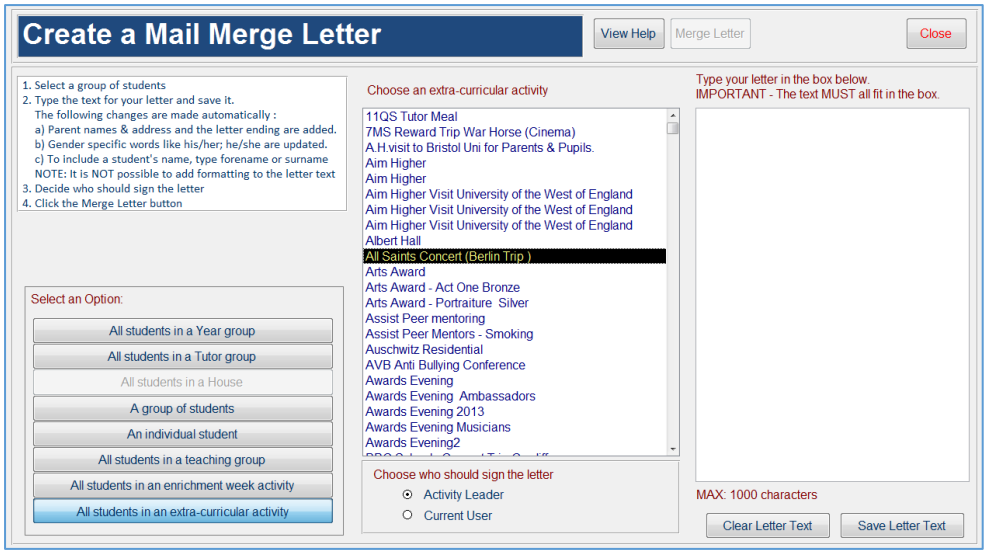
Creating mail merge letters in CEO

The ability to send mail merge letters from ***Curriculum Enrichment Organiser*** is a very popular feature. It is much simpler than the normal mail merge process where you link to a suitable data source in ***Word*** and use this to obtain data for required data fields.

a) Mail merge letters

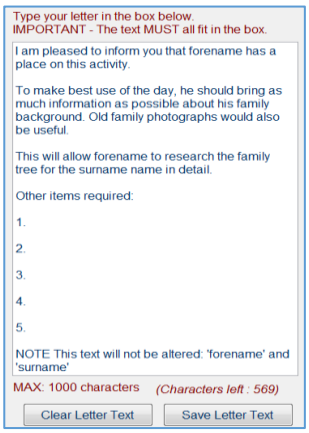
From the main menu screen in ***CEO***, select ***Students … Send Mail Merge Letters***

The mail merge letters screen opens.
Choose a group of students from the options available: e.g. all students in an extra-curricular activity
Then choose the required group from the list that appears



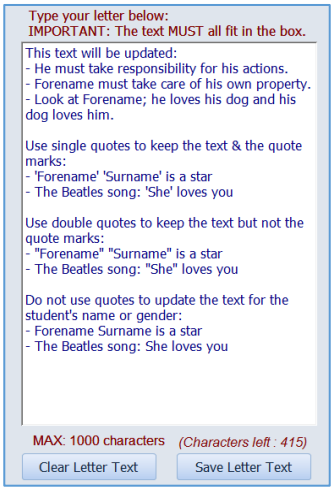
An empty box now appears on the right of the form in which you will enter the letter text
To ensure this all fits on one page, you should make sure all the text fits in the letter text box
The number of characters available depends on the text layout used but cannot be more than 1000 characters. As you enter text, the number of characters used is displayed.

