

[Test] ParishSOFT Newsletter - Mail Merge

1 message

 Catholic Diocese of Sioux Falls - Carla Haiar <chaiar@sfcatholic.org>
 Thu, Jan 30, 2014 at 12:58 PM

 Reply-To: us7-d75c814320-6a44ad6871@inbound.mailchimp.com
 Thu, Jan 30, 2014 at 12:58 PM

 To: "<< Test First Name >> << Test Last Name >>" <chaiar@sfcatholic.org>

 Diocese of Sioux Falls is utilizing ParishSOFT for parish management.
 View this email in your brow ser

 This new sletter will be sent periodically to assist in your transition.
 View this email in your brow ser

 Rease encourage other ParishSOFT Users in your organization to subscribe. Thank you! Carla Haiar
 Concess of Sioux Falls

 Catholic Diocese of Sioux Falls
 Family Suite

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.

Ζ.	Home	Eamly Directory	Religious	Fd.	Offering	Ministry 9	cheduler	Adminis	tration			
	Family	List A Member Li	st 🖂 Sacr	aments	Eamily	Workarou		ember W	orkaroups	Repo	rts	
/	W runny i	www.ricinoci.ca		umentes	- I dining	Workgrot		ciliber w	ongroups			
	Family	/ List							5	St. Stanislaus	Kostka, I	.ake O
3.	A-Z A	B C D	E F	G	ΗI	JК	L M	N	O P	Q	R S	т
	0-9 0	1 2	3 4	5	6	7 8	9 F	ilter Criter	ia: None	Filter Column	n: Family A	scendin
				P	Add No	w Family	Delete Se	lected Far	nilies			
	AC	Family		Δ	Envelope #	E-Mail	Address		Prim	ary Phone	Primar	y Addı
		Aaland, Thomas							555-2	222	2516 Ald	iringhai
	8	Aasen, Kathy							555-2	222	- No Add	iress-T
	8	Aasen, Nancy							555-2	222	- No Add	dress-T
		Aberg, JudyAnn							555-2	222	- No Add	iress-T
	8 🗆	Abler, Jason and T	racey		6491	demo@	parishsoft.c	om	555-2	222	5048 Ru	dgate
	8 🗖	Abney, Greg and E	Barb		2901				555-2	222	4632 Wy	ndwoo
	8 🗆	Abramovicz, Tom	and Jane		4995	demo@	parishsoft.c	m	555-2	222	4952 Hig	hpoint
	8 🗖	Abrams, Angela							555-2	222	81 Fox F	λun
	a	Abt, Shirley							555-2	222	- No Add	iress-T
	a	Achterberg, Dean	and Marci		1125				555-2	222	4041 W	Centra
			111									

On your filter, select Registered and Active. Alw ays verify your filters before dow nloading and working with a csv file.





V															
A-Z	A	В	С	D	E	F	G	Н			J	К	L	М	Ν
0-9	0	1	2	3		4	5			7		8	9	Fit	er Crite
101	A C	Family	4		CX8	41	Ve	Enve	elope	#	E-N	lail A	Addre	ss	select
82		Kurtz, Gre	gory												
-		Schmirler,	Brian	and Ka	athry	n									
82		Stackhous	e, Celi	a											
02		<u>Cveykus,</u>	Dougla	ns & Je	<u>ean</u>										
		Peterson,	Thom	as and	d Glor	ria									
-		Green, W	lliam a	nd Pat	ricia					1					
22		Shipley, G	eorge							2	gm	ship@	Inonar	ne.cor	n
		Wojcik, Fr	ank ar	nd Nori	ma					9					
-		Sandersor	n <mark>, Al</mark> ain							13					
22		Haertle, R	iad an	d Hana	an					17					
•				111	e.					-					

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.

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1	Family List	St. Stanisla	uus Kostka, Lake Orion	
	v		Q de	r Search Results
	A-Z A B C D E F G	JKLMNOPQ	R S T U V W	ХҮ
	0-9 0 1 2 3 4 5	7 8 9 Filter Criteria: None Filter Colu	mn: Envelope # Ascending	Clear F
	10 records 🕑 📑 🖼 🥅 🈼 🚱 🏹 📓	Add New Family Delete Selected Families		Quick Reports
	A C Family Envelop	be # E-Mail Address Primary Phon	e Primary Address	City
	😢 🔲 Kurtz, Gregory	555-2222	5903 Pepperell Pl	Ann Arbor
	Schmirler, Brian and Kathryn	555-2222	936 Alvison Rd	Ann Arbor
	😢 🔲 Stackhouse, Celia	555-2222	1125 Clarion Ave	Houghton
	😤 📄 Cveykus, Douglas & Jean	555-2222	2260 Maryann Pl	Houghton
Y	Peterson, Thomas and Gloria	555-2222	4021 Asbury Dr	Ann Arbor
	Green, William and Patricia	1 555-2222	R099 28229 County Road 33 Lot C135	Ann Arbor
	😚 🔲 Shipley, George	2 gmship@noname.com 123-456-7890	123 Main Street	Tarpon Spring
	Wojck, Frank and Norma	9 555-2222	2330 Waterford Vilage Dr	Ann Arbor
	😵 🔲 Sanderson, Alain	13 555-2222	4040 Cliff Creek Way Apt A	Ann Arbor
	🛞 🔲 Haertle, Riad and Hanan	17 555-2222	4415 W Sylvania Ave	Ann Arbor

1. Click the Excel icon to dow nload the file in CSV format.

2. File will appear in the bottom left hand corner of your screen.

Note: dow nloads are specific to the brow ser you are using. Google Chrome drops the file to the low er left hand corner of the screen.

Double Click on the file to open in excel.



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.

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	

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



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









- 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.



You have created a WORD Label template that can be used for ANY label dow nloaded 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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