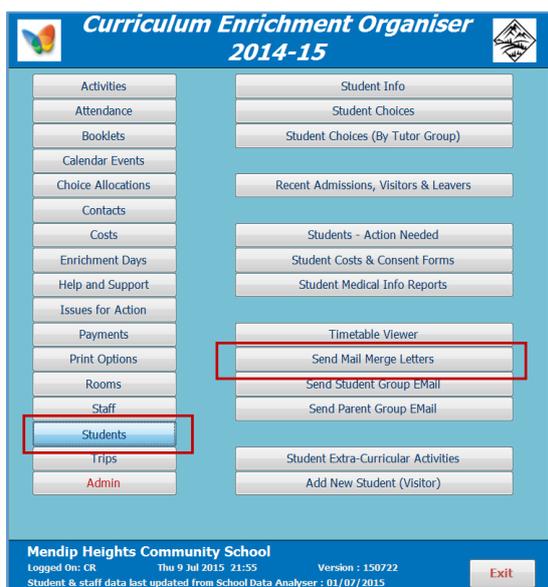


Creating mail merge letters in CEO

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.

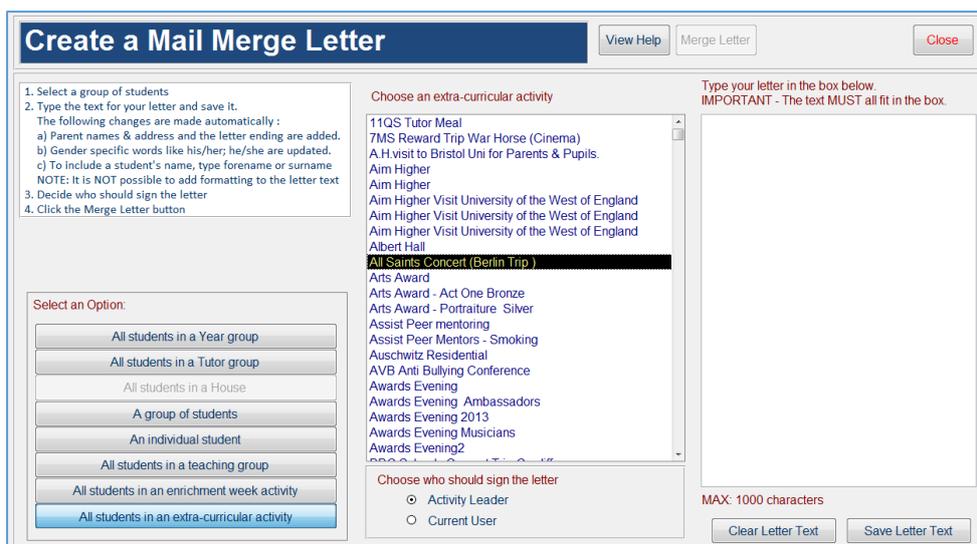
a) Mail merge letters

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

The screenshot shows the 'Create a Mail Merge Letter' form. It has a title bar with 'View Help', 'Merge Letter', and 'Close' buttons. The form is divided into several sections. On the left, there are instructions: '1. Select a group of students', '2. Type the text for your letter and save it.', and '4. Click the Merge Letter button'. Below the instructions is a 'Select an Option:' section with buttons for 'All students in a Year group', 'All students in a Tutor group', 'All students in a House', 'A group of students', 'An individual student', 'All students in a teaching group', 'All students in an enrichment week activity', and 'All students in an extra-curricular activity' (which is selected). In the center, there is a 'Choose an extra-curricular activity' section with a list of activities including '11QS Tutor Meal', '7MS Reward Trip War Horse (Cinema)', 'A.H.visit to Bristol Uni for Parents & Pupils', 'Aim Higher', 'Aim Higher Visit University of the West of England', 'Albert Hall', 'All Saints Concert (Berlin Trip)', 'Arts Award', 'Arts Award - Act One Bronze', 'Arts Award - Portraiture Silver', 'Assist Peer mentoring', 'Assist Peer Mentors - Smoking', 'Auschwitz Residential', 'AVB Anti Bullying Conference', 'Awards Evening', 'Awards Evening Ambassadors', 'Awards Evening 2013', 'Awards Evening Musicians', and 'Awards Evening2'. Below this list is a 'Choose who should sign the letter' section with radio buttons for 'Activity Leader' and 'Current User'. On the right, there is a large text box for entering the letter content, with a note: 'Type your letter in the box below. IMPORTANT - The text MUST all fit in the box.' Below the text box is a 'MAX: 1000 characters' indicator and two buttons: 'Clear Letter Text' and 'Save Letter Text'.

