Merging the Initial CSA letter through Microsoft Word

These instructions assume you are sending a letter to **all current contacts.**

Completing necessary clean-up steps: Receiving a letter containing the name of a divorced or deceased family member can be very painful for the surviving family members. Before you send any CSA follow-up letter, you should review these views and rectify these potentially painful situations.

1. Visit this view: [Fix: Households w/ Deceased Contact](#) If you have any families that contain deceased Heads of Household, you must run the DPT.
2. Visit this view: [Fix: Divorced Heads in same Household](#) If you have families that contain both divorced (or separated) Heads of Household, you must either:
   - Move one of the spouses to his/her own household marked as Head of Household. **Or,**
   - Mark one of the spouses as Other Adult and change his or her Contact Status to Inactive. The remaining spouse should remain Head of Household

Exporting the contact list from Ministry Platform

1. Clear any sticky/saved selections:

   1. Click **Home** on Ministry Platform's menu and click **My Selections** on top of screen.
   2. If anything appears on this page, click the **check box** at the bottom of the screen.
   3. Click the **Actions** button and choose **Clear** and then **c**lick the **Clear** button.

2. Click **Contacts** and choose the view named **All current contacts**.

3. Check the box in the lower left corner to select everyone on this view.

4. Click the **Reports** button in the upper right corner.

5. Choose **Selected Mail Merge: 1 per Family – Erie.**

6. Make choices on the window that appears – especially these:

   Sort Order: Choose Name or Zip order.

   Omit Bulk Mail Opt Out: Choose True if you want to eliminate people who've opted out.

7. Click the **View Report** button**.**

8. Click the **diskette** button and choose **Excel**.

9. Open the spreadsheet if it doesn't automatically open for you. Depending on your browser, the spreadsheet will either open or be saved to your downloads folder.

10. Click the **Enable Editing** button if one appears.

11. Click **File** and **Save As** to save this file named **Selected Mail Merge 1 Per Family - Erie-1.xlsx** somewhere memorable.

12. Close Excel and the small MP report window.

13. Clear your selections

1. Click the arrow next to **All Records** in the lower right corner and choose **Current/Unsaved Selection**.

2. Click the **x** to deselect your contacts.
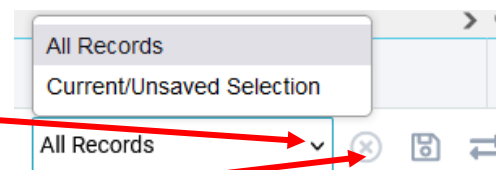
Setting up the Shell document

1) Open the merge letter you downloaded from the website or received via email. If your pastor has written his own letter, paste that text into the letter provided by the diocese. These instructions assume use of the letter supplied by the Diocese.

2) Click the **Mailings** ribbon.

3) Click the **Select Recipients** button and choose **Use Existing List**.

4) Browse and find the spreadsheet named **Selected Mail Merge 1 Per Family - Erie-1.xlsx** from the yellow step on the previous page.

5) Click the **OK** button on the small window that pops up.

6) Delete this placeholder text **AddressBlockGoesHere.**

7) Click the **Address Block** button on the Mailings ribbon.

8) Click the **Match Fields** button on the **Insert Address Block** screen.

9) Match fields as shown in the screen shot.

10) Click the **Preview** button and review the letters.
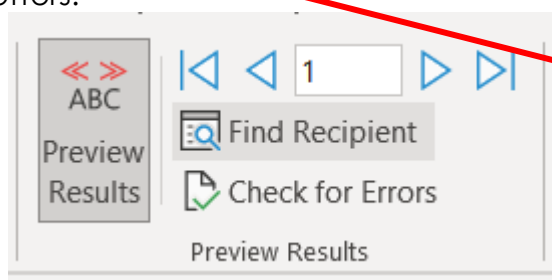
11) Print a letter to make sure it fits on your letterhead and/or is situated right for positioning in a window envelope.

Merging and printing your letter.

A. Print a single letter to make sure it fits on your letterhead and/or is situated right for positioning in a window envelope.

B. Click **File** and choose **Save** because we want to save all your changes.

C. Click the **Finish and Merge** button and choose **Edit Individual document.** The **Merge to new document** pop-up will appear.
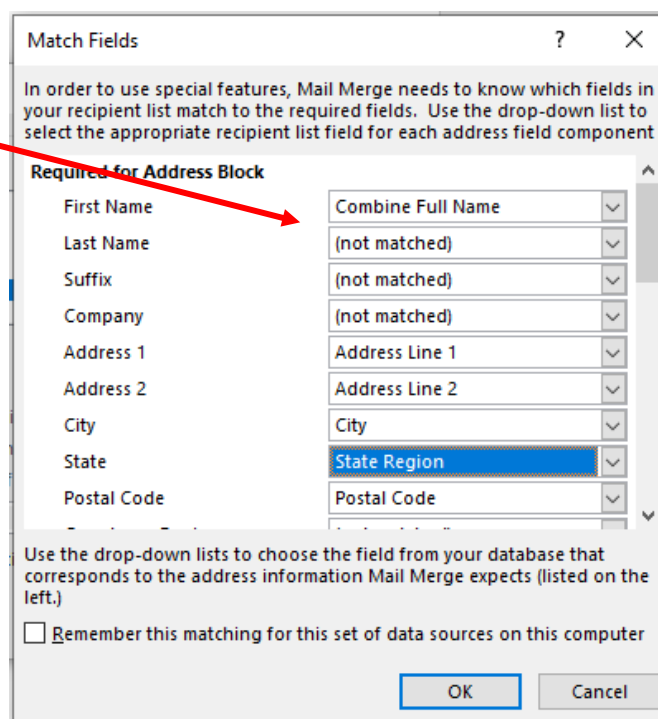
D. Place a dot next to **All** and click **OK**. A new document named Letters1 will appear. This is what I refer to as a scrap document because once you print the letters you can close this document without saving it. You can print this document like you would any normal document.

E. Review your letters.

    i. **If you find errors that affect the entire group of letters**, close the scrap letter (don't save it) and fix the shell document. Start again at step B above to remerge the letters. Note: your scrap document name will change every time you merge.

    ii. **If you find errors that affect only one letter** (like a bad salutation) fix the scrap document and write yourself a note so you can fix the record in MP.

F. Put any special paper in the correct drawer in the printer.

G. Click **File** and choose **Print**.

H. Click **Close** and click **Don't Save** because you don't need to save your scrap document.