Once you reach the character limit, it will not be possible to add additional text.
The screenshot below is an example showing text that will fit on one page.
Although this is far less than 1000 characters, the text fills all the available space in the box



The screenshots above also show items that will be updated automatically for each student:

- Words such as him/her , he/she, himself/herself are updated depending on student gender
- To enter a student's name, type forename or surname – these are updated for each student.
- If, for some reason, you need the words forename or surname to appear in the letter, enclose these using quotation marks e.g. 'forename'
- Similarly, if you need a gender-specific word to remain unaltered, enclose it in quotation marks e.g. The Beatles song "She" loves you

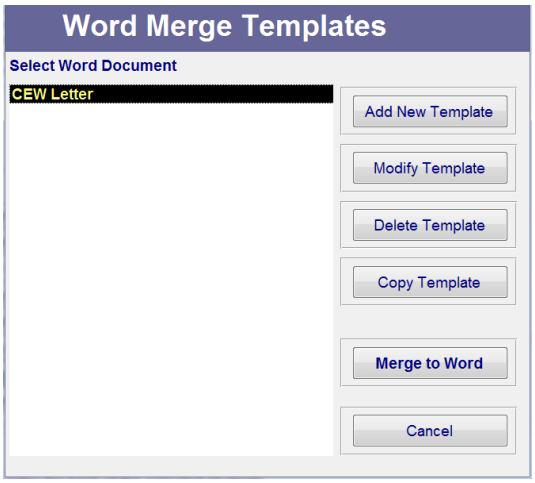


The following items are added automatically:

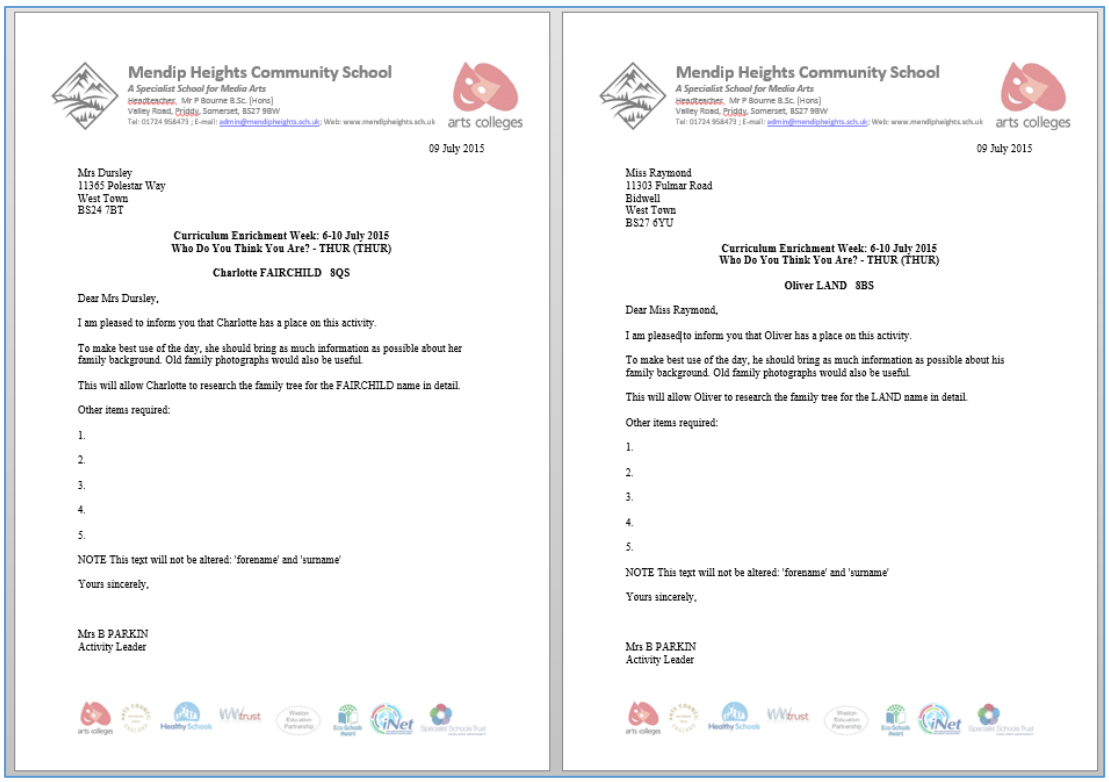
- Your school letter header and footer
- Parent name & address – arranged to fit a standard envelope window
- Student name and tutor group
- Activity name (where relevant)
- The letter heading – 'Dear …"
- The letter ending 'Yours sincerely' followed by the current users name
  For some options, you will be able to select the activity leader as an alternative

