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**[Test] ParishSOFT Newsletter - Mail Merge**

1 message

**Catholic Diocese of Sioux Falls - Carla Haiar** <chair@sfcatholic.org>

Thu, Jan 30, 2014 at 12:58 PM

Reply-To: us7-d75c814320-6a44ad6871@inbound.mailchimp.com

To: "&lt;&lt; Test First Name &gt;&gt; &lt;&lt; Test Last Name &gt;&gt;" &lt;chair@sfcatholic.org&gt;

Diocese of Sioux Falls is utilizing ParishSOFT for parish management. This new sletter w ill be sent periodically to assist in your transition. Please encourage other ParishSOFT Users in your organization to subscribe. Thank you! Carla Haiar

[View this email in your brow ser](#)*Catholic Diocese of Sioux Falls*

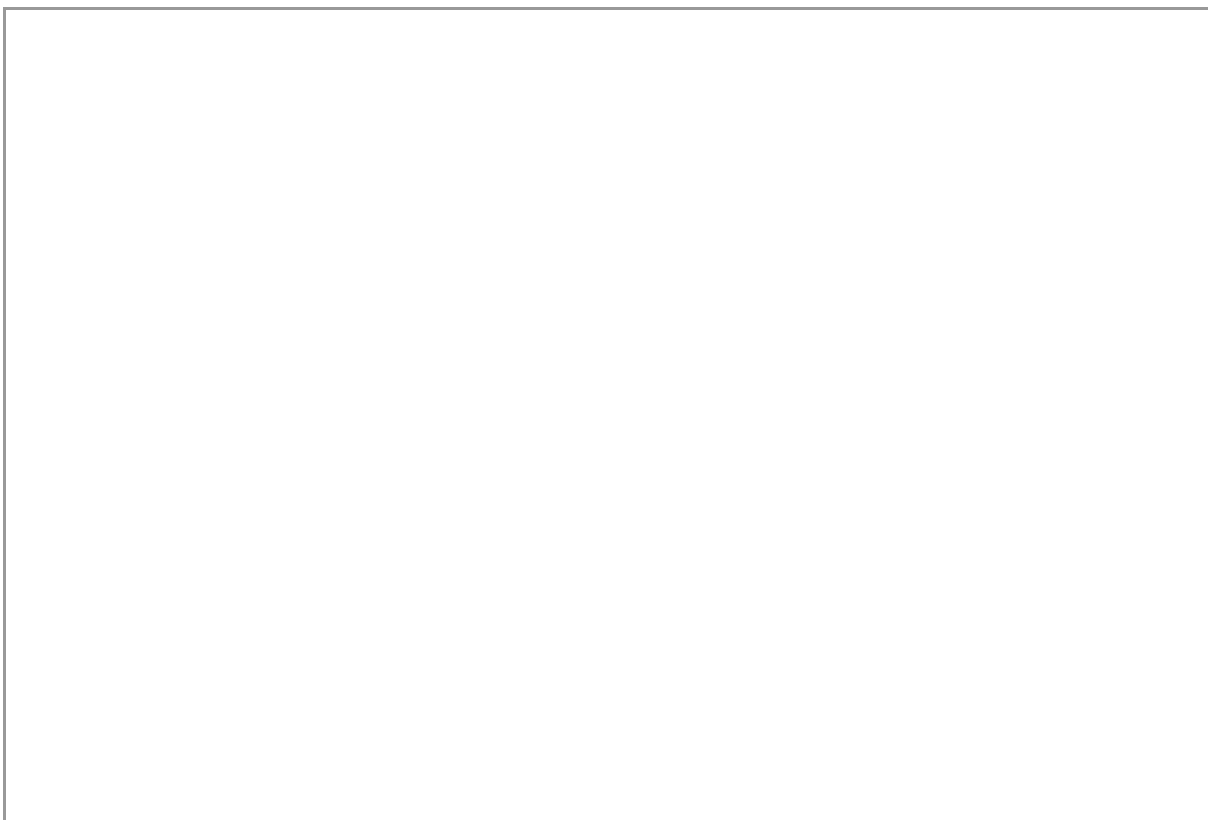
Family Suite

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# Mail Merge

Working with CN Family Suite changes how we think, use and process reports.

