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Introduction

If you’ve created Microsoft Word text templates and spreadsheets containing student information in Portfolio Navigator’s Action Center, you can use mail merge functionality to create customized outreach communications to help your students prepare for and succeed in repayment. There are two different methods to do this, based on your familiarity with the mail merge process.

Note: Spreadsheets containing student information used to reach out via email and mail are named as follows.

  • **[Status] – [Outreach Type]:** This naming format is used for spreadsheets used to reach out to your students who are struggling in repayment.
    
    **Example:** Late Delinquency – Email
  
  • **Great Lakes – [Outreach Type]:** This naming format is used for spreadsheets used to reach out to students to encourage them to create a Great Lakes website account.
    
    **Example:** Great Lakes - Letter

  • **Labels:** Spreadsheets containing mailing addresses used to create custom mailing labels are always named Labels.

Note: This document provides steps for using Microsoft Word 2010. If you’re using another version, the steps you follow may differ slightly. Consult the available help resources for the version you’re using for more information.

Create Communications Using the Shortcut Method

If you’re familiar with the mail merge process, you can use the shortcut method to quickly and easily create customized emails, letters, and mailing labels.

Note: If you’re not familiar with the mail merge process, it may be helpful for you to go through this process using the step-by-step Mail Merge wizard. Refer to the Create Communications Using the Mail Merge Wizard section for more information.
Create Customized Outreach Emails and Letters

You can use the email and letter text templates and spreadsheets containing student information created in Action Center to create customized outreach emails and letters.

1. Save the appropriate spreadsheet in a convenient location (e.g., your desktop).

2. Open the appropriate text template in Microsoft Word 2010.

3. Select the Mailings tab on the ribbon.

4. Click Select Recipients in the Start Mail Merge section and select Use Existing List from the menu that displays to open the Select Data Source dialog box.

5. Browse to the location where you saved the appropriate spreadsheet.

6. Click Open to open the Select Table dialog box.

7. Make sure the Report Data row is selected, and then click OK to close the Select Table dialog box.

Note: The Report Data tab on the spreadsheet contains information about the students in the targeted outreach group, including their email addresses (if sending emails) and mailing addresses (if sending letters). By making sure that this row is selected, you ensure that the data from this tab is used during the mail merge.
8. Delete any red instructional text in the template.

   **Note:** This text is provided by Great Lakes to help you understand how to use the template and is not intended to be shared with your students.

9. If you’re creating outreach emails, add your school’s contact phone number.

10. Add your school’s standard disclaimer text in the appropriate location in the template, if needed.

11. Click **Preview Results** in the Preview Results section of the **Mailings** tab.

   ![Figure 4. Example of the Mailings tab indicating the Preview Results button](image)

   Preview text for each individual communication is created.

   ![Figure 5. Example of a template indicating actual data in the greeting](image)

12. Click the **Right Arrow** and **Left Arrow** buttons in the Preview Results section to preview data for individual recipients.

   ![Figure 6. Example of the Mailings tab indicating the Right Arrow and Left Arrow buttons](image)

13. Make any necessary changes.

   **Example:** Click **Edit Recipient List** in the Start Mail Merge section of **Mailings** tab to edit the list of recipients.
14. Finish and send your communications.
   - If you’re sending emails, go to the Finish and Send Emails section.
   - If you’re sending letters, go to the Finish and Send Letters section.

**Finish and Send Emails**

If you’re creating outreach emails, complete the following to set up and send your email messages.

1. Click **Finish & Merge** in the Finish section of the Mailings tab and select Send E-Mail Messages from the menu that displays to open the Merge to E-Mail dialog box.

![Figure 7. Example of selecting Send E-Mail Messages from the Finish & Merge button menu](image)

2. Set up your email message.
   a. Select Borrower_Email_Address from the To drop-down list.
      
      **Note:** Selecting this option pulls in the email addresses for each student listed on the spreadsheet created in Action Center.
   b. Enter the subject line to use for each email in the Subject Line field.
   c. Select the email format from the Mail Format drop-down list.