NOTE: It is NOT possible to add text formatting such as bold or underline to the merge text

When you have finished the letter text, click the ‘Save Letter Text’ button
The ‘Merge Letter’ button is then enabled. Click this and a screen similar to this will appear.
Select a document from the list, then select ‘Merge to Word’



After a few seconds, ***Word*** will open with your merged letter ready for use. For example:



Mendip Heights Community School
A Specialist School for Media Arts
Headteacher: Mr P Bourne B.Sc. (Hons)
Valley Road, Priddy, Somerset, BS27 9BW
Tel: 01724 958473 ; E-mail: admin@mendipheights.sch.uk; Web: www.mendipheights.sch.uk

09 July 2015

Mrs Dursley
11365 Polestar Way
West Town
BS24 7BT

Curriculum Enrichment Week: 6-10 July 2015
Who Do You Think You Are? - THUR (THUR)

Charlotte FAIRCHILD 8QS

Dear Mrs Dursley,

I am pleased to inform you that Charlotte has a place on this activity.

To make best use of the day, she should bring as much information as possible about her family background. Old family photographs would also be useful.

This will allow Charlotte to research the family tree for the FAIRCHILD name in detail.

Other items required:

1.
2.
3.
4.
5.

NOTE This text will not be altered: 'forename' and 'surname'

Yours sincerely,

Mrs B PARKIN
Activity Leader

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09 July 2015

Miss Raymond
11303 Fulmar Road
Bidwell
West Town
BS27 6YU

Curriculum Enrichment Week: 6-10 July 2015
Who Do You Think You Are? - THUR (THUR)

Oliver LAND 8BS

Dear Miss Raymond,

I am pleased to inform you that Oliver has a place on this activity.

To make best use of the day, he should bring as much information as possible about his family background. Old family photographs would also be useful.

This will allow Oliver to research the family tree for the LAND name in detail.

Other items required:

1.
2.
3.
4.
5.

NOTE This text will not be altered: 'forename' and 'surname'

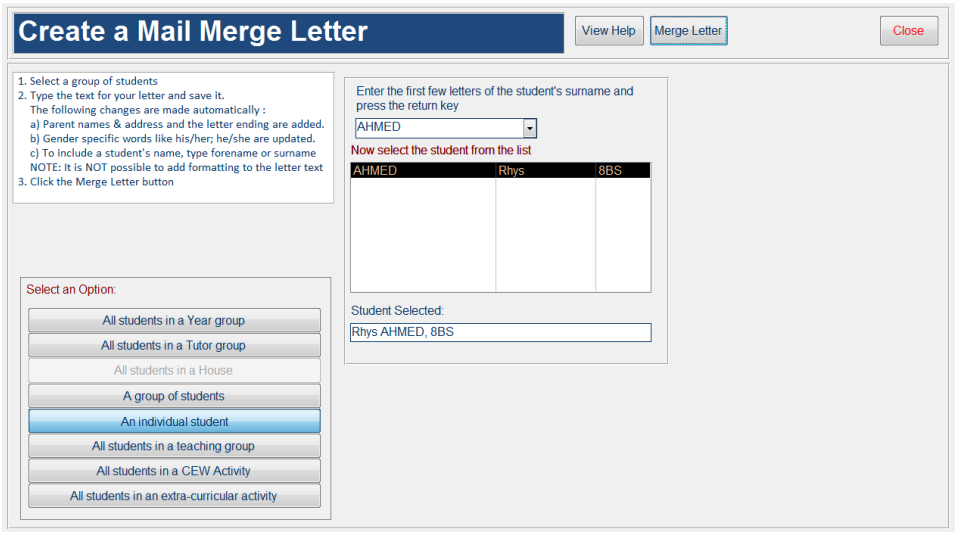
Yours sincerely,

Mrs B PARKIN
Activity Leader

Note that gender specific words and student forenames / surnames have been updated for each letter.

