**Microsoft Office 2010 Mail Mergers – Letters**

This instructions sheet will walk you through using a data download from NST and the Microsoft Office mail merge wizard to create letters to send to home owners with minor housing code violations.

**\*\*Please note, this template uses the inspection notes field to summarize property issues in the letter. If this information is in another field, add that field to the report before downloading\*\***

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**Creating the NST data download**

1. Log onto NST (<http://neocando.case.edu/nst/>) and load your Code Enforcement service area.
2. Click on **Reports** and select the **Download for Letter Mail Merge** report.
   1. This report turns on the following columns:
      1. Current owner
      2. Date acquired
      3. Escrow account holder
      4. TMA name
      5. TMA street #
      6. TMA street direction
      7. TMA street name
      8. TMA street suffix
      9. City
      10. TMA state
      11. TMA zip
      12. Source
      13. Date complaint received
      14. Inspection date
      15. Housing specialist
      16. Finding or violation type
      17. Inspection notes
      18. Letter date
      19. B&H referral date
      20. Currently active condemnations
      21. VN issue date
3. **Filter** by **Inspection Date** to bring up recent inspections that you haven’t sent letters out to yet. The report filters out any inspection not listed with finding/violations as minor.
   1. You can additionally choose to filter by other columns as you see necessary. You may want to check to see if any properties have currently active condemnations or VNs and filter these out.
   2. **Filter by source** if you have multiple types of letters to send out.
4. Click **Download** and **download here** once the download is ready.
5. **Save the file** in an appropriate location. We suggest creating a letter download file in your code enforcement documents, and including a date in the download file name (example file name: Routine Inspection Letter 07-14-2014.csv).

**Using Microsoft Office to Merge Data with Letter Template**

Please use the letter templates provided by the Code Enforcement Partnership, available on the [NST Resources Page](http://neocando.case.edu/nst/resources.jsp). Each type of inspection has a different letter template, so be sure download the correct template.

1. **Download appropriate letter template.** Save the downloaded template in an appropriate location and open the file. You may need to click on “enable editing” in the yellow banner upon opening the file, depending on the version of Microsoft Word you are using.
2. **Click on Mailings, Start Mail Merge, and Step-by-Step Mail Merge Wizard.** 
   1. Choose “letters” to indicate you are creating a letter.
3. **Click next: Starting document**
   1. In the first prompt, choose ‘Use current’ – This allows you to use the letter template as your mail merge letter.
4. **Click next: Select Recipients**
   1. Choose ‘Use existing list’
   2. Click browse
   3. Select the excel sheet that your recipient’s names and addresses are listed on. (This is the download created in the first half of this instruction sheet)
   4. You can choose to additionally filter the data if needed:
      1. Filter by **letter date** to ensure you are sending out letters to only those who haven’t yet received them.
      2. Filter by **source** to choose inspections relevant to the letter template (choose routine inspections for the routine letter template, etc.)
   5. Mail Merge Recipients will pop up. You can select/deselect the various recipients. You can also further filter data in your worksheet.
   6. Press ok
5. **Click next: Write your letter.** Since you’re using the letter template, this part is mostly done.
   1. Be sure to add your name, contact info, and your organization’s information at the signature line of the letter. The last line of the letter calls for you to add a contact phone number.
   2. The letter template uses the **inspection notes** field in NST to describe to the issues with the property. If you want to use another field, click on **more items** in the mail merge wizard and select the name of the item you’d like to add and click on **insert.**
   3. The date field at the top of the letter should reflect today’s date automatically. If it does not, be sure to update it.
6. **Click next: Preview Your Document**
   1. At this time your information from the spreadsheet should appear. You can scroll through each letter to make sure the information is correct for each letter.
7. **Click next: Complete the merge and save the file**
   1. From here you can save the file (example file name- Routine Inspection mail merged letters 07-14-2014.docx), edit individual letters, or print all your letters.

*\*\*Great YouTube video for help:* [*Mail Merge in Microsoft Office Word, 2010 Part 1*](http://youtu.be/cx6Ve-kwLxU)