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### Mass Mailings Made Simple

Bonnie B. Anderson  
bonnie\_anderson@byu.edu

Larysa V. Oprya

Marshall B. Romney

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# JOURNAL OF ACCOUNTANCY

TECHNOLOGY WORKSHOP

## Mass Mailings Made Simple

This do-it-yourself job can save an office a great deal of money.

BY BONNIE BRINTON ANDERSON, LARYSA V. OPRYA AND MARSHALL B. ROMNEY  
APRIL 2005

**Y**ou want to tell 130 clients about several new professional services and send them updated fee schedules. You considered outsourcing the project to a direct-mail ad agency and found the setup alone for each variation of the letter was \$65—way over your budget. Worry not. This is a job your support staff should be able to handle after reading this article.

### Key to Instructions

To help readers follow the instructions in this article, we used two different typefaces:

■ **Boldface type** is used to identify the names of icons, agendas and URLs.

■ **Sans serif type** shows commands and instructions users should type into the computer and the names of files.

We'll use Microsoft Office's **Mail Merge** function, which merges and integrates documents and data sources, to customize the letters. The final product will be 130 personal letters to each client's contact person.

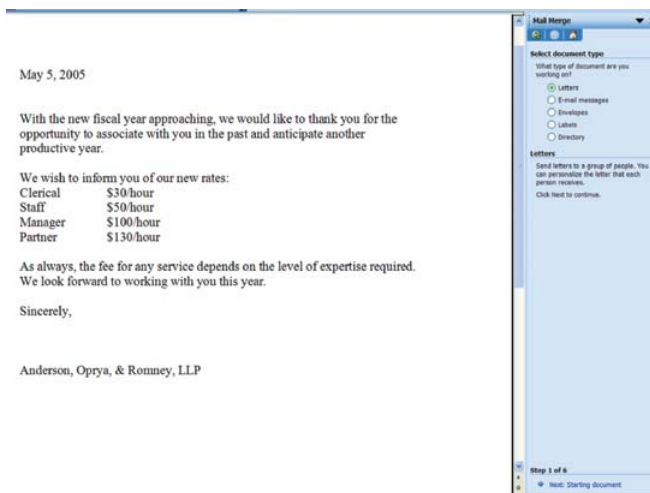
The setup takes just a few minutes. You have two options: Use the **Mail Merge** toolbar ( [exhibit 1](#) , below)—a shortcut method that you'll probably prefer once you get the hang of it—or the wizard, which takes you through the process step-by-step. We'll demonstrate the process with the wizard so you can see how each step works.

### Exhibit 1



To open the wizard, click on **Tools** , point to **Letters and Mailing** and click on **Mail Merge** . Your screen should resemble [exhibit 2](#) ; however, yours obviously won't have the main document letter we prepared to illustrate the process. Notice that our letter lacks a contact person's name, an address or a salutation; we will add that later. Notice, too, that on the bottom right-hand side of the screen the wizard is ready for you to launch the first of six steps.

### Exhibit 2



■ **Step 1:** Under **Select document type** , click on **Letters** because that is the type of document you want to create. Then click on **Next: Starting document** at the bottom right of the screen, to bring up the screen shown in [exhibit 3](#) .

### Exhibit 3



■ **Step 2:** Under **Select starting document** , choose the setup for your letter from the following options: If you are starting from scratch, click on **Use the current document** . If you want to use a template, click on **Start from a template** . And if you already have a saved letter you want to open, edit and send, click on **Start from existing document** .

Since you do not have a letter ready, select **Use the current document** and then compose your letter.

Then click on **Next: Select recipients** ( [exhibit 4](#) ).

### Exhibit 4



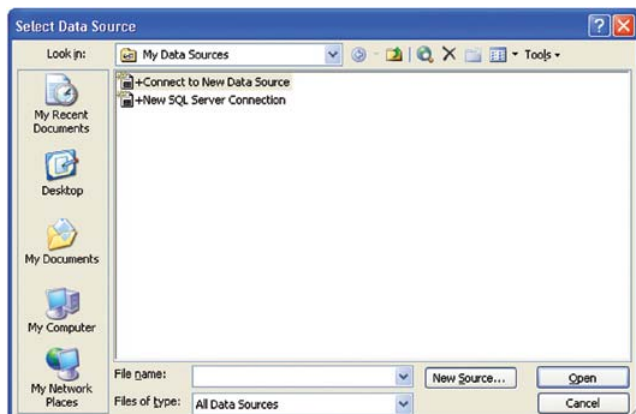
That moves you to step 3 and produces the screen shown in exhibit 5 .

