Printing Sacramental Notifications in Connect Now

1. Please login to your ParishSOFT website. You will see a screen similar to below:

2. Click on the Family Directory tab and then the Sacrament then the Add/Edit Sacrament area in the drop down as seen below:

3. On the Sacraments screen, seen below, Click the arrow next to the Baptism listing, to select the sacrament you’d like to print a notification for. In our example below, we’re going to print off First Eucharist notifications. If you wish to enter in and search either by a date range or by family last name, first name, etc. enter in those parameters prior to clicking the Search button to find your information.
4. To choose the members you wish to print the sacrament notification for, you can either select some (certain records) or all of them on the page, by clicking the selection box on the far left of the screen.
5. Next, click on the Mail Merge icon, you will be given an option of either mail merging all the records or only some of them. (as seen below)

6. You will next see a screen after the mail merge tool has opened:

In the sections above, the **My Templates** area is any template that you have already customized and saved as your own (even your own template that you marked as “global”).

The **Global Templates** area is any global templates other users in the Diocese of Madison have saved so that we can all share that template. The **ParishSOFT Templates** area is template that ParishSOFT has pre-loaded in so we can use a pre-filled in template or use it as a starting point for another document.

7. Please click on the **Global Templates** name in the upper header area, indicated below. It will open, as seen below. Under the template name area, seen below, select the template marked **Notification for First Eucharist Template** (or the name of the sacrament you are getting the notification for).
8. After clicking on the name of the template, it will populate and you will see an image similar to the one below. (you can see that we’ve selected some of the records to mail merge, as it shows a number of records in the middle section of the screen below.

![Mail Merge Preview](image)

9. In order to preview your data, click on the area in the upper header called **Mail Merge**, as indicated above with an arrow. This will take you to the **Mail Merge** tab, showing the members that are connected and giving different options across the top for how to handle the mail merge. Click the **View Data** icon, as indicated below, to see a preview of how your data will merge into this template.
a. If you wish to edit the template, please note, that the “fields” which are being filled in with your data are indicated by the << >> symbols. If we click on the **Insert Merge Field** area, as indicated in the arrow below, we will see a new popup box that allows us to select additional fields if we wish to change or edit this template.
10. After clicking your **View Data** button, if you wish to print off this template with your members information merged, you will need to click the **Merge to File** icon, as seen in the area indicated below.

11. You will see a popup **Merge to File** box, similar to below. Click **Ok**.

12. You will then see a request from your web browser asking if you wish to open or save the document. Click **Open**. (please make sure your default word processing program, Microsoft Word most likely, is selected)
13. The document should open in MS Word, in a protected format, similar to the screen below. The merge should already be performed. Click the **Enable Editing** button, as seen in the image below.

14. You will now have a standard MS word document listed (which was downloaded to your local computer) and which you can now click **File** then **Print** to print off the document.
Please Note: There may be times when the member’s baptism was also recorded at your parish, as seen in the example below. You may wish to just print off ONLY the occurrences where the baptism was elsewhere to save paper.

Another Note: There may also be times when you will NOT see an address for the parish, as seen in the example below:
15. When we go back to the record for the member, looking up their BAPTISMAL record, NOT the First Eucharist/Confirmation/Marriage record for the member, we can note that the parish name is missing, as seen in the example below:

Or, as in the example below, the parish name is listed incorrectly in Connect Now:

As opposed to this listing, which we see after clicking **Edit Details** and searching and pulling the parish back into the member’s Baptismal record:

a. If you cannot find the parish and need to enter in a new parish with its details, please go to the **Home** tab and enter in the full parish details on the **Organization Directory** area in blue, after searching and clicking the green circle with the + sign. You will see an **Add Custom Organization** screen, as seen in the image below. Fill in the **Jurisdiction** with **Madison WI** to indicate our diocese, and fill in the **Address, City, State, and Postal Code** so that the parish information can correctly fill in on your notifications.
16. Finally, go back to the Baptismal record for the member, re-pull in the new parish name now, and then the new merged information will show correctly on the template and mail merge. (after going through the steps again from the start.)