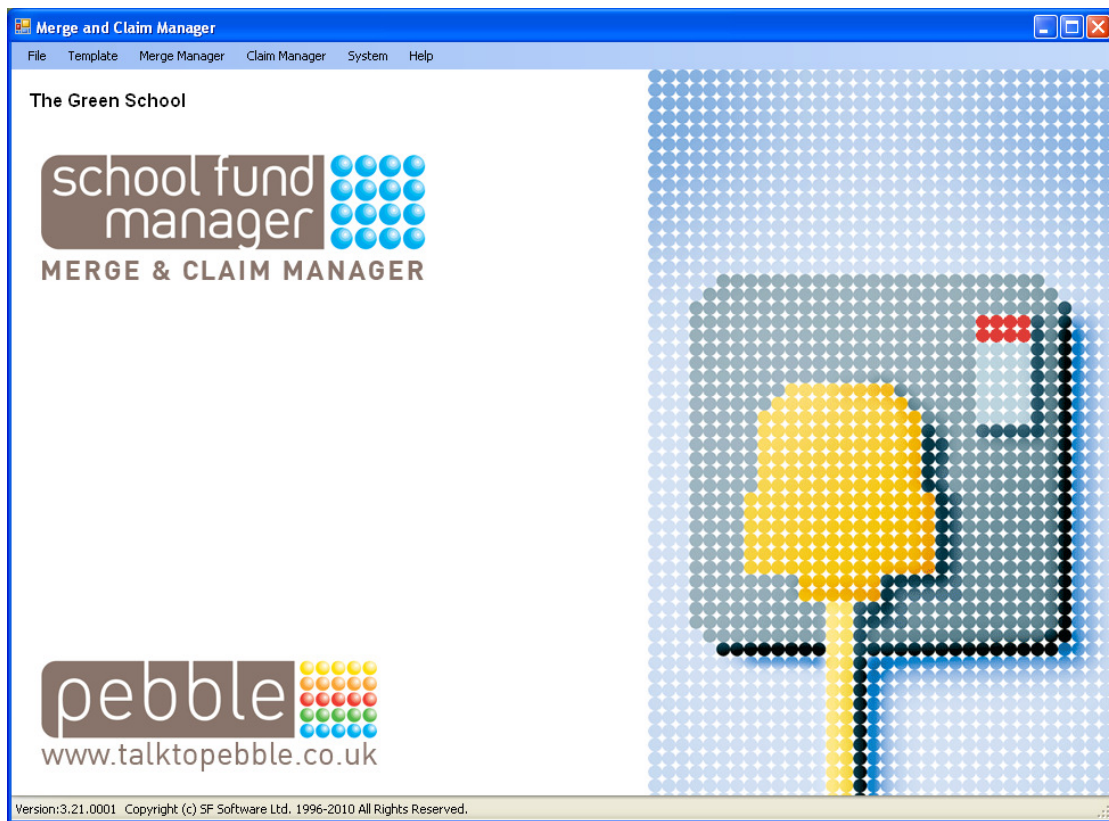


Merge Manager User Guide



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Creating a CSV file, Using Sims.net

To prepare the parent names and addresses file you need to create a file containing the names and addresses of parents/guardians in your administration database. Below are the step by step instructions to create the file using sims.net. At the end is a table for other administrative database options.

Using SIMS.net to create a CSV file of the whole school roll

☞ Reports ☞ Design ☞ Create a New Report ☞ Student ☞ Next ☞ On Roll ☞ Next

At this point you will identify the 14 fields required for the .csv file

From the Basic detail list on your right select the first 3 fields - highlight and Double Click on

- Forename
- Surname
- Date of Birth (DOB)

Now double click on Registration and select the next 4 fields from the expanded list

- Admission number
- Year Group
- Registration Group
- UPN

Now double click on Family Home and select the next 7 fields from the expanded list

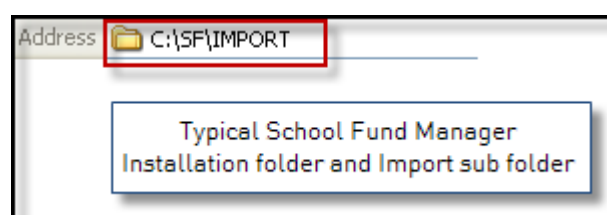
- Parental Salutation
- House Number
- House Name
- Street
- Town
- County
- Postcode

Please make sure you have selected 14 fields in total.

☞ Next
☞ Next – if no filter is to be applied
☞ Next – if no sort order is required

To create this as a .csv file you must select TEXT from the types of file offered
You will then see a box with comma separated highlighted and an empty field box in which you will enter the file name. To browse to the \SF folder

☞ Browse then ☞ to select the drive letter where School Fund is installed
☞ SF folder
☞ Import folder



Then enter the file name e.g. donors2009/10.csv

Save

Finish

RUN – this will create the file. You will see a screen message stating that the file has been saved in the n:\SF\import folder (n is your drive letter).

Save

Exit

The instructions above are specific to sims.net. In the table below are the specific field names used in alternative administrative databases.

You should select those fields appropriate to your administrative database.

Details required	Integris	Semis	Sims.net	Other
Forename	Forename	Forename	Forename	Forename
Surname	Surname	Surname	Surname	Legal Surname
Parent/Guardian Salutation	Correspondence Salutation	Home postal title	Parental Salutation	Parental Salutation
UPN	UPN	UPN	UPN	UPN
Admission number	Id	Id	Adno	Adno
Date of birth	Date of birth	Date of birth	DOB	DOB
Year	Year	Year	Year	Year
Registration Group	Reg Grp name	Reg	Reg	Reg
House number/name	Address1	Line1	HouseNumber	House number
Street	Address2	Line2	Street	Street
Town	Address3	Line4	Town	Town
County	Address4	County	County	County
Postcode	Home post code	Home post code	Postcode	Postcode

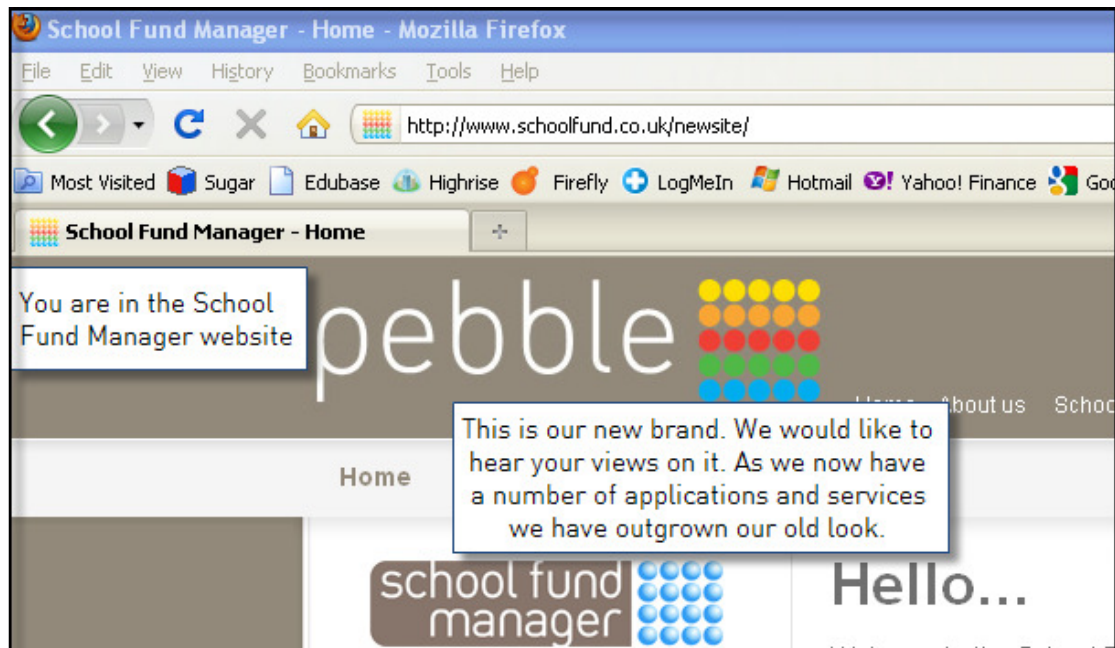
If you are unable to match the requested field names in your admin database, please look for the field names we have listed in the 'Other' column. If you require any further assistance please contact our Support Team on 0845 310 1788.

