



**ESBER CASH REGISTER**

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**1-800-669-0792**

## **FORMAT – Create and Print Letters**

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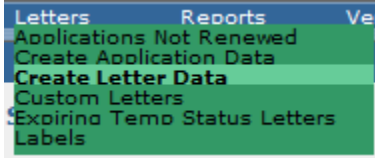
For Help or Assistance, Please Call 1-800-669-0792

Sincerely,

*Esber Support Team*

## 1. Create Letter Data in FORMAT –

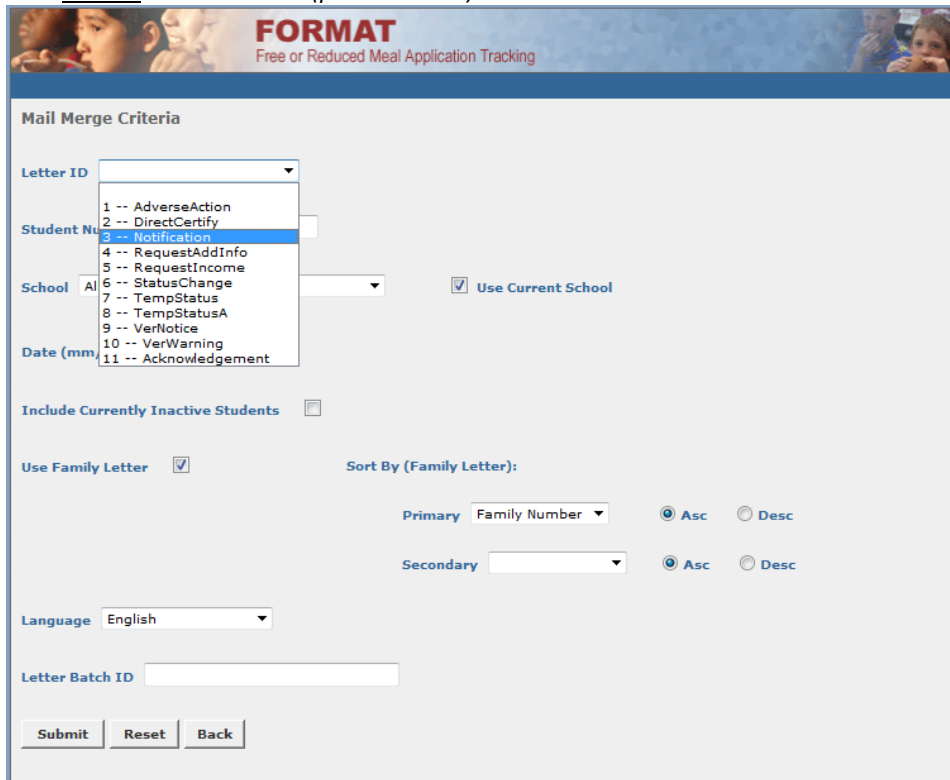
In FORMAT, Select Letters > Create Letter Data (picture below)



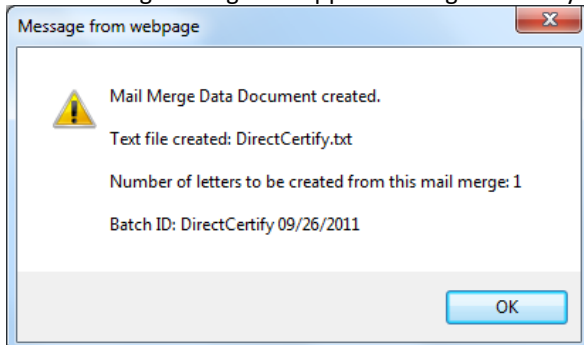
Under **Letter ID**, select the type of letter you are generating.

Check Mark **Use Family Letter** to place students of same family on 1 letter.

