

MAIL MERGE PRACTICE

SKILLS

- Open Microsoft Excel and Microsoft Word
 - Create a contact list with necessary fields and records
 - Design a professional business letter
 - Apply various contact list fields to the business letter
 - Save and submit the contact list and business letter
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Instructions

1. Begin by opening Microsoft Excel and create a new workbook. Rename the first spreadsheet tab to “ABC Taxing Contacts”.
2. Create the following contact list within the “ABC Taxing Contacts” tab.

<u>Salutation</u>	<u>First Name</u>	<u>Last Name</u>	<u>Street</u>	<u>City</u>	<u>State</u>	<u>Zip</u>	
Ms	Mary	Burger	123 Center Lane	Austin	Texas	12345	
Ms	Susan	Elia	456 Twin Street	Atlanta	Georgia	34532	
Mr	Thomas	Smith	567 Sweet Lane	Orlando	Florida	55512	
Ms	Nancy	Hardee	987 Turner South	San Francisco	California	99843	
Mr	Charlie	Bates	439 Right Court	Las Vegas	Nevada	45698	

3. Save your contact list as **mycontactlist.xlsx**. Note: Remember to save the workbook in an easy to locate location (e.g., Desktop, My Documents folder, etc.).
4. Open Microsoft Word and generate as closely as possible the following business letter. Hint: All font is Arial with the font size of 11 point. Make sure to pay close attention to line breaks.

Recipient First and Last Name
Address
City, State Zip

Dear Salutation Last Name:

Thank you for your patronage. This letter is to confirm that your order from Doe Books has been filled and should arrive within 15 days. Shipping books at the book rate generally slows delivery.

As you know, payment in full (\$20.75) is due by the end of the month. Thank you for doing business with Doe. We look forward to serving you again.

Sincerely,

Sam Brown
Vice President of Company, Inc.
555-555-5555
s.brown@companyinc.com

5. Create a mail merge that:
 - a. Replaces the text Recipient First and Last name with the First Name and Last Name fields in the mycontactlist.xlsx spreadsheet.
 - b. Replaces the text Address with the Street field in the mycontactlist.xlsx spreadsheet.
 - c. Replaces the text City, State, Zip with the City, State, and Zip fields in the mycontactlist.xlsx spreadsheet.
 - d. Test your mail merge. Remember there are five records in the contact list.

6. Save your business letter as **mybusinessletter.docx**. Note: Remember to save the document in an easy to locate location (e.g., Desktop, My Documents folder, etc.).