

Managing Mail Merge from Family Suite

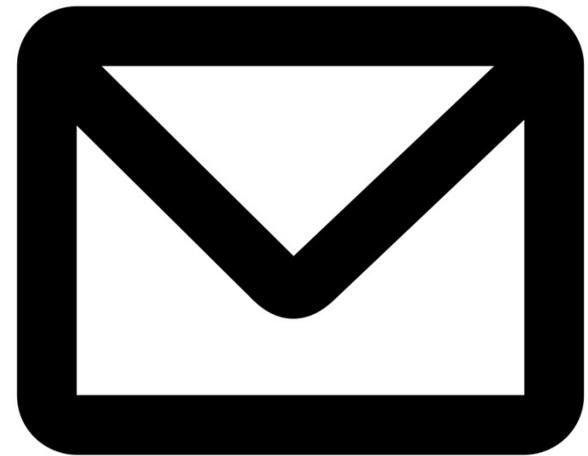
Joe Slomiany
ParishSOFT



ParishSOFT®
Celebrating 20 Years of Service

Today's Agenda

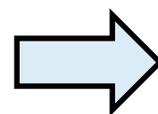
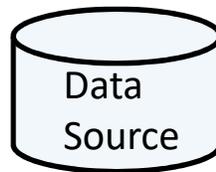
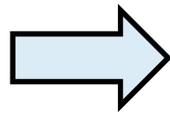
- What is Mail Merge?
- How can Mail Merge help my Ministry?
- How does Mail Merge work?
- Exporting Data for Mail Merge
- Using Mail Merge
 - In Family Suite
 - In Word/Excel
- Building Mail Merge Templates



What is Mail Merge?

- Mail Merge is an ideal solution for creating formal announcements, form letters, or any other type of document that you want to send in bulk to a large number of people.

Main Document

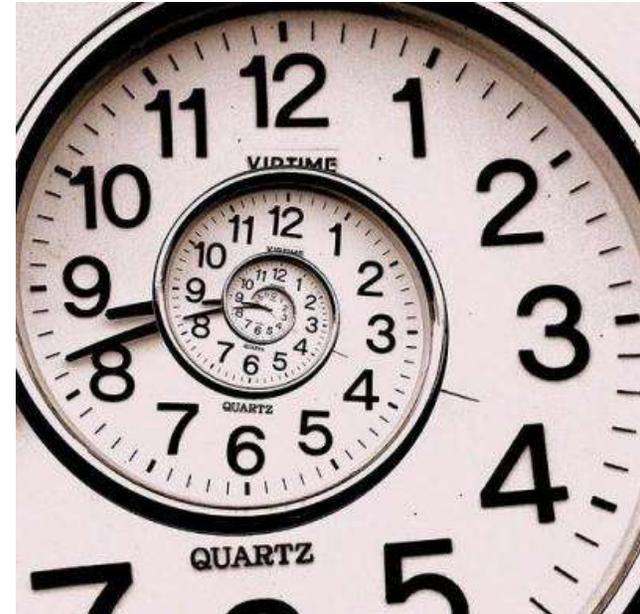


Merge Documents



How Can Mail Merge Help My Ministry?

- Reduce repetitive tasks
 - Certificates
 - Notification of Sacraments
 - Bulletins
 - Newsletters
 - Postcards
- Open opportunity for new methods of outreach