Instead of going to a "report" button, we can apply filters, modify columns and view our data instantly. Most filter lists have the ability to download to a csv file. This csv file format enables you to utilize Mail Merge in Word to print labels, letters or envelopes.



1. Click on Family Directory

2. Click on Family List

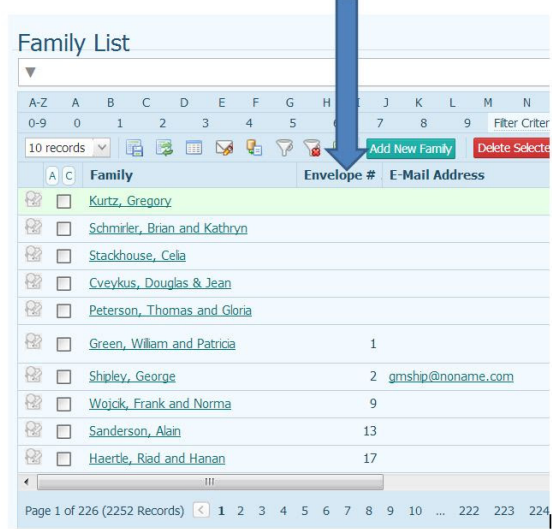
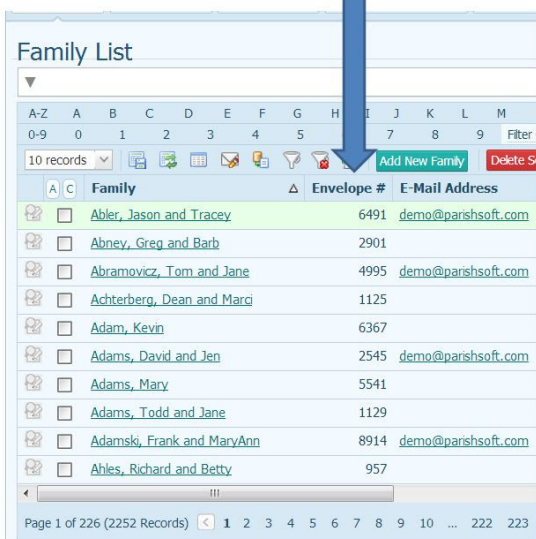
3. Click on Filter icon.

On your filter, select Registered and Active. Always verify your filters before downloading and working with a csv file.

