

# Managing Mail Merge from Family Suite

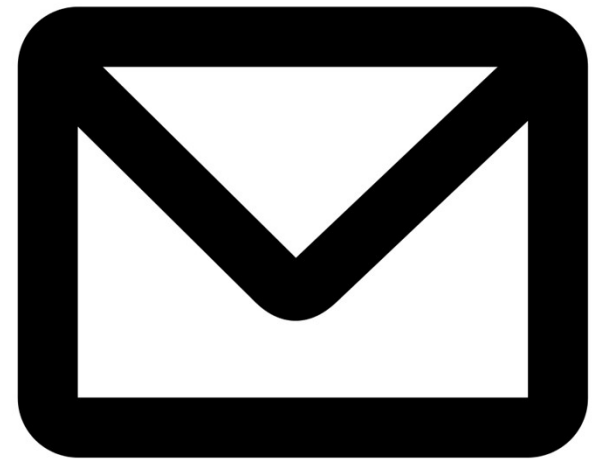
Joe Slomiany  
ParishSOFT



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Celebrating 20 Years of Service

# Today's Agenda

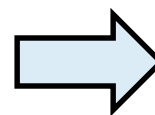
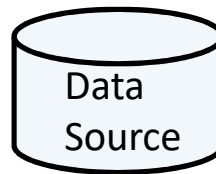
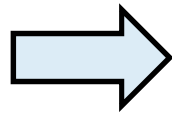
- What is Mail Merge?
- How can Mail Merge help my Ministry?
- How does Mail Merge work?
- Exporting Data for Mail Merge
- Using Mail Merge
  - In Family Suite
  - In Word/Excel
- Building Mail Merge Templates



# 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

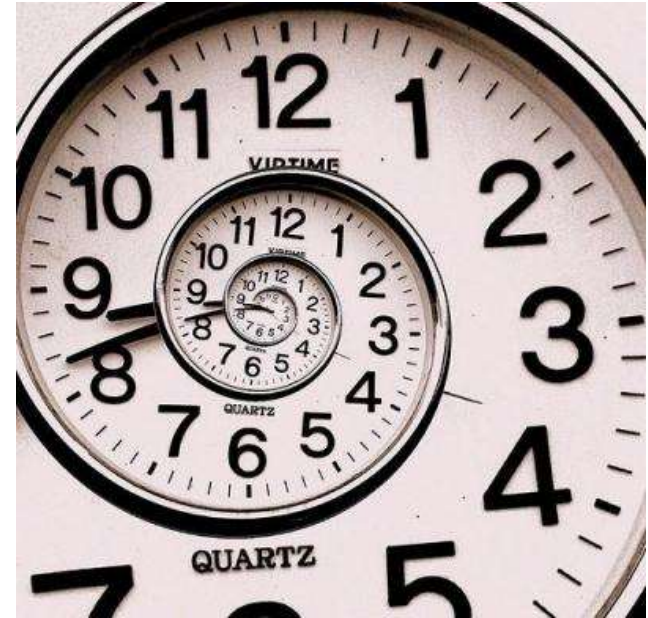


Merge Documents



# How Can Mail Merge Help My Ministry?

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

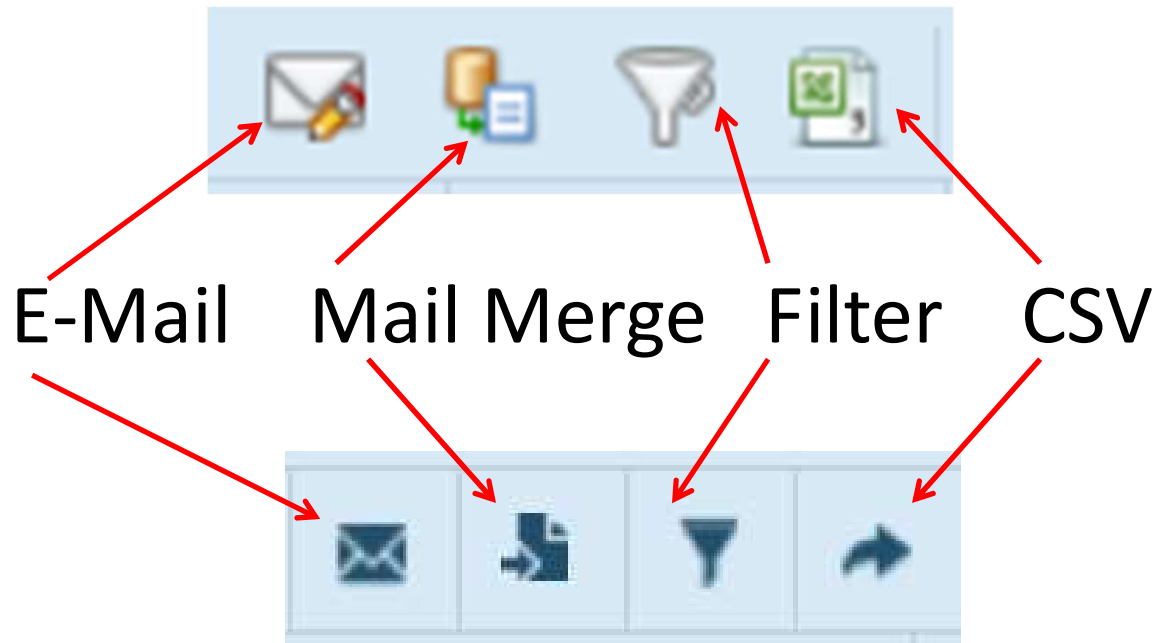


# How Does Mail Merge Work?

- 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



## Members in Workgroup: Parish Council

A-Z	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	
0-9	0	1	2	3	4	5	6	7	8	9	Filter Criteria:		Filter Col						
10 records																			
								</											





# 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

▼  [Clear Search Results](#)

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

50 records ▼        [Add New Family](#) [Delete Selected Families](#) [Quick Reports ▼](#)

1	Family	Registered	Family Group	E-Mail Address	Primary Phone	Primary Address	City
<input type="checkbox"/>	<a href="#">Abler, Jason and Tracey</a>	Yes	Active	<a href="mailto:abler@demoemailaddress.com">abler@demoemailaddress.com</a>	555-2222	2351 Ellsworth Rd	Ypsilanti
<input type="checkbox"/>	<a href="#">Adams, Todd and Jane</a>	Yes	Active	<a href="mailto:adamsfamily@demochurch.com">adamsfamily@demochurch.com</a>	734-621-1212	373 N Zeeb Rd	Ann Arbor
<input type="checkbox"/>	<a href="#">Albert, Mike and Stacey</a>	Yes	Active	<a href="mailto:salbert@demoemailaddress.com">salbert@demoemailaddress.com</a>	555-888-7777	53 Truman Dr	Ann Arbor
<input type="checkbox"/>	<a href="#">Alberts and Fernandez, Sal and Allison</a>	Yes	Active	<a href="mailto:alberts@demoemailaddress.com">alberts@demoemailaddress.com</a>		234 19th Ave	Ann Arbor
<input type="checkbox"/>	<a href="#">Albrecht, Jennifer</a>	Yes	Active	<a href="mailto:j.albrecht@church.com">j.albrecht@church.com</a>	313-694-4642	3810 Syracuse St	Dearborn
<input type="checkbox"/>	<a href="#">Allen, Marion</a>	Yes	Active	<a href="mailto:mallen@demoemailaddress.com">mallen@demoemailaddress.com</a>	555-666-8888	42 Vine Ave	Belleville
<input type="checkbox"/>	<a href="#">Allen, Paul and Andrea</a>	Yes	Active	<a href="mailto:allen@demoemailaddress.com">allen@demoemailaddress.com</a>	545-2323	3 Jackson Blvd	Ann Arbor
<input type="checkbox"/>	<a href="#">Anderson, Sarah</a>	Yes	Active	<a href="mailto:anderson@demoemailaddress.c">anderson@demoemailaddress.c</a>	555-888-9999	24 Gold Pl #45	Ann Arbor
<input type="checkbox"/>	<a href="#">Anderson, Thomas and Andrea</a>	Yes	Active	<a href="mailto:anderson@demoemailaddress.c">anderson@demoemailaddress.c</a>	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 ▼	<input type="checkbox"/> Unique Records Only	Execute Query	Query Results ▼
Families First Names	Families Last Name	Families_Contact Info Primary Address 1	Families_Contact Info Primary City	Families_Contact Info Primary State	
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	

# 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

▼ 🔍 [Clear Search Results](#)

A-Z 0-9 0 1 2 3 4 5 6 7 8 9 Filter Criteria: None Filter Column: Family Ascending Clear Filter

50 records Add New Family Delete Selected Families Quick Reports ▼

Family	Family Group	E-Mail Address	Primary Phone	Primary Address	City
<input checked="" type="checkbox"/> <a href="#">Abler, Jason and Traci</a>	Active	<a href="mailto:abler@demoemailaddress.com">abler@demoemailaddress.com</a>	555-2222	2351 Ellsworth Rd	Ypsilanti
<input checked="" type="checkbox"/> <a href="#">Adams, Todd and Jane</a>	Active	<a href="mailto:adamsfamily@demochurch.com">adamsfamily@demochurch.com</a>	734-621-1212	373 N Zeeb Rd	Ann Arbor
<input checked="" type="checkbox"/> <a href="#">Albert, Mike and Stacey</a>	Active	<a href="mailto:salbert@demoemailaddress.com">salbert@demoemailaddress.com</a>	555-888-7777	53 Truman Dr	Ann Arbor
<input checked="" type="checkbox"/> <a href="#">Alberts and Fernandez, Sal and Allison</a>	Active	<a href="mailto:alberts@demoemailaddress.com">alberts@demoemailaddress.com</a>		234 19th Ave	Ann Arbor
<input checked="" type="checkbox"/> <a href="#">Albrecht, Jennifer</a>	Active	<a href="mailto:j.albrecht@church.com">j.albrecht@church.com</a>	313-694-4642	3810 Syracuse St	Dearborn
<input checked="" type="checkbox"/> <a href="#">Allen, Marion</a>	Active	<a href="mailto:mallen@demoemailaddress.com">mallen@demoemailaddress.com</a>	555-666-8888	42 Vine Ave	Belleville
<input checked="" type="checkbox"/> <a href="#">Allen, Paul and Andrea</a>	Active	<a href="mailto:allen@demoemailaddress.com">allen@demoemailaddress.com</a>	545-2323	3 Jackson Blvd	Ann Arbor
<input checked="" type="checkbox"/> <a href="#">Anderson, Sarah</a>	Active	<a href="mailto:anderson@demoemailaddress.com">anderson@demoemailaddress.com</a>	555-888-9999	24 Gold Pl #45	Ann Arbor
<input checked="" type="checkbox"/> <a href="#">Anderson, Thomas and Andrea</a>	Active	<a href="mailto:anderson@demoemailaddress.com">anderson@demoemailaddress.com</a>	777-4444	8941 River Road	Ann Arbor
<input checked="" type="checkbox"/> <a href="#">Balk, Michael and Sharon</a>	Active	<a href="mailto:balk@demoemailaddress.com">balk@demoemailaddress.com</a>	444-5555	7999 7th Street	Ann Arbor

1 2 3 4

1: Select all records (checkboxes)

2: Mail Merge icon

3: Merge Selected Records (50)































4: Merge All Records



# 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"/>
  	<a href="#">10 Envelope</a>
  	<a href="#">Birthday Letter</a>
  	<a href="#">Certificate of Anointing</a>
  	<a href="#">Certificate of Anointing Parish Detail</a>
  	<a href="#">Certificate of Baptism</a>
  	<a href="#">Certificate of Baptism Full</a>
  	<a href="#">Certificate of Baptism Full Parish Detail</a>
  	<a href="#">Certificate of Baptism Parish Detail</a>
  	<a href="#">Certificate of Confirmation</a>
  	<a href="#">Certificate of Confirmation Parish Detail</a>

# 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   **View Data**   Show Field Codes   Show Field Results   First Record   Previous Record   Next Record   Last Record   Merge to File   Finish

