

CourtMail
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Microsoft Word Instructions for creating a letter template from a records file
when records come in the body of the email.

1. Open up the email that contains your records.
2. Click “edit” then “select all” then “edit” then “copy” or manually highlight the text and copy it, whichever works best with your email program.
3. Close the email.
4. Open up the **WORD PAD** program (this program is usually found on the accessories menu from the “start” button).
5. Click “edit” then “paste special” and then select “unformatted text”.
6. Type the numbers 1 through 15 separated by commas only (no spaces) above the first line of text. It should look like this:

1,2,3,4,5,6,7,8,9,10,11,12,13,14,15

“ROWAN County”, “Case Number 01CR0030678”, “Mr.”, “John Doe”, “”, “0021 SOUTH BLVD”, “CHARLOTTE NC 28209”, “020201 offense date”, “061801 filing date”, “080301 trial date”, “Infraction SPEEDING”, “Traffic NO OPERATORS LICENSE”

7. Delete any billing information found at the bottom of your records. This has already been removed from the sample file.
8. Select “file” then “save as”. Choose a location to save your file that is easy to remember and readily accessible. Make sure you save the file as a text document. (You may get a message that says you will remove all formatting by saving as a text document – this is ok and you should proceed.)
9. Close Word Pad and open Microsoft Word. Select “file”, then “open”. Find the file that you just saved from Word Pad and open it in Microsoft Word.
10. If quotation marks remain in the document, follow these steps to remove them. Select “edit” from the tool bar, then “replace” and type a single quotation mark (“) in the find box and leave the replace with box blank. Now click “replace all” and your quotation marks will be removed.
11. Select “edit” then “select all”. The entire file should be highlighted now.
12. Select “table” then “convert text to table”. A box should appear in which you should make sure that it has 15 columns and is separating the text by commas. Click “ok” and your text will be converted into a table.
13. Select “file” then “save as” to save this table; save as a Word document in a place you can easily find it. Name it something you will remember.
14. Close this file.
15. Open a new document in Word. (This will become your letter template. You will only create this document one time.)

16. Click “tools” and then select “mail merge”.
17. You should now have a window asking for your main document and data source. Click “create” under main document. Select “form letter” and then “active window”.
18. Now you are ready to get your data source. Click “get data” and then “open data source”. You will want to select and open the table you created earlier as your data source.
19. You should now get a message that says you have no merge fields in your main document. Click “edit main document”. This will allow you to type your letter and insert merge fields wherever you want them. Start typing your letter as you want it to appear. Anywhere you need a merge field, simply click the “insert merge fields” option at the top of the screen and choose the fields that you want to insert. Below are the fields and the information they contain:

<M1> = County, <M2> = Case number, <M3> = Salutation (Ms. Mr. Etc.), <M4> through <M7> = name, <M8> = street address or PO Box, <M9> = City, State, Zip, <M10> = offense date, <M11> = filing date, <M12> = trial date, and <M13> through <M15> are the offenses.

20. When you are finished with your letter and all merge fields are in, save your letter template.
21. Now you are ready to merge. With your letter template open, select “tools” and then “mail merge”. Make sure that your main document is your letter template and that your data source is the table you created from the records. Now click “merge” and “merge” again. Scroll through and make sure that all of your letters merged correctly. Now you are ready to print your letters and mail away.
22. Make sure that when you close the program, you do NOT save changes to the letter template. Be sure to save a copy of your letter template in another location should you ever need a backup copy.

If quotation marks remain around your merge fields, follow the instructions below to remove them:

1. With your letter template open, Click “tools” then “mail merge”.
2. You should see a box with three steps. Go to Step 2 which is the Data Source and select “edit”.
3. Your table should be selected. Click on it and you will get a window that says “Data Form”. Click the option to the right that says “View Source”. Your Table should appear.
4. From the tool bar at the top, click “edit” and then “replace”. You should get a box that asks “Find What?” type a quotation mark in this box and leave the second box that says “Replace With” blank.
5. Now click “replace all” and your quotation marks should disappear.
6. Close your table and when it asks if you would like to save changes to your table, select “yes”. Your letters should now merge without the quotation marks.
7. Remember that you **never** want to save changes to your letter template.