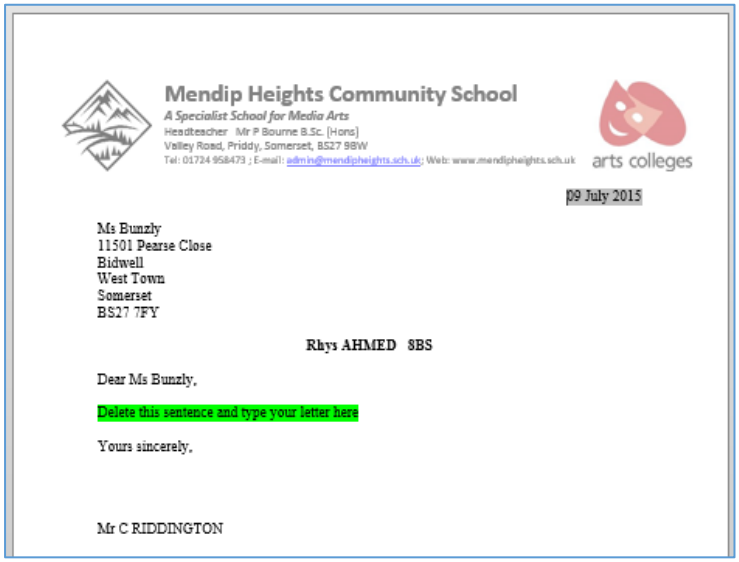
If you need to add formatting to the letter text, you can do so at this stage.
You can then print or save the letter for later use.

If you chose to create a letter for an individual student, the approach is slightly different
In this case, you will enter text directly into the headed letter



Select the student then click the 'Merge Letter' button
The letter then opens for you to enter the text directly.

Replace the text highlighted in green with your own text:

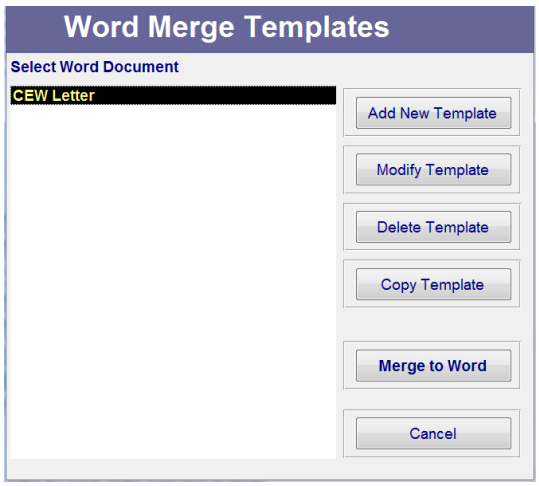


b) Modifying the supplied letter templates

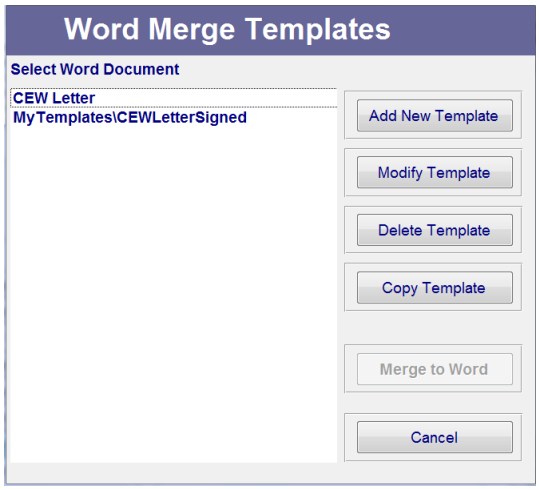
All users who have been assigned 'CEO Manager' status will be able to modify letter templates using the first 4 buttons on the form below. For example, you may wish to add your signature by using a special font such as Lucida Handwriting or by inserting a scanned image of your signature.

