



Merging Follow-up Letters through Microsoft Word



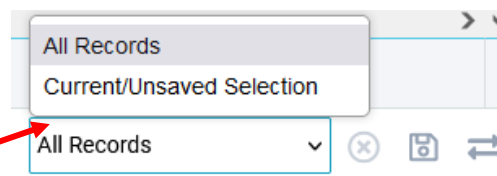
Completing necessary clean-up steps: Receiving a letter containing the name of a divorced or deceased family member can be very painful for the surviving family members. Before you send any CSA follow-up letter, you should review these views and rectify these potentially painful situations.

1. **DO NOT run Follow up labels/letters in January. The process only works after February.**
2. Click **Contacts** and choose the view **Fix: Households w/ Deceased Contact** If you have any families that contain deceased Heads of Household, you must run the DPT.
3. Click **Contacts** and choose the 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. **Important:** Clear any sticky/saved selections:
 - a. Click **Home** on Ministry Platform's menu and click **My Selections** on top of screen.
 - b. If anything appears on this page, click the **check box** at the bottom of the screen.
 - c. Click the **Actions** button and choose **Clear** and then click the **Clear** button.
2. Choose the follow-up approach that best fits your needs from the bulleted list below
 - **Those who have not yet given to this year's CSA**
 - a. Click **Contacts** and choose the CSA – Never Given view
 - **Those who gave last year but not this year (LYBUNT)**
 - a. Click **CSA or Other Campaigns** and choose **CSA BUNT Families**.
 - b. Choose the **LYBUNT** view
 - c. Check the box in the lower left to select all records. (This is one time where we WANT sticky selections.)
 - d. Click **Contacts** on the left menu.
 - e. Choose the view named **CSA BUNT Selected Families**.
 - **Those who gave to some past CSA but not this year (SYBUNT)**
 - a. Click **CSA or Other Campaigns** and choose **CSA BUNT Families**.
 - b. Open the **SYBUNT** view
 - c. Check the box in the lower left to select all records. (This is one time where we WANT sticky selections.)
 - f. Click **Contacts** on the left menu.
 - g. Choose the view named **CSA BUNT Selected Families**.
3. Check the bottom left box to select everyone on the list or check mark specific people as needed.
4. Click the **Reports** button and **Selected Mail Merge 1 per Family – Erie v2**.
5. Choose a **Sort Order** – either Name or Zip order.
6. Click the **diskette** button and choose **Excel**.
7. Open the spreadsheet if it doesn't automatically open for you. Depending on your browser, the spreadsheet will either open automatically or be saved to your downloads folder.

8. Click the **Enable Editing** button if one appears. **csafollowup**
9. **File, Save As** to drop this file somewhere memorable.
10. **Name this file.xlsx.** (If you always save it in the same place with the exact same name, you can reuse the shell document to send Thank you letters later in the year.)
11. Close Excel and possibly the small MP report window if it appears.
12. **Important:** Clear your selections
 - a. Click the arrow next to **All Records** in the lower right corner and choose **Current/Unsaved Section.**
 - b. Click the **x** to deselect your contacts.

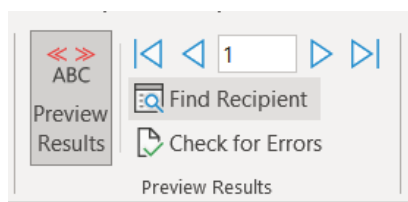


Setting up the Shell document:

- 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 to the **csafollowup.xlsx** file you exported during the yellow step on page 1.
- 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.

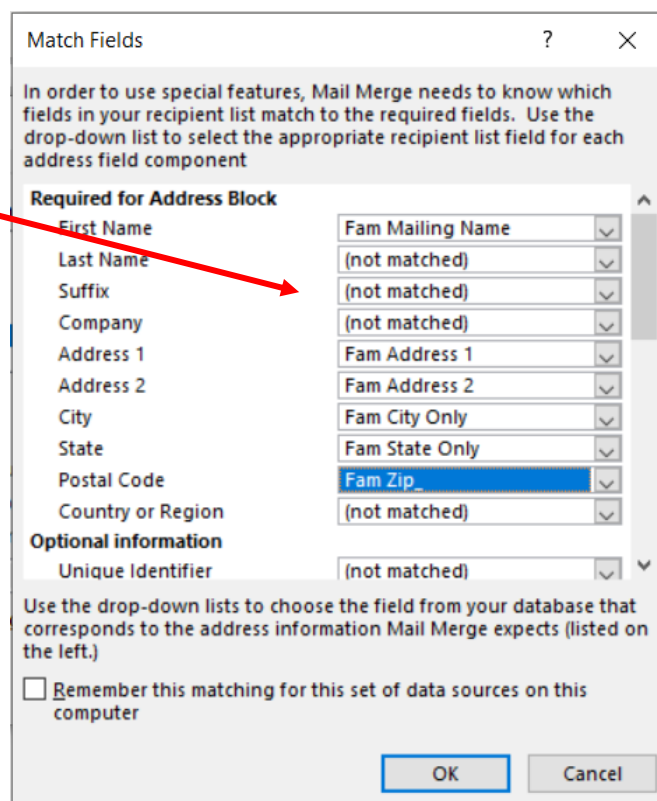
For formal letters, use:
Fam Mailing Name - Formal and Salutation – Formal

For formal letters, use:
Fam Mailing Name - Informal and Salutation - Informal
- 10) Click the **Preview** button and review the letters.



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) and fix the shell document. Repeat step C 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.
- I. If you send thank you letters throughout the year make note of today's date on these instructions. It is important in step 3b above.