1 2 3 4

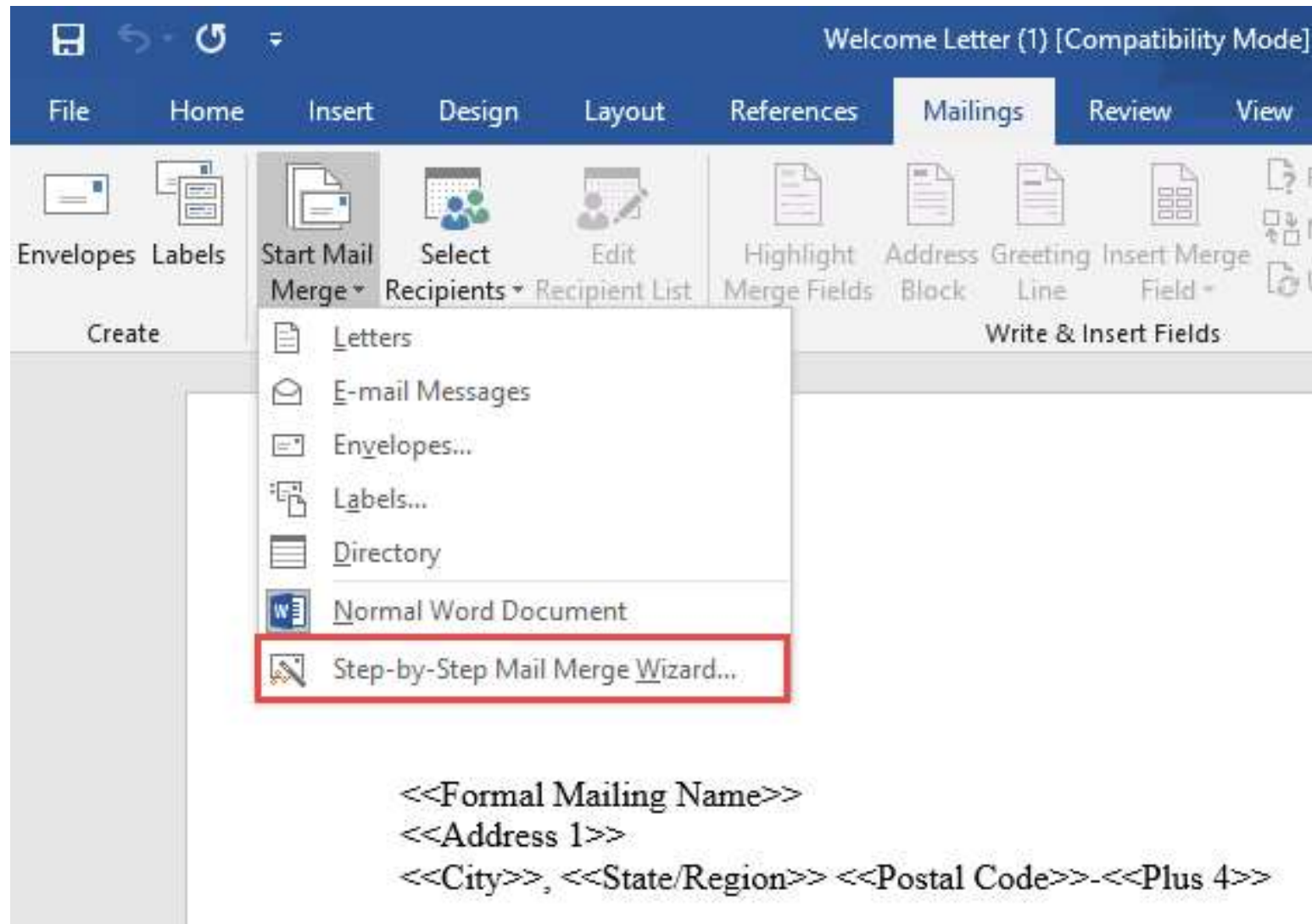
September 5, 2012

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

Dear <<First Names>>,

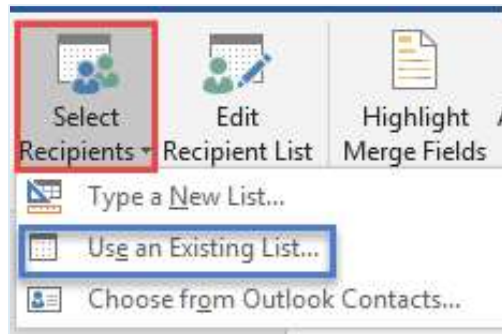
Welcome to our parish!

# Using Mail Merge – Word/Excel





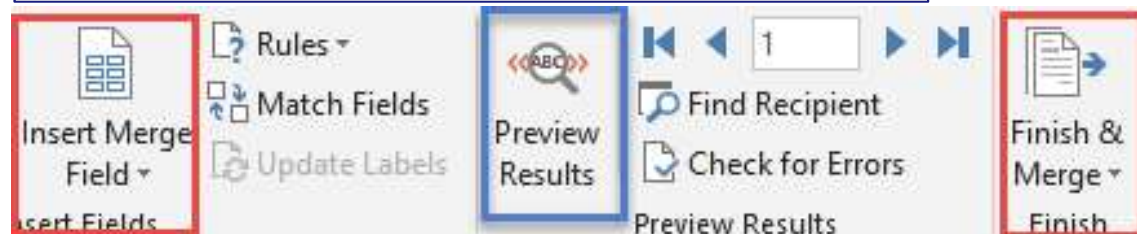
# Using Mail Merge – Word/Excel



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

New Source...

Source: Mail Merge List



# Building a Template for Mail Merge



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# QUESTIONS?

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# Thank you!

## ParishSOFT



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