

Mail Merge Part 1: Data Source and Template

60 minutes

ICT Specialism 1: Word processing

Outcome M1.U2.2

Outcome M3.U1.4

WHAT THIS LESSON DOES

Learn the basics of mail merge by creating a data source spreadsheet with recipient details and a template letter that includes merge fields. This prepares you to send personalised letters efficiently for your project.

CURRICULUM OUTCOMES

Outcome	What the specification asks for
M1.U2.2	Demonstrate an ability to input text in a variety of formats, and adjust the settings to suit the purpose of the document.
M3.U1.4	Enter and manipulate data in worksheets and create logical formulas using standard functions.

WHAT STUDENTS SHOULD BE ABLE TO DO

- Explain what mail merge is and why it saves time
- Build a data source with one row per recipient
- Create a template letter with merge fields for name and one project-specific field

BEFORE THE BELL

- Prepare any printed example materials for the key concepts discussion if required.
- Confirm students have Project_Portfolio/09_specialism/sm1 ready; catch-up students need the folder before the step-by-step.
- Decide whether you will give a teacher-only desktop Mailings or Google add-on preview; students stay on visible placeholders today.
- Rescue route, with nothing to prepare: a student more than about 5 minutes behind on the letter build pastes the letter printed in their own instructions.
- Have a sample recipient list and a short template letter ready on the classroom screen. Confirm whether desktop Word Mailings or a Google Docs mail-merge add-on will be used next lesson. Students need cloud access to Project_Portfolio.
- No prep needed beyond the sample table already in the lesson content
- Students need Microsoft 365 or Google Workspace access and their Project_Portfolio/09_specialism/sm1 folder. Support needs nothing shared: a student who is behind types the four headers shown in their instructions plus two recipient rows, and finishes Aoife's rows before independent practice.
- Optional teacher-only desktop Word Mailings demo. Nothing to share: students more than about 5 minutes behind paste the letter printed in their instructions.
- Circulate to confirm Something Real recipients are vocationally plausible, official filenames land in sm1/, and EXAMPLE practice files were not overwritten. Support scaffold: students who need it copy the header row from their own sm1_doc4_mailmerge_source_EXAMPLE and rename the last column for their project.

Mail Merge Part 1: Data Source and Template

HOW THE LESSON RUNS

5 min	introduction	Introduction
5 min	content	Key concepts
8 min	activity	Step-by-step: data source
8 min	activity	Step-by-step: template letter
4 min	content	Common issues
20 min	activity	Independent practice
5 min	content	Reflection
5 min	summary	Lesson summary

TEACHING MOVES

- Model the spreadsheet then the letter on the projector; paste « » once on the board before students type.
- Type the letter body once on the projector as a model, then let students paste it from the letter printed in their own instructions and check the markers; keep data entry as the students' own hands-on work.
- Lead concept names orally; dwell on the Aoife table and exact header/field match (FirstName against First Name).
- Open independent practice with a 60-second filename chant: the EXAMPLE pair stays, and the official names are for the student's own project.
- Circulate during independent practice: folder and header match first, content second.
- Encourage real project contacts where possible; a realistic role plus first name is fine where privacy matters.
- End independent practice with a one-minute check of each portfolio: sm1_doc4_mailmerge_source.xlsx and sm1_doc4_mailmerge_letter.docx are the files you keep as evidence. In the summary, only spot-check two portfolios and note anyone needing to catch up.

WHAT TO WATCH FOR

- Students place files in the wrong folder; direct them to the Specialism Module 1 folder.
- Merge fields do not match headers exactly; check spelling and use copy-paste for markers.
- Blank rows in data source cause errors; ensure one row per recipient with no gaps.
- Students overwrite EXAMPLE practice files instead of creating a new pair for their own project under the official names.

DIFFERENTIATION

- Support: the step-by-step already offers a shorter route for students who need it, so point them to the four headers plus two recipient rows and let them add Aoife's remaining rows afterwards.
- Support: allow use of the alternate Work Experience opening and the field ideas list, and accept a letter that has the Dear «FirstName» opening with all three markers in place before the body is finished.
- Extension: challenge students to include additional merge fields beyond the minimum.