

Form letters with WORD

To create a form letter go to **Persons/Form Letter**. The function **Persons/Export Addresses** will also lead you to the mask for form letters:

Pre-settings

Before creating a form letter it is necessary to define a **group of persons** and the **order**.

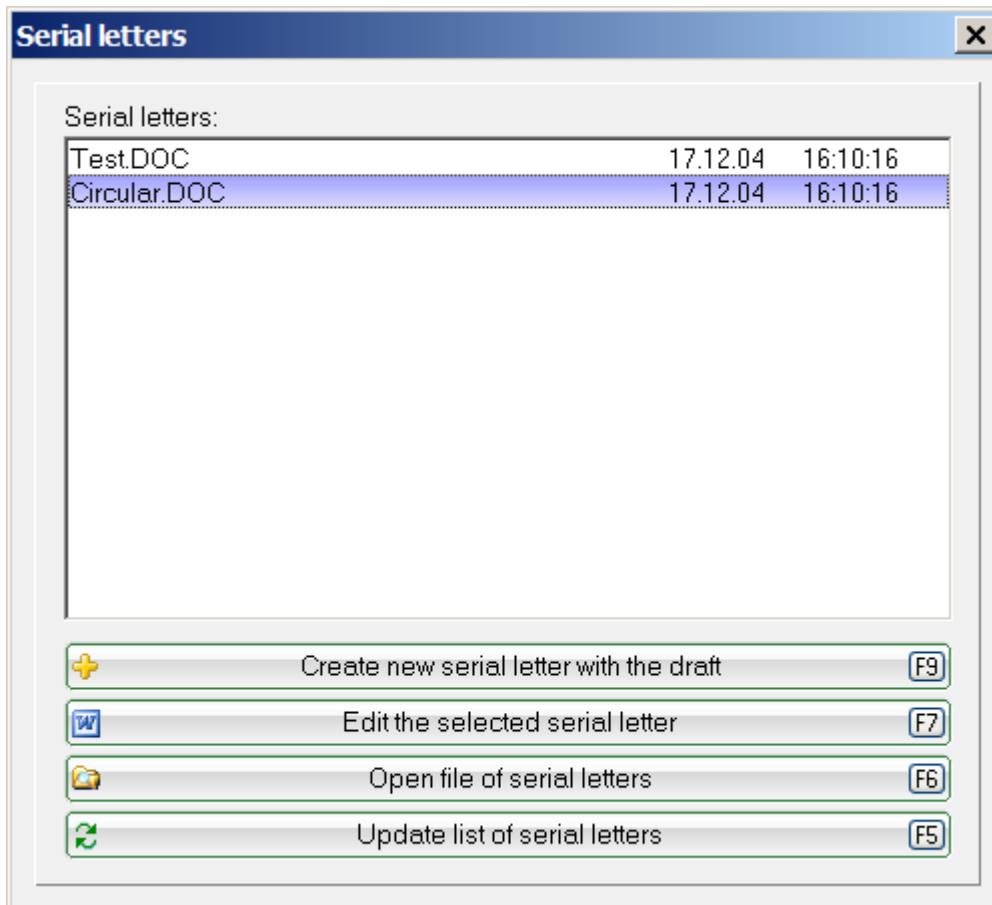


All members of your golf club receive a letter with best wishes for the New Year.

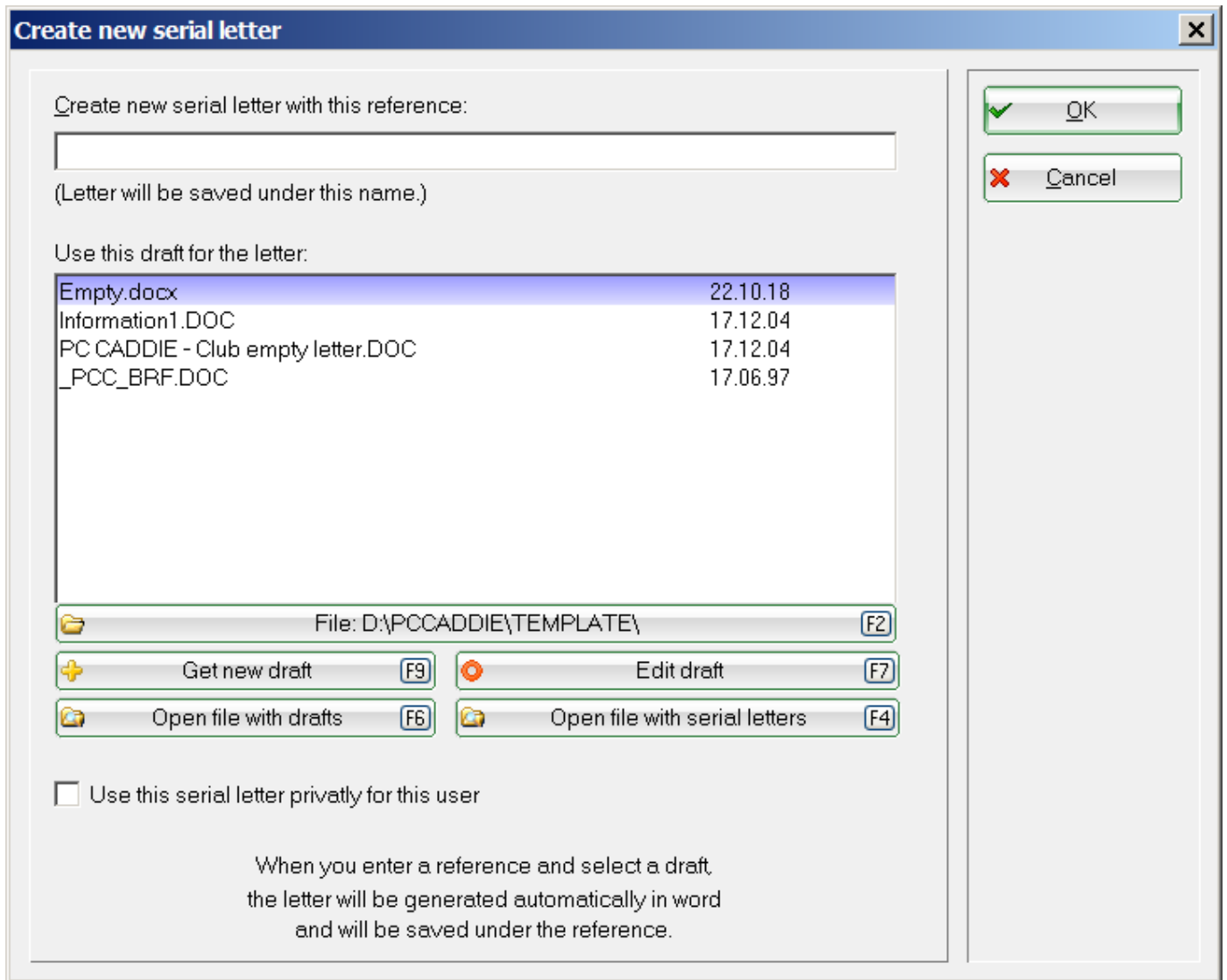
- For this example select „all members“ as the **group of persons**.
- By confirming with the button **Output** the person data will be saved to the form letter file that was set in **Layout**.
- Before creating the form letter you should make sure that you set have set the document in **Layout** to be a „*.doc“-file. The directory is set as default by PC CADDIE.

Creating a form letter

Now click the button **Form letter**:



In this window you can see already used form letters. To create a new form letter please click **Create new serial letter with template** (F9). This allows you to get any Word document from any directory from your computer and save it as a template.



Activate the desired template and enter a **Subject*** for your form letter. In our example we use the template