Click **Submit** when finished. (picture below)

A screenshot of the 'Mail Merge Criteria' form in the FORMAT application. The form includes several fields and options: 'Letter ID' is a dropdown menu with a list of letter types (1 -- AdverseAction, 2 -- DirectCertify, 3 -- Notification, 4 -- RequestAddInfo, 5 -- RequestIncome, 6 -- StatusChange, 7 -- TempStatus, 8 -- TempStatusA, 9 -- VerNotice, 10 -- VerWarning, 11 -- Acknowledgement); 'Student Number' is a dropdown menu; 'School' is a dropdown menu with 'All' selected and a 'Use Current School' checkbox checked; 'Date (mm)' is a dropdown menu; 'Include Currently Inactive Students' is a checkbox; 'Use Family Letter' is a checked checkbox; 'Sort By (Family Letter):' has two sections: 'Primary' with 'Family Number' selected and 'Asc' radio button selected, and 'Secondary' with an empty dropdown and 'Asc' radio button selected; 'Language' is a dropdown menu with 'English' selected; 'Letter Batch ID' is a text input field; and there are 'Submit', 'Reset', and 'Back' buttons at the bottom.

The following message will appear stating how many letters will be created...

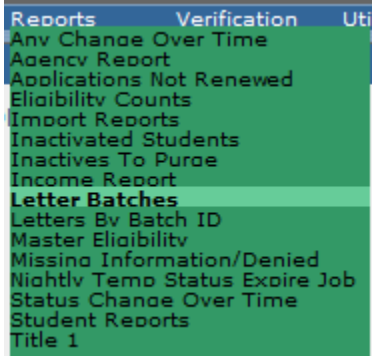


Click OK.

This creates a \*.txt file of students for the specified letter in the MailMergeData folder on your desktop. You will need this file when merging students to specified document later.

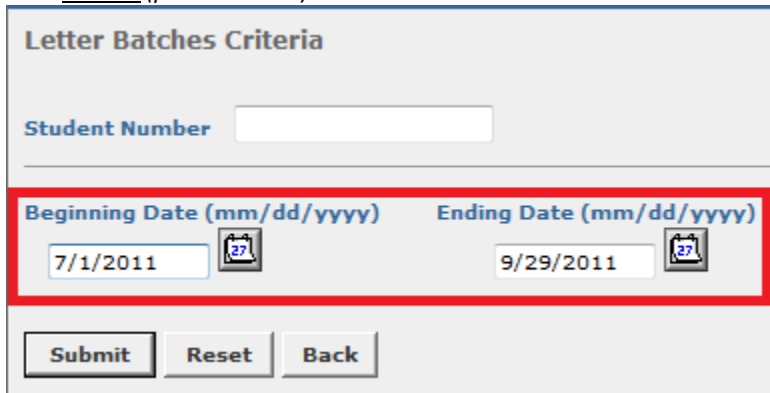
## 2. Rmerge Previous Letter Batch –

In FORMAT, Select Reports > Letter Batches (picture below)

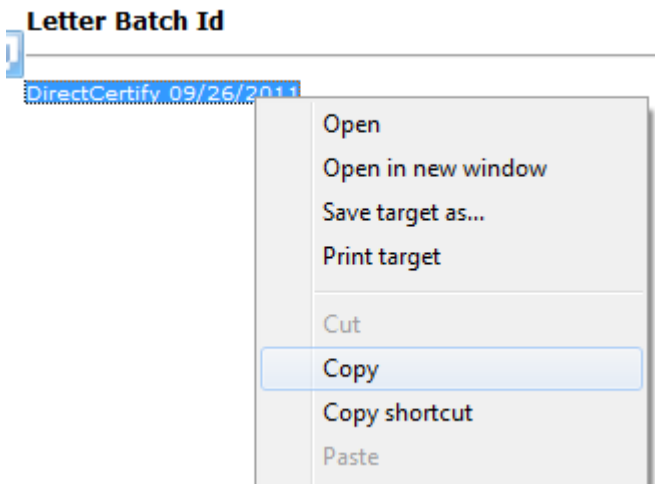


Select Date Range

Click **Submit** (picture below)

A screenshot of a web form titled 'Letter Batches Criteria'. It has a 'Student Number' input field. Below it, there are two date pickers: 'Beginning Date (mm/dd/yyyy)' with the value '7/1/2011' and 'Ending Date (mm/dd/yyyy)' with the value '9/29/2011'. The date pickers are highlighted with a red box. At the bottom, there are three buttons: 'Submit', 'Reset', and 'Back'.