Installation

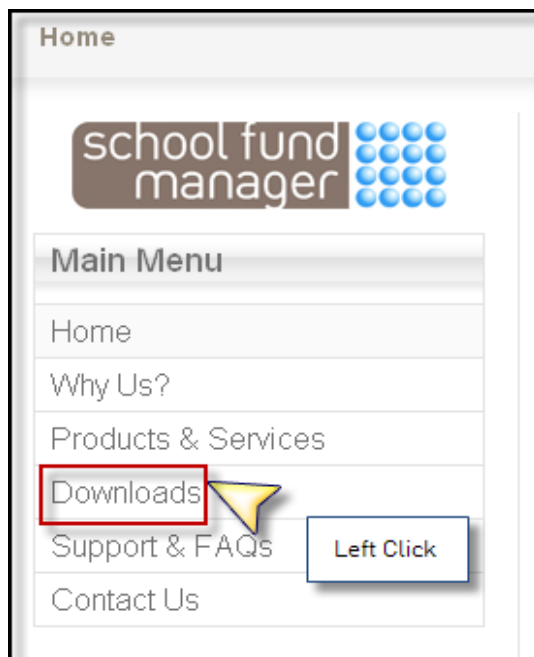
Please make sure you are logged on as **ADMINISTRATOR** before you start.

These instructions will guide you through a **new installation**; simply follow the instruction screens that appear on your system.

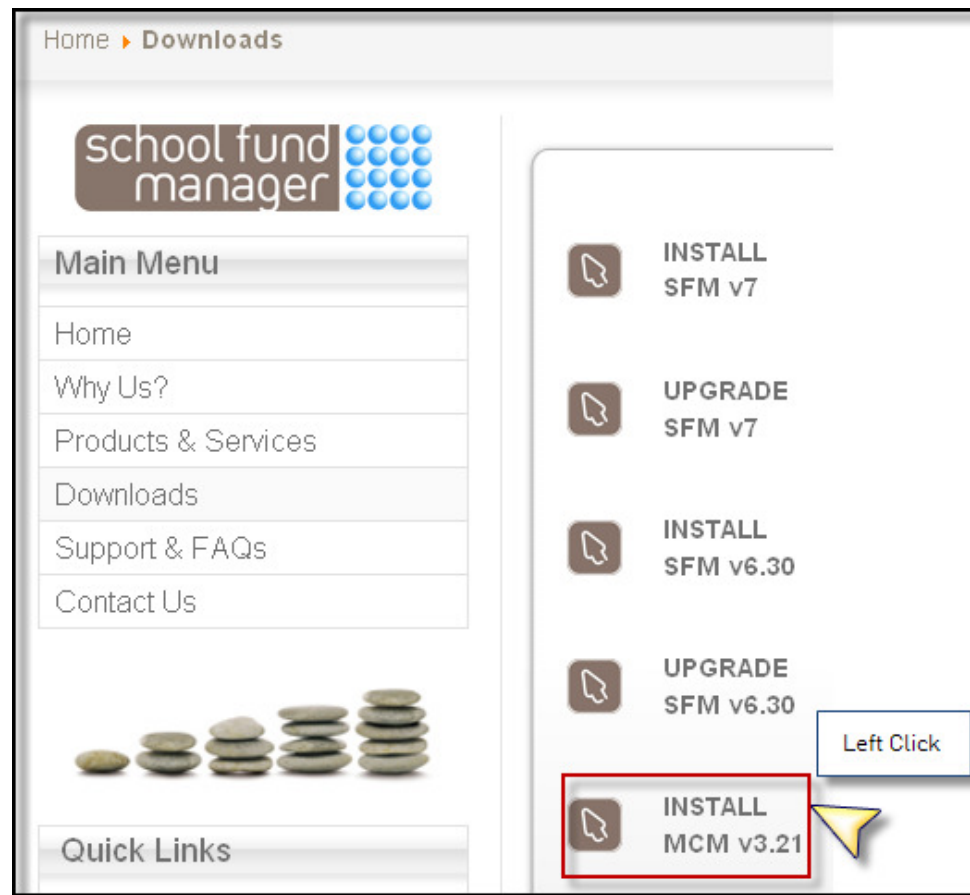
STEP 1: Click on your web browser - **Internet Explorer**. Type in the address box: www.schoolfund.co.uk and you will see the screen below:



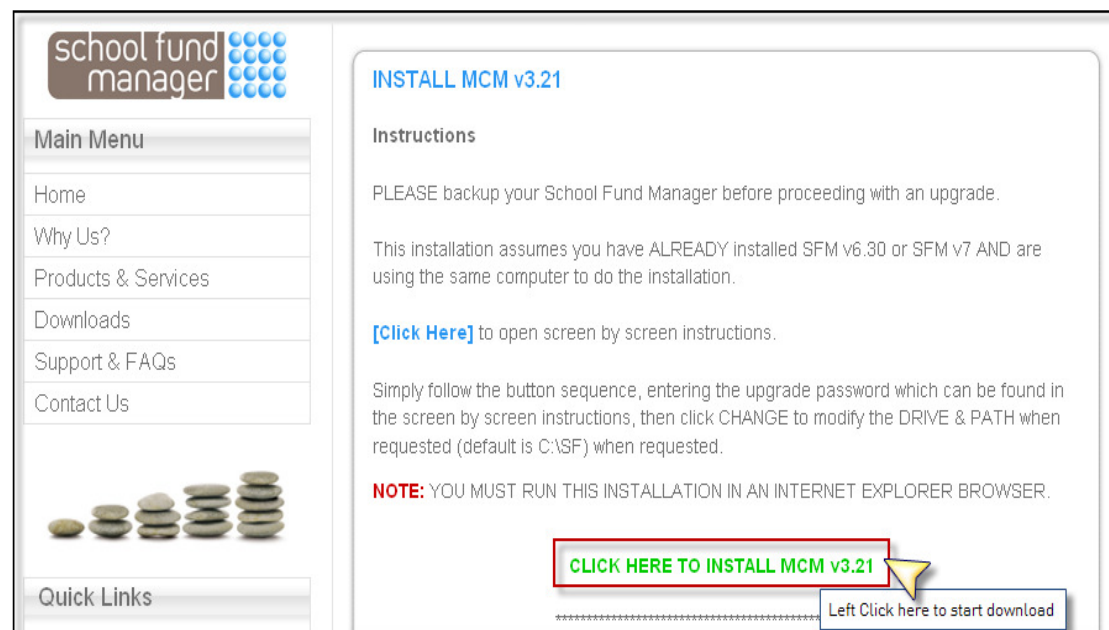
STEP 2: On the left hand side, below the Main Menu you will see a number of options - please click **DOWNLOADS** as shown below:



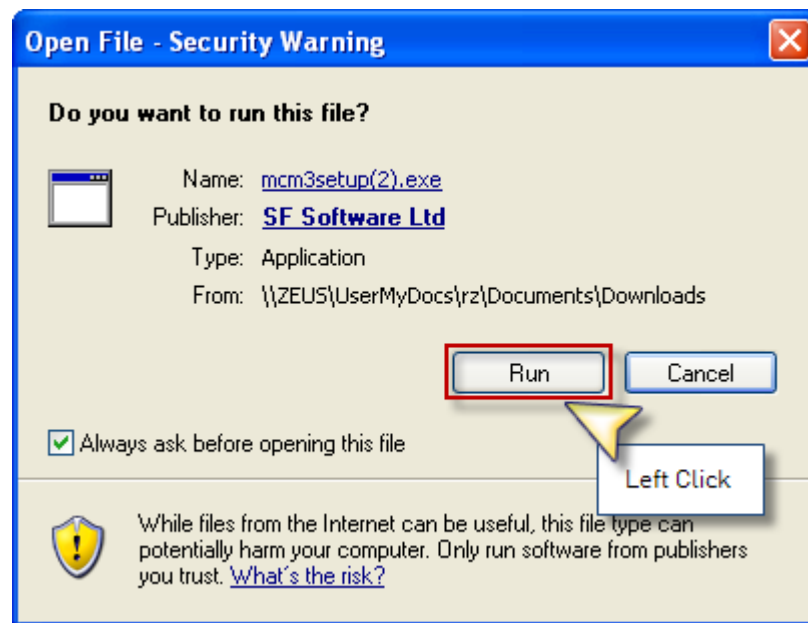
STEP 3: Please click **INSTALL MCM v3.21** as shown below:



Step 4: You will then see this installation screen, please click:
CLICK HERE TO INSTALL MCM v3.21 as shown below:

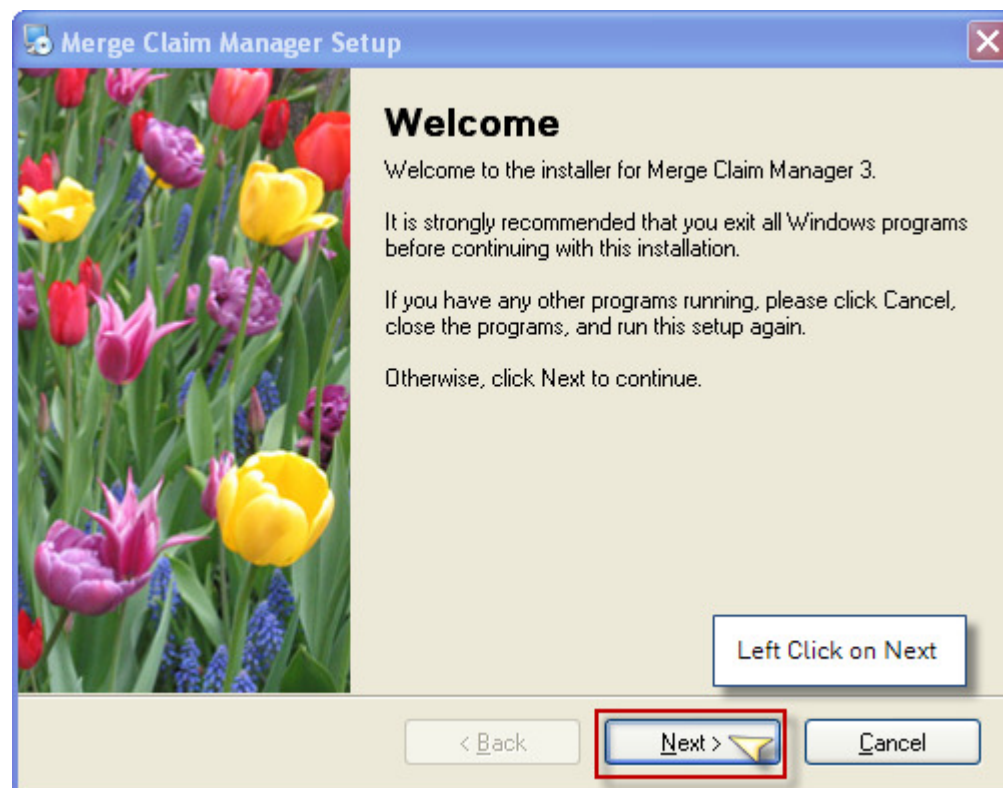


STEP 5: Left click on **RUN** to proceed with the download:

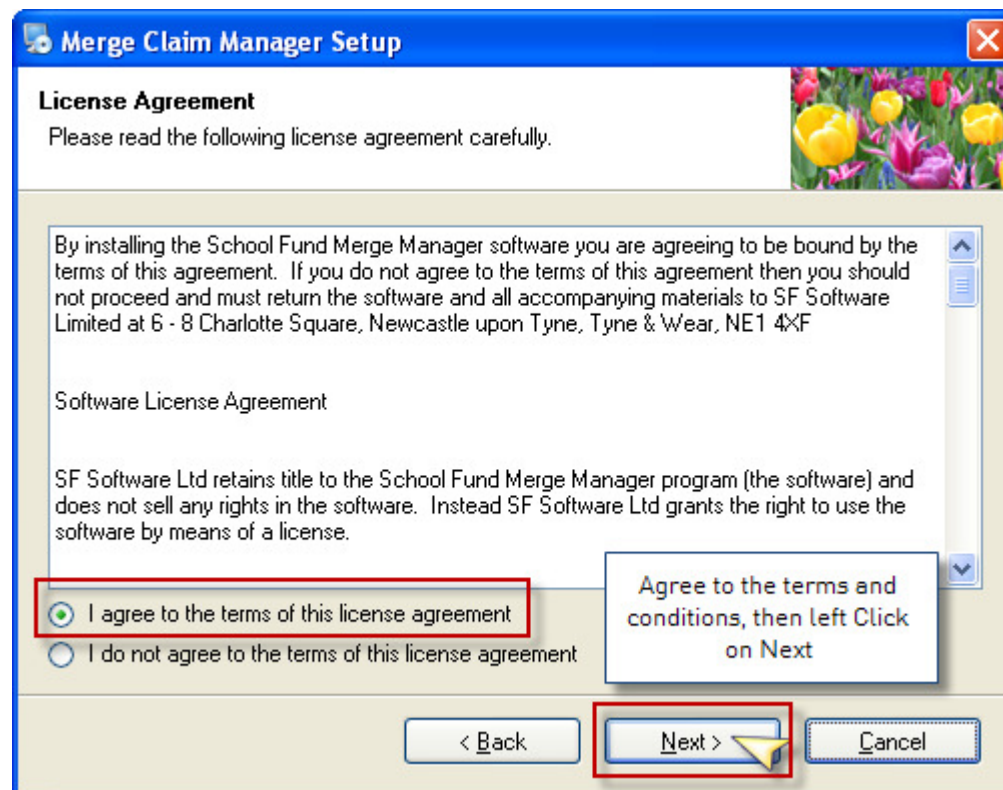


PLEASE NOTE: You may see the following prompt: 'Do you want to allow the following program to make changes on this computer?' - Left click on **YES** to continue

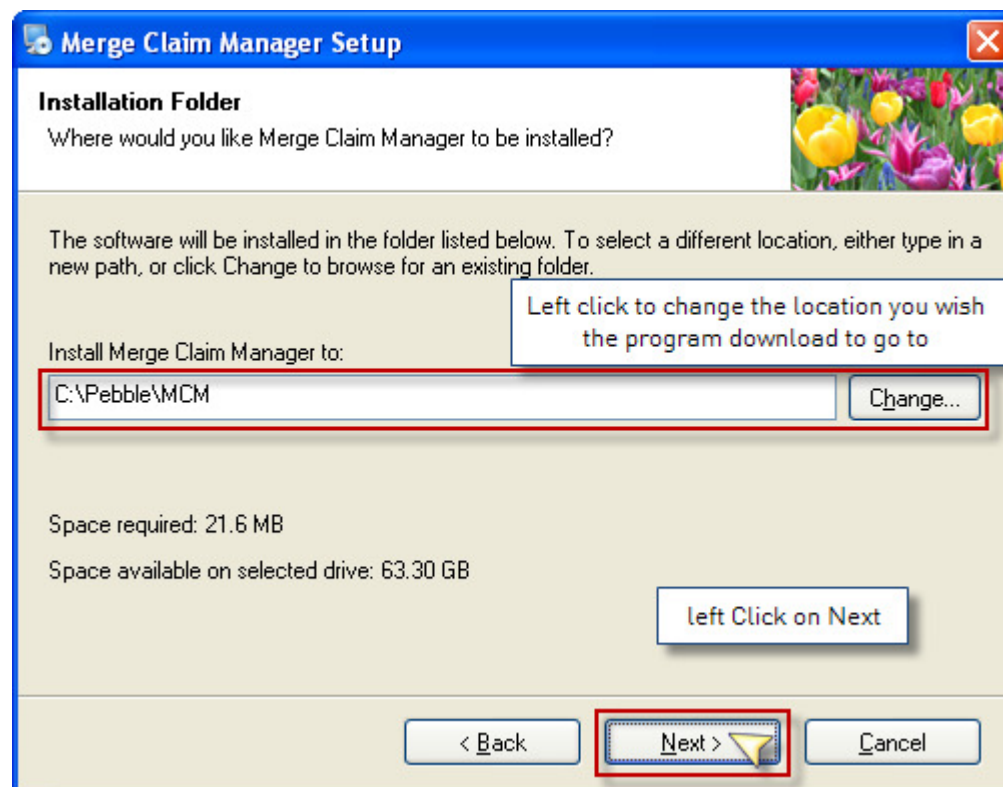
STEP 6: On the Welcome Screen left click on **NEXT** to continue:



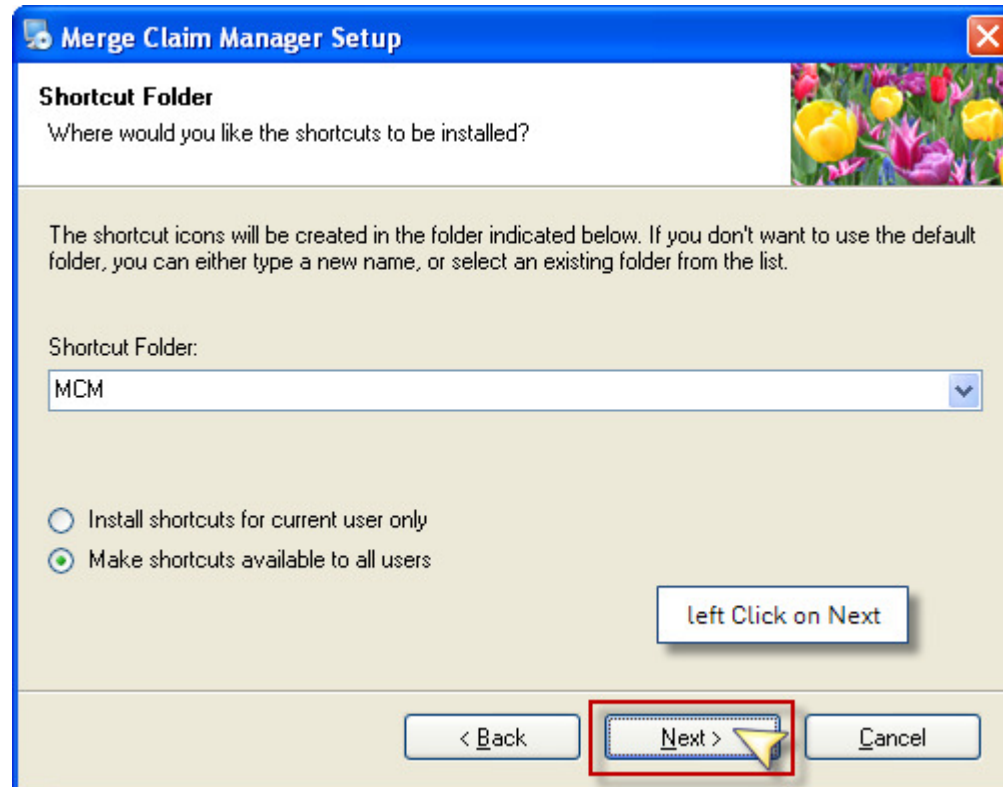
STEP 7: Select 'I agree to the terms of this License Agreement' and then click **NEXT**:



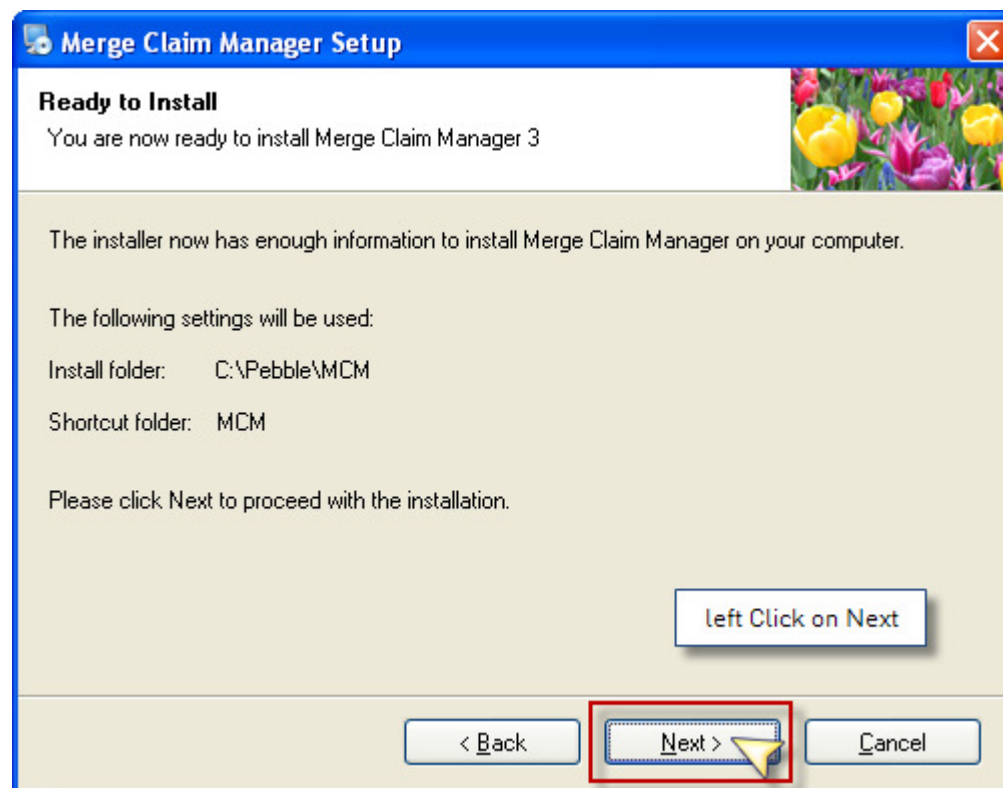
STEP 8: Destination folder screen, click on **CHANGE** if you wish to change the Destination Folder or click **NEXT** to continue:



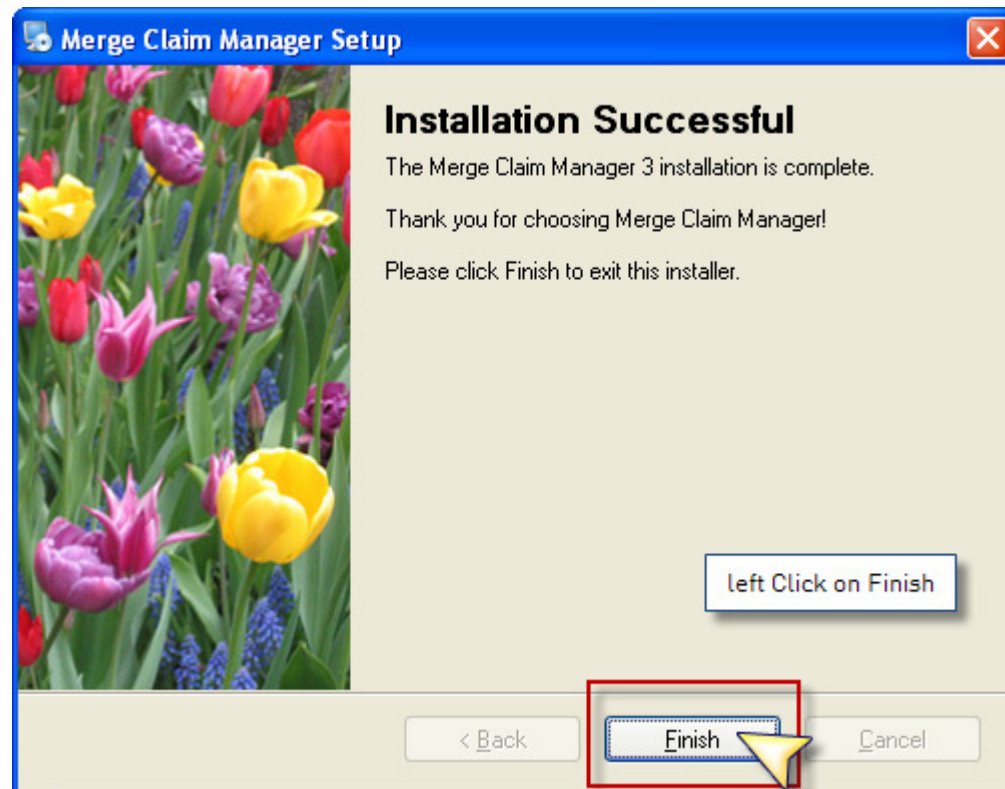
STEP 9: Left click on **NEXT** to continue:



STEP 10: Left click on **NEXT** to confirm installation:



Congratulations you have successfully installed MCMv3.21



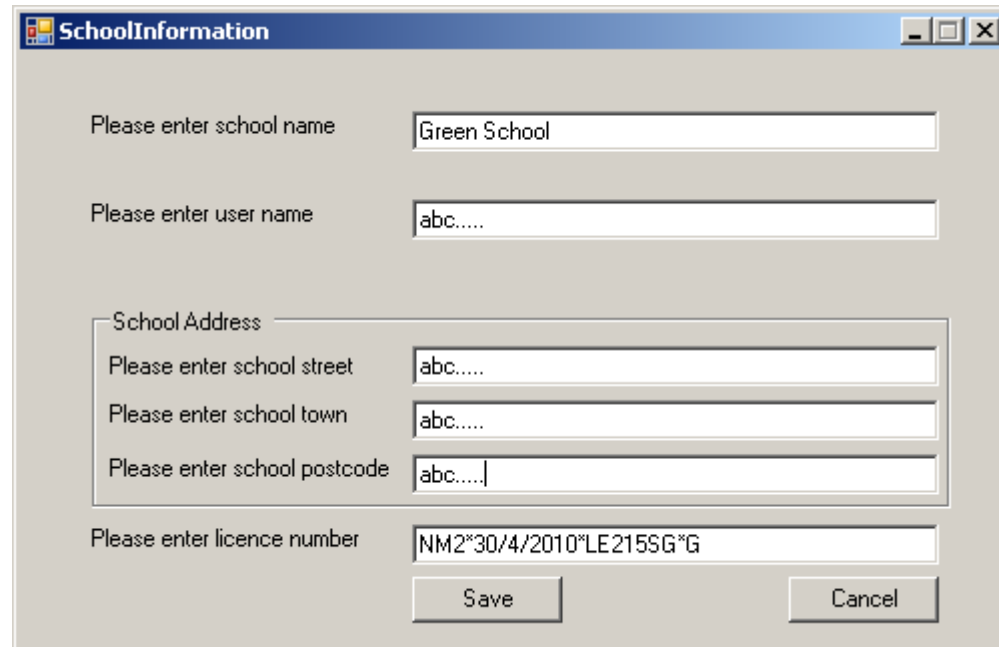
You will see the following Icon on your desktop.



Licence application

Once Installation is complete, double click on the Merge Manager icon on your desktop to begin using it.

Enter the school's details and your licence number. This number will have been provided by email.

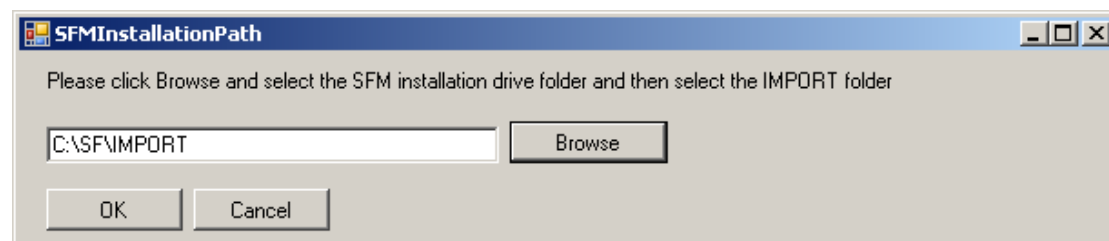


The **SchoolInformation** dialog box contains the following fields and controls:

- Please enter school name:** Text box containing "Green School".
- Please enter user name:** Text box containing "abc.....".
- School Address:** A group box containing three sub-fields:
 - Please enter school street:** Text box containing "abc.....".
 - Please enter school town:** Text box containing "abc.....".
 - Please enter school postcode:** Text box containing "abc.....".
- Please enter licence number:** Text box containing "NM2*30/4/2010*LE215SG*G".
- Buttons:** "Save" and "Cancel" buttons at the bottom right.

Next identify the location of the SFM Folder and Import subfolder.

Please click browse and select the SFM installation drive folder and then select the IMPORT folder then press Ok.



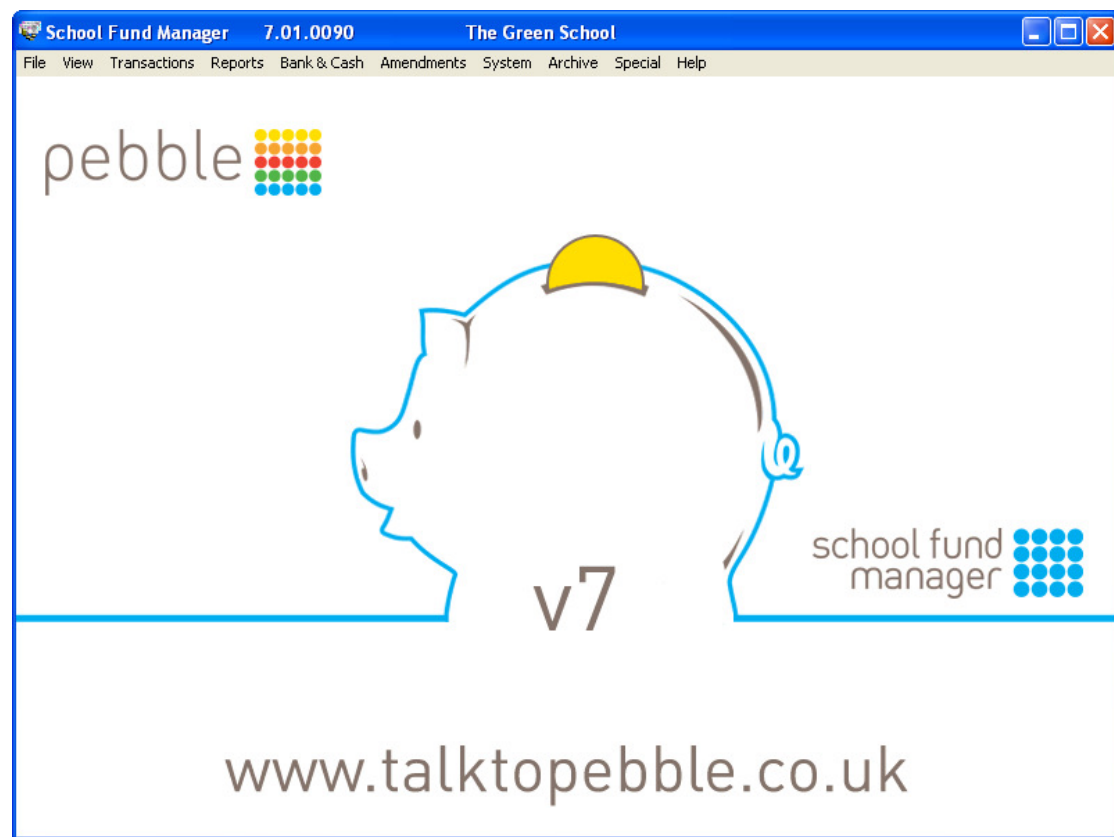
The **SFMInstallationPath** dialog box contains the following elements:

- Instruction:** "Please click Browse and select the SFM installation drive folder and then select the IMPORT folder".
- Text box:** Contains the path "C:\SFM\IMPORT".
- Buttons:** "Browse", "OK", and "Cancel" buttons.

Now the Merge Manager Program is ready to be used.

Introduction

- ✚ Create a template – a reminder letter, or an introduction to a new event.
- ✚ Run a report – in School Fund Manager the Who's Not Paid report.
- ✚ Merge the two together to produce named and addressed letters.
- ✚ Save time, chasing overdue contributions.
- ✚ No extra work required, all the details are already in School Fund Manager and Names Manager – you just preview the merged file and then print out the letters.
- ✚ File copies are saved for you to reprint or just check who was sent which letter.



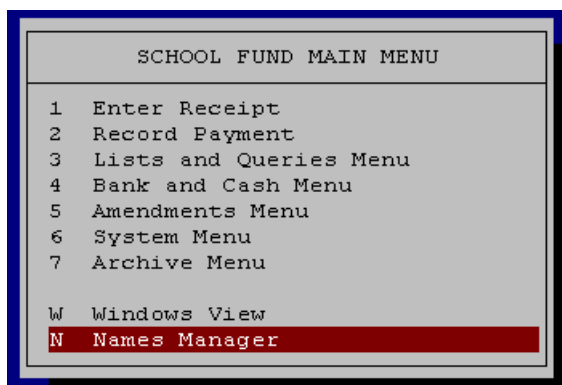
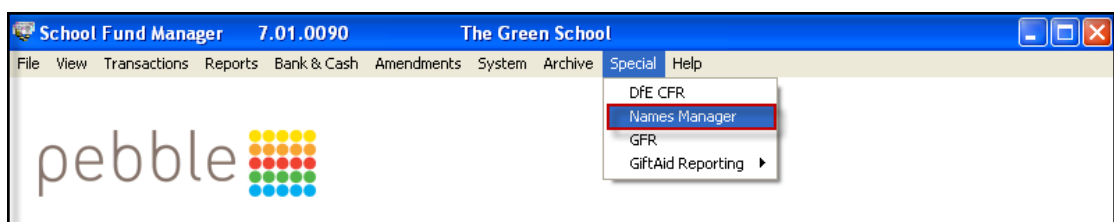
**School Fund Manager + Parents details + Merge Manager
= instant merged documents.**

To prepare to use the Merge Manager Module you must:-

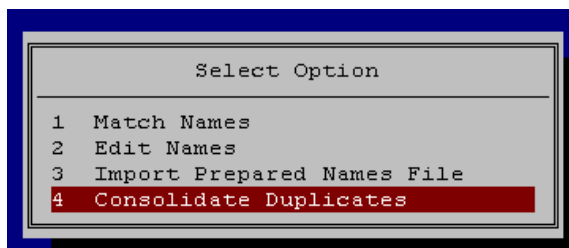
1. Be using School Fund Manager v 6.30.0034 or above.



2. Import the student roll into School Fund Manager using the **Names Manager** option (if not already done). This can be found using Special>Names Manager or the Classic view of School Fund Manager



3. Consolidate duplicate names (if not already done).



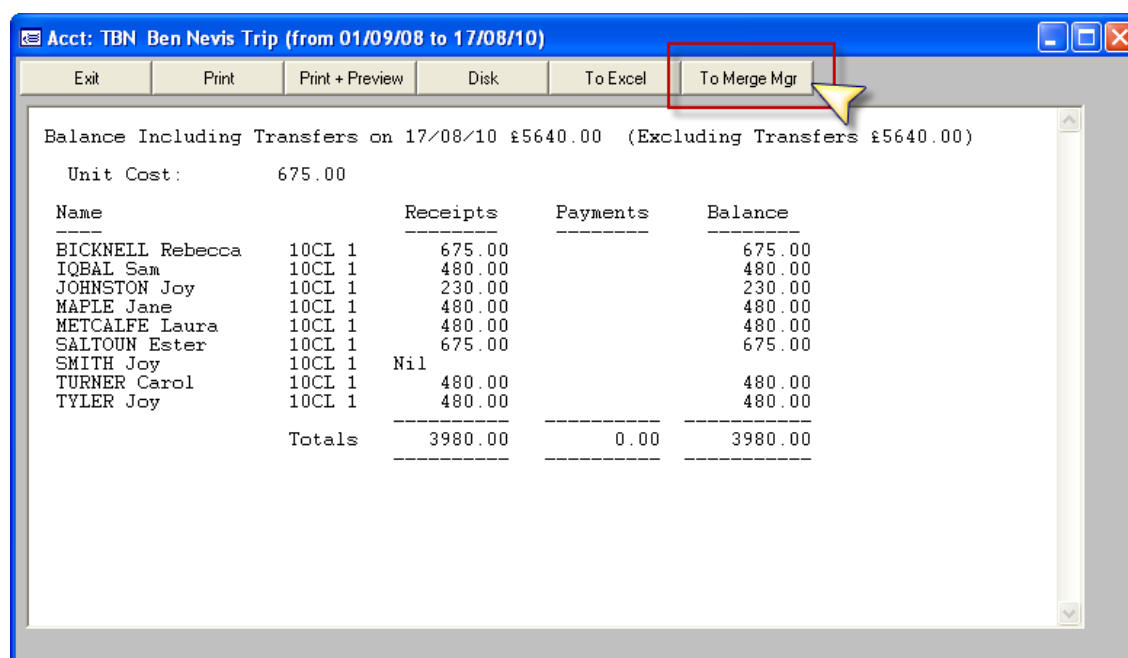
This will prepare the student names already in your School Fund Manager file to be matched automatically with the parent/guardian names and addresses you are about to import.

The names you have already entered into School Fund Manager **MUST** be imported and consolidated before using Merge Manager, otherwise you will be required to manually match all the student names with the appropriate parent/guardian name and address **EACH** time you use Merge Manager.

Once the student names in School Fund Manager have been prepared you can then use Merge Manager to create merged documents.

Steps to create a merged letter (In School Fund Manager)

1. Using your administration database, create a CSV file to import Student Names into SFM. (This will require Names Manager 1). Then Import your student names following the on screen instructions in School Fund Manager.
2. Consolidate any names that were manually entered into School Fund Manager rather than imported as in step 1 above.
3. To get the most out of the new mail merge functions you should have a User Account associated with either a Class/Registration Group or User Defined list of Students.
4. Run the Who's Not Paid report, selecting first the appropriate list of students and next a User Account to see the report of who has paid and who has not!



