INTEGRATION Project #2: Word Table/Mail Merge

Using Mail Merge

In this example of Mail Merge you will combine a **Word document** and a **Word table**. The Word table contains a list of **bank customers**. The Word document is a **Form Letter** sent to all customers. In order to **personalize** the document, you will **mail merge** the information on the Bank Customer Table with the Word Form Letter document.

1. **Open** the **Bank Customers Table** Word document to view the data.
2. The table contains 5 Bank customer's information entered in a **TABLE** format. Look at the first row of the table, it contains the following column headings: **Title**, **First Name**, **Last Name**, **Address**, **City**, **State**, **Zip**
3. You will use the **Bank Customers Table** as your **Recipient List**.
4. **Close** the **Bank Customers Table** document.
5. **Open** the **New Checking Bank Form Letter**. **Save As** – add your initials to the end of the file name.
6. Start the **Mail Merge Wizard**.
7. Insert the current date in the appropriate position.
8. Select the **Bank Customers Table** document as the **Recipient List**.
9. Insert the **<Address Block>** merge field in the appropriate position.
10. Insert the **<Greeting Line>** merge field in the appropriate position.
11. Click the arrow next to the comma, and then **click : (the colon)**.
12. In the closing, insert your First Name and Last Name. **SAVE**
13. Click the **Preview Results button** to preview the Inside Address Block, Greeting Line and Closing line.
14. Click the **Preview Results button** again to turn it off. **SAVE**
15. Click the **Finish & Merge button**. **DO NOT PRINT**.
16. Click **Edit individual Documents** to **Merge to a New Document. Click OK.**
17. You should have **5 letters** after the merge. Scroll down to view each letter.
18. **SAVE AS:** **New Checking Bank MERGE (followed by your initials).**