Find the Letter Batch Id of the Letter you want to rmerge i.e. "DirectCertify 09/26/2011"  
Hi-Light that Id name, Right Click, **COPY** (picture below)



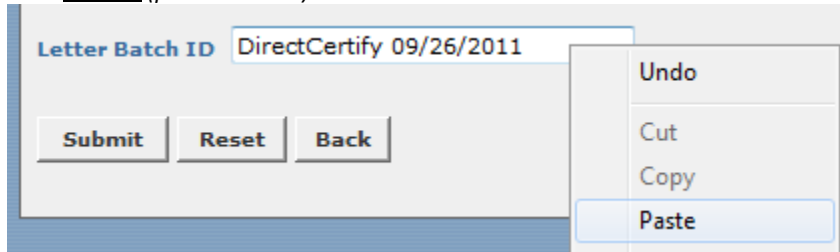
Go Back to Letters > Create Letter Data *(Refer to Create Letter Data Part 1)*

Under **Letter ID**, Select Type of Letter

Check Mark **Use Family Letter**

**Letter Batch ID** (@bottom), Right Click, PASTE the letter you just copied above i.e. "DirectCertify 09/26/2011"

Click **Submit** *(picture below)*



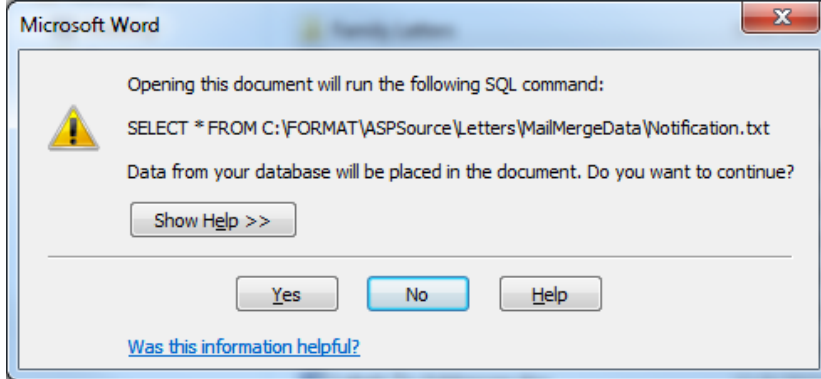
Reopen that Letter from MailMergeDocs and Edit *(Refer to Edit Letter in Word Part 3)*

Merge Letter Data Using Microsoft Office *(Refer to Merging Letter Data Part 4 or 5)*

### 3. Open and Edit Letter in Microsoft Word –

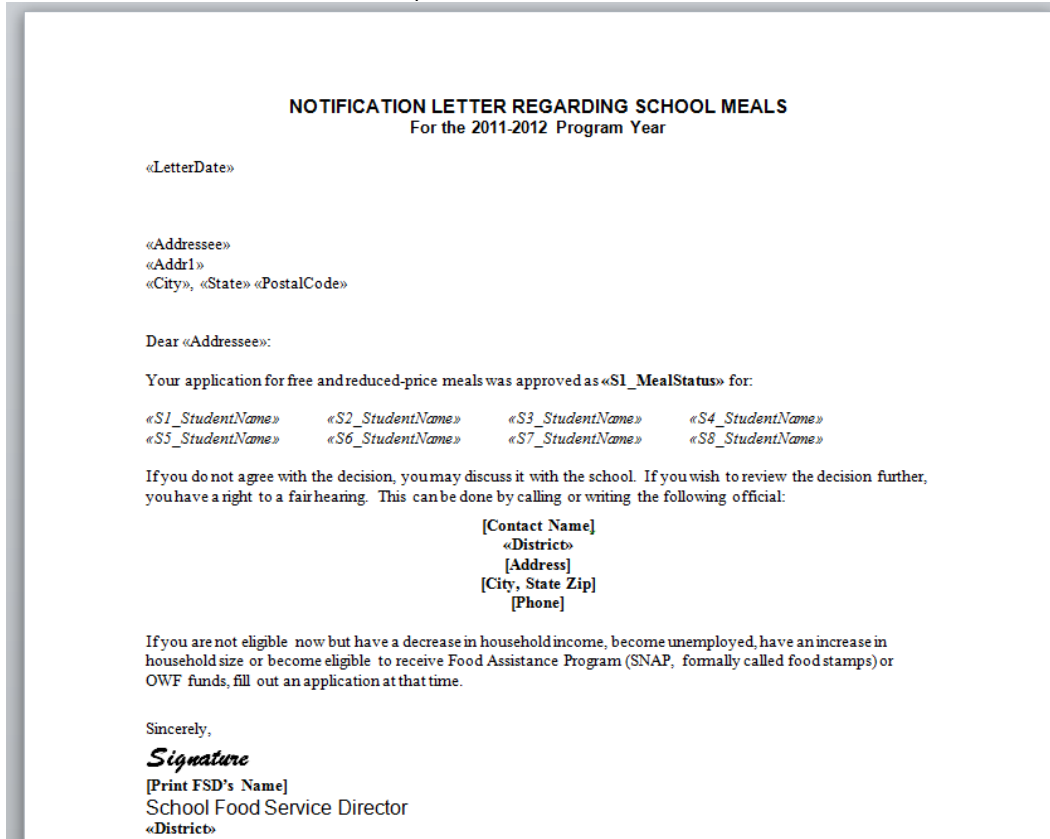
Open MailMergeDocs > Family Letters on desktop.  
Select the same Letter you specified in Create Letter Data above.

Message below may or may not appear...



This message is asking if you would like to use the data from the previous time this letter has been created, say "No" to the above message.

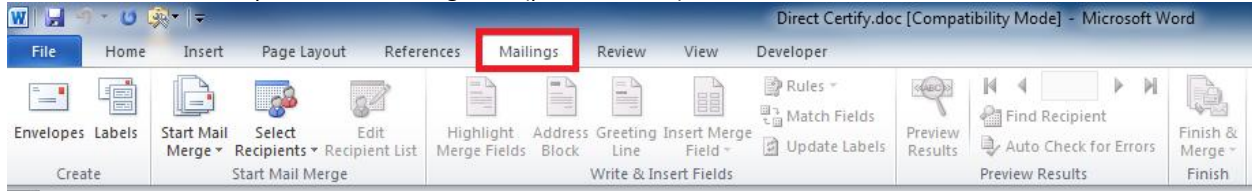
Your Letter should look similar to the picture below...



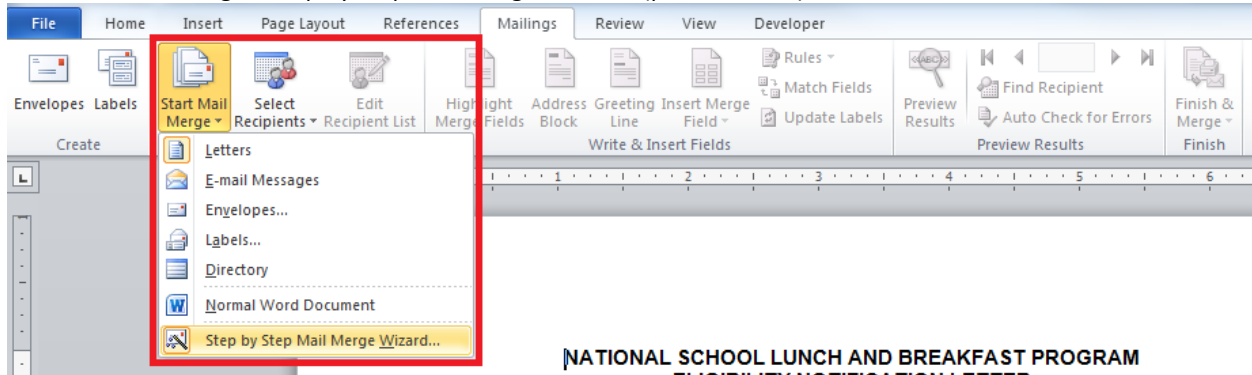
Please carefully read the letter and edit as necessary. (i.e. fill in "Contact Name", "Address", etc...) Any field enclosed like this: <<value>> **do not touch**, these fields will fill in automatically when merged. When finished editing/proof reading the Letter click **Save** to remember your preferences for next time.

#### 4. After Opening & Editing Letter, Merge Letter Data in Microsoft Office 2007 - 2010 –

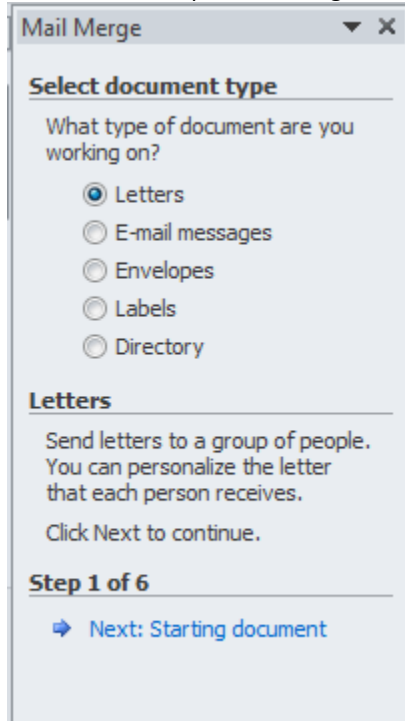
In the toolbar at the top, Click the Mailings tab. (picture below)



Click Start Mail Merge > Step by Step Mail Merge Wizard... (picture below)



A Menu should open on the right-side of the screen; follow the Wizard Step by Step. (picture below)



Step 1 of 6 – Select document type

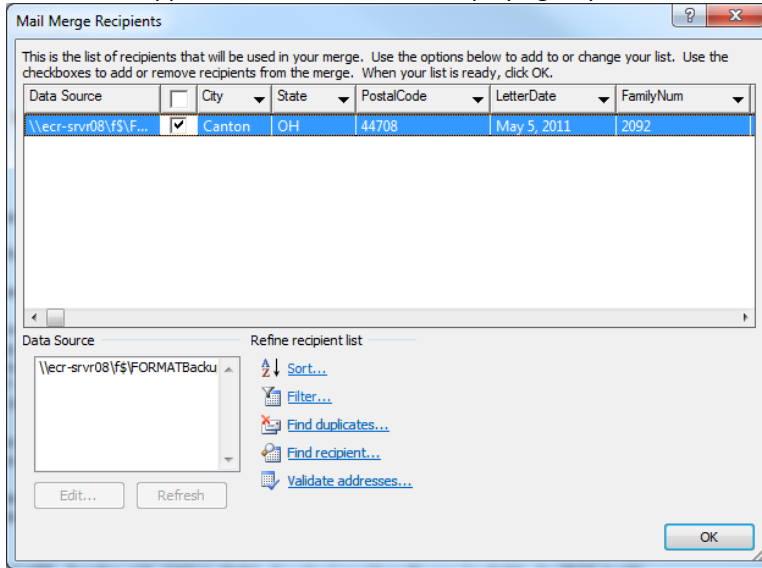
Check “Letters”, Click Next: Starting document

Step 2 of 6 – Select starting document

Check “Use the current document”, Click Next: Select recipients

Step 3 of 6 – Select recipients

Check “Use an existing list”, Click Browse and Open the \*.txt file created from Letter Data step. (There should be a folder on your desktop called MailMergeData where you will find your text file, once selected a window will appear after a few minutes displaying all your student data to be merged.) *(picture below)*



Click Next: Write your letter

Step 4 of 6 – Write your letter

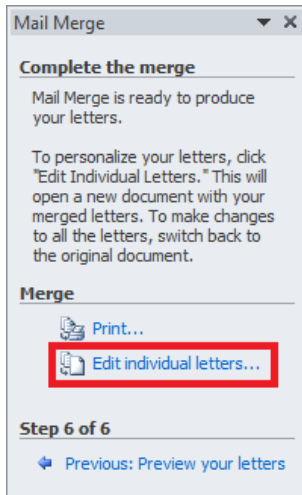
Your letter is already created you can skip this step and Click Next: Preview your letters

Step 5 of 6 – Preview your letters

This will display your first letter, go ahead and just Click Next: Complete the merge

Step 6 of 6 – Complete the merge

Click “Edit individual letters...” *(picture below)*



All your letters should now start displaying; bottom left will tell you how many letters will be printed.

Check/verify a few make sure there are no errors.

To print Click File > Print or hit Ctrl + P on the Keyboard, Select the Printer you want to send it to.  
Print when ready.

Repeat same process for Labels using the same Text file from MailMergeData you used on the Letter.





Check All then Click OK



All your letters should now start displaying; bottom left will tell you how many letters will be printed.

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Check/verify a few make sure there are no errors.

To print Click File > Print or hit Ctrl + P on the Keyboard, Select the Printer you want to send it to.  
Print when ready.

Repeat same process for Labels using the same Text file from MailMergeData you used on the Letter.