Acct: TBN Ben Nevis Trip (from 01/09/08 to 17/08/10)

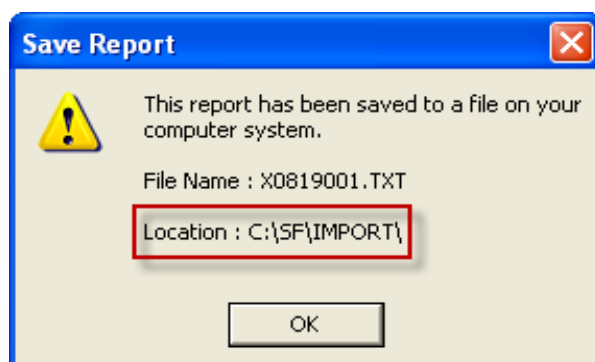
Exit Print Print + Preview Disk To Excel **To Merge Mgr**

Balance Including Transfers on 17/08/10 £5640.00 (Excluding Transfers £5640.00)

Unit Cost: 675.00

Name		Receipts	Payments	Balance
BICKNELL Rebecca	10CL 1	675.00		675.00
IQBAL Sam	10CL 1	480.00		480.00
JOHNSTON Joy	10CL 1	230.00		230.00
MAPLE Jane	10CL 1	480.00		480.00
METCALFE Laura	10CL 1	480.00		480.00
SALTOUN Ester	10CL 1	675.00		675.00
SMITH Joy	10CL 1	Nil		
TURNER Carol	10CL 1	480.00		480.00
TYLER Joy	10CL 1	480.00		480.00
Totals		3980.00	0.00	3980.00

5. Click on **To Merge Manager** to send the report to Merge Manager – the file will be saved in the \IMPORT sub folder of \SF



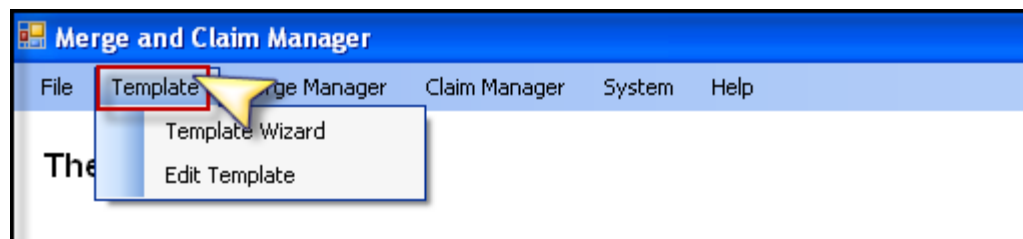
Steps to create a merged letter (In Merge Manager)

- 1 Create a .csv file of Parents Names & Addresses of ALL students in school (see separate instructions page 2 specific to the administration database you are using). Copy/save the .CSV file to the \Import sub folder in your \SF folder.
- 2 Run Merge Manager`
- 3 Student names from your School Fund Manager report will be 'matched' with the names and addresses of the parents '*automatically*' when a number of fields, including the UPN is available in both files. If the matching can not be done automatically, you will be prompted to match student names with their parents addresses, manually.
- 4 Use a Letter Template

Templates consist of:-

- a. fields to be merged e.g. Parent/Guardian Name, Address, Salutation, User Account - a full list is on the next page and
- b. content - which is the text of the letter.

To Create a Template in Merge Manager click on template



- c. Create a New Template – by going to Template > Template Wizard (easiest method)

There are 16 fields that can be merged – they are listed in the Template Wizard. You may select all, or only those that are required.

(If you require more fields than those we have made available, please contact us, we are willing to make changes to suit the needs of our users).

- d. Edit Saved Template – by going to Template > using Edit Template

- 5 Field identifier MUST be positioned with << >> in a Template. When creating and placing fields that will be filled with details from the Names and Address file and School Fund Manager report use << >> to surround the name of each field.
- 6 Next create the content of the Template. This is your opportunity to:-
 - a) ask for any outstanding balances, by a certain date for Trips, Events etc
 - b) ask for support for a new Charity collection
 - c) remind parents they have agreed to contribute to xyz event and you are waiting for their funds etc..

<pre> <<SchoolName>> <<SchoolAddress>> <<Name>> <<HouseNo>><<Street>> <<Town>> <<County>> <<Postcode>> Dear <<Parent/Guardian>> <<Create Date>> Reference:<<Reference>> your son/daughter <<Student Name>> Once you selected the fields to be merged, you can add the content for your t Cost of Event <<Unit Cost>> Balance <<Balance>> Amount Owing<<Amount Owing>> Sincerely, <<User>> </pre>	<p>The Information in the <<SchoolName>>, <<SchoolAddress>> and <<User>> fields is taken from the details entered in Merge Manager See Page 5.</p> <p>The information in the <<Amount Owing>> field is calculated based on Unit cost minus Balance.</p> <p>The rest of the fields are taken from the Who's Not Paid report in SFM.</p>
<p>You may rearrange the layout of these merge fields.</p> <p>Content can be entered at any point in the template.</p>	

The final stage of construction is the preview. Here you can check all necessary merge fields have been identified and the content is complete.

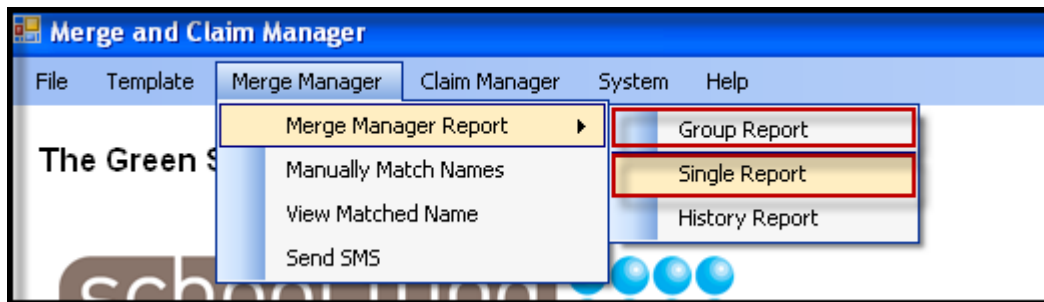
If any changes are required make sure you change the Template rather than each individual letter.

Create the merged letters.

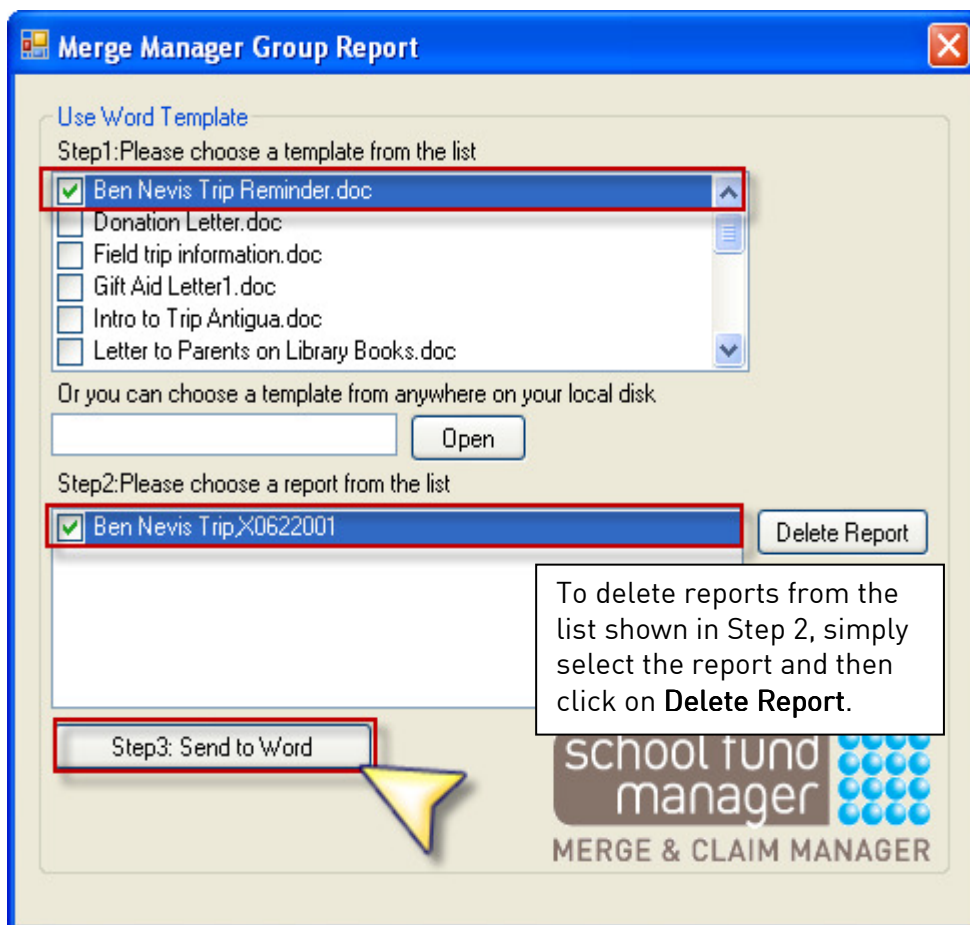
Now all you have to do is identify the Group to merge with the template.

Use the Merge Letters option to select:

1. Merge Manager Option > Merge Manager Report > Group Report (Single Report option should be used if you wish to send letter to only a few student)



2. Step 1: Choose the template – Created in Merge Manager
Step 2: Choose the report – Created in School Fund Manager
Step 3: Click on Send to Word



Once you click on **Send to Word**, Merge Manager program will create the merged letter.

See below merged letter sample.

The Green School

Mr and Mrs Iqbal
65 Market Lane
Wallsend
GU21 5HT

12-11-2009

Dear Mr and Mrs Iqbal

Your son/daughter Sam Iqbal has a place reserved on the trip to Ben Nevis taking place in March 2010. Would you please indicate below if there are any special circumstances we should be aware of.

Please note the following details regarding payment for this activity. We would appreciate any outstanding balance being cleared before the end of February 2010.

Activity Name	Ben Nevis Trip
Unit Cost	£ 675.00
Amount received	£ 480.00
Amount Outstanding	£ 195.00

Kindest Regards

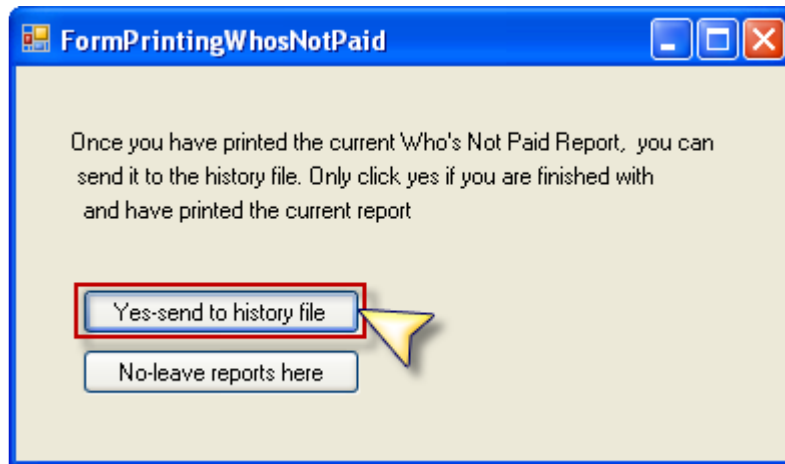
JHG

Response Form

We note our balance outstanding of £195.00. Signed _____

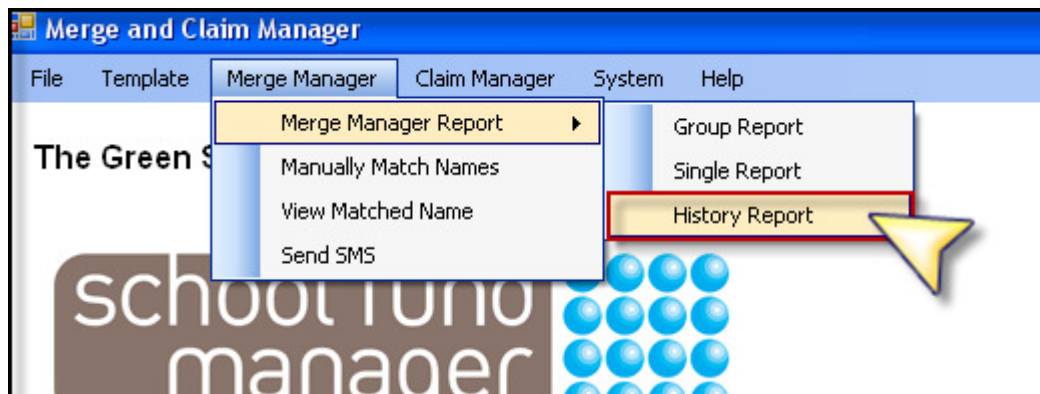
- ☐ Please indicate whether Sam Iqbal has a medical condition that we should be aware of.
- ☐ Please indicate whether Sam Iqbal has your permission to partake of all activities while on the trip.
- ☐ Please indicate whether Sam Iqbal has an insurance policy which includes school trips and mountaineering.
- ☐ Please indicate whether Sam Iqbal can be included in group photographs.

Once the merged letter is completed, you will have the option either to save the report and view it anytime later or leave the report here.



How to view history / saved merged letters and reprinting

To view saved merged letters, go to Merged Manager option > Merge Manager Report and then click on History Report



Here you will be able to see all the saved merged letters / history reports. If you wish to view or reprint any saved merged letter, use the search option by name or by reference.

To search by name, simply type the first name and surname in the search boxes and then click on Search by name.

Merge Manager History Report

Step1: Search

Search by Student's Firstname:

Search by Student's Surname:

or

Search by reference:

Step2: please select template

☐ Ben Nevis Trip Reminder.doc

☐ Donation Letter.doc

☐ Field trip information.doc

☐ Gift Aid Letter1.doc

☐ Intro to Trip Antigua.doc

☐ Letter to Parents on Library Books.doc

Step3: Please select one from list

☐ Rebecca,Bicknell,X02090011

☐ Rebecca,Bicknell,X02260011

☐ Rebecca,Bicknell,X02260021

☐ Rebecca,Bicknell,X03240011

☐ Rebecca,Bicknell,X04020011

☐ Rebecca,Bicknell,X04230011

☐ Rebecca,Bicknell,X06040011

Step4: generate letter

school fund manager

MERGE & CLAIM MANAGER

To search by reference, select the user account then click on Search by Reference.

Merge Manager History Report

Step1: Search

Search by Student's Firstname:

Search by Student's Surname:

or

Search by reference:

Step2: please select template

☐ Ben Nevis Trip Reminder.doc

☐ Donation Letter.doc

☐ Field trip information.doc

☐ Gift Aid Letter1.doc

☐ Intro to Trip Antigua.doc

☐ Letter to Parents on Library Books.doc

Step3: Please select one from list

☐ Rebecca,Bicknell,X02090011

☐ Sam,Iqbal,X02090012

☐ Joy,Johnston,X02090013

☐ Jane,Maple,X02090014

☐ Laura,Metcalf,X02090015

☐ Hester,Saltoun,X02090016

☐ Joy,Smith,X02090017

Step4: generate letter

school fund manager

MERGE & CLAIM MANAGER