

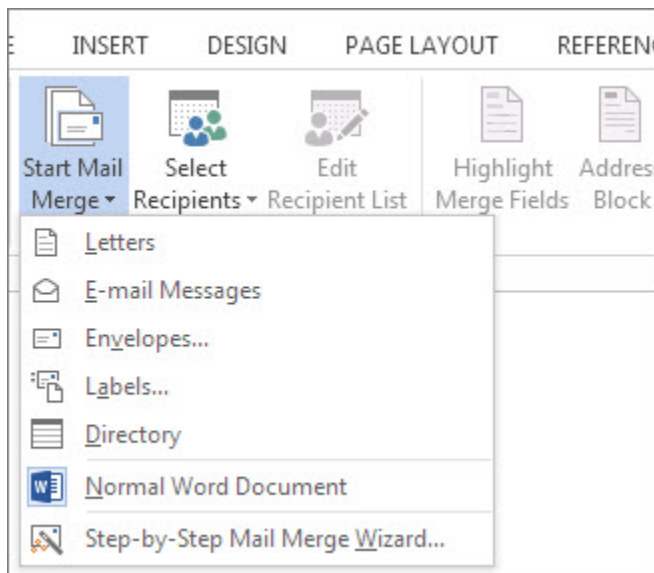
Mail merge using the Parent Instructions letter (Word) and the Student List (Excel)

Mail merge is used to create multiple documents at once. These documents have identical layout, formatting, text, and graphics. Only specific sections of each document varies and is personalized. There are three documents involved in the mail merge process:

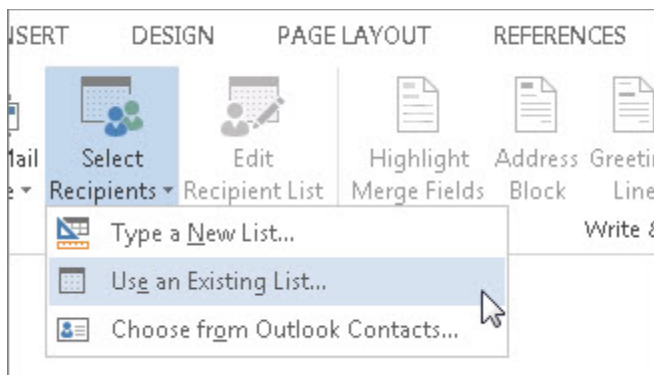
- The main Word document (parent instruction letter)
- The Excel data source (student list)
- The merged document (individual sheets for distribution)

Step 1: Start the mail merge

1. Open the *Survey Instructions for Parents* Word document and place your cursor after **Student/Estudiante:**.
2. On the **Mailings** tab, in the **Start Mail merge** group, choose **Start Mail Merge**, and then choose **Normal Word Document**.



3. Choose **Select Recipients > Use an Existing List**.



4. Browse to your Excel **Student List** spreadsheet, and then choose **Open**. Note: You may be using one list for students under age 18 and a second list for students over age 18.
5. If Word prompts you, choose **SheetList\$ > OK**. Note: The spreadsheet is now connected to the letter.



Step 3: Insert a merge field

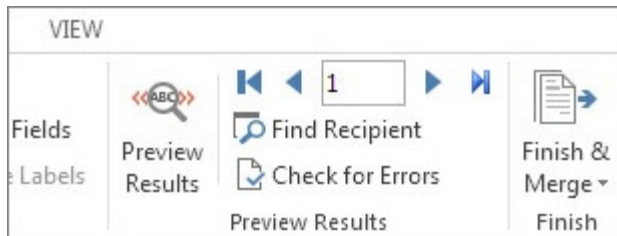
You will now insert four mail merge fields that pull the information from the Student List into the Parent Instruction Letter.

1. Place your cursor after **Student/Estudiante:**.
2. On the **Mailings** tab, in the **Write & Insert Fields** group, choose **Insert Merge Field**.
3. In the **Insert Merge Field** dialog box, under **Fields**, choose **First Name** and **Insert**. Then, choose **Last Name**, **Insert** and **Close**.
4. Place your cursor after **Login Code:**.
5. In the **Insert Merge Field** dialog box, under **Fields**, choose **Login Code**, **Insert** and **Close**.
6. Place your cursor after **School:**.
7. In the **Insert Merge Field** dialog box, under **Fields**, choose **School Name**, **Insert** and **Close**.
8. Choose **File > Save**.

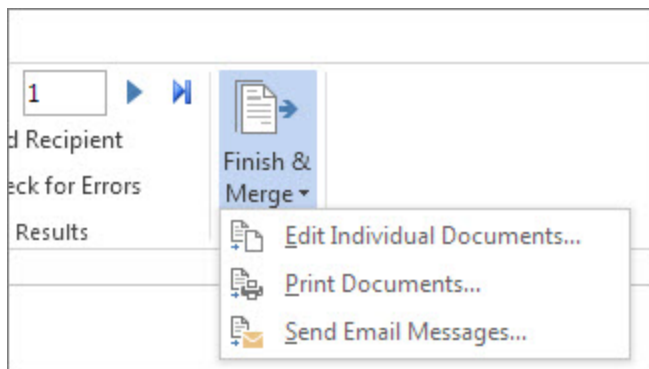
Step 4: Preview and finish the mail merge

After you insert the merge fields you want, preview the results to confirm that the content is okay. and then you're ready to complete the merge process.

1. On the **Mailings** tab, choose **Preview Results**.



2. Choose the **Next** or **Previous** record button to move through records in your data source and view how the records will appear in the document.
3. In the **Finish** group, choose **Finish & Merge**, and choose **Print Documents** or **Send E-mail Messages**.



Step 5: Save your mail merge

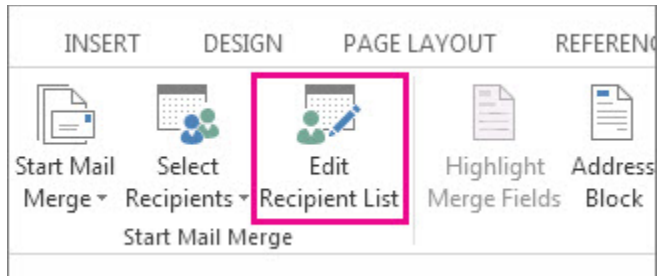
When you save the mail merge document, it stays connected to your data source. You can reuse the mail merge document for your next bulk mailing.

- Open the mail merge document and choose **Yes** when Word prompts you to keep the connection.

ADDENDUM:

Edit your mailing list, if necessary, to delete students over 18 who have not assigned educational rights to a parent.

1. Choose **Edit Recipient List**.



2. In the **Mail Merge Recipients** dialog box, clear the check box next to the name of any person who you don't want to receive your mailing.

