

Church Office Automation

Merging Data to make Letters, Labels and Other Things

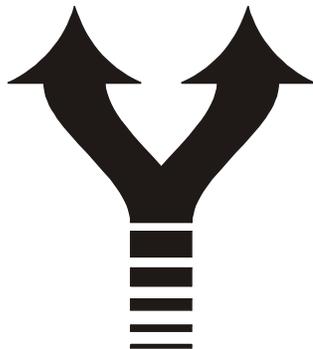
Merging Information in General

Every church office is called upon to send information to some or all members of the congregation or various committees. The ease in getting desired information to selected individuals in your organization directly impacts on the quality of your communication. And since quality communication is desired by all church leaders, you need to cultivate your ability to do mail merge functions with your word processor and the software with which you store your membership information. (See the article in a previous 1998 edition of this newsletter entitled “Managing Church Information With Database Software”)

 **Rule of Thumb 1: Keep all your membership (and committee) information in ONE list.**

Let’s play Pick-a-Path for a minute and let you choose which Church Office Administrator you’d like to be — just to illustrate this first rule.

There is **Zelmar**, who works at Megabucks Presbyterian Church, and there is **Zeenon**, who is similarly employed at the Prosperity Presbyterian Cathedral in the next town. (The last names were omitted to maintain confidentiality in our Presbytery examples.) Both Zelmar and Zeenon use Microsoft Word for word processing. Both happen to use Microsoft Excel to store and maintain their information on church



members. (Neither of these two church professionals know that they’d be wiser to use Microsoft Access to maintain their lists, but they will learn this when they read next quarter’s article in this newsletter.)

Zelmar

Zelmar has a list of members of each church committee in a separate *Excel* spread sheet. Since there are twenty committees at Megabucks Presbyterian, there are twenty lists, plus the membership list. Oh yea, there’s the list of Sunday School parents; then there’s also the list that has the kids in the Sunday School, but there is also another list for each Sunday School class. Plus there is the list of Sunday School teachers. Then there is the “~~master~~” “mistress” list of all church members. And, oh yes, I almost forgot — there’s the church newsletter list that has members and non-members. Did I mention the list of potential members the minister updates weekly? What does that make, . . . about 40 lists in all?

So, Zelmar hears five requests a week for changes of address, phone numbers, committee memberships, church membership status or various typos. The most frequent question Zelmar asks himself is this: “Did I make all the changes in *all* of the lists in which the changes were required?” And guess how many hours Zel spends each week editing the multiple lists? Then guess how accurate his address labels and the merged letters are as a result of the many changes that had to be made in all the lists that he, personally, had to remember?



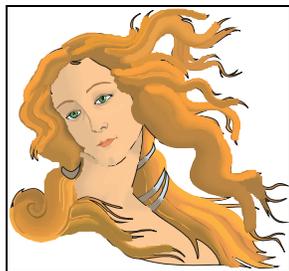
Zeenon

Zeenon, in the other Presbyterian church in the next town, surprisingly has everyone who is in or associated with her church (and its committees) in *one* list. So like her counterpart, Zelmar, Zeenon receives at least five requests a

week for changes of address, phone numbers, committee memberships, church membership status or name spellings. But Zeenon never asks herself if she has made the changes in all the necessary file locations. She already knows the answer because there is only ONE list. So Zeenon spends only minutes, each week, making the changes in the member information because any necessary change just has to be made once in one list.

And Zeenon wins the accuracy contest because the only place the person’s information resides is in the one record in front of her and nowhere else, so she makes the change only one time.

Because Zeenon is spending so little time managing her one file of information on people related to the church, she now is able to spend two hours of her work day in the new Tae Bo exercise class down the hall in the activity room. She’s in fabulous shape. So which person would you like to be?



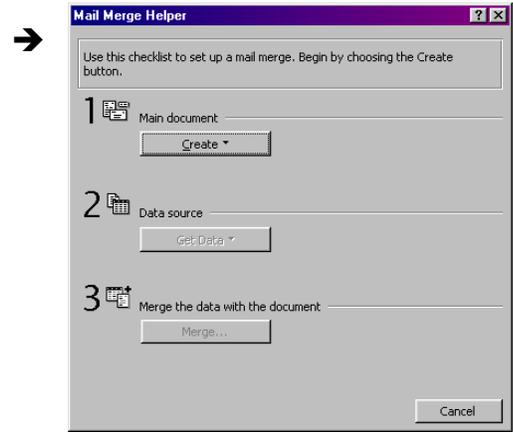
What does Zeenon know that Zelmar doesn’t? Zeenon knows at least two things. First, that rule number one is “Keep all your membership and committee information in only one list.”

Secondly, Zeenon has learned how to sort her list of people on various fields containing specific criteria. That is, she knows how to do a merge for a letter (memo or labels) so that it produces the printing for only certain people who are on a committee, of a certain age or who are involved in the specific project pertaining to the published information.

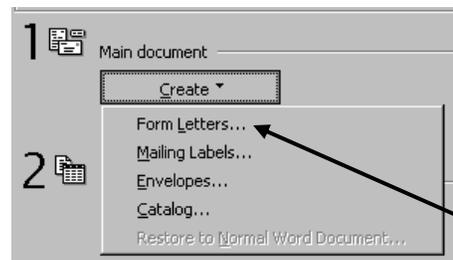
How To Make a Merge Letter in Word

You want to create a letter only for the Christian Education Committee about a coming training event. To do so, with *Word* open, save a document named CE Letter.DOC.

Next, with this document open, choose, from the menu bar, Tools and then from this Tools menu, choose Mail Merge. You will see this three part screen (see top of next column).

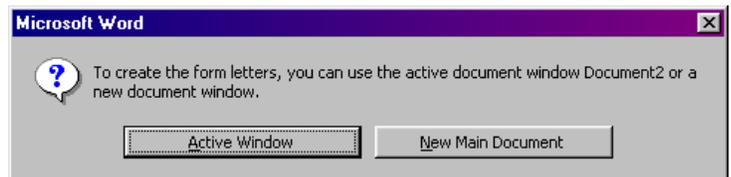


Next, click on the Create button in Section Number 1. This will reveal a menu of four choices for kinds of merge files you could create (see below). ↓

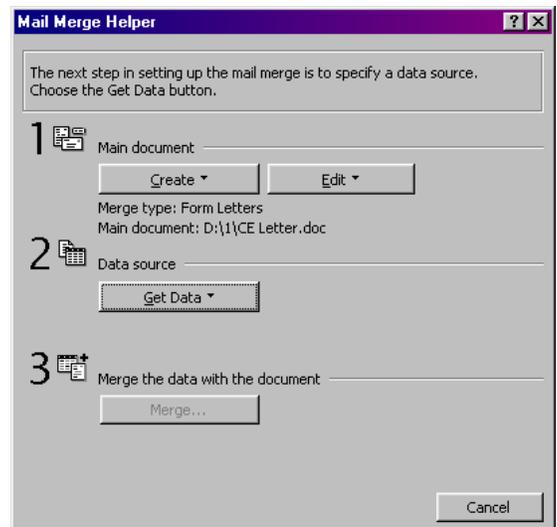


Since you’re going to make a form letter, click on Form Letters. You will see the following small window appear.

Click on the Active Window button. ↓



Next, you will see the following window. ↓



This window is visually telling you that you've completed the first step of a mail merge. It shows you've chosen **Form Letters** as the type of main merge file and you're using the file named **CE Letter.doc** for that file. Step 2 is next, so click on the "Get Data" button.

How To Make a Word Data Source File

Rule of Thumb 2: You can perform data merges in Microsoft Word using any one of three types of file formats for your list of information about people.

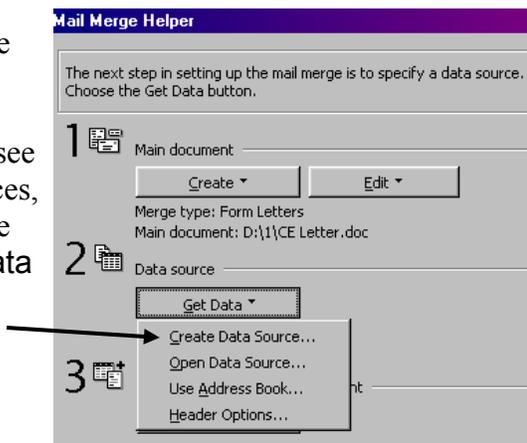
1 Create Data Source actually creates a new Word document that is formatted as a table. With this method, you can edit this table document with Word's database-like screen. This is a separate and independent document from the main merge file which will be going out to everyone on the Christian Education Committee. In this new file, you will be able to store and maintain any desired information on your church members. This is the example of the type of data source file we are using in this article. In the coming articles, we'll discuss the next two ways of keeping member information.

2 You can keep the information in an Excel spreadsheet file. This method is a little better, if you know Microsoft Excel.

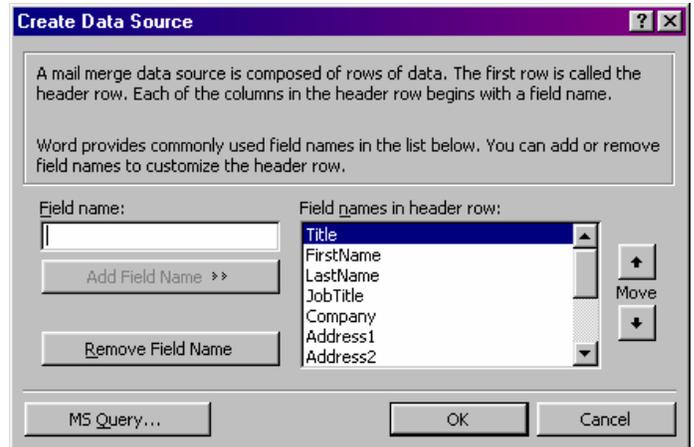
3 You can maintain your membership information in a Microsoft Access database file. This is the best method, for reasons that will be discussed in next quarter's article.



When you click on the **Get Data** button and when you see these choices, click on the **Create Data Source** choice.



When you choose this option, you will be brought to the following screen. ↓



The list on the right, under "Field names in header row:" are suggestions for typical field names. This is the place where you can accept the suggested field names you want, erase the names on the list that you do not need and add the new field names you desire.

For example, the first suggestion for a field name is **Title**. Lets say you feel that you will never use this field name, so you want to remove it from the list on the right. To do so, simply click once on that name and click on the button (in the lower left of the screen) entitled "Remove Field Name." It will take that name out of the list (on the right) and temporarily put it over to the left under "Field Name:" Scroll up or down that list (on the right) and remove any field names you do not want in the list. (If you don't like the exact name of a field (that is in the list) but want a field with a similar name, simply remove the name from the list. You will next add new field names, typing them exactly as you prefer.

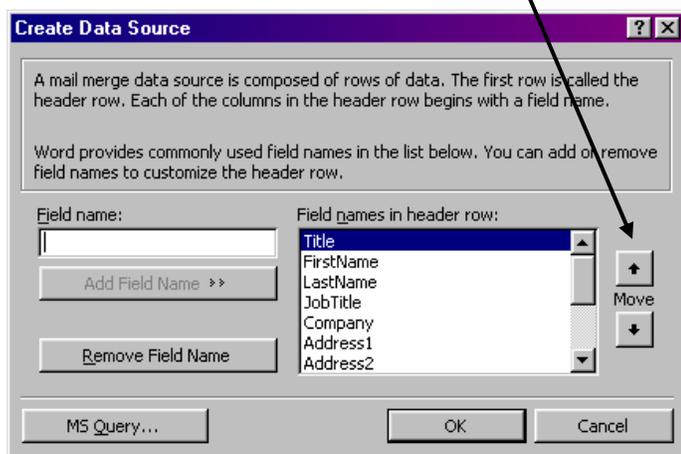
To add a new field name to the list, click your cursor in the white area under "Field Name:" and type the name of the new field. For example, if you did not like the field name **Address1** — but preferred the name **Street1** — you removed the **Address1** field name from the list on the right. Then, to add a new field called **Street1** — click in the area under "Field Name:" and type **Street1** and then click on the now available button called "Add Field Name." This will cause the field name **Street1** (that you just typed) to go over to the right to be included in your list of field names.

Because you're thinking ahead, you also remember to include a new field called "Committee." This will enable you to type in Christian Education (to indicate that person's membership there) or Stewardship or Elder, etc. to indicate their membership in those groups.

Including this field to indicate committee or group membership is extremely important for sorting later on. [Remember in the previous article in this newsletter on databases, 95% of the work of creating a database is done up front — choosing the proper fields to hold your membership information. You definitely need to devote a lot of thinking to the names of fields you want to use — before you arrive at this point in the process.] If you do this in the initial setup process, your life, when managing member information and doing data merges, will be wonderful. You'll also sleep better at night.

Once you have removed all the field names you do not want and added all the field names you do want, you'll put the list in the order you prefer.

To change the order of your list of fields, simply click once (to highlight it) on the name of the field you want to move. Once you've highlighted a field name, you can click on the Move Arrow Buttons (up or down) and you will see the name of the field going up or down on your list of fields. Do the same procedure to change the order of your field list (*see below*).

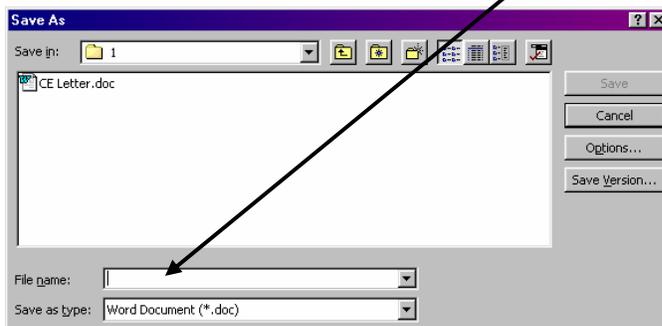


Once you have the names of the fields you want in the order you'd like, click on the "OK" button. This will take you to a "Save As" screen, enabling you to name this *Word* data

source file that will hold the information about your members. (*See the screen picture below*).

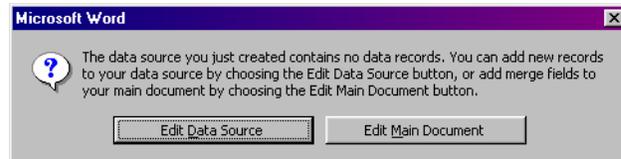
As you always do whenever saving a *Word* document, use the browser movement buttons to go to the desired drive and directory, then type the document's name in the "File Name" field. A good name to type for this file would be:

Member Information.DOC.



After you've typed in a name for this data source file, click on the now available "Save" button to save the file.

As soon as you save the information, the merge wizard will present you with the following small screen: ↓



It is basically telling you that ❶ the data source document you've just made doesn't have any information in it, and ❷ your main merge form letter doesn't have any merge codes for placing member information in your letter.

For now, click on the "Edit Main Document" button. This will take you back into your form letter document. When you get there, there will be something new — a new tool bar showing at the top (with one or more other tool bars). You'll see these buttons on the toolbar (*which I'm showing in two sections because the picture is wider than this column*): ↓



Your next task will be to place the field codes in your form letter. This is rather simple. Just go to the place in the letter where you want member information (such as the person’s name, address, etc.) and use the “Insert Merge Field” button on the tool bar to place the field code.



If, for instance, you want the recipient’s first and last name in the upper left part of this letter, followed by their address below their name, first go to the upper left of the page. Then click on the “Insert Merge Field” button and click on the First field name. It will place that field name inside the coding <<First>> at the location of your cursor.

Next, tap the space bar because you would normally type a space between the first and last name.

Next, click on the “Insert Field Name” button again and this time choose the Last field. Again, it puts that field name there on the page in the field code brackets <<Last>>.

Just as you normally would when typing this kind of information, tap your Enter key to go to the next line. Continue to select the appropriate field names (such as Street 1, Street 2, City, State, Zip, etc.). Continue to use spaces, commas, line breaks and whatever punctuation desired to separate words or numbers from one another. Before long, you’ll be down to the line that begins the letter:

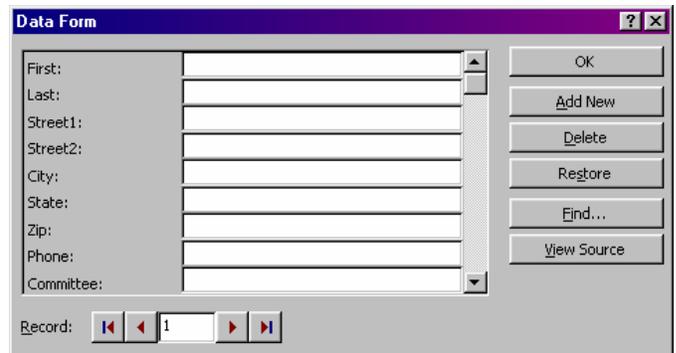
Dear <<First>>,

On the next line, you’ll start typing the prose of your letter to the members of the Christian Education Committee. At the bottom of this page, you’ll close the letter. If you’re lucky enough to have a graphic of the signature (of the person writing the letter), you’ll drop that in above their typed name and you’re home free. Next, save this mail merge form letter document.

How To Add or Modify Your Data Source Document

The next task is to go to your data source file and add or modify your information about the members of your church. At this point, we haven’t added any information on our church members, so here is how you do it, having already set up a Word data source document (that is essentially a table containing information on the members).

To go to the data source file that you set up to hold member information, go up to your merge tool bar (still showing at the top of your screen) and click on the Edit Data Source Button on the right side of the Merge Tool Bar (see arrow). This will immediately take you to the database-like screen that shows you one household’s record at a time. This is the window enabling you to fill in the information on any person or household record: ↓



Your cursor will be pulsing in the field at the top. In this example, the field at the top is for the person’s first name.

Type in the person’s first name. Move from field to field by tapping your Tab key or clicking in it with the mouse. To add another record, click on the “Add New” button. Continue adding records until you have all the information you need.

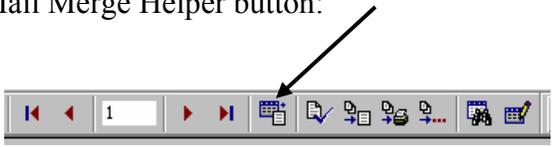
To navigate forward or backward in this database, use the navigation arrows in the bottom left of this screen. The maroon triangle pointer buttons (to the right of “Record:”) move one record at a time forward or backward. The maroon triangle pointer buttons (that point to a black vertical line) take you to either the very first or last record. Alternatively, you could highlight the record number in the middle of that navigation bar, type in a specific record number

and tap your Enter key. (By the way, this navigation part of the screen works exactly like the one in the *Access* program, in case you're interested.)

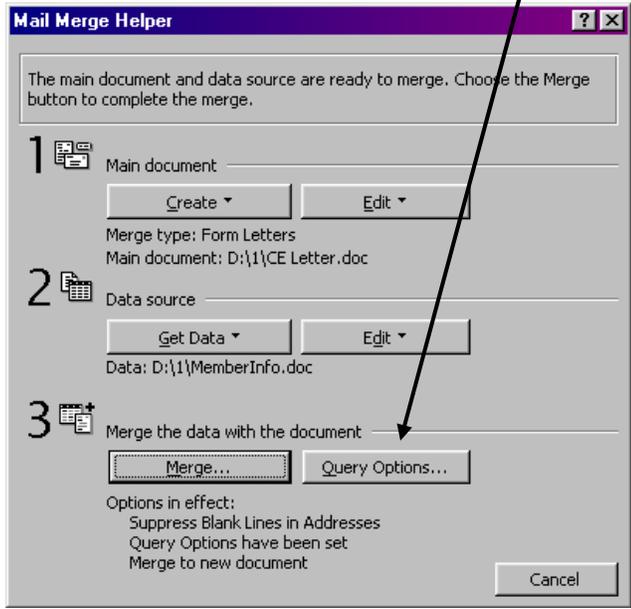
Once you've finished adding or modifying information on your members, click on the "OK" button and you'll return to the main merge form letter you've written to the Christian Education committee members.

How To Merge Only Some of The Information Into The Form Letter

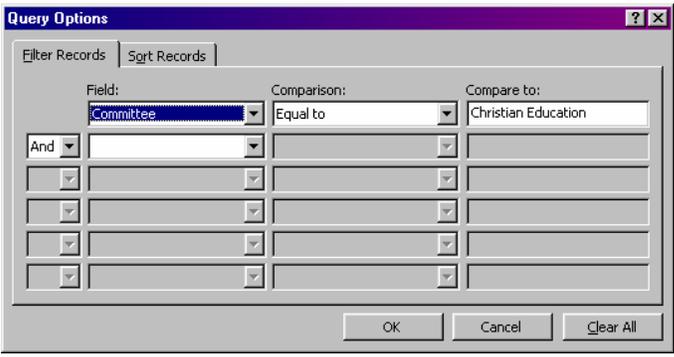
When you have returned to your merge form letter, you can use the Mail Merge Helper button, on the merge tool bar, to specify which of the members you want to select as recipients of this letter. In this case, you want only those who are on the Christian Education committee. To limit the names to only members of the Christian Education Committee, click on the Mail Merge Helper button:



This will open up the three part merging screen (see below). Click on the Query Options button in Section 3 of this window.



