Mail Merge Assignment

We will be using a new technique in Microsoft Word called “Mail Merge” in order to create form letters. You will start off by using Microsoft Excel to create a database of information to include in the letters.

You will need to create headers and fill in the information for 20 customers. Your headers will be as follows:

* First Name
* Last Name
* Street Address
* Email
* Phone Number
* Account Number
* Balance of Account
* Recommended Step
* Type the word “gained” or “lost”
* Reason for change
* Dollar Amount

Scenario:

Imagine that you are a financial advisor working for a major bank. You have a number of clients who have invested money with you and you need to send them an update on how their investment is doing as well as what you recommend they do next.

Steps:

1. Create the excel spreadsheet with the information above.
2. In Microsoft word, start a Mail Merge. You will find this under “Mailings”.
3. Select “Letter” as your type.
4. Select “From existing List” as your recipients and choose the excel file you created.
5. Use the tools in Mail Merge to create a form letter. This will involve using:
   1. Address Block
   2. Greeting Line
   3. Inserting Merge Fields
6. Write your letter so that you can update the information for each person automatically. This way you only write the letter once but you are able to create 20 letters.
7. I recommend writing the letter with the “Preview Results” button selected so you can see how it looks.
8. Format your letter to look professional.
9. Create a custom header for the bank that you work for.