3. Click **OK** to create your email messages.

![Figure 8. Example of the Merge to E-Mail dialog box indicating the OK button](image)
Finish and Send Letters

If you’re creating outreach letters, you can choose to personalize individual letters, or to print and send your letters as is.

To personalize individual letters, complete the following.

1. Click Finish & Merge in the Finish section of the Mailings tab and select Edit Individual Documents from the menu that displays to open the Merge to New Document dialog box.

![Figure 9. Example of selecting Edit Individual Documents from the Finish & Merge button menu](image)

2. Select the appropriate options to indicate the letters you want to include, and then click OK to open a new document containing all of the selected letters.

![Figure 10. Example of the Merge to New Document dialog box indicating the OK button](image)

3. Make any necessary changes, and then print your letters.

-or-

To print your letters as is, complete the following.

1. Click Finish & Merge in the Finish section of the Mailings tab and select Print Documents from the menu that displays to open the Merge to Printer dialog box.

![Figure 11. Example of selecting Print Documents from the Finish & Merge button menu](image)
2. Select the letters you want to include, and then click OK to open the Print dialog box.

![Figure 12. Example of the Merge to Printer dialog box indicating the OK button](image)

3. Select the appropriate printer options, and then click OK.

![Figure 13. Example of the Print dialog box indicating the OK button](image)

**Create Customized Mailing Labels**

When creating outreach letters in Action Center, you also have the option to create mailing labels. If you choose to create preformatted mailing labels, the labels are created in Avery 5160 format in a Portable Document Format (PDF) document. If you need mailing labels in a different format, you can create a Labels spreadsheet containing student information. This spreadsheet is then used during the mail merge to create customized mailing labels.

1. Save the Labels spreadsheet in a convenient location (e.g., your desktop).

2. Open a new document in Microsoft Word 2010.

3. Select the Mailings tab on the ribbon.
4. Click **Start Mail Merge** and select **Labels** from the menu that displays to open the Label Options dialog box.

![Figure 14. Example of selecting Labels from the Start Mail Merge button menu](image)

5. Select the appropriate options to indicate the mailing label format needed, and then click **OK**.

![Figure 15. Example of the Label Options dialog box indicating the OK button](image)

6. Click **Select Recipients** and select **Use Existing List** from the menu that displays to open the Select Data Source dialog box.

![Figure 16. Example of selecting Use Existing List from the Select Recipients button menu](image)

7. Browse to the location where you saved the Labels spreadsheet.
8. Click Open to open the Select Table dialog box.

![Select Data Source dialog box](image1)

Figure 17. Example of the Select Data Source dialog box indicating the Open button

9. Make sure the Label Data row is selected, and then click OK to close the Select Table dialog box.

**Note:** The Label Data tab on the Labels spreadsheet contains the names and mailing addresses of the students in the targeted outreach group. By making sure this row is selected, you ensure that the data from this tab is used during the mail merge.

![Select Table dialog box](image2)

Figure 18. Example of the Select Table dialog box indicating the OK button

10. Insert merge fields (i.e., fields used to pull in individual student data from the Labels spreadsheet) in the first mailing label in the document.

   a. Place your cursor where you want to insert a merge field.
b. Click **Insert Merge Field** in the Write & Insert Fields section of the **Mailings** tab and select the merge field you want to insert from the menu that displays.

![Figure 19. Example of selecting a merge field from the Insert Merge Field button menu](image)

The merge field displays in the mailing label in the format `<<[Merge Field Name]>>`.

c. Repeat steps 11a – 11b for each merge field you want to insert.

![Figure 20. Example of how merge fields display in a mailing label](image)

11. Click **Update Labels** in the Write & Insert Fields section of the **Mailings** tab to copy the layout of the first mailing label to all other mailing labels.

![Figure 21. Example of the Mailings tab indicating the Update Labels button](image)
12. Click **Preview Results** in the Preview Results section of the *Mailings* tab.

