

Tech Tip of the Week

Creating a Form Letter

Using Word's "Mail Merge" and Excel Data

Definition: Form Letter

A form letter is created from a template that is used for printing or distributing to a group.

How to use Mail Merge to create a Form Letter

- First, collect your data and put it in Excel. The following data was collected using a survey tool, but I added additional information to help make it easier for me to create the form letter. The information below contains about the teacher, class, technology, principal, and school.

First Name	Last Name	Middle	ID #	Projector	Computer Teacher Uses	Number of Students	Grade Level	Subject Taught	School	Address	State	Zip	Number of Computer in Room	Email	Principal	School Phone
Jack	Smith	E	12324	Yes	iMac	20	eight	Math	South Mountain	10 Cold Fork Road	KY	41211	20	JackSmith	James Matthew	678-6789
Mike	Watts		12580	Yes	Dell	21	eight	Math	North Mountain	20 Cold Fork Road	KY	41210	15	MikeWatts	Carol Young	678-4444
Mary	Jones	R	12836	No	HP	32	fifth	English	West Hill	30 Cold Fork Road	KY	41211	5	MaryJones	Steve Little	677-3456
Kim	May	D	13092	No	Laptop	15	fourth	English	West Hill	30 Cold Fork Road	KY	41211	15	KimMay	Steve Little	677-3456
Larry	Lee		13348	Yes	iPad	17	third	Math/Science	East Hill	50 Cold Fork Road	KY	41211	5	LarryLee	Mary Day	677-2768
John	Henry	F	13604	No	Dell	12	tenth	Science	North Mountain	20 Cold Fork Road	KY	41210	15	JohnHenry	Carol Young	678-4444
Michael	Jordan	D	13860	Yes	Dell	25	third	Reading/Writing	East Hill	50 Cold Fork Road	KY	41211	5	MichaelJordan	Mary Day	677-2768

- Second, setup the main Document.
 - Start a new Word Document or use a template that you created. On the next page you will see a template of a form letter that will be used by a district to send to each teacher who took the survey above. I added the *underlining* to show you were I want to input data.

Dear _____,

Welcome back to Compass District Schools. Last year, you had _____ students and _____ computers in your classroom. We also wanted to let you know that the room you are assigned this year _____ have a projector. In addition, the district technology staff has assigned you the following email address for the upcoming year: _____@compass.kyschools.us.

This year we will be offering professional development based on the _____ computer in your room and how to integrate _____ and technology in your classroom.