This will open the "Query Options" window (see the picture at the top of the next column) where you can specify which people you want included in this merge.



To limit the recipients of the letter to just the members of the Christian Education committee, fill in the "Field:" and the "Comparison:" and the "Compare to:" fields as shown above and click on the "OK" button. This will return you to the main merge form letter.

What you've done is limit the information that will be retrieved for the next merge. If, in the future, you wanted to use this data file's information for another merge letter (or labels), you would have to return to the "Mail Merge Helper" window and the "Query Options" window and change (or eliminate) the specified criteria to allow the next merge to select some other (or all) information contained in your data file.

There are two things to keep in mind when using this type of document to store your membership information.

① You will have to have typed the words "Christian Education" (or whatever word or words to designate that committee) **exactly** the same as was typed in each record for people on that committee.¹ In other words, if you typed "CE" in the Query field instead of "Christian Education" — you would only get the names (if any) of the people whose records have "CE" typed in that field.

② As I mentioned earlier in this article, this *Word* file (in a table format) method of storing your member information is not as nimble a means as using the Microsoft *Excel* or *Access* programs. In this query (selection) process, there isn't a way to specify "Christian Education" in a field that also has, perhaps "Deacon" and/or the name of another committee on which the person also serves.

¹ Talk about complex sentence structure; is that the future pluperfect of the verb?

How To Complete the Merge

After limiting your merge to just individuals on the Christian Education Committee, you will return to the main merge form letter. To complete the merge of the information, look again to the merge tool bar. This time, click on the “Merge To New Document” tool button (see below).



This “Merge To New Document” button will ① pick up your main merge form letter (with the merge codes in it), and ② pick up your data source file with the membership information, and ③ create a third (and separate) document containing as many merge letters (with members’ information on the letters) as there are members who were selected for the merge process. In other words, if there were fifteen people who had “Christian Education” in their “Committee” field, there would be fifteen letters (each on their own page) in this third document. All you have to do is print that document and you are done (except for making mailing labels, stuffing them in envelopes and mailing them).

Once you successfully print this third document, you can close it without saving this file. You don’t have to save it. Why? Because you still have the original merge letter (with the merge codes) and your original data source file (with all the member information). You can do the merge again without any problem anytime. Saving this file with the merged information (which changes every week anyway) only takes up precious hard drive space.

Coming Articles

Because of space, and my limited attention span, this article is not going to explain how to use the same data source file for making mailing labels. [Know, however, that you just have to create **Mailing Labels** (instead of a **Form Letters**) in your choice of the kind of merge file in Step 1. The rest is the same.]

In next quarter’s article, we’ll discuss how some of these same principles will be used in setting up an *Excel* or *Access* data source file.

The good news is that even if you set up your church member information with this method, you can easily migrate your table of member information to *Excel* or *Access* without having to retype any of it.

This article was written entirely in Microsoft *Word*. Because of the many screen captures, which regularly use half-toned images, we decided not to drop the quality of resolution down to a second-generation version photocopier’s 300 dots per inch. Instead, these seven pages were printed on a Hewlett-Packard LaserJet 4000 printer which has a terrific 1,200 dots per inch resolution. The relatively small number of copies produced were such that we had the resource of time permitting this higher quality.



Screen captured pictures were created in *Word*, copying the active windows to the clipboard and dropping them from the clipboard into text boxes throughout the article. I apologize for the length (and probable tediousness) of this article. There is no plot and there are no car chases. But if you are following it to actually do a merge function, chances are that its lengthy explanation of things is a little better than what is in the manual.

Also, if you moderate the Session of your church and if you have some input in the discussions of your Session’s Personnel Committee, consider this: This article shows some of the complexity involved in using computer software programs. Hand a copy of this article to your Personnel Committee the next time they evaluate the office staff salaries for the coming year. If business have to compete for and pay a fair wage to obtain office administrators able to accomplish these complex computer tasks, why wouldn’t a church do the same?

If you would like to contribute an article or lead a “how-to” demonstration with a little of your computer wizardry, drop an email to:



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