![Figure 22. Example of the Mailings tab indicating the Preview Results button](image)

Preview text for each mailing label is created, with the student data displaying in each merge field you inserted.

![Figure 23. Example of a mailing label containing actual data in place of the merge fields](image)

13. Click the **Right Arrow** and **Left Arrow** buttons in the Preview Results section of the *Mailings* tab to preview data for individual recipients, if necessary.

![Figure 24. Example of the Mailings tab indicating the Right Arrow and Left Arrow buttons](image)

14. Make any necessary changes.

**Example:** Click **Edit Recipient List** in the Start Mail Merge section of the *Mailings* tab to edit the list of recipients.

15. To personalize individual mailing labels, complete the following.

a. Click **Finish & Merge** in the Finish section of the *Mailings* tab and select **Edit Individual Documents** from the menu that displays to open the Merge to New Document dialog box.

![Figure 25. Example of selecting Edit Individual Documents from the Finish & Merge button menu](image)
b. Select the appropriate options to indicate the mailing labels you want to include, and then click OK to open a new document containing all of the selected mailing labels.

![Merge to New Document dialog box indicating the OK button](image)

*Figure 26. Example of the Merge to New Document dialog box indicating the OK button*

c. Make any necessary changes, and then print your mailing labels.

-or-

To print your mailing labels as is, complete the following.

a. Click **Finish & Merge** in the Finish section of the **Mailings** tab and select **Print Documents** from the menu that displays to open the Merge to Printer dialog box.

![Example of selecting Print Documents from the Finish & Merge button menu](image)

*Figure 27. Example of selecting Print Documents from the Finish & Merge button menu*

b. Select the appropriate options to indicate the mailing labels you want to include, and then click OK to open the Print dialog box.

![Example of the Merge to Printer dialog box indicating the OK button](image)

*Figure 28. Example of the Merge to Printer dialog box indicating the OK button*
c. Select the appropriate printer options, and then click **OK**.

![Print dialog box](example.png)

**Figure 29. Example of the Print dialog box indicating the OK button**

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**Create Communications Using the Mail Merge Wizard**

If you’re not familiar with the mail merge process, you can use the Mail Merge wizard to complete a step-by-step flow to easily create customized emails, letters, and mailing labels.

**Create Customized Outreach Emails**

You can use the email text template and spreadsheet containing student information created in Action Center to create customized outreach emails.

1. Save the spreadsheet in a convenient location (e.g., your desktop).
2. Open the email text template in Microsoft Word 2010.
3. Select the **Mailings** tab on the ribbon.
4. Click **Start Mail Merge** and select **Step by Step Mail Merge Wizard** from the menu that displays to open the Mail Merge wizard.

![Mail Merge wizard](example.png)

**Figure 30. Example of selecting Step by Step Mail Merge Wizard from the Start Mail Merge button menu**
5. Select **E-mail Messages** in the Select Document Type section.

6. Click **Next: Starting Document**.

7. Make sure **Use the Current Document** is selected in the Select Starting Document section.

8. Click **Next: Select Recipients**.

9. Make sure **Use an Existing List** is selected in the Select Recipients section.
10. Click **Browse** in the Use an Existing List section to open the Select Data Source dialog box.

![Figure 33. Example of step 3 in the wizard indicating the Use an Existing List option and Browse link](image)

11. Browse to the location where you saved the spreadsheet containing student information.

12. Click **Open** to open the Select Table dialog box.

![Figure 34. Example of the Select Data Source dialog box indicating the Open button](image)
13. Make sure the Report Data row is selected, and then click **OK** to open the Mail Merge Recipients dialog box.

**Note:** The *Report Data* tab on the spreadsheet contains information about the students in the targeted outreach group, including their email addresses. By making sure that this row is selected, you ensure that the data from this tab is used during the mail merge.

