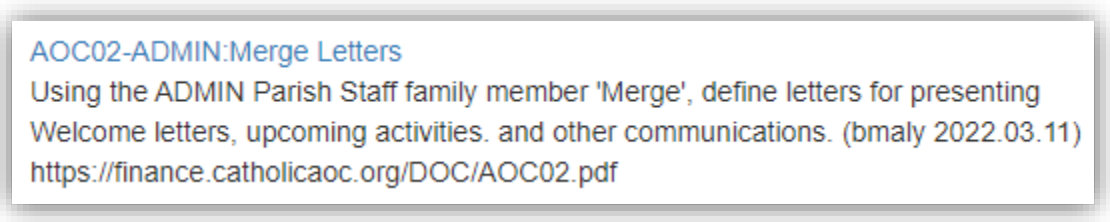
Mail Merge letters 'ADMIN:Merge Letters' Report



Description – for preparing a variety of letters to be sent to specified groups of families. All parishes are provided template 'Letter' and 'Welcome to the Parish' letters.

Parameters:

- Church
- Form (multiple forms can be defined)
- Family Statuses
- Registered Parishioners
- Begin (if Range selected)
- End (if Range selected)
- Family Tags
- Member Committees
- Mail to
- Greeting
- Date
- Address to use
- Address format
- Format Options

Purpose – Prepares variety of Mail Merge letters

The parameters for the report allow you to select a subset of families.

Family Status. Typically set to 'ACTIVE'.

Registered Parishioners. This is intended for preparing a 'Welcome to the Parish' letter. When you select 'Registered within a date range', the 'Begin' and 'End' date parameters become part of the filter to identify any Family 'registered' within the date range.

If you are preparing a letter to be sent to Tag Groups, one or more groups can be selected (press the 'cntl' key while clicking on multiple tag groups). Selecting a committee and then the option for the Family Name or the Member name.

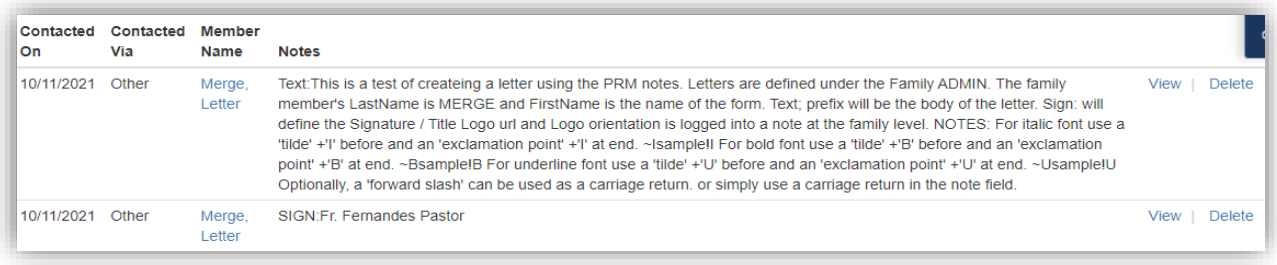
Greeting select the formal Salutation or casual First Name.

Each family can have a Street Address found on the main family page as well as a mailing address and an alternate address. The default 'Address to use' is set to Mailing Address, which considers date specific alternates and mailing addresses. You can switch this to Street Address if desired.

The 'Address Format' will give the choice for the address to Mixed Case, Upper Case (as desired by USPS) and left to the format found in your data (the default).

By default, your return address is printed. You can suppress this with the 'Format Options' parameter.

THIS REPORT USES THE PRM NOTE MERGE FEATURE. Every parish has been loaded with a Parish Staff family named ADMIN. In this family you will find a member named 'Merge, Letter'' and 'Merge, Welcome to the Parish'. The text for the letter is defined in PRM notes. A parish can add multiple letter formats by adding a new member in the ADMIN family. The member's last name should be changed to 'Merge' with the first name being a description of the letter. This new 'letter' will appear in the 'Form' drop down parameter.



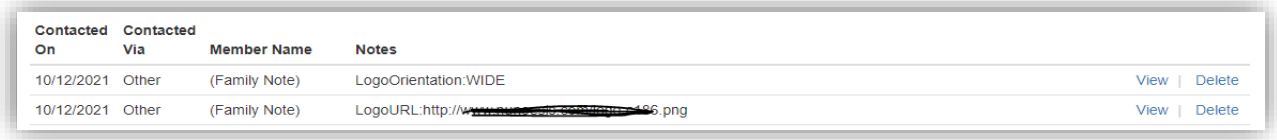
Contacted On	Contacted Via	Member Name	Notes	
10/11/2021	Other	Merge, Letter	Text:This is a test of createing a letter using the PRM notes. Letters are defined under the Family ADMIN. The family member's LastName is MERGE and FirstName is the name of the form. Text; prefix will be the body of the letter. Sign: will define the Signature / Title Logo url and Logo orientation is logged into a note at the family level. NOTES: For italic font use a 'tilde' +'I' before and an 'exclamation point' +'I' at end. ~IsampleII For bold font use a 'tilde' +'B' before and an 'exclamation point' +'B' at end. ~BsampleIB For underline font use a 'tilde' +'U' before and an 'exclamation point' +'U' at end. ~UsampleIU Optionally, a 'forward slash' can be used as a carriage return. or simply use a carriage return in the note field.	View | Delete
10/11/2021	Other	Merge, Letter	SIGN:Fr. Fernandes Pastor	View | Delete

Using these PRM notes, you can define multiple letters, each containing the text for your parish needs.

- A PRM note type of 'Other' with the first characters being 'TEXT:' is the content of the letter before the table showing giving summarized by fund.
  NOTES: For Text data
  For italic font use a 'tilde' +'I' before and an 'exclamation point' +'I' at end. sample
  For bold font use a 'tilde' +'B' before and an 'exclamation point' +'B' at end. sample
  For underline font use a 'tilde' +'U' before and an 'exclamation point' +'U' at end. sample
  Optionally, a 'forward slash' can be used as a carriage return. or simply use a carriage return in the note field.
- A PRM note type of 'Other' with the first characters being 'SIGN:' is the content of the person signing the letter.
- A PRM note type of 'Other' with the first characters being 'SIGNURL:' is the location of a png or jpg of the signer's signature.

Logo and return addresses: Family Level PRM notes can be used to define how your logo displays. This is an optional feature. You can also define these notes at the Member PRM level if you use a different logo for each letter type. Defining a member level PRM LogoURL and LogoOrientation will override the Family PRM definitions for LogoURL and LogoOrientation.

- A PRM note type of 'Other' with the first characters being 'LogoURL:' is the location of a png or jpg of the parish logo.
- A PRM note type of 'Other' with the first characters being 'LogoOrientation:' provides the report information about the physical dimensions of the logo file: Entering 'WIDE' will place the logo on the top of the page and the return address on the right. Entering 'Square' will place the logo on the top right of the page with the return address above the recipient's address.



Contacted On	Contacted Via	Member Name	Notes	
10/12/2021	Other	(Family Note)	LogoOrientation:WIDE	View | Delete
10/12/2021	Other	(Family Note)	LogoURL:http://[redacted].png	View | Delete



St. Ignatius of Loyola Church

5222 North Bend Road, Cincinnati, Ohio 45247 • (513) 661-6565

LogoURL

10/20/2021 ⇦ Date Parameter

M
1
Lawrenceburg, IN 47025

Can be Suppressed ⇨

St Ignatius Parish
5222 North Bend Rd
Cincinnati, OH 45247

Dear Mrs. Aston,

This is a test of createing a letter using the PRM notes. Letters are defined under the Family ADMIN.
The family member's LastName is MERGE and FirstName is the name of the form. Text; prefix will be the body of the letter. Sign: will define the Signature
Title Logo url and Logo orientation is logged into a note at the family level.

NOTES:
For italic font use a 'tilde' +'I' before and an 'exclamation point' +'I' at end. *sample*
For bold font use a 'tilde' +'B' before and an 'exclamation point' +'B' at end. **sample**
For underline font use a 'tilde' +'U' before and an 'exclamation point' +'U' at end. sample
Optionally, a 'forward slash' can be used as a carriage return. or simply use a carriage return in the note field.

⇧ Text

Fr. Fernandes
Pastor

⇦ Sign