Exhibit 5



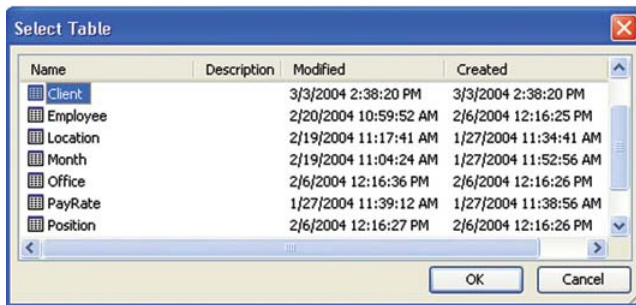
■ **Step 3:** Insert the addresses of your clients by choosing one of the first two options shown in exhibit 4, or you can type a new list (that process will be described later). In our example, since we have the information stored in an Access database table, we select **Use an existing list** under **Select recipients** and when we click on **Browse** to find the list, the **Select Data Source** screen appears ( exhibit 6 , below).

Exhibit 6



To browse through your folders for the address table, click on the down arrow next to **My Data Sources** . Find the desired database, click on it, and the **Select Table** dialog box appears ( exhibit 7 , below). It lists all the tables available in that database. We have highlighted the **Client** table.

Exhibit 7



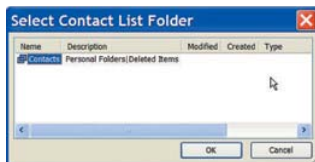
If your client list is in **Outlook** , click **Select from Outlook contacts** ( exhibit 8 ).

Exhibit 8



That evokes the **Select Contact List Folder** ( exhibit 9 ).

Exhibit 9



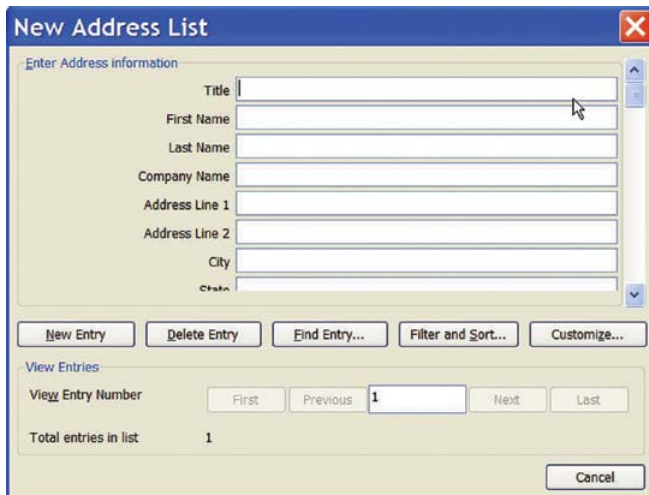
If you wish to create a new list, click on **Type a new list** and **Create** ( exhibit 10 ).

Exhibit 10



That brings up the **New Address List** screen ( exhibit 11 , below).

Exhibit 11



Fill out each client's information and click on **New Entry** for each additional entry. After entering all the names and addresses, click on **Close** and name and save your new list so you can use or edit it later.

For those readers following along using Word, please note that you will not be able to proceed to step 4 until you have at least one recipient established.

Exhibit 12



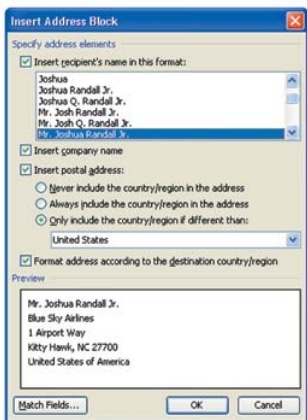
■ **Step 4:** Now it is time to write or edit your existing letter so click on **Next: Write your letter** ( [exhibit 12](#) , above). Click on **Next** to evoke the **Mail Merge** screen ( [exhibit 13](#) , below).