![Select Table dialog box](image.png)

**Figure 35.** Example of the Select Table dialog box indicating the OK button

14. Clear the checkboxes for any students you don’t want to send an email to.

**Note:** By default, all students on the spreadsheet are selected.

15. Click **OK** to return to the Mail Merge wizard.

![Mail Merge Recipients dialog box](image.png)

**Figure 36.** Example of the Mail Merge Recipients dialog box indicating the OK button

16. Click **Next: Write Your E-Mail Message**.

17. Delete any red instructional text in the template.

**Note:** This text is provided by Great Lakes to help you understand how to use the template and is not intended to be shared with your students.

18. Add your school’s contact phone number and/or standard disclaimer text in the appropriate locations in the template, if needed.
19. Click **Next: Preview Your E-mail Messages**.

   Preview text for each email message is created, with the student data displaying in each merge field you inserted.

   ![Example of an email template indicating the actual data in place of the merge field in the email greeting](image)

   **Figure 37. Example of an email template indicating the actual data in place of the merge field in the email greeting**

20. Click the **Right Arrow** and **Left Arrow** buttons in the Preview Your Email Messages section to preview data for individual recipients.

   ![Example of step 5 in the wizard indicating the buttons in the Preview Your E-Mail Messages section](image)

   **Figure 38. Example of step 5 in the wizard indicating the buttons in the Preview Your E-Mail Messages section**

21. Make any necessary changes.

22. Click **Next: Complete the Merge**.

23. Click **Electronic Mail** in the Merge section to open the Merge to E-Mail dialog box.

   ![Example of step 6 in the wizard indicating the Electronic Mail link](image)

   **Figure 39. Example of step 6 in the wizard indicating the Electronic Mail link**

24. Set up your email message.
   
   a. Select **Borrower_Email_Address** from the **To** drop-down list.

   **Note:** Selecting this option pulls in the email addresses for each student listed on the spreadsheet.
b. Enter the subject line to use for each email in the Subject Line field.

c. Select the email format from the Mail Format drop-down list.

25. Click OK to create your email messages.

![Example of the Merge to E-Mail dialog box indicating the OK button](image)

**Create Customized Outreach Letters**

You can create pre-formatted, ready-to-use letters in Action Center that can be easily printed and saved. If you need to create customized outreach letters, use the letter text template and spreadsheet containing student information created in Action Center.

1. Save the spreadsheet in a convenient location (e.g., your desktop).

2. Open the letter text template in Microsoft Word 2010.

3. Select the Mailings tab on the ribbon.

4. Click Start Mail Merge and select Step by Step Mail Merge Wizard from the menu that displays to open the Mail Merge wizard.

 ![Example of selecting Step by Step Mail Merge Wizard from the Start Mail Merge button menu](image)
5. Make sure **Letters** is selected in the Select Document Type section.

![Select document type](image)

*Figure 42. Example of step 1 in the wizard indicating the Letters option*

6. Click **Next: Starting Document**.

7. Make sure **Use the Current Document** is selected in the Select Starting Document section.

![Select starting document](image)

*Figure 43. Example of step 2 in the wizard indicating the Use the Current Document option*

8. Click **Next: Select Recipients**.

9. Make sure **Use an Existing List** is selected in the Select Recipients section.
10. Click **Browse** in the Use an Existing List section to open the Select Data Source dialog box.

![Figure 44. Example of step 3 in the wizard indicating the Use an Existing List option and Browse link](image)

11. Browse to the location where you saved the spreadsheet containing student information.

12. Click **Open** to open the Select Table dialog box.

![Figure 45. Example of the Select Data Source dialog box indicating the Open button](image)
13. Make sure the Report Data row is selected, and then click **OK** to open the Mail Merge Recipients dialog box.

   **Note:** The **Report Data** tab on the spreadsheet contains information about the students in the targeted outreach group, including their mailing addresses. By making sure that this row is selected, you ensure that the data from this tab is used during the mail merge.