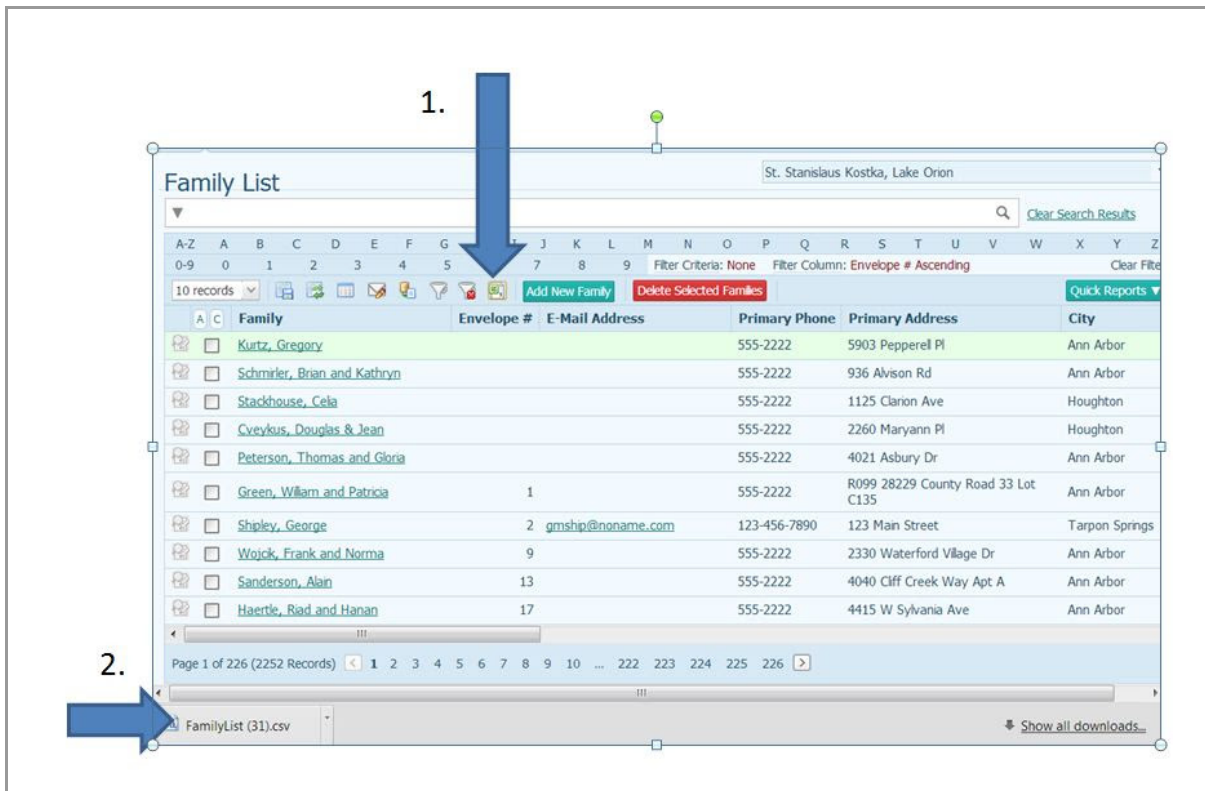
1. Membership to Registered.

2. Family Group to Active.

3. Click Apply.



1. Review list of names returned.
2. Click on the column heading you wish to sort by. As you can see, clicking on Envelope # column to sort by Envelope Number will resequence your records.



1. Click the Excel icon to download the file in CSV format.
2. File will appear in the bottom left hand corner of your screen.

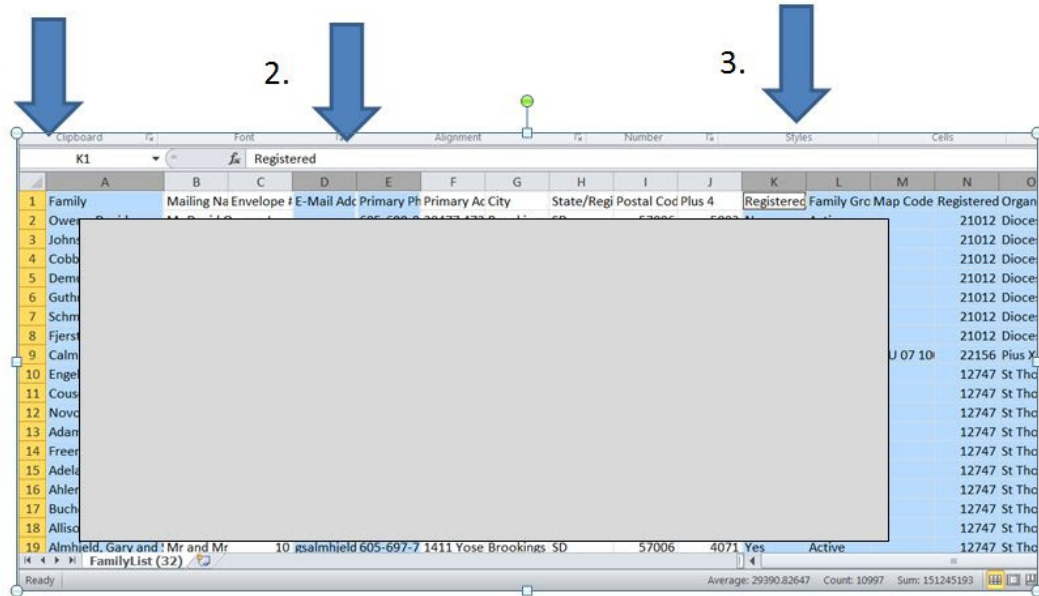
Note: downloads are specific to the browser you are using. Google Chrome drops the file to the lower left hand corner of the screen.

Double Click on the file to open in excel.

1.

2.

3.



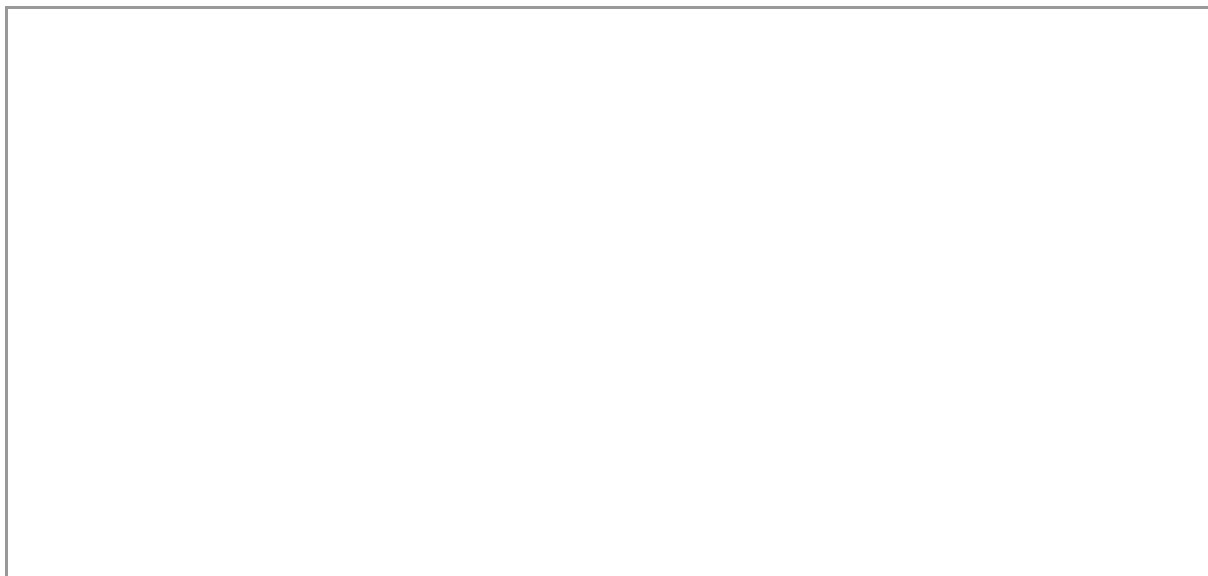
If generating labels or a simple letter, you may choose to delete the columns you are not using in your label or letter.

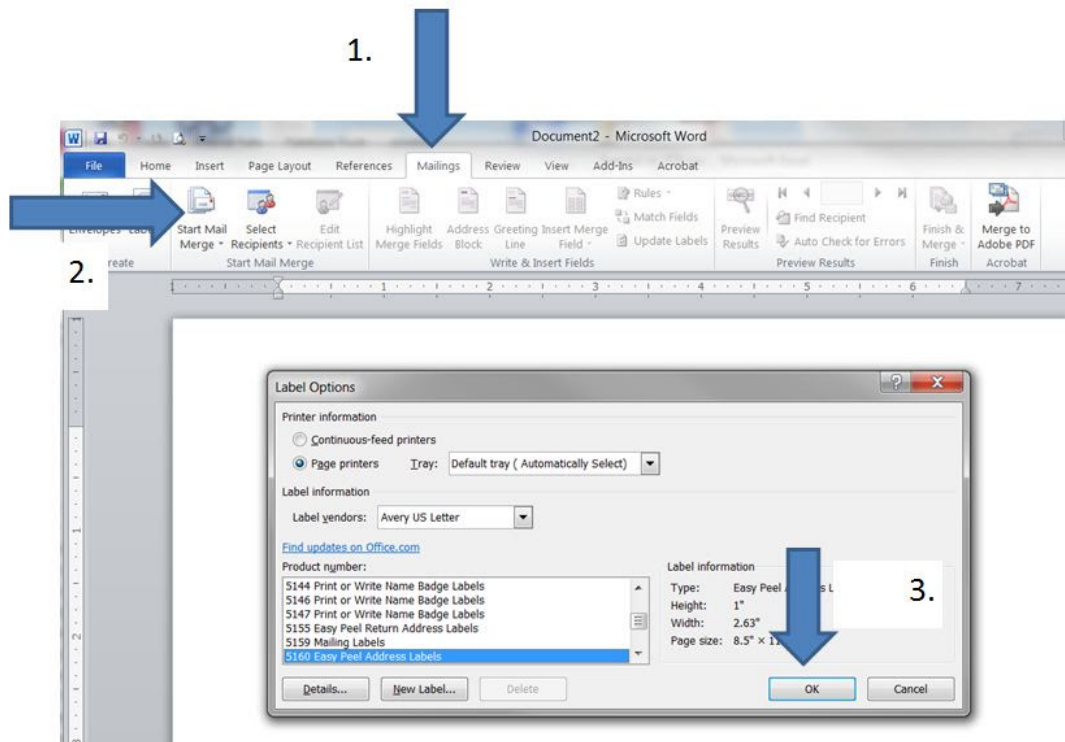
1. Select Columns A, D and E and delete these columns.
2. Select all columns to the right of the Postal Code Plus 4 and Delete these columns.
3. Save this spreadsheet to a folder on your computer.

