

How to Mail Merge our Parent Letter / Email

1. In Satchel One, click on *Admin > Login details*.
2. On this screen, you can choose which parents you're going to target. Select an individual year group, registration group, or the whole school. Once you've made your selection, click *Continue*.
3. Select *Mail Merge File*. Under 'Users to include', ensure that both *Students (All)* and *Parents/Guardians* are ticked.
4. Click *Generate*. This will generate an XLS spreadsheet containing the students and any linked parent accounts. Download the spreadsheet.
5. If you're going to contact parents by letter, **skip to Step 6**. However, if you're going to contact parents by email, proceed as follows:
 - From your MIS, export a CSV file containing student UPNs and parent email addresses.
 - Use the [VLOOKUP](#) function to transfer the parent email addresses from the CSV into the mail merge file - *Parent code* (Column K).
 - Save and close the mail merge file.
6. Open our [template letter/email](#), download it as a Microsoft Word document and open.
7. Click on *Mailings > Select Recipients > Use an Existing List*. Locate and select the mail merge file you have just downloaded. Click OK. Your letter/email and mail merge file are now linked.
8. In place of the bold text, write today's date, the name of your school and the name of the person signing off at the end.
9. One at a time, highlight the remaining pieces of bold text and replace with the relevant merge fields - to do this, click *Mailings > Insert Merge Field*. The relevant merge fields are:
 - **Student_Forename Student_Surname** (add a space in between as shown)
 - **Registration_Group**
 - **Parent_Code**
10. Make any further edits as required. For example, you may want to include a digital signature.

11. Click on *Finish & Merge* and then select one of the following options:

➤ *Send Email Messages*

In the 'To' menu, select
Parent/Guardian 1 Last Active.

Then enter a subject line for your
email and click 'OK'.

➤ *Print Document*

The letters will be populated with
the correct information.