![Select Table dialog box](image1)

![Example of the Select Table dialog box indicating the OK button](image2)

14. Clear the checkboxes for any students you don’t want to send a letter to.

   **Note:** By default, all students on the spreadsheet are selected.

15. Click **OK** to return to the Mail Merge wizard.

![Mail Merge Recipients dialog box](image3)

![Example of the Mail Merge Recipients dialog box indicating the OK button](image4)

16. Click **Next: Write Your Letter**.

17. Delete any red instructional text in the template.

   **Note:** This text is provided by Great Lakes to help you understand how to use the template and is not intended to be shared with your students.

18. Add your school’s standard disclaimer text in the appropriate location in the template, if needed.
19. Click **Next: Preview Your Letters**.

Preview text for each letter is created, with the student data displaying in each merge field you inserted.

![Figure 48. Example of a letter template indicating the actual data in place of the merge field in the letter greeting](image)

20. Click the **Right Arrow** and **Left Arrow** buttons in the Preview Your Letters section to preview data for individual recipients.

![Figure 49. Example of step 5 in the wizard indicating the buttons in the Preview Your Letters section](image)

21. Make any necessary changes.

22. Click **Next: Complete the Merge**.
23. To personalize individual letters, complete the following.
   a. Click **Edit Individual Letters** to open the Merge to New Document dialog box.

   ![Figure 50](image1.png)
   *Figure 50. Example of step 6 in the wizard indicating the Edit Individual Letters link*

   b. Select the appropriate options to indicate the letters you want to include, and then click **OK** to open a new document containing all of the selected letters.

   ![Figure 51](image2.png)
   *Figure 51. Example of the Merge to New Document dialog box indicating the OK button*

   c. Make any necessary changes, and then print your letters.

   -or-
To print your letters as is, complete the following.

a. Click **Print** to open the Merge to Printer dialog box.

Figure 52. Example of step 6 in the wizard indicating the Print link

b. Select the letters you want to include, and then click **OK** to open the Print dialog box.

Figure 53. Example of the Merge to Printer dialog box indicating the OK button
Use Mail Merge Functionality to Create Customized Outreach Communications

c. Select the appropriate printer options, and then click **OK**.

![Print dialog box with OK button highlighted](image)

*Figure 54. Example of the Print dialog box indicating the OK button*

### Create Customized Mailing Labels

When creating outreach letters in Action Center, you also have the option to create mailing labels. If you choose to create preformatted mailing labels, the labels are created in Avery 5160 format in a Portable Document Format (PDF) document. If you need mailing labels in a different format, you can create a Labels spreadsheet containing student information. This spreadsheet is then used during the mail merge to create customized mailing labels.

1. Save the Labels spreadsheet in a convenient location (e.g., your desktop).
2. Open a new document in Microsoft Word 2010.
3. Select the **Mailings** tab on the ribbon.
4. Click **Start Mail Merge** and select **Step by Step Mail Merge Wizard** from the menu that displays to open the Mail Merge wizard.

![Start Mail Merge button menu](image)

*Figure 55. Example of the Start Mail Merge button menu*
5. Select *Labels* in the Select Document Type section.

![Select Document Type](image1.png)

*Figure 56. Example of step 1 in the wizard indicating the Labels option*

6. Click *Next: Starting Document*.

7. Make sure *Change Document Layout* is selected in the Select Starting Document section.

8. Click *Label Options* in the Change Document Layout section to open the Label Options dialog box.

![Select Starting Document](image2.png)

*Figure 57. Example of step 2 in the wizard indicating the Change Document Layout option and Label Options link*
9. Select the appropriate options to indicate the mailing label format needed, and then click **OK**.

![Label Options dialog box](image)

*Figure 58. Example of the Label Options dialog box indicating the OK button*

10. Click **Next: Select Recipients**.

11. Make sure **Use an Existing List** is selected in the Select Recipients section.

12. Click **Browse** in the Use an Existing List section to open the Select Data Source dialog box.

![Select recipients](image)

*Figure 59. Example of step 3 in the wizard indicating the Use an Existing List option and Browse link*

13. Browse to the location where you saved the Labels spreadsheet.
14. Click **Open** to open the Select Table dialog box.

