

Use myReports to Create a Mail Merge Letter

HOW TO

myReports is an ad hoc reporting tool that is free for all customers. myReports is updated daily which allows campuses to create reports, manage borrower populations, and access report data on an on-going basis as opposed to the traditional monthly method. myReports helps identify and isolate variables, and ultimately can be used to create letters very easily and quickly.

myReports can also be used to help create borrower letter campaigns through the mail merge process with the Microsoft Office Suite. Some campuses currently are using myReports to perform extended due diligence activities. Some of these campus campaigns contact borrowers additional times before their grace period expires and might invite the borrower to contact them regarding more information about deferments, cancellations, and forbearances, or share the benefits of consolidation and the appropriate time to consider consolidation or simply to ensure that the current contact information on file is accurate.



Below, you will find the steps that are needed to create a **credit balance refund report** that will inform the borrower about the overpayment and can be used to refund the monies back to the borrower.

1. Open myReports and choose the Ad Hoc Report Tool.
2. At this point, filters will need to be set.
3. The first filter is the Principal Balance (PrinBalAmt), which will need to be less than "0."
4. A number of different fields will need to be added to the report:
 - a. Name,
 - b. Addr Line 1,
 - c. Addr Line 2,
 - d. Addr Line 3,
 - e. Addr City St,
 - f. Addr Zip, and the
 - g. PrinBalAmt.



The report is now ready to be downloaded.

5. Find the download icon (a small envelope) and choose MS Excel (Data Only) as the format .
6. Once the Excel document has been opened, rename the column headers to correspond with each column (for example, column A should be entitled "Name," column B should be named "Addr Line 1," and so on). Save this as an Excel file.
7. At this point, type your borrower letter, and insert mail merge fields, using the Mail Merge helper in Word.
8. Finally, complete the merge using the Excel file and print the borrower letters.

If you need help with setting up a mail merge, see the directions available through the Help option in Word or consult the directions on the next page.

Mail Merge Directions (For more details, consult the Help function available through MS Word.)

1. Type your letter in Word. Make sure that the font is the same in both the Excel spreadsheet and the letter and that you keep Word document open.
2. Under **Tools** on the tool bar, select the **Mail Merge** helper.
3. Click **Create** button, choose **Form Letters**, choose **Active Window**. Since you already have the Word document open, it will appear in the **Active Window**.
4. Click **Get Data** button, select **Open Data Source**, locate and select Excel spreadsheet, choose **Entire Spreadsheet**.
5. Message appears “Word found no merge fields in your main document. Choose the Edit Main Document button to insert fields into your main document.” Click **Main Document** button.
6. Main Document appears. Choose “**Insert Merge Fields**” button on tool bar. Insert merge fields from drop down menu at appropriate places in your letter.
7. Return to the **Mail Merge Helper** on the Tool menu. You are now ready to merge the data from your spreadsheet into your letter.
8. Select the **Merge** button. Choose **New Document**. Select **All**. Choose “**Don’t print blank lines when data fields are empty option.**” Choose the “**Check errors**” option that you prefer. “Complete the merge, pausing to report each error as it occurs” is the default setting.
9. Select **Merge**. Your letters are ready to print.



As always, we at Campus Partners understand the complexities related to the process from start to finish and welcome any opportunity to walk you through the mail merge process. If you would like help with this process, please contact your Account Manager.

Get the Most from myReports!

Our Customer Service team will present a Web conference on How to Use myReports on June 9, 2006 at 2:00 PM Eastern Time. Step by step directions will be presented and we will provide an opportunity to ask questions. Contact Debra Pitts at dpitts@campuspartners.com to sign up.