	A	B	C	D	E	F	G
1	Mailing Name	Envelope #	Primary Ac	City	State/Regi	Postal Code	
2	Mr and Mrs Curt	1	PO Box 30	Aurora	SD	57002	
3	Mr and Mrs Rola	2	1030 17th	Brookings	SD	57006	
4	Mr and Mrs Craig	3	1519 Wind	Brookings	SD	57006	
5	Mr and Mrs Glen	4	405 1st Av	Brookings	SD	57006	
6	Mr and Mrs Tyle	5	20717 471	Brookings	SD	57006	
7	Mr and Mrs Mich	6	47158 203	Brookings	SD	57006	
8	Mrs Mercedes A	7	131 Sunris	Brookings	SD	57006	

Final spreadsheet should have Mailing Name, Envelope # and Address.

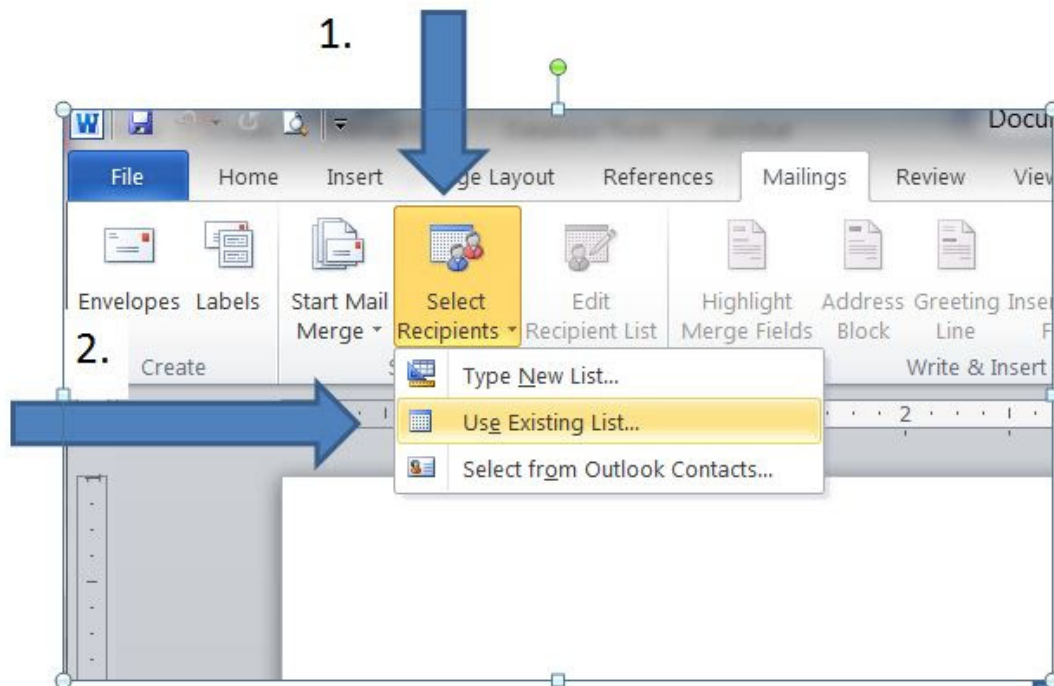
To Generate Labels from this SPREADSHEET, use Microsoft WORD Mail Merge.





