>) button on the Mail Merge task pane to view the next letter and the (<<) button to view the previous letter.
- Click on 'Next: Complete the merge' at the bottom of the Mail Merge task pane.

Step 6 of 6: Complete the merge

Now, you are ready with mail merge and you can print all the letters directly, if the printer is connected to your computer.

To do so, follow these steps:

- Click the option 'Print' from the Mail Merge pane which displays the 'Merge to Printer' dialog box.
- Choose an appropriate option (say, 'All' to print records).



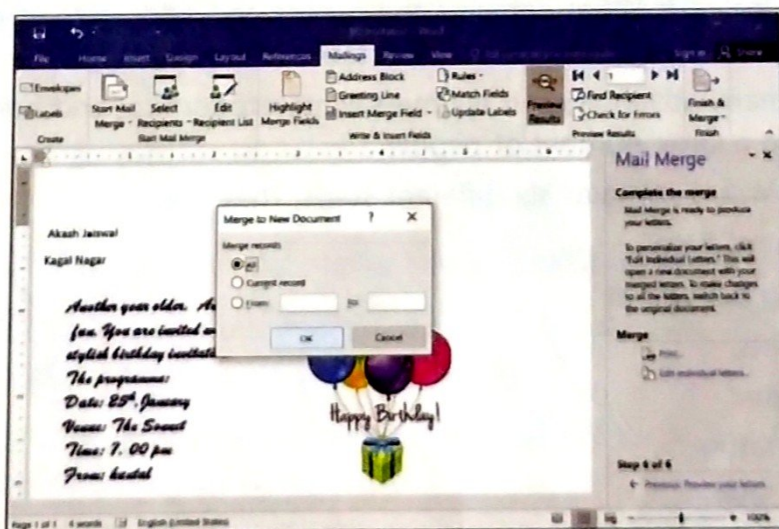
- Click 'OK' and the 'Print' dialog box appears on the screen.
- Click 'Find Printer' option to select the printer to set with your computer (if not done).
- Select 'Page range' (if any) and click 'OK'.

Thus, the printing of merged document will begin and gets the letters ready for your purpose.

Saving Merged Document

If you don't want to print the merged document then it can be saved as a word document. To do so, follow these steps:

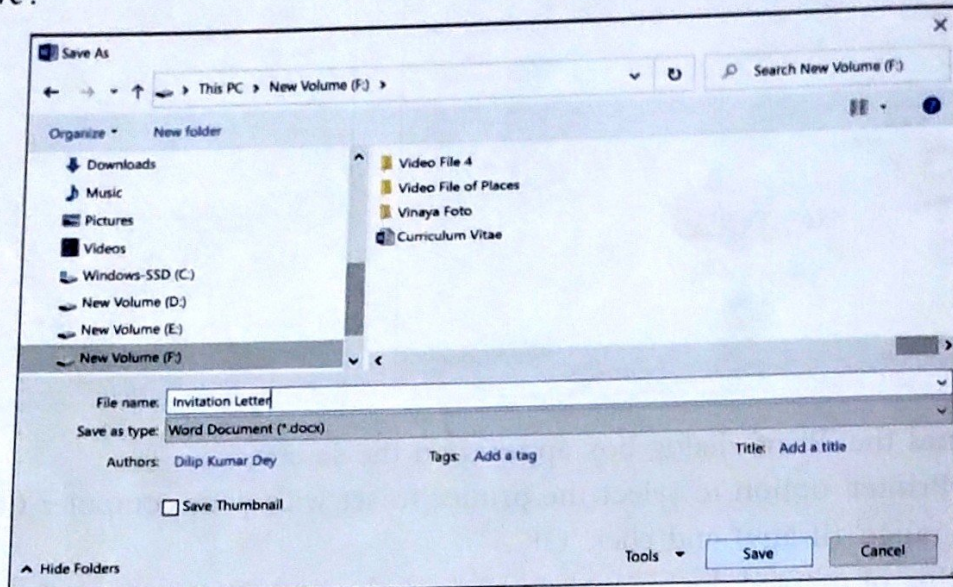
- Click the 'Edit Individual Letters' on the Mail Merge task pane. It displays the 'Merge to New Document' dialog box on the screen.
- Select 'All' if you want to merge all the records.
- Click 'OK'.



The merged document will now be available on the screen with the first recipient. You can view all the recipients by scrolling the vertical bar.

Now, you can save the merged document in MS Word for future use. Perform the following steps:

- Click the 'File' button.
- Select the 'Save As' option and the drive where you want to save (say, F: drive).
- Enter the file name in the space provided (say, Invitation Letter) in the 'Save As' dialog box.
- Click 'Save'.



Chapter at a Glance

- (Fill in blanks)*
- B-1 ✓
- Mail Merge is a special feature in MS Word that helps to create multiple individual letters using a data list.
 - Mail Merge requires two types of documents. They are:
 - (i) Main Document: It is the document that contains text and graphics. It may be a standard formal or an official letter (such as an invitation letter/appreciation letter).
 - (ii) Data Source: It is a file that contains the names and addresses of different friends or persons. It can be a word document with tables or an Excel file.
 - Mail Merge has many advantages. It is time-saving, economical and makes it easy to send the same letter to a large number of people.
 - The Mail Merge Wizard contains six different steps. They are:
 - (a) Select document type
 - (b) Select starting document
 - (c) Select recipients
 - (d) Write your letter
 - (e) Preview your letters
 - (f) Complete the merge
 - Merged document can be printed or saved as a new document for future use.
- B-1 ✓
- B-1 ✓
- LG

