

Mail Merge Part 2: Running the Merge

60 minutes

ICT Specialism 1: Word processing

Outcome M1.U1.2

Outcome M1.U3.3

WHAT THIS LESSON DOES

This lesson teaches you how to run a mail merge using a sample recipient list and letter template, then finish your own Something Real batch. Preview each personalised letter, finish to a new document, export PDF, and spot-check pages so they are error-free.

CURRICULUM OUTCOMES

Outcome	What the specification asks for
M1.U1.2	Create and edit basic word processing documents.
M1.U3.3	Evaluate the layout features of a text for the intended audience.

WHAT STUDENTS SHOULD BE ABLE TO DO

- Run a mail merge and preview individual merged documents
- Finish the merge to a new document and export a PDF batch
- Spot-check layout problems across merged pages

BEFORE THE BELL

- Catch-up files to set up in advance: Place sm1_doc4_mailmerge_source_sample (three contacts) and sm1_doc4_mailmerge_letter_sample in the shared sm1/ area for the guided task and for anyone who missed Part 1, and put the same two files on a second shared path if students use one.
- Room path decision: all desktop Word, all Google manual fill, or named students on a desktop machine, announced at the start of the guided task.
- Confirm that classic Word opens via Open in Desktop App wherever Mailings is needed, because Word Online on its own is often not enough.
- No Google add-on is required, as the written Docs path is a manual fill from the sheet. If you want an extra support option, pre-copy sm1_doc4_mailmerge_batch_working.
- Board note: the guided PDF is sm1_doc4_mailmerge_output_practice.pdf and the keeper PDF is sm1_doc4_mailmerge_output.pdf.
- HARD PRE-FLIGHT: load sample source+letter into shared sm1/ (and mirror if students use a second shared path). Decide room path before class: all-desktop-Word, all-Google-manual, or named students on a desktop machine. Confirm Open in Desktop App / classic Word where Mailings is needed. Check PDF save/rename on classroom devices. Optional: pre-copy sm1_doc4_mailmerge_batch_working for support. No Google add-on required.
- Prepare one clean preview screenshot and one broken preview screenshot for a quick board comparison. If using Google, rehearse the 60-second three-page fill demo.
- Room path decided and announced. Sample source and letter open on the demo machine; desktop Word available where needed; optional pre-copied batch_working for support; PDF rename path tested on both suites.
- Be ready to demo one blank-field fix, one Open in Desktop App hop, and one Docs page-break refill during a short hands-up call-out.
- 30-second filename/finish recap on board, then circulate with a quick filename and spot-check pass. Note any student still on the sample only and move them onto own or adapted rows.
- No prep needed beyond a quick pair-share prompt; ready to shrink to one question if exports overrun.
- Quick end-of-lesson portfolio check on the keeper filename if time allows.

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HOW THE LESSON RUNS

5 min	introduction	Introduction
6 min	content	Key concepts
18 min	activity	Step-by-step task
3 min	content	Common issues
20 min	activity	Independent practice
3 min	content	Reflection
5 min	summary	Lesson summary

TEACHING MOVES

- Demonstrate Preview and Finish on desktop Word, or a full three-page Docs fill, before students open the sample themselves.
- Keep print and email to a 30-second mention of what happens later when letters are sent for real.
- For students who need support on the Google path, allow pairs, hand out a pre-copied working file, or accept two contacts on the guided run, still saved under the practice PDF name.
- Before independent practice, spend 30 seconds recapping their own filenames, the finish option, and the keeper PDF name only.
- If time runs short, make sure the practice PDF is banked first, then that their own merge is started with clean pages, and treat the keeper PDF as the target they should still reach before they leave.
- Circulate for correct filenames and for fixes made in the source sheet rather than in a finished letter.
- Use whole-class discussion for the reflection; there is no written reflection file.

WHAT TO WATCH FOR

- Finishing the merge before checking the records.
- Saving the guided run under the keeper name, or saving both runs as the same PDF and overwriting the earlier file.
- Editing one finished letter instead of the source sheet.
- Leaving document.pdf in Downloads instead of moving it into sm1/03_finished/.
- Looking for File then Download in classic Word after Open in Desktop App, when it is Save As or Export.

DIFFERENTIATION

- Support: the sample pair with a printed three-record checklist, pairing up anyone missing Part 1 work, a pre-copied Docs working file, and two contacts instead of three on the guided run.
- Support: a desktop Word machine, or a teacher-led finish, for students blocked on browser Mailings.
- Extension: one optional extra merge field, only after the keeper PDF is saved.