Exhibit 13



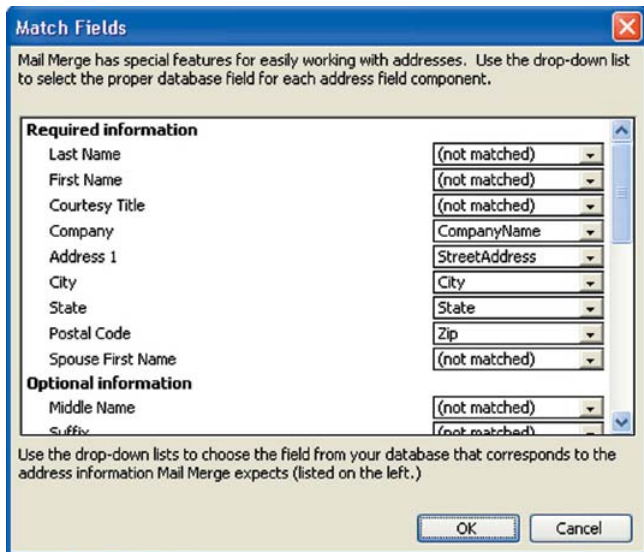
Begin by clicking on **Address block** to specify the address elements. As shown in [exhibit 14](#) , below, you can choose one of many different formats for the person's name, whether to include the company name in the address and whether to insert the postal address.

Exhibit 14



If you are using Microsoft Access, click on the **Match Fields** option (see bottom of [exhibit 14](#) ). That brings up the **Match Fields** screen ( [exhibit 15](#) ), which requires a link for each element of information (last name and first name, for example) to its corresponding database field.

Exhibit 15



After you've matched the fields and clicked on **OK**, you're ready to add the greeting line. Go to the **Mail Merge** screen ( [exhibit 13](#) ) and click on **Greeting Line** to specify the greeting elements.

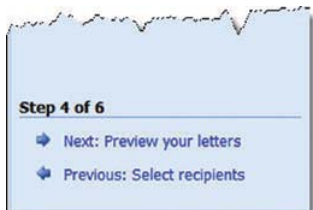
Fill in the requested information ( [exhibit 16](#) ) and click on **OK**.

**Exhibit 16**



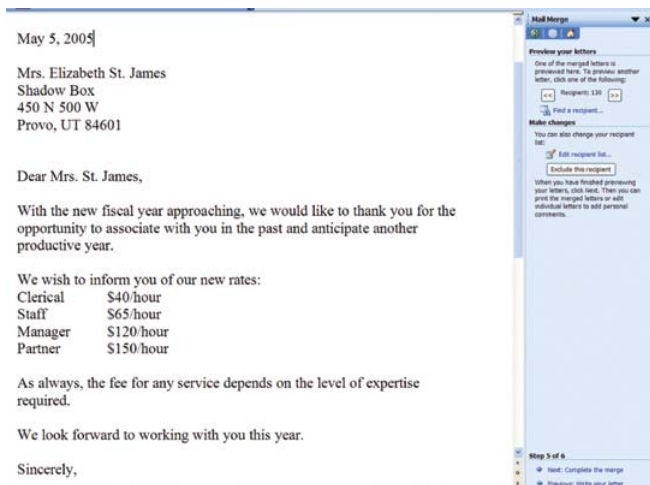
Return to the **Mail Merge** screen ( [exhibit 17](#) ) and click on **Next: Preview your letters**. That brings up the screen shown in [exhibit 18](#).

**Exhibit 17**



You now can preview each custom letter by using the back (<<) and forward (>>) arrows or by clicking on **Find a recipient**. Note in [exhibit 18](#) that we used the arrows to display our 130th recipient. Be aware that you still can make changes to the letters, such as editing the recipient list or excluding recipients by selecting the appropriate function.

**Exhibit 18**



Return to the **Mail Merge** screen and click on **Next: Complete the merge** ( [exhibit 19](#) ).

**Exhibit 19**

**Step 5 of 6**[Next: Complete the merge](#)[Previous: Write your letter](#)

■ **Step 5:** At this point you can complete the merge setup, or if you wish, you can click on **Previous: Write your letter** and further edit the letters or print them.

As you can see, **Mail Merge** is a powerful tool that will save you time and money while creating professional, personalized letters. You also can use it to set up customized e-mail messages, envelopes and labels or a directory of addresses. ■

BONNIE BRINTON ANDERSON, PhD, is an assistant professor of information systems, School of Accountancy and Information Systems, Brigham Young University, Provo, Utah. Her e-mail address is [bonnie\\_anderson@byu.edu](mailto:bonnie_anderson@byu.edu). LARYSA V. OPRYA is a graduate student at the School of Accountancy and Information Systems. Her e-mail address is [opryalv@hotmail.com](mailto:opryalv@hotmail.com). MARSHALL B. ROMNEY, CPA, PhD, CFE, is a professor of accounting and information systems at Brigham Young. His e-mail address is [mbr@byu.edu](mailto:mbr@byu.edu).

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