Sincerely,

Principal _____

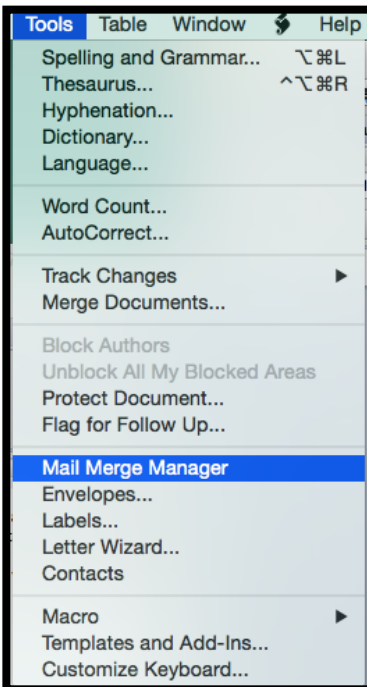
School: _____

Address: _____

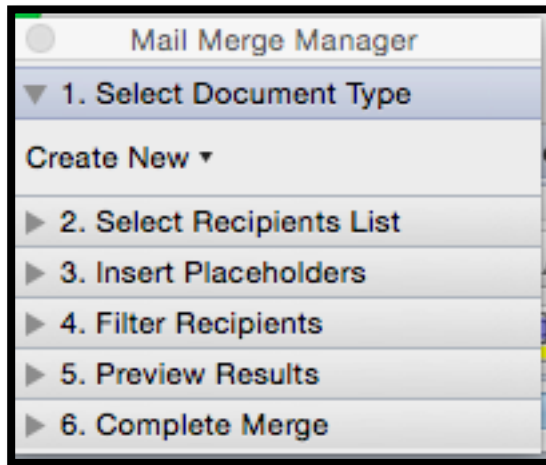
Zip: _____

Phone: _____

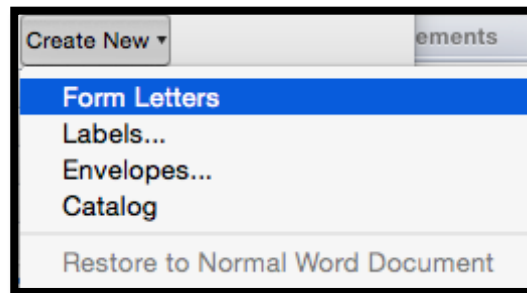
- First – I will need to setup a “MAIL MERGE”
 - Click Tools – Select “Mail Merge Manager”



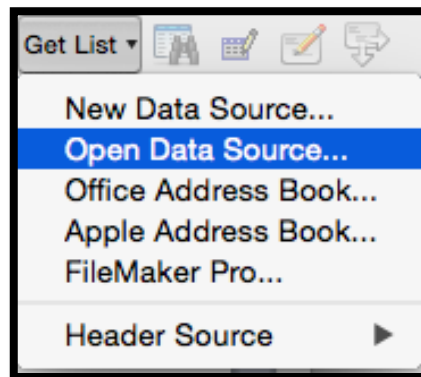
- “Mail Merge Manager” Pop-Up Window will appear



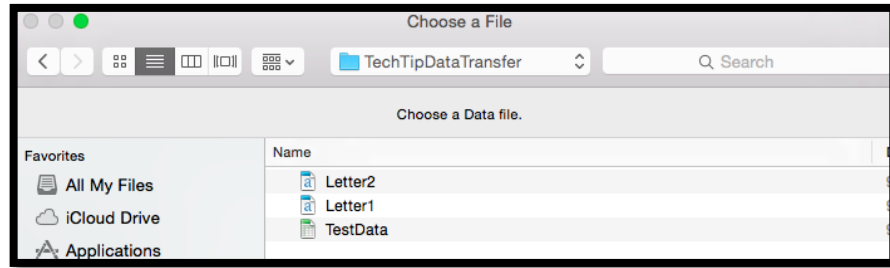
- Step One: Select Document Type
 - Click: Create New – Drop Down Arrow
 - Select Form Letters



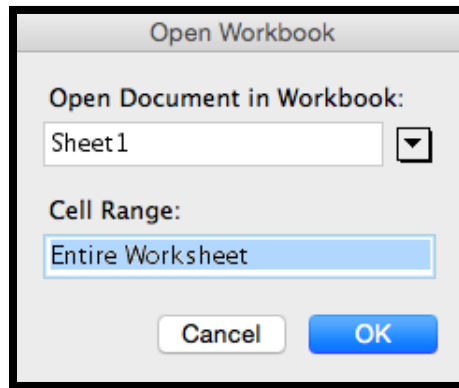
- Step Two: Select Recipients List
 - Click: Get List – Drop Down Arrow
 - Select “Open Data Source”



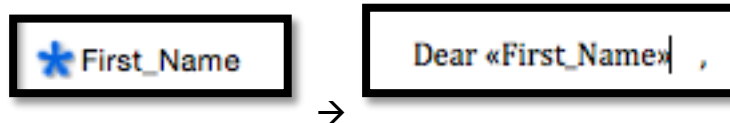
- Find and Select your Excel Data File from the Popup Window



- Click “Open”
- On the popup window that appears next, select the excel sheet that contains the data.



- Step Three – Insert Placeholders
 - You should now see the headers of the spreadsheet you just imported and you can now use them to input into your word document.
 - Using your mouse, click and drag the placeholder item to the location in the document.