![Select Data Source dialog box](image)

*Figure 60. Example of the Select Data Source dialog box indicating the Open button*

15. Make sure the Label Data row is selected, and then click **OK** to open the Mail Merge Recipients dialog box.

**Note:** The Label Data tab on the Labels spreadsheet contains the names and mailing addresses of the students in the targeted outreach group. By making sure that this row is selected, you ensure that the data on this tab is used during the mail merge.

![Select Table dialog box](image)

*Figure 61. Example of the Select Table dialog box indicating the OK button*

16. Clear the checkboxes for any students you don’t want to create a mailing label for.

**Note:** By default, all students listed on the Labels spreadsheet are selected.
17. Click **OK** to return to the Mail Merge wizard.

![Image of the Mail Merge Recipients dialog box indicating the OK button](image1.png)

**Figure 62. Example of the Mail Merge Recipients dialog box indicating the OK button**

18. Click **Next: Arrange Your Labels**.

19. Insert merge fields (i.e., fields used to pull in individual student data from the Labels spreadsheet) in the first mailing label in the document.
   
   a. Place your cursor where you want to insert a merge field.
   
   b. In the Mail Merge wizard, click **More Items** in the Arrange Your Labels section to open the Insert Merge Field dialog box.

![Image of the Arrange your labels dialog box](image2.png)

**Figure 63. Example of step 4 in the wizard indicating the More Items link**

   c. Make sure **Database Fields** is selected in the Insert section.
d. Select the merge field you want to insert from the *Fields* list, and then click **Insert**.

![Insert Merge Field dialog box](image)

*Figure 64. Example of the Insert Merge Field dialog box indicating the Database Fields option and Insert button*

The merge field displays in the mailing label, in the format `<<[Merge Field Name]>>`.

![Merge fields example](image)

*Figure 65. Example of how merge fields display in a mailing label*

e. Click **Close**.

f. Repeat steps 20a – 20e for each merge field you want to insert.

20. Click **Update All Labels** in the Replicate Labels section to copy the layout of the first mailing label to all other mailing labels.

![Replicate labels](image)

*Figure 66. Example of step 4 in the wizard indicating the Update All Labels button*
21. Click **Next: Preview Your Labels**.

Preview text for each mailing label is created, with the student data displaying in each merge field you inserted.

![Example of a mailing label containing actual data in place of the merge fields](image)

**Figure 67. Example of a mailing label containing actual data in place of the merge fields**

22. Click the **Right Arrow** and **Left Arrow** buttons in the Preview Your Labels section to view how the data displays for each individual recipient, if necessary.

![Example of step 5 in the wizard indicating the buttons in the Preview Your Labels section](image)

**Figure 68. Example of step 5 in the wizard indicating the buttons in the Preview Your Labels section**

23. Make any necessary changes.

24. Click **Next: Complete the Merge**.
25. To personalize individual mailing labels, complete the following.
   a. Click **Edit Individual Labels** to open the Merge to New Document dialog box.

![Image of Mail Merge window](image1)

*Figure 69. Example of step 6 in the wizard indicating the Edit Individual Labels link*

b. Select the appropriate options to indicate the mailing labels you want to include, and then click **OK** to open a new document containing all of the selected mailing labels.

![Image of Merge to New Document dialog box](image2)

*Figure 70. Example of the Merge to New Document dialog box indicating the OK button*

c. Make any necessary changes, and then print your mailing labels.

-or-

-
To print your mailing labels as is, complete the following.

a. Click Print to open the Merge to Printer dialog box.

b. Select the appropriate options to indicate the mailing labels you want to include, and then click OK to open the Print dialog box.
c. Select the appropriate printer options, and then click **OK**.

![Example of the Print dialog box indicating the OK button](image-url)