

HOW TO MAIL MERGE



To start a mail merge you will need 2 documents

- **Word Document** - that contains appropriate attendance letter
- **Excel Spreadsheet** – that contains student information and appropriate data

Attendance Letters

Attendance Letters can be found [here](#)

- Click on the attendance letter that you need – they are available in all 6 languages
- Fill in the information that will stay constant regardless of student data (example: Date, school name, school phone number)
- Save document in an attendance specific folder so that you can reuse the template as needed.

Excel spreadsheet

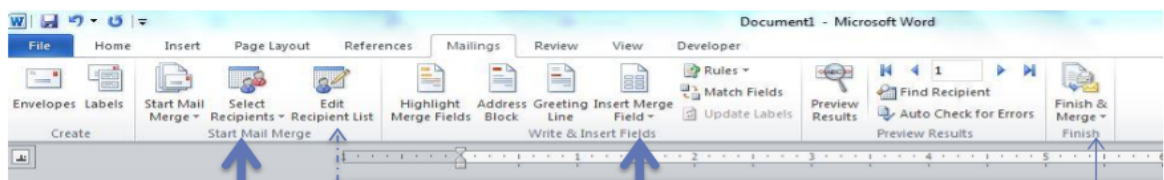
Attendance Data can be found on [Dashboard](#)

- The **Chronic Absence Monitoring** report is the best report to run for attendance letters
- Export to Excel by clicking the floppy disk
- Delete all student rows that will not be included in the mail merge.
- Clean up the data by removing the rows and columns that are unnecessary for attendance letters (example: Top rows that do not contain relevant information, school name column, school year column, Sped through Home Phone columns)
- **Separate the students first and last name**
 - o Highlight column that contains student names
 - o Click **Data** at the top of the task bar
 - o Click the icon that shows **Text to Columns**
 - Check **Delimited** then click next
 - Check **Tab** and **Comma** then click next
 - Click Finish
 - Warning will pop up stating data is already in that column, click OK
 - Change the title to **Last Name** and **First Name**
- Save excel spreadsheet in the same attendance specific folder with the attendance letters

How to Mail Merge

Start by opening the Attendance Letter Document that you had entered necessary school information in to in the beginning.

- Click **Mailings** at the top of the taskbar
- Click **Start Mail Merge**
 - o Click **Letters**
- Click **Select Recipients**
 - o Click **Use Existing List**
 - o Go to folder that has the excel spread sheet with attendance data,
 - o Select Data and click OK
- Click **Edit Recipient List**
 - o Make sure only the names that are to be included in the merge are checked
 - For English only have English speaking families names checked
 - For Spanish only have Spanish speaking families names checked
 - ETC.
 - o Note which data is needed for the letter
 - Document this information on a sticky note for easy reference
 - Click OK
- Click **Insert Merge Field** and insert F# as appropriate
- Once finished inserting all necessary F#'s click **Preview Results**
- Review Attendance Letter
- If everything is correct
 - o Click **Finish & Merge**
 - o Click **Edit Individual Documents**
 - o Select **All** and click OK
- **SAVE ATTENDANCE LETTERS IN ATTENDANCE SPECIFIC FOLDER**
- **PRINT**



Step 1: After you have formatted the attendance letter, click here to select your existing excel document.

Step 2: Insert appropriate information into your letter. For example: First Name, Last Name, Address, etc.

Step 3: Refine your list of students. Filter school's data so only students with less than 90% ADA are included.

Step 4: Finish and merge. Click "Finish & Merge" → "Edit Individual Documents" → "All".