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

Type your letter in the box below.
IMPORTANT - The text **MUST** all fit in the box.

I am pleased to inform you that forename 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 forename to research the family tree for the surname name in detail.

Other items required:

- 1.
- 2.
- 3.
- 4.
- 5.

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

MAX: 1000 characters (Characters left : 569)

Clear Letter Text Save Letter Text

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

Type your letter below:
IMPORTANT: The text **MUST** all fit in the box.

This text will be updated:

- He must take responsibility for his actions.
- Forename must take care of his own property.
- Look at Forename; he loves his dog and his dog loves him.

Use single quotes to keep the text & the quote marks:

- 'Forename' 'Surname' is a star
- The Beatles song: 'She' loves you

Use double quotes to keep the text but not the quote marks:

- "Forename" "Surname" is a star
- The Beatles song: "She" loves you

Do not use quotes to update the text for the student's name or gender:

- Forename Surname is a star
- The Beatles song: She loves you

MAX: 1000 characters (Characters left : 415)

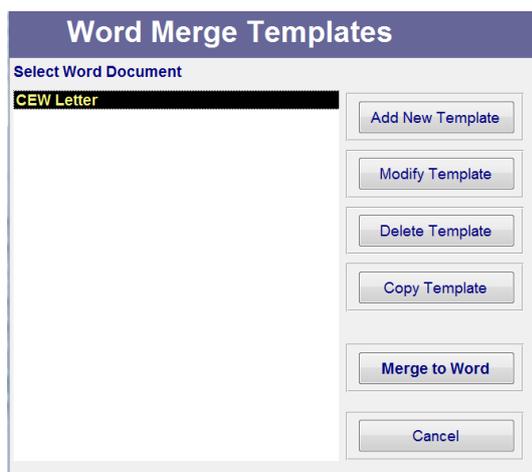
Clear Letter Text Save Letter Text

The following items are added automatically:

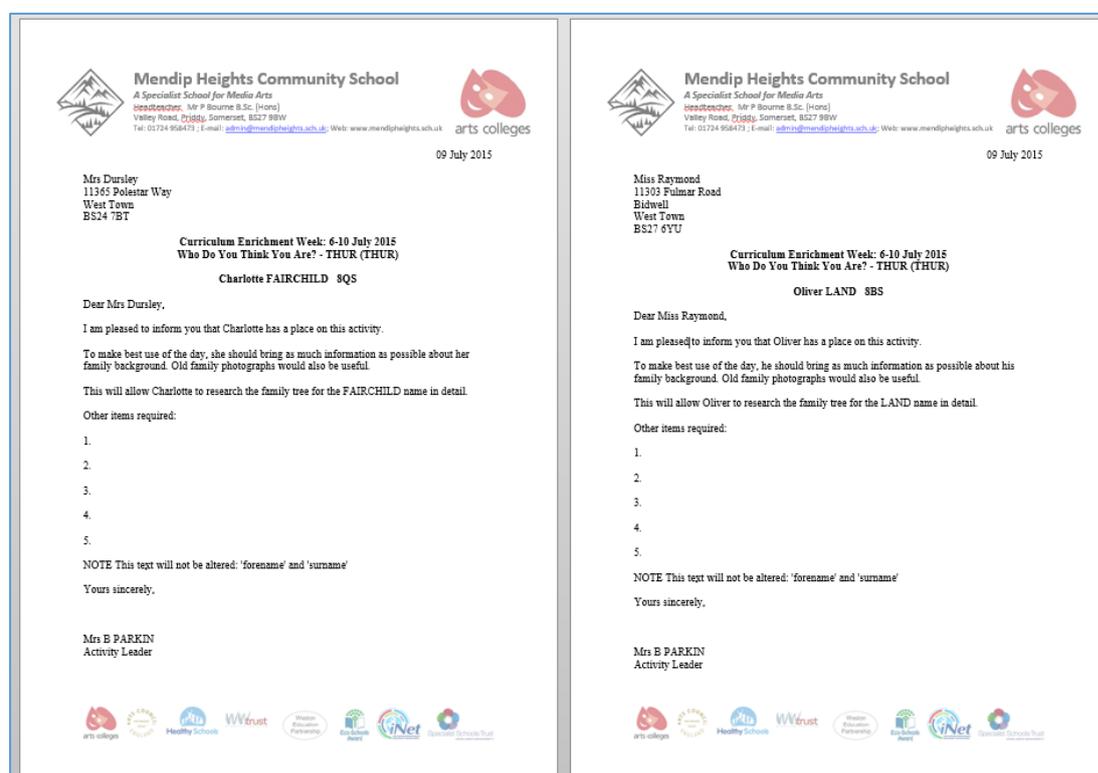
- Your school letter header and footer
 - Parent name & address – arranged to fit a standard envelope window
 - Student name and tutor group
 - Activity name (where relevant)
 - The letter heading – ‘Dear ...’
 - The letter ending ‘Yours sincerely’ followed by the current users name
- For some options, 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:



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

Create a Mail Merge Letter View Help Merge Letter Close

1. Select a group of students
 2. Type the text for your letter and save it.
 The following changes are made automatically:
 a) Parent names & address and the letter ending are added.
 b) Gender specific words like his/her; he/she are updated.
 c) To include a student's name, type forename or surname
 NOTE: It is NOT possible to add formatting to the letter text
 3. Click the Merge Letter button

Select an Option:

All students in a Year group
 All students in a Tutor group
 All students in a House
 A group of students
An individual student
 All students in a teaching group
 All students in a CEW Activity
 All students in an extra-curricular activity

Enter the first few letters of the student's surname and press the return key

AHMED

Now select the student from the list

AHMED	Rhys	8BS

Student Selected:
 Rhys AHMED, 8BS

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:

 **Mendip Heights Community School**
 A Specialist School for Media Arts
 Headteacher: Mr P Bourne B.Sc. (Hons)
 Valley Road, Priddy, Somerset, BS27 9BW
 Tel: 01274 958473 ; E-mail: admin@mendipheights.sch.uk ; Web: www.mendipheights.sch.uk

 **arts colleges**

09 July 2015

Ms Bunzly
 11501 Pearse Close
 Bidwell
 West Town
 Somerset
 BS27 7FY

Rhys AHMED 8BS

Dear Ms Bunzly,
 Delete this sentence and type your letter here

Yours sincerely,

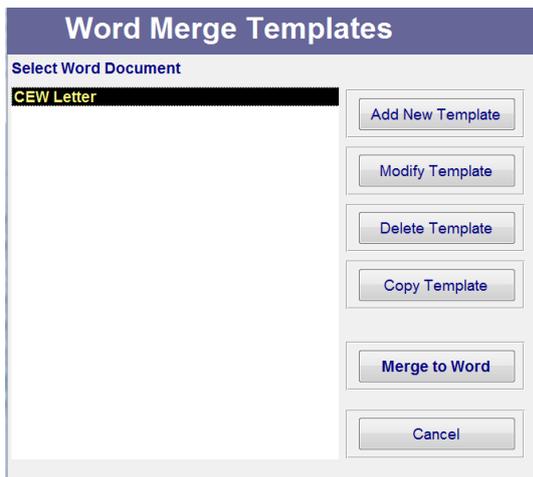
Mr C RIDDINGTON

b) Modifying the supplied letter templates

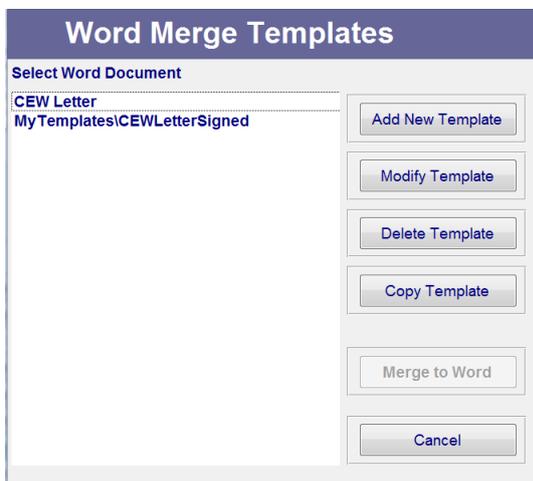
All users who have been assigned 'CEO Manager' status will be able to modify letter templates using the first 4 buttons on the form below. For example, you may wish to add your signature by using a special font such as Lucida Handwriting or by inserting a scanned image of your signature.

