Steps to merge a list of Certificates

- 1. Click on the Data List and save to your desktop.
- 2. Open the 'Data List' File in Excel and insert the names and data you intend to print on the certificates.

| | A | В | C | D | E | F | G | н | I. | J | K | L | M | N |
|----|-----------|------------|-----------------|-------------|----------|--------|----------|---------------|-------------------------------|------------|------------|---------------|------------------|-----------------|
| | FirstName | LastName | BornOn | City | Province | Father | Mother | Date | ParishName | ParishCity | ParishProv | Godp1 | Godp2 | Celeb |
| ! | Marg | Allen | March 11, 2015 | Toronto | Ontario | Jim | Sue | March 26,2016 | St. Patrick's Catholic Church | Toronto | Ontario | Trevor Svarog | Adriana Richelle | Jessa Hibbert |
| | Susan | Freeman | January 2, 2015 | mississauga | Ontario | Frank | Isebella | March 26,2016 | St. Patrick's Catholic Church | Toronto | Ontario | Parker Barlow | Malinda Tuft | Normina Peacock |
| L. | Maggie | Astrauskas | May 26, 2015 | Brampton | Ontario | Bill | Sallie | March 26,2016 | St. Patrick's Catholic Church | Toronto | Ontario | Veva Jernigan | Suzy Abrahams | Monty Derby |
| : | | | | | | | | | | | | | | 1 |

- 3. Save and close the Data List document.
- 4. Click on the Certificate of your choice and save it to your desktop
- 5. From your desktop, select and open the Word template for the type of Sacramental Certificate you saved.

6. Click on 'Enable editing'

| FILE | TOOLS | VIEW | Baptism Temp (5).docx (Protected View |) - Word |
|------|---------------|--|---|----------------|
| 0 | ROTECTED VIEV | Be careful—files from the Internet can contain viruses. Unless you need to e | edit, it's safer to stay in Protected View. | Enable Editing |
| | | | | |

7. a)

If the following window pops up, Click 'Yes' and then continue to Step 8 to Select your Data Source (List).

| Microsof | 't Word | × |
|----------|---|-----|
| | Opening this document will run the following SQL command: SELECT * FROM `list\$` | |
| | Data from your database will be placed in the document. Do you want to continu Yes No | ie? |

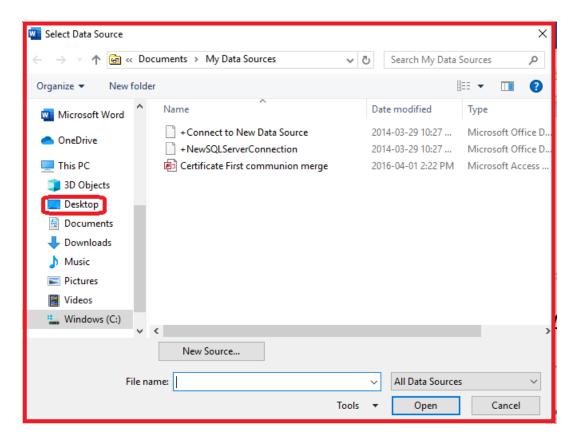
b) If the above window DOES NOT appear, click on "Mailings",

| Auto | oSave 💽 Off | | ି ମ ୟି | | ertificate of Confi | irmation Temp - Sav | ed to this PC | • | р si |
|-------|--|--------|--------|--------------|---------------------|---------------------|---------------|----------|------------|
| File | Home | Insert | Design | Layout Refer | rences Maili | ngs Review | View H | lelp | |
| Paste | X Cut [≌ Copy ∜ Format Pa | inter | | | | E - j≡ - j⊊ - | | | AaE ∏ N |
| | Clipboard | ы | | Font | ы | Parag | jraph | Lتا ا | |

| Then cli | ck "Sta | art Mail N | Лerge", а | nd "Step b | y Step N | /lail Merge | Wizard' |
|-------------|---------|----------------------|------------------------|------------------------|-------------------|------------------------------|------------------|
| File H | lome | Insert | Design | Layout | Referenc | es Mailin | igs F |
| invelopes L | abels | Start Mai Merge V | Select Recipients ~ | Edit Recipient List | Highli Merge I | ight Address Fields Block | Greeting Line |
| Create | | E Lett | ers | | _ | | Write & I |
| | | 🛆 <u>E</u> -m | ail Message | 5 | | | |
| | | Env | elopes | | | | |
| | | 🔁 L <u>a</u> b | els | | | | |
| | | Dire | ctory | | | | |
| | | Mor Nor | mal Word D | ocument | | | |
| | | L≫ Step | o-by-Step Ma | ail Merge <u>W</u> iza | rd | | |

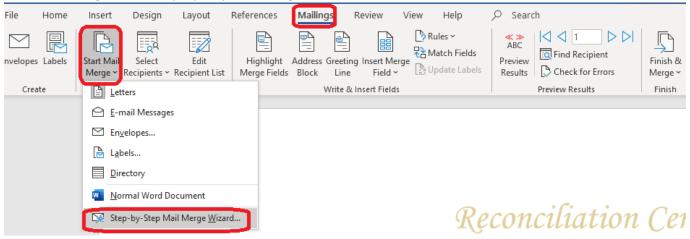
Then skip to Step # 11, 12 below.

8. The following "Select Data Source" window will appear, from which you need select your 'Desktop' folder, then select the Data List file saved there.

