School templates
Demo & quick start

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What this demonstration proves

The workbook contains working totals, balances and amount-in-words formulas. The Word files contain actual mail-merge fields. The PDF form uses shared fields across its parent and office copies. All records are fictional; none is proof of payment or an issued award.

Receipt	Tuition	Net / received	Balance	Amount in words
DEMO-001	3,000.00	4,000.00	0.00	Rupees Four Thousand Only
DEMO-002	3,010.00	4,010.00	0.00	Rupees Four Thousand Ten Only
DEMO-003	3,020.00	4,020.00	0.00	Rupees Four Thousand Twenty Only

Example: tuition 3,000 + activity 500 + transport 1,000 − concession 500 = net 4,000. Receipt balance is net minus amount received. Amount-in-words follows the amount received, including paise. The formula uses the Indian lakh/thousand system, from INR 0 to 99,99,999.99. Outside this range it returns “Out of range”.

Checks completed

100 receipt rows and 250 certificate rows were processed into sample PDF batches using a scripted PDF generator. Every receipt total and balance was checked. Amount-in-words was checked at 14 boundary/example values, including zero, paise, lakh, the maximum and out-of-range values. Six shared PDF fields were filled, saved and reopened, with values and both widget appearances verified.

Native Microsoft Word mail merge, Excel desktop and Adobe Acrobat interaction were not executed in this environment. The batch PDF checks are data-generation checks; they are not a claim that Word processed the batches. First-record acceptance testing in the school’s actual software is required before production.

Included files

Receipt: fee-receipt-mail-merge.docx, fee-receipt-feeder.xlsx, fee-receipt-fillable.pdf and a readable sample PDF. Certificate: certificate-mail-merge.docx, certificate-roster.xlsx and a readable sample PDF. This guide accompanies both. The Word merge masters are simple editable layouts; the decorated sample PDFs are illustrative design previews.

Run the receipt demonstration

1. Open the workbook

Save a local copy of fee-receipt-feeder.xlsx. Use the Receipts sheet. Yellow cells are inputs; pale blue cells calculate Net_Amount (K), Balance (M) and Amount_In_Words (N). Preserve the column headers and the Words lookup sheet. The 100 existing rows are fictional examples: replace them or filter/select only the rows you intend to merge. Do not issue a receipt until payment has actually been verified.

2. Check a change

For the first example, change Amount_Received (L2) from 4000 to 3900. Balance (M2) should become 100.00 and Amount_In_Words (N2) should become “Rupees Three Thousand Nine Hundred Only”. Restore 4000 after the check. Ensure spreadsheet calculation is automatic; save and close the workbook before connecting it in Word.

3. Connect the Word template once

Open fee-receipt-mail-merge.docx in desktop Word. Set your school name/address and required fee labels. Choose Mailings → Start Mail Merge → Letters, then Select Recipients → Use an Existing List. Choose the workbook and Receipts sheet, with the first row as column headers. The document is not prelinked to a machine-specific file path.

4. Preview and finish

Use Preview Results and inspect the first, last and longest record. Both copies on one A4 sheet should show the same student and receipt number. Do not add a Next Record field between copies. Use Finish & Merge → Edit Individual Documents, select your intended records, then save as PDF. Check layout, dates, decimals, words and pagination before printing. Print at actual size, with your printer’s normal safe margins.

5. More rows

The workbook contains formulas for the supplied 100 rows. To extend it, copy a complete existing row including formula cells, then replace only the inputs. Ensure the Word recipient range includes those rows. Performance, long-name layout and page count depend on the installed software and the data; preview a short batch before a larger run.

Certificate demonstration

Use certificate-roster.xlsx (Certificates sheet) with certificate-mail-merge.docx. There are 250 fictional examples. Replace the sample roster, set the school name and signatures, connect it through the same desktop Word workflow and preview. The template is A4 landscape. One selected recipient produces one certificate. Change the award/title wording to match the actual event; verify names and authorisation before issue.

PDF form & compatibility

Shared receipt fields

fee-receipt-fillable.pdf is a separate, simple manual-entry receipt. Each logical field has two widgets sharing one stored value: Receipt_No, Student_Name, Admission_No, Amount_Received, Amount_In_Words and Payment_Reference. Enter a value, leave the field, save a copy, reopen it and confirm that both parent and office copies match.

The form does not calculate totals or amount-in-words. Copy checked values from the workbook or enter them manually. Browser and mobile PDF viewers may handle shared fields differently; use a desktop PDF form editor and test saving/printing in your chosen viewer. Standard PDF fonts may limit non-Latin text.

File / feature	Target workflow	What was verified
XLSX formulas	Excel desktop Microsoft 365 / Excel 2021 or later; no macros	Recalculated with the workbook engine; 100 rows and 14 number-word cases checked. Native Excel not executed.
DOCX merge fields	Word desktop Microsoft 365 / Word 2021 or later	Field names match the spreadsheets; both templates render to one page. Native Word merge not executed.
Shared PDF form	A PDF viewer with AcroForm support; desktop Acrobat Reader is a target	Six parent fields, twelve widgets; saved values and appearances checked programmatically. Acrobat not executed.
Sample PDFs	Any modern PDF reader	Page sizes and sample content checked; previews rendered and visually inspected.

The listed desktop versions are intended targets, not an application certification. Word for the web, Google Docs/Sheets, browser PDF editors and mobile apps are not validated for this merge/form workflow. Arrange a first-record test in your exact software version before accepting a production workflow.

Print and customisation scope

Flyer PDFs are A5 (148 × 210 mm); receipt is A4 portrait; certificate is A4 landscape. These sample PDFs use RGB vector/text artwork. They are not press-certified CMYK or PDF/X masters and do not include a bleed allowance. Paper weight, finish, perforation and print quantities are production choices to confirm with the school and printer. Physical printing is not included in these files.

Long names, additional fee columns, other currencies, non-Latin fonts, changed page sizes and different merge software require an adjusted layout and fresh proof. Remove sample labels only after replacing fictional content and approving the final school-specific proof. These files do not connect to a payment gateway or school database.