CEO Managers can do the following:

- Create a new template – you will need to add the database fields you require
- Modify an existing template – e.g. add/delete fields or add a signature
- Delete an existing user template (standard templates cannot be deleted)
- Copy a template

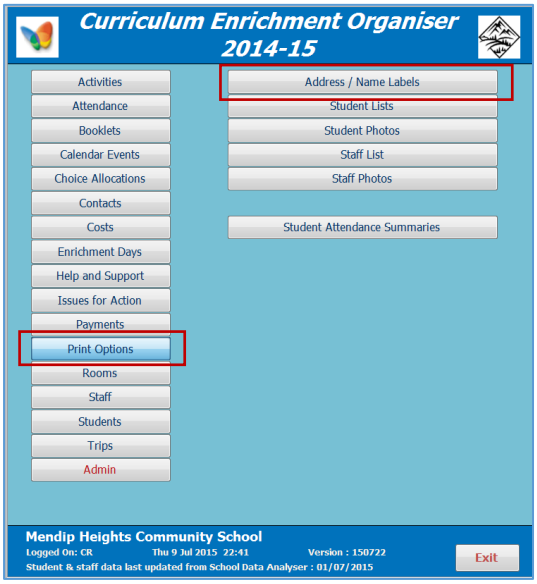


NOTE: These 4 buttons are disabled for standard users of the CEO database.
New or modified templates will be saved to a new folder ***CEOTemplates*** in your ***My Documents*** folder.
These templates will NOT be available to other users of the database



c) Envelope labels

NOTE: If you do not have access to windowed envelopes, you can instead print envelope labels.
From the ***Main Menu*** screen, select ***Print Options…Address/Name Labels***

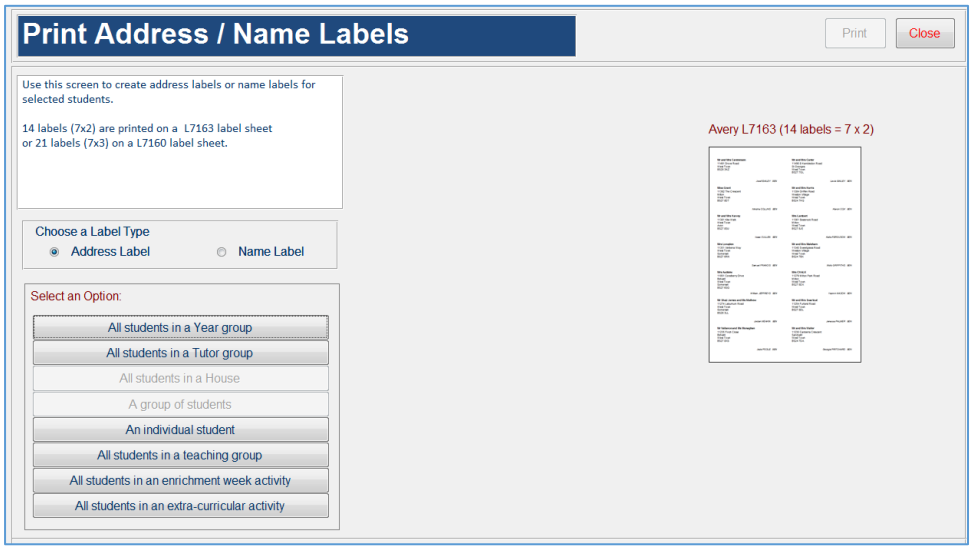
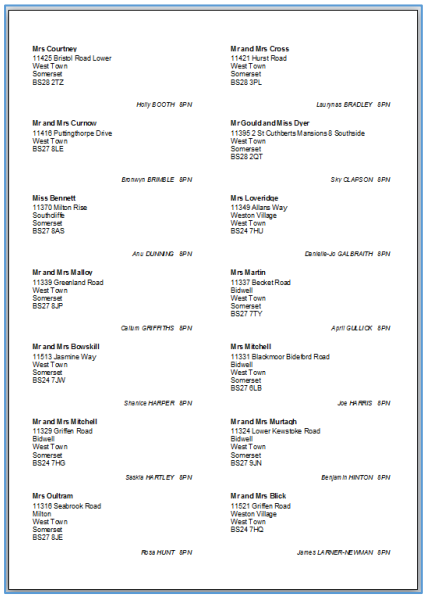


The labels are designed to fit standard Avery label types:

- L7163 (14 per page = 7 x 2) or L7160 (21 per page = 7 x 3)

If you use a different label type, please email support@mendipdatasystems.co.uk for advice.

Otherwise, choose the label type (14 or 21 per page) then select the group of students as before



The labels should then be printed using the appropriate label paper: