# Mail merge with ... write

We support two Office programmes for creating form letters:

- Microsoft Word (word export)
- OpenOffice, LibreOffice

Depending on which Office programme you have installed, the following menu items will open under People:



This article covers areas that apply to both Office programmes.

# Main dialogue

To create a mail merge, select **People/Serial letter** Write with Microsoft Word. Via the menu item **Export persons/addresses** menu item will also take you to the mail merge screen.

Address export		×
Layout PERSONEN.DOC D:\PCCADDIE\USER_1\DATEN\ Split mark: Tabulator Salutation: Mr, Mrs, Family	Edit	Export
Persons group		Address file
All members Order	Defi <u>n</u> e	Mailmerge
Alphabet (Names)	Edit	😒 Note
		Nap Map
WITH and WITHOUT direct-debit	Define	
Families together mail addr., ex	dra. 💌	Quit

### **Default settings**

Before you create the form letter, it is necessary to create a *group of people* and the *sequence* must be determined.

All members receive a letter from their golf club with congratulations for the new year.

- For this example, select Group of people "All members".
- By pressing the button **Output** button, the personal data for the mail merge is saved in the file selected for **Layout** is set.
- Under *Layout* you should ensure that it is a "\*.doc" document before creating a mail merge. The path is preset by PC CADDIE.

#### Create mail merge

Now click on the button Serienbrief:

Serial letters		×
Serial letters:		
Test.DOC 17.12.04 Circular DOC 17.12.04	16:10:16	
		:
🔶 Create new serial letter with the draft	F9	
Edit the selected serial letter	F7	
😂 Open file of serial letters	F6	
CUpdate list of serial letters	FS	

In this window you can see the mail merge letters already in use. To create a new form letter, please click on *Create new mail merge based on a template* (F9). This allows you to retrieve any Office document from any path on your computer and then save it as a template.

Create new serial letter	×
<u>C</u> reate new serial letter with this reference:	
	X Cancel
(Letter will be saved under this name.)	
Use this draft for the letter:	
Empty.docx 22.10.18	
Information1.DOC 17.12.04	
PC CADDIE - Club empty letter.DOC 17.12.04	
_PCC_BRF.DUC 17.06.97	
File: D:\PCCADDIE\TEMPLATE\	
🔶 Get new draft F9 🔷 Edit draft F7	
😂 Open file with drafts F6 😂 Open file with serial letters F4	
Use this serial letter privatly for this user	
When you enter a reference and select a draft,	
the letter will be generated automatically in word	
and will be saved under the reference.	

Activate the desired template and enter a **subject** for the mail merge. In our example, we use the template "PC CADDIE Club blank letter" and enter "Happy New Year" as the subject. To edit an existing template, simply click on the button **Edit template** (F7). With the button **Open template folder** (F6) button opens the template folder. You can get a new template with **F9**, You can update the list with the **F5**. Then confirm with **OK**.

Depending on the Office programme activated, Microsoft Office Word or OpenOffice Writer will open.

#### Edit / use mail merge

Serial letters		×
Serial letters:		
TestDOC	17.12.04	16:10:16
Circular.DOC	17.12.04	16:10:16
	Create new serial letter with the draft	F9
	Edit the selected serial letter	F7
	Open file of serial letters	F6
2	Update list of serial letters	F5

Select the desired mail merge and click on *Edit or use the selected mail merge* button.

Edit / use mail merge with ...

Microsoft Word

OpenOffice

#### **Print mail merge**

Print mail merge with...

Microsoft Word

OpenOffice

#### Annotate mail merge

If you work with the module CRM\DMS , you can note the mail merge in each person mask to complete it. The button *Note* button makes this possible:

Annotation	×
Last printing: 18.10.18 - 11:04:14 (1 Records) Record output in the following category: Letter, general	✓ <u>N</u> ote     X   Cancel
Additional text:	
Attached document: Happy New Year.doc	
Status:       ✓ done         Eor:       STimo Tester         Privat       New	
Verify export list F7	

At the top of the screen you can see the current data record, which can be **annotation** is suggested.

Specify the category under which the letter is to be annotated, the text of the annotation and then attach the desired document. The button *Check export list* (F7) shows for which persons a note is created.

Once you have made all the entries, the note can be created using the **Note** button to definitively start the note:



Confirm this dialogue again with OK, start annotation.

PC CADDIE then stores the following note in each person mask of the affected person group:

Info: 15			x
memo todo	contact p	erson Co	ntact general overview correspondence E-Mail Changes to the data Search
√15.06.16	13:06	TERM	Discuss membership status / 15.06.16-16:41-test: /
✔16.06.16	21:10	TURAN	OK:Project Competition / Sie wurden erfolgreich angemeldet. / Member, Paul
✔16.06.16	21:23	TURAB	OK:16.06.16 Project Competition / CD1 / @TURN:000004-01-1-00000013-1 0
✓21.06.16	16:24	TURAB	OK:10.06.16 Testcup / CD1 / @TURN:000001-01-1-00000003- 1 10:08 /
₹23.06.16	15:16	TURAN	OK:PC CADDIE Cup / Sie wurden erfolgreich angemeldet. / Member, Paul (Mer
₹23.06.16	20:53	TURAB	OK:23.06.16 PC CADDIE Cup / CD1 / @TURN:000011-01-1-00000017- 1 0:00
<b>√</b> 20.07.16	12:32	TURAN	OK:PC CADDIE Cup / Sie wurden erfolgreich angemeldet. / Member, Paul (Mer
✓20.07.16	15:38	TURAB	OK:20.07.16 PC CADDIE Cup / CD1 / @TURN:000015-01-1-00000019- 1 0:00
✓21.07.16	16:35	TURAN	OK:Gentlemen day / Sie wurden erfolgreich angemeldet. / Member, Paul (Men
<b>√</b> 28.09.16	09:55	TURAN	OK:3. Jura Cup / Sie wurden erfolgreich angemeldet. / Member, Paul (Membe
<b>√</b> 28.09.16	09:55	TURAN	OK:1. Jura Cup / Sie wurden erfolgreich angemeldet. / Member, Paul (Membe
<b>√</b> 03.10.16	18:10	TURAN	OK:Tournament name / Sie wurden erfolgreich angemeldet. / Member, Paul (I
✓25.11.17	15:14	TURAN	OK:25.11.17 Christmas competition / SPED-tito / @TURN:000036-01-1-000000
✓22.10.18	14:56	LETT	Happy New Year / Sir / Dr. Paul von Member / Hasslerstrasse 15 / 52055 Aac
Contact Pe	ers		:@ANSP
		FAM 2	Omember, Petra (04393/3949593)
	Ontions		
		pergle	

# Create individual letter using a template

To create an individual letter using a template, call up a person and click in the respective person mask on *Word/Export* or *Writer/Export* (depending on the Office programme).

Export person	×
von Member, Dr. Paul (mepa)	<u>~ o</u> k
Export only this address	
Create automatically a letter (maybe with ref.!)	
Reference:	Cliphoard
(Letter will be saved under this name.)	
Use this draft for the letter:	
Empty.docx 22.10.18	
Information1.DOC 17.12.04	Setun
PCCADDIE - Club empty letter.DUC 17.12.04	
😂 Open draft file 🙃 🖾 Open letter file 🖂	
Attach to existing file Families together	X <u>C</u> ancel

Activate the option "Automatically create a letter" and specify a template for the letter. This dialogue is structured in the same way as the dialogue for serial letters. Once you have made all the changes, click **OK**. The relevant Office programme will then open; in our example, the fields in the template are already filled appropriately for "Günter Ackermann". You can now work with the Word document as usual. After closing the document, the following window appears with the attached document:

Info: PC CADDIE - Club enpty letter.DOC	×
Address: mepa Member; von, Dr. Paul   Contact person: Select F3   Project: F4	✓ <u>OK</u> F12 Save F11 Done F3
Subject: PC CADDIE - Club enpty letter.DOC	
Dr Paul von Member	Project
1234 Example	Checkback
(Families together)	Answer       Image: Stamp
	▲ Link info
Eixed date:       22.10.18       Time:       15:11       Duration:       :         Follow-up:       22.10.18       Time:       15:11       0       Image: Comparison of the second secon	Call
For: STimo Tester From: Timo Tester	
Visable: QAll users Done:	
Status: Otodo	
<u>C</u> reated: <u>C</u> hanged:	
Show in <u>s</u> taff timetable IV New entry	
Attachment: C:\Users\monstruletul\Documents\an PC CADDIE\Member, von, 🚵 🔄	
open attachment F6 open address F7	X <u>C</u> ancel

Make all the required entries according to your needs and exit the window with OK (F12). The document has now been saved in the person mask for "Günter Ackermann".

### **Export addresses**

Click on the button **Address file** button at Hauptdialog to export the addresses:

🔒 Address file

Address file	X
You can open the address file in Word or copy it to another destination:	Zuit
Open export file with <u>W</u> ord	
Open export file with <u>E</u> xcel	
Open blank letter in Word	
Copy export file to this directory:	
Target directory: DA Compared	

You have the option of exporting the addresses either to Word or Excel. The export file in Excel is particularly recommended if you want to print out the addresses or use them for other purposes. Please remember that this is an HTML file and you will have to save it again as an Excel file. You can also copy the file to any destination or open a blank letter.

#### **Document storage locations**

In PC CADDIE, documents are saved in different folders.

Folder	Folder content		
Attached Individual letter			
Mail merge	Mail merge		
template	Templates		

PCCADDIE							
	LOCALDISK (D:)	PCCADDIE •			▼ 100	Search PCCADDIE	
Organize 🔻 [ Open	Include in library	▼ Share with ▼	Burn New folder			8	- 🗌 🤇
👠 monstruletul		Name 🔺		Date modified	Туре	Size	
Computer		ATTACHED		22.10.2018 15	:14 File folder		
Local Disk (C:)		L DATEN		22.10.2018 15	:21 File folder		
-8df8426a.7c98.76	011104267200	L DRUCKER		21.11.2016 20	:07 File folder		
1 al	b4=520784	👢 FONTS		22.07.2015 16	:11 File folder		
Adis		👢 FTP		22.07.2015 16	:11 File folder		
an PC CADDIE	-	👢 graphics		19.02.2018 12	:46 File folder		
		👢 HTML		29.08.2018 19	:04 File folder		
books		👢 IMPORT		26.09.2018 11	:21 File folder		
Buletine		👢 INDEX		15.10.2018 14	:08 File folder		
e870e6409a11da	e3d3	👢 INFO		22.07.2015 16	:11 File folder		
e Hi Emi		👢 INTRANET		22.10.2018 09	:49 File folder		
EmiFromC	-	👢 leader		25.07.2016 16	:19 File folder		
The Collies		👢 MAIL		22.07.2015 16	:11 File folder		
mails		📜 MAILMERGE		22.10.2018 14	:40 File folder		
Ny ePools		👢 Mustermann	Date created: 22.07	29 09 2018 18	:15 File folder		_
MyEirstAppTest		👢 PICTURES	Size: 57,0 KB	12	:56 File folder		
Navison		👢 SERVICE	Folders: test, test\$, Files: Circular, Test	tito, tito\$ 14	:39 File folder		
PCCADDIE		👢 SERVICES		16.10.2018 10	:33 File folder		
The Participant		👢 SICHER01		19.02.2018 12	:38 File folder		
Program Files		👢 SICHER02		02.10.2018 11	:26 File folder		
Program Files (xt	6)	👢 SICHER03		19.02.2018 12	:37 File folder		
	<b>_</b>	- 👢 TEMPLATE		22.10.2018 15	:11 File folder		
MAILMERGE File folder	Date modified: 22.	10.2018 14:40					

Further information on **Storage locations of the documents** for:

OpenOffice