EXERCISES

Objective

I. Choose the correct option:

1. You can start 'Mail Merge' by clicking on the option in the Ribbon.
(a) insert ☒ (b) mailings (c) review (d) none of these
2. In MS Word, the 'Print' option is available in
☒ (a) Backstage View (b) File
(c) Home ☒ (d) All of these
3. By default, the system prints copy/copies of the merged document.
☒ (a) one (b) five (c) six (d) none of these
4. In the first step of the mail merge wizard, you need to select the
☒ (a) recipients' list (b) starting document
(c) document type (d) none of these
- B-1 ☒ 5. In mail merge, the list of recipients can be edited in the window.
(a) Save address list (b) Mail Merge Recipient
☒ (c) New Address List (d) None of these

II. State whether the following statements are True/False:

- B-1 ☒ 1. Mail merging means keeping a number of documents together in a file. F
2. In mail merge, the document containing the common text is called the main document. T
3. The mail merge process is completed in six different steps. T
4. The current document opened in MS Word can be used in the mail merge process. T
5. In mail merge, multiple copies of the merged document can't be printed. F

III. Fill in the blanks:

1. Mail merge is the process of combining a Main letter with the contents of a database.
2. The data source contains the names and addresses of the recipients of formal letters.
3. The Mail Merge Recipients dialog box is displayed when we click on 'Edit Individual Letters' in the last step of the mail merge process.
4. The New entry option allows to enter the details of the recipients in the 'New Address List' as soon as one entry is completed.
5. In mail merge, the list of recipients can be saved in the New Address window.

IV. Match the following:

Column A

1. Main Document (d)
2. Recipients' Entry List (e)
3. Preview Letter (a)
4. Edit Recipients' List (b)
5. Complete the Merge (c)

Column B

- (a) Viewing individual letters (3)
- (b) Mail Merge Recipients (2)
- (c) Merged letter (5)
- (d) Body of the letter (1)
- (e) New Address List (4)

V. List the six different steps of the Mail Merge Wizard.

- (a) select document type
- (b) select document type
- (c) select recipients
- (d) write your letters
- (e) Preview your letters
- (f) Complete the merge

VI. Assertion and Reason based questions:

1. Solved

Assertion (A): Mail Merge is a special feature in MS Word that helps to create multiple individual letters using a data list.

Reason (R): Mail Merge makes use of two types of documents. They are Main Document and Data Source.

Based on the above discussion, choose an appropriate statement from the options given below:

- (a) Both A and R are true and R is the correct explanation of A.
- (b) Both A and R are true and R is not the correct explanation of A.
- (c) A is true but R is false.
- (d) A is false but R is true.
- (e) Both A and R are false.

Ans. (a) Both A and R are true and R is the correct explanation for A.

2. Unsolved

Assertion (A): The main advantage of Mail Merge is that it makes it easy to send the same letter to large number of people.

Reason (R): Mail Merge is the process of combining a letter with the contents of a database, usually a name and address list. Each copy of the letter has one entry from the database to make it a complete a letter.

Based on the above discussion, choose an appropriate statement from the options given below:

- (a) Both A and R are true and R is the correct explanation of A.
- (b) Both A and R are true and R is not the correct explanation of A.
- (c) A is true but R is false.
- (d) A is false but R is true.
- (e) Both A and R are false.

VII. Case Study based questions:

Solved

1. Payal designed a greeting card on Teachers' Day using one of the application softwares in MS Office package and saved it in her laptop. Further, she created a separate file to store the names of all her favourite teachers to whom she wanted to send the cards. Finally, she printed the greeting cards for each of the teachers with their names and a common message.

Read the above situation and answer the following questions:

- (a) Which application software would she have used to prepare the greeting card?
- (b) What would be the extension of the above file containing the greeting card?
- (c) Do you also need to save the file containing names of different teachers?
- (d) Name the feature using which the cards are printed.

Ans. (a) MS Word (b) *.doc or *.docx (c) Yes (d) Mail Merge

Unsolved

1. Mail Merge is a technique to create a document (letter, notice, invitation, etc.) along with a database containing the names and addresses of different people. The document is merged with the database to print the common message with the name and address of each person.

Based on the above discussion, answer the following questions:

- (a) What will be the extension of the database file? → *.mdb (if using access) or .xlsx (if using Excel)*
- (b) Name the tab you should click on the ribbon to start Mail Merge. → *Mailings*
- (c) How many steps are there to perform the Mail Merge? → *Six steps*
- (d) What will you do with merged file, if it is not to be printed immediately?
→ *save the file for future printing.*

Subjective

I. Short Answer Questions:

1. What is mail merge?

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2. Define data source.

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3. What is meant by main document?

.....

.....

4. Name the two types of documents that are required in the Mail Merge process.

(a)

(b)

II. Long Answer Questions:

1. What are the advantages of mail merge?
2. How will you create a list of recipients during the mail merge process? Explain.
3. Mention all the steps to be followed to print a merged document.
4. Explain the process of merging the main document with the list of recipients.
5. Write all the steps to insert field values (say: name, address and pin code) in the main document.



Activities

Debate

You have organised an Inter-class Quiz between Class VI and Class VII. Now, you want to invite all the students through invitation letters. One of your groups wants to invite them using the mail merge feature and the other group through handwritten invitation letters. Justify the above discussion through debate.



In the Computer Lab

Organise an Inter-class 'Sit and Draw' competition for Classes V and VI. Make a list of all the teachers whom you want to invite. Now, write an invitation letter and merge this letter in the given format:

To

<Name of the teacher>

<Name of School>

Respected <Ma'am/Sir>

We are organising a 'Sit and Draw' competition for Classes V and VI. The details of the programme are given below:

Sit and Draw competition

Date:

Time:

Duration:

Venue:



It would be an immense pleasure for us if you make yourself available to attend the programme.

Your student