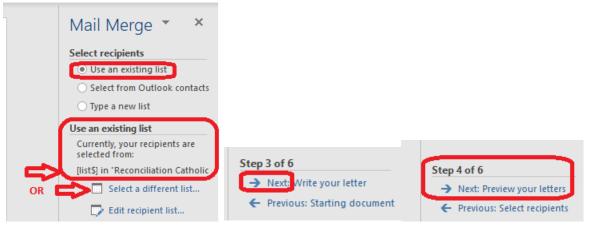


- w Select Data Source × > This PC > Desktop √ Search Desktop Q Organize 🔻 New folder HEE 🔻 Name Size Date modified w Microsoft Word This PC from backup stick 2018-02-03 4:58 PM F Baptism Catholic Godparents Certificate FR list 2019-09-17 1:25 PM ×∎ 11 KB 🧊 3D Objects ľ Baptism Catholic Godparents Certificate list 12 KB 2019-10-02 1:03 PM Desktop Catholic Certificate of First Communion Te... 146 KB 2019-08-29 10:34 ... 4 Documents Catholic Certificate of Reconciliation Temp 2019-10-03 1:45 PM 174 KB Reconciliation Catholic Certificate Data list 12 KB 2019-10-03 1:47 PM Videos Windows (C:) < New Source... File name: Reconciliation Catholic Certificate Data list All Data Sources Tools Cancel Open
- 9. Select and Open the appropriate data file. (the one you initially saved to your desktop)

10. Your Certificate Template will automatically open now. Click on the 'Mailings' tab at top of screen; then click 'Start Mail Merge', then 'Step-by-step Mail Merge Wizard...'



- 11. On the right side of the template, the following instructions will appear.
 - a) If the Data List you previously filled in **DOES** APPEAR under "Use an existing list Currently, your recipients are selected from: ..." then click on "Next", at the bottom then, "Next", again



b) If the Data List you previously filled in DOES NOT APPEAR under "Use an existing list - Currently, your recipients are selected from: ...[list\$] in..." (or you see an option to 'Browse' for an existing list,) then you will need to click on "Select a different list..." (or Browse) and the window will open for you to proceed to Select Data Source as in Points #8 and 9 above,

then click OK for 'Select Table', and , as below, and 'Next: Preview'

| Mail Merge 👻 🗙 | Mail Merge 👻 X |
|---|---|
| Select recipients O Use an existing list | Select recipients Use an existing list |
| Select from Outlook contacts Type a new list | Select from Outlook contacts Type a new list |
| Use an existing list Currently, your recipients are selected from: | Use an existing list Use names and addresses from a file or a database. |
| OR Edit recipient list | Browseclick |

12. The following 'Select Table' window will appear. Click OK

| Select Table | | | | ? | × |
|-------------------------------|----------------|-----------------------------------|----------------------------------|---------------|---------|
| Name III list5 | Description | Modified 2019-10-03 1:47:09 PM | Created 2019-10-03 1:47:09 PM | Type TABLE | |
| < ✓ First <u>r</u> ow of d | ata contains c | olumn headers | ОК | Canc | > el |

And click ok again on the following 'Mail Merge Recipients' window as shown below.

| Mail Merge Recipien | ts | | | | | ? | × | |
|--|----------|----------------|---------------|-------------|----------|---------|--------|------------------------------|
| This is the list of recip Jse the checkboxes to | | | | | | | t. | |
| Data Source | ~ | LastName 🚽 | FirstName 🚽 | City 🗸 | Province | - BomOn | | |
| Reconciliation Ca | | Allen | Marg | Toronto | Ontario | March | 15, 2 | |
| Reconciliation Ca | ~ | Freeman | Susan | Mississauga | Ontario | Januar | y 2, 2 | |
| Reconciliation Ca | ~ | Astrauskas | Maggie | Brampton | Ontario | May 26 | 5, 201 | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| < | | | | | | | | |
| Data Source | | Refine reci | pient list —— | | | | | |
| Reconciliation Cath | nolic C | erti 🔨 🐴 Sort. | <u></u> | | | | | |
| | | Filter | | | | | | |
| | | 🔀 Find | duplicates | | | | | |
| | | E Find | recipient | | | | | |
| | | | ate addresses | | | | | Step 4 of 6 |
| Edit | Refres | | ate addresses | | | | | → Next: Preview your letters |
| | | | | | | | | - Next. Preview your letters |
| | | | | | | OK | | Previous: Select recipients |
| | | | | | | | č | and |

13. When you Click the 'Preview your letters' tab, you will see the information that you had in your excel file displayed in the final look of the documents to be printed. Use the arrows to the right of 'Preview Results' as shown below, to select views of subsequent certificates in your list.

| р | ⊖ Searc | ch | |
|------------------|---------------------------------|------------------------------------|---------------------|
| Fields Labels | ≪≫ ABC Preview Results | Find Recipient Check for Errors | Finish & Merge ~ |

- 14. If you see a mistake, or need to make a change, you can correct the info before printing by clicking on the 'Edit Recipient List' on the right side of the screen.
- 15. Or if you want to print only certain names, use the checkboxes in the 'Edit Recipient List' tab to select only the names needed.
- 16. Print by using the 'Finish & Merge' tab at the top right of screen. (Be sure you print on plain paper first, and check to ensure that your foil stamped certificates are inserted in your printer correctly)
- 17. After printing, take your Church embossing seal and affix that seal over the hot stamped gold foil at the bottom right of each certificate.