- After you drag the placeholder into the document, it will look like the above right <<First,Name>>
- Continue dragging the placeholders until you have completed your document.
- As seen in the document on the next page.

Dear «First_Name» «Last_Name»,

Welcome back to Compass District Schools. Last year, you had _«Number_of_Students» students and «Number_of_Computer_in_Room» computers in your classroom. We also wanted to let you know that the room you are assigned this year «Projector» have a projector. In addition, the district technology staff has assigned you the following email address for the upcoming year: «Email»@compass.kyschools.us.

This year we will be offering professional development based on the «Type_of_Computer_Teacher_Uses» computer in your room and how to integrate «Grade_Level» «Subject-Taught» and technology in your classroom.

Sincerely,

Principal «Principal»

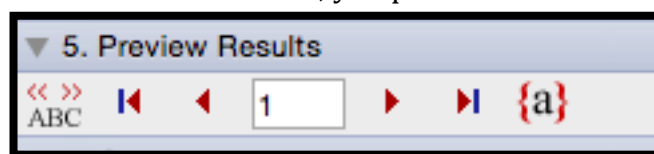
School: «School»


Address: «Address»

Zip: «Zip»

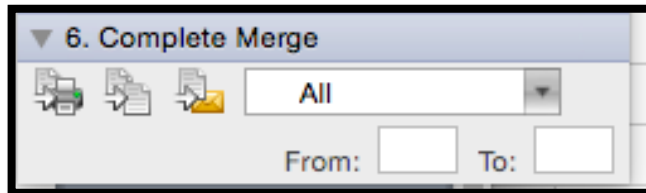
Phone: «School_Phone»

- Step Four – Filter Recipients
 - If you need to filter the list, use this tool to help.
 - This is optional
- Step Five – Preview Results
 - This will allow you to see what each document looks like before, you print or save them.

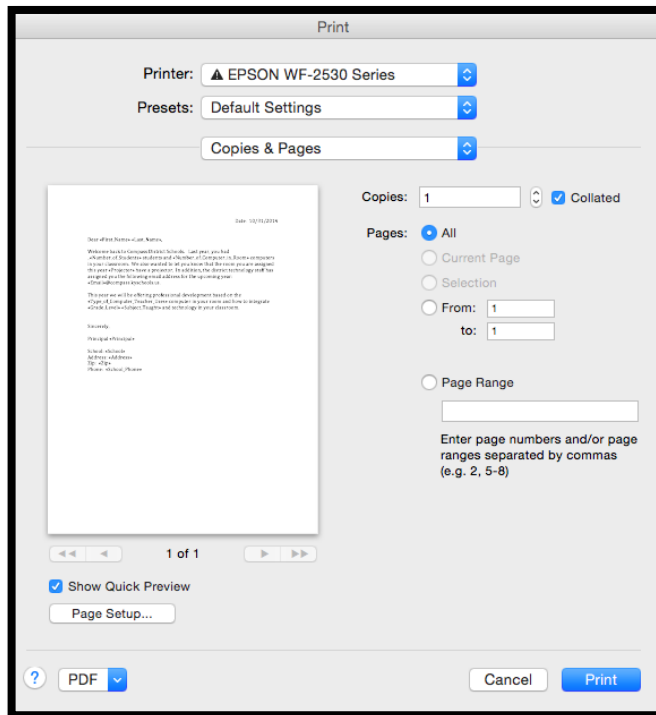


- Click  , to see each individual form.

- Continue to Click the Right Arrow, to preview the next form.
- This tool will provide you the option to modify the document before you complete the merge. If the document does not meet your approval go back and edit the document and then come back to here to preview it.
- Step Six: Complete the Merge



- You have 3 options
 - 1st Merge to Printer (Print)



- Merge to New Document (Creates new document that contains all form letters). Save the document and print it later.
- Generate e-mail messages (This only works if you have a desktop client)
- You can select All, Current, or Custom (Select the pages)

Video “How to” Link:
http://youtu.be/p3Y_o4210tI