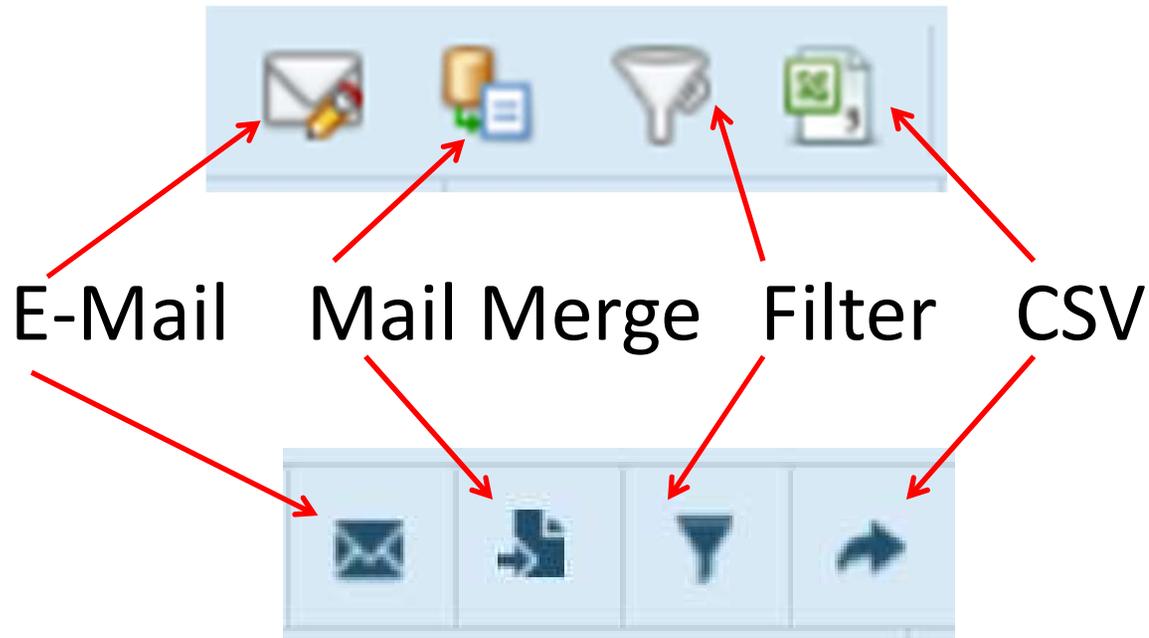


How Does Mail Merge Work?

- Main document contains merge fields
- Data Source with the fields
- Data source has unique records
- Merge process combines the data source and main document
- Merged documents (many) are the result of your mail merge

Exporting Data for Mail Merge

- All modules have icons for easy exporting.



Exporting Data for Mail Merge

Home | **Family Directory** | Religious Education

Family List | Member List | Sacraments | Far

Family List

10 records

A-Z	A	B	C	D	E	F	G
0-9	0	1	2	3	4	5	6

Export icons: Print, Refresh, Mail Merge, Export, Filter

Members in Workgroup: Parish Council

10 records

Last Name	First Name	E-Mail
Abler	Jason	abler@demoemailaddress.com

Export icons: Print, Refresh, Mail Merge, Export, Filter

Home | Family Directory | Religious Education | Offering | **Ministry Scheduler**

Configuration | **Minister Directory** | Teams | Preferences | Scheduling Options | Sched

Minister Directory

+ Add New Minister | + Batch-Add New Ministers | Batch-Edit Ministers | Bulk Change End Date

10 records

A-Z	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
0-9	0	1	2	3	4	5	6	7	8	9	Filter Criteria: Non				

Export icons: Print, Refresh, Mail Merge, Export, Filter

Exporting Data for Mail Merge

ParishSOFT® Family Suite

HELP - CONTACT - HOME - SIGN OUT

Sample Parish, Ann Arbor
trainer (Kimberly Spindler)

Home | **Family Directory** | Religious Education | Offering | Ministry Scheduler | Tuition | IQ | Administration

Family List | Member List | Sacraments ▼ | Family Workgroups | Member Workgroups | Reports

Family List

Sample Parish, Ann Arbor

50 records

A-Z | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z

0-9 | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9

Filter Criteria: None | Filter Column: Family Ascending | Clear Filter

Add New Family | Delete Selected Families | Quick Reports ▼

Family	Registered	Family Group	E-Mail Address	Primary Phone	Primary Address	City
<input type="checkbox"/> Abler, Jason and Tracey	Yes	Active	abler@demoemailaddress.com	555-2222	2351 Ellsworth Rd	Ypsilanti
<input type="checkbox"/> Adams, Todd and Jane	Yes	Active	adamsfamily@demochurch.com	734-621-1212	373 N Zeeb Rd	Ann Arbor
<input type="checkbox"/> Albert, Mike and Stacey	Yes	Active	salbert@demoemailaddress.com	555-888-7777	53 Truman Dr	Ann Arbor
<input type="checkbox"/> Alberts and Fernandez, Sal and Allison	Yes	Active	alberts@demoemailaddress.com		234 19th Ave	Ann Arbor
<input type="checkbox"/> Albrecht, Jennifer	Yes	Active	j.albrecht@church.com	313-694-4642	3810 Syracuse St	Dearborn
<input type="checkbox"/> Allen, Marion	Yes	Active	mallen@demoemailaddress.com	555-666-8888	42 Vine Ave	Belleville
<input type="checkbox"/> Allen, Paul and Andrea	Yes	Active	allen@demoemailaddress.com	545-2323	3 Jackson Blvd	Ann Arbor
<input type="checkbox"/> Anderson, Sarah	Yes	Active	anderson@demoemailaddress.c	555-888-9999	24 Gold Pl #45	Ann Arbor
<input type="checkbox"/> Anderson, Thomas and Andrea	Yes	Active	anderson@demoemailaddress.c	777-4444	8941 River Road	Ann Arbor

Exporting Data for Mail Merge

	A	B	C	D
1	Family	Mailing Name	E-Mail Address	Primary Phone
2	Abler, Jason and Tracey	Mr. and Ms Jason Abler	abler@demoemailaddress.com	555-2222
3	Adams, Todd and Jane	Mr. and Mrs. Todd Adams	adamsfamily@demochurch.com	734-621-1212
4	Albert, Mike and Stacey	Mr. and Mrs. Micheal Albert	salbert@demoemailaddress.com	555-888-7777
5	Alberts and Fernandez, Sal and Allison	Mr. Sal Alberts and Mrs. Allison Fernandez	alberts@demoemailaddress.com	
6	Albrecht, Jennifer	Ms Jennifer Albrecht	j.albrecht@church.com	313-694-4642
7	Allen, Marion	Mrs. Marion Allen	mallen@demoemailaddress.com	555-666-8888
8	Allen, Paul and Andrea	Mr. and Mrs. Paul Allen	allen@demoemailaddress.com	545-2323
9	Anderson, Sarah	Ms Sarah Anderson	anderson@demoemailaddress.com	555-888-9999
10	Anderson, Thomas and Andrea	Mr. and Ms Thomas Anderson	anderson@demoemailaddress.com	777-4444
11	Balk, Michael and Sharon	Mr. and Ms Michael Balk	balk@demoemailaddress.com	444-5555
12	Berg, Henry and Barbara	Mr. and Mrs. Henry Berg	bergfamily@demo.com	734-514-2484
13	Bloom, Alan and Kathy	Mr. and Mrs. Alan Bloom	bloom@demoemailaddress.com	777-8888
14	Braun, Steven and Julie	Mr. and Ms Steven Braun	braun@demoemailaddress.com	555-3333
15	Burgundy and Corningstone, Mark and Veronica	Mr. and Mrs. Mark Burgundy	markburgundy@church.com	319-555-3674
16	Cantrell, Hope	Ms Hope Cantrell	hcantrell@demoemailaddress.com	777-777-7777
17	Cash, Loose	Mr. Loose Cash		
18	Christensen, Linda	Ms Linda Christensen	christensen@demoemail.com	734-568-4544
19	Cooper, Michael	Mr. Michael Cooper	mcooper@church.com	213-555-5678
20	Curry, Stephen and Ellen	Mr. and Mrs. Stephen Curry	curry@demoemailaddress.com	333-333-3333

Exporting Data for Mail Merge

Query Results - 25,159

Return All results Unique Records Only Execute Query Query Results

Families First Names	Families Last Name	Families_Contact Info Primary Address 1	Families_Contact Info Primary Cit	
Stanley	Flat	1234 Stone Street	Unassigned	
Chris	Day	3767 Ranchero Dr	Antioch	
Mike and Carol	Brady	11222 Dilling St	North Hollywood	
Susan	Sunshine	225 Cordova Street	Anchorage	
Theresa	Terrific	225 Cordova St	Anchorage	
Gene	Petrescu	225 Cordova St	Anchorage	AK
Jason and Laurie	Dinneen	225 Cordova St	Anchorage	AK
Dick and Jane	Sample	123 Anywhere Street	Victoria	BC
Dick and Jane	Sample and Doe	123 Anywhere St.	Victoria	BC
John and Jane	Order	235 Iforgot St.	Victoria	BC

Export to CSV
Mail Merge
Generate Email Address List
Create Family Workgroup
Create Member Workgroup

Using Mail Merge

- A Mail Merge can be performed easily in the Family Suite
- You can also use Mail Merge in Microsoft Word
 - More complex merge like a directory
 - Labels
 - Outside data source

Using Mail Merge – Family Suite

Home | **Family Directory** | Religious Education | Offering | Ministry Scheduler | Tuition | IQ | Administration

Family List | Member List | Sacraments ▼ | Family Workgroups | Member Workgroups | Reports

Family List

Sample Parish, Ann Arbor

50 records

Filter Criteria: None | Filter Column: Family Ascending | Clear Filter

Family	Family Group	E-Mail Address	Primary Phone	Primary Address	City
<input checked="" type="checkbox"/> Abler, Jason and Tr...	Active	abler@demoemailaddress.com	555-2222	2351 Ellsworth Rd	Ypsilanti
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<input checked="" type="checkbox"/> Anderson, Thomas and Andrea	Active	anderson@demoemailaddress.c	777-4444	8941 River Road	Ann Arbor
<input checked="" type="checkbox"/> Balk, Michael and Sharon	Active	balk@demoemailaddress.com	444-5555	7999 7th Street	Ann Arbor

1: Red box around the Family column header and the first row of data.

2: Red circle around the 'Merge Selected Records (50)' button.

3: Red circle around the 'Merge All Records' button.

4: Red circle around the 'Merge All Records' button.

Using Mail Merge – Family Suite

My Templates Global Templates ParishSOFT Templates Mail Merge (50 Records)

Select a template below, [create a new one](#) or [open one](#).

	Template Name
	<input type="text"/>
  	10 Envelope
  	Birthday Letter
  	Certificate of Anointing
  	Certificate of Anointing Parish Detail
  	Certificate of Baptism
  	Certificate of Baptism Full
  	Certificate of Baptism Full Parish Detail
  	Certificate of Baptism Parish Detail
  	Certificate of Confirmation
  	Certificate of Confirmation Parish Detail

Using Mail Merge – Family Suite

My Templates Global Templates ParishSOFT Templates Mail Merge (4 Records)

Viewing Template **Welcome Letter**

File Home Insert Page Layout **Mail Merge**

Insert Merge Field Insert Fields View Data Show Field Codes Show Field Results First Record Previous Record Next Record Last Record Current Record Merge to File Finish

1 2 3 4

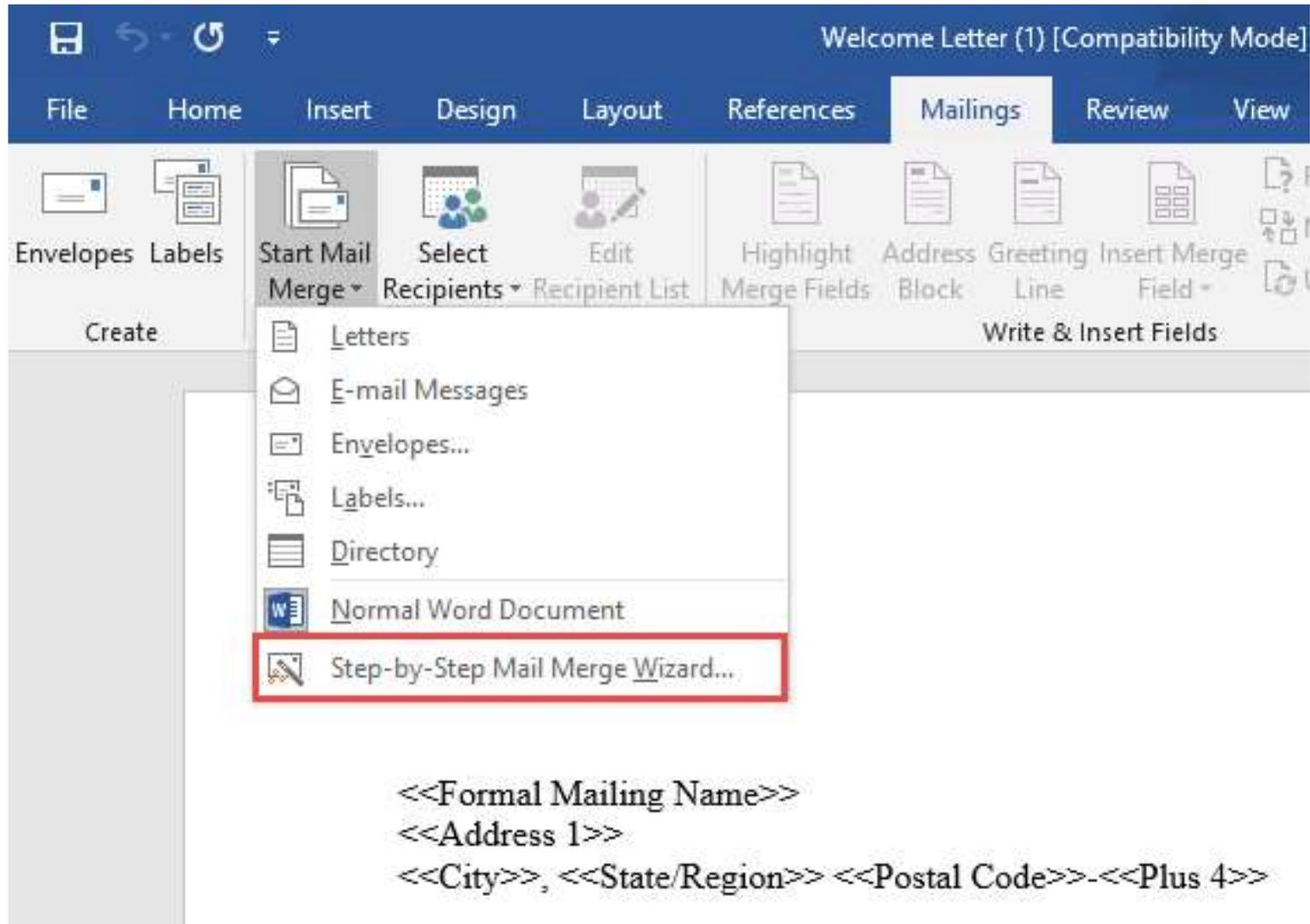
September 5, 2012

<<Formal Mailing Name>>
<<Address 1>>
<<City>>, <<State/Region>> <<Postal Code>> <<Plus 4>>

Dear <<First Names>>,

Welcome to our parish!

Using Mail Merge – Word/Excel



The screenshot shows the Microsoft Word interface with the Mailings ribbon selected. The 'Start Mail Merge' button is highlighted, and its dropdown menu is open. The menu items are: Letters, E-mail Messages, Envelopes..., Labels..., Directory, Normal Word Document, and Step-by-Step Mail Merge Wizard... (highlighted with a red box). Below the ribbon, the following text is displayed:

<<Formal Mailing Name>>
<<Address 1>>
<<City>>, <<State/Region>> <<Postal Code>> <<Plus 4>>

Using Mail Merge – Word/Excel

The screenshot displays the Mail Merge ribbon in Microsoft Word. The **Recipients** dropdown menu is open, showing options: **Select Recipients** (highlighted with a red box), **Edit Recipient List**, **Highlight Merge Fields**, **Type a New List...**, **Use an Existing List...** (highlighted with a blue box), and **Choose from Outlook Contacts...**. The main Mail Merge task pane shows a table with the following data:

Name	Date modified
Mail Merge List	10/26/2018 1:21 PM
Mail Merge Welcome Letter	10/26/2018 11:01

Below the table is a **New Source...** button and a text field containing **Mail Merge List**. The ribbon also includes **Insert Merge Field** (highlighted with a red box), **Rules**, **Match Fields**, **Update Labels**, **Preview Results** (highlighted with a blue box), **Find Recipient**, **Check for Errors**, and **Finish & Merge** (highlighted with a red box).

Building a Template for Mail Merge



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QUESTIONS?

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Thank you!

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