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

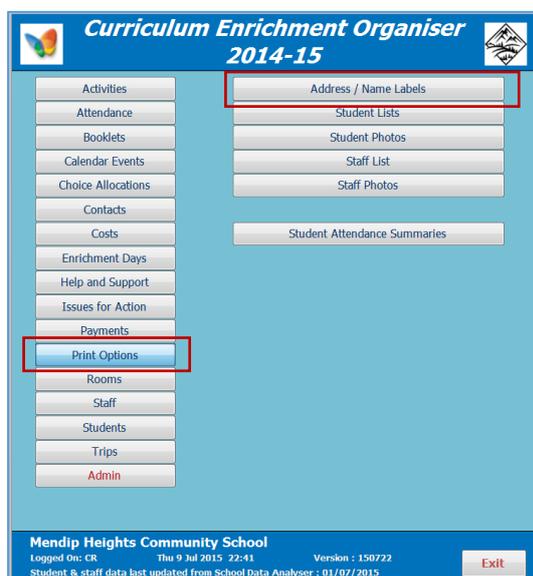


NOTE: These 4 buttons are disabled for standard users of the CEO database.
 New or modified templates will be saved to a new folder **CEOTemplates** in your **My Documents** folder.
 These templates will NOT be available to other users of the database



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

Print Address / Name Labels Print Close

Use this screen to create address labels or name labels for selected students.

14 labels (7x2) are printed on a L7163 label sheet or 21 labels (7x3) on a L7160 label sheet.

Choose a Label Type

Address Label Name Label

Select an Option:

All students in a Year group

All students in a Tutor group

All students in a House

A group of students

An individual student

All students in a teaching group

All students in an enrichment week activity

All students in an extra-curricular activity

Avery L7163 (14 labels = 7 x 2)

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

Mrs Courtney 11423 Small Road Lower West Town Somerset BS28 2TZ	Mr and Mrs Cross 11421 Nuns Road West Town Somerset BS28 3PL
Holly BOOTH <i>SPN</i>	Lauryns BRADLEY <i>SPN</i>
Mr and Mrs Carron 11416 Puddingstone Drive West Town Somerset BS27 8LE	Mr Gould and Mrs Dyer 11395 2 St Cuthberts Mansions 8 Southside West Town Somerset BS28 2DT
Edwain BRIMBLE <i>SPN</i>	Siv CLAPSON <i>SPN</i>
Miss Bennett 11370 Milton Rise Southside Somerset BS27 8AB	Mrs Lovelidge 11249 Albars Way Weston Village West Town Somerset BS24 7HQ
Alic DUNNING <i>SPN</i>	Carole-Jo GALBRAITH <i>SPN</i>
Mr and Mrs Mallow 11339 Greenand Road West Town Somerset BS27 8JP	Mrs Martin 11337 Blackmoor Road Bidwell West Town Somerset BS27 7TY
Gavin CHEPPING <i>SPN</i>	Ashli GLENDON <i>SPN</i>
Mr and Mrs Bouskell 11513 Jasmine Way West Town Somerset BS24 7JW	Mrs Mitchell 11331 Blackmoor Bidwell Road Bidwell West Town Somerset BS27 8LB
Sharon HAPPER <i>SPN</i>	Joe HARRIS <i>SPN</i>
Mr and Mrs Mitchell 11329 Giffen Road Bidwell West Town Somerset BS24 7HD	Mr and Mrs Murtadh 11324 Lower Kewable Road Bidwell West Town Somerset BS27 8JN
Sarah HIRTLEY <i>SPN</i>	Benjamin HINTON <i>SPN</i>
Mrs Outram 11321 Salsbrook Road Milton West Town Somerset BS27 8LE	Mr and Mrs Black 11321 Giffen Road Weston Village West Town Somerset BS24 7HQ
Ross HUNT <i>SPN</i>	James LAUNDER-NEWMAN <i>SPN</i>