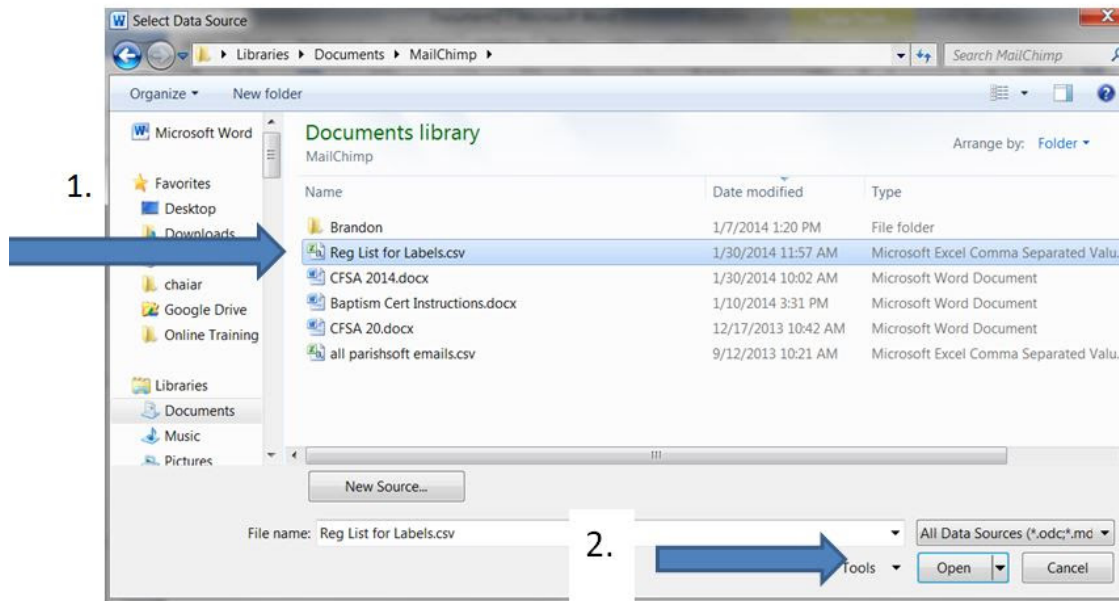
Open Microsoft Office Word

1. Click Mailings
2. Click Start Mail Merge, Select Labels
3. Locate your Label, standard is 5160, click OK.

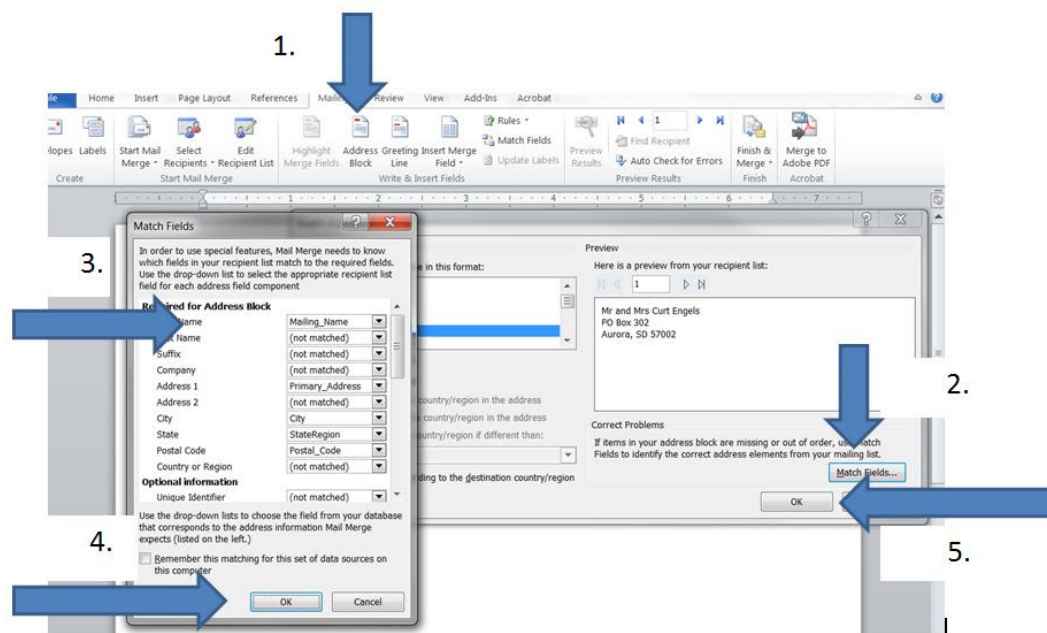


1. Click Select Mail Recipients
2. Click Use Existing List

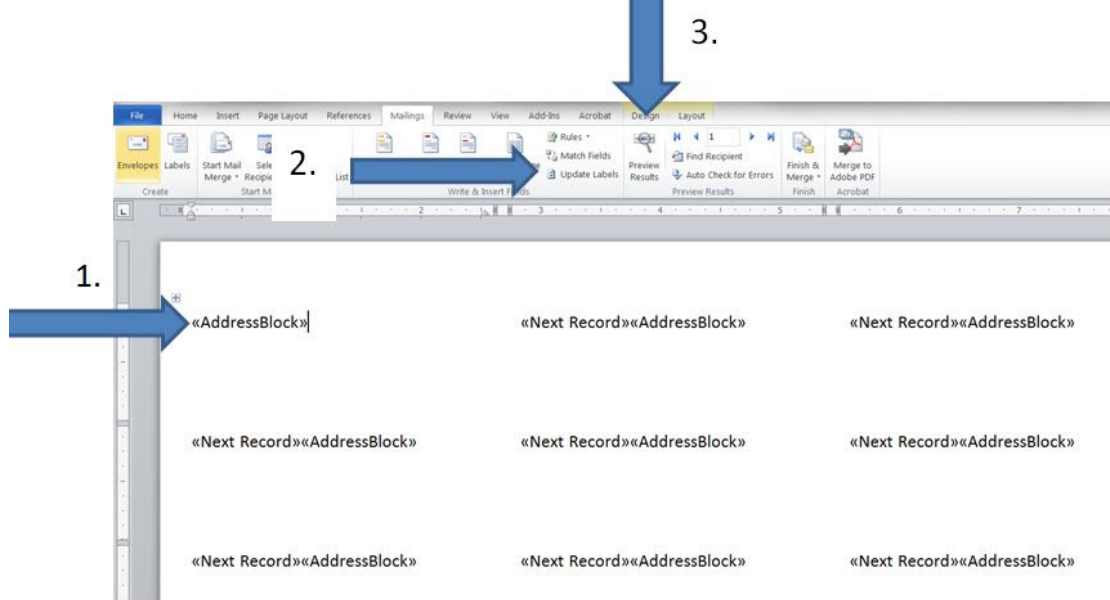




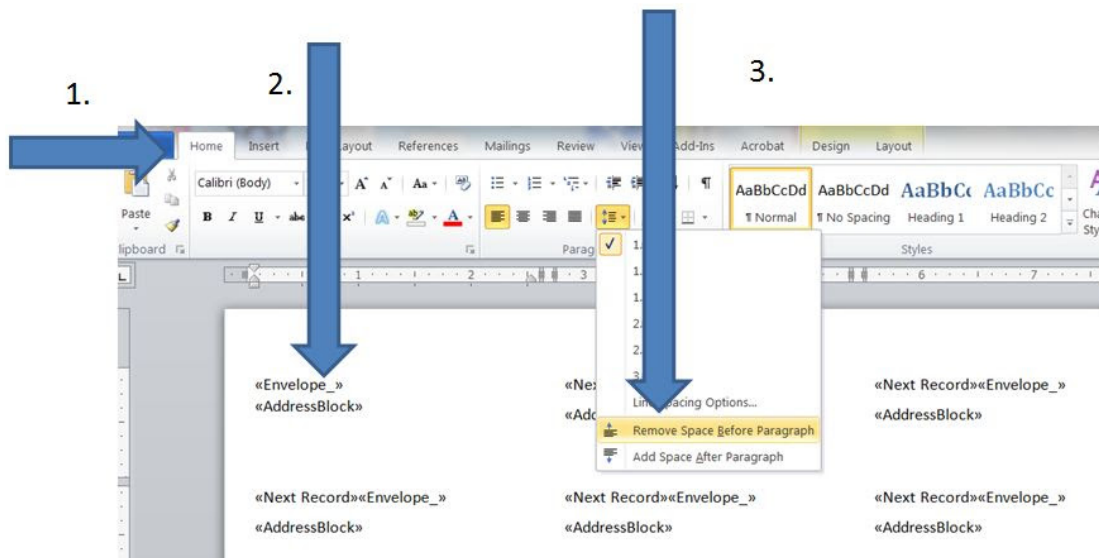
1. Browse to your desired folder location and click on the CSV file.
2. Click Open



1. Click Address Block
2. Click Match Fields
3. Click on First Name and select Mailing Name in drop down.
4. Click Address 1 and select Primary\_Address in drop down.
5. Click State and select StateRegion from drop down.
6. Click Postal Code and select Postal\_Code from drop down.
7. Click OK.
8. Click OK

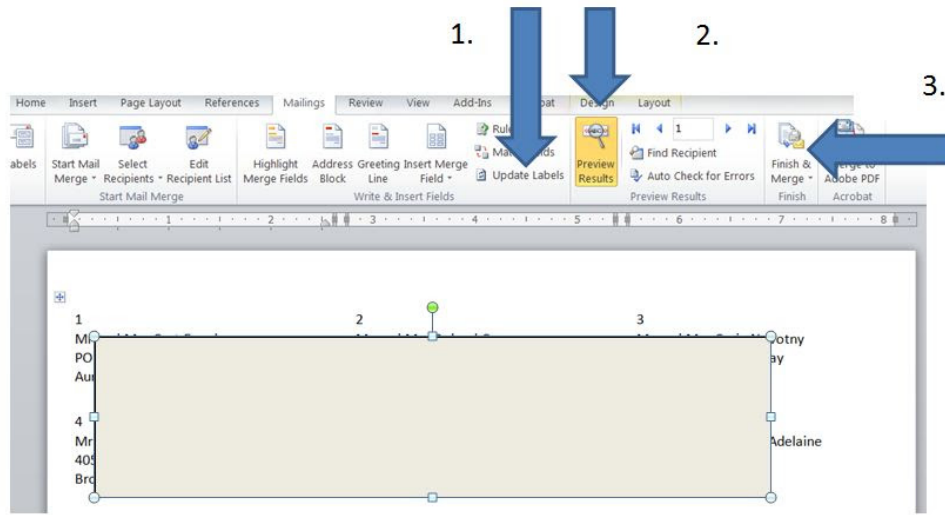


1. You should see <<AddressBlock>> directly below .
2. Click on Update Labels, you will see you labels form populated with Next Record
3. Click Preview Results



Many times the labels are too spread out to fit on this 5160 label. So let's remove the extra vertical space.

1. Click Home
2. Select AddressBlock
3. Click on Paragraph, line spacing icon, Remove Space Before Paragraph.



1. Be sure to go back to Mailings, Update Labels to apply to ALL labels on this page.
2. Click Preview results to see how your labels look.
3. Click Finish and Merge, Print Documents

You have created a WORD Label template that can be used for ANY label downloaded from CN Family Suite. Be sure to save this WORD document and just change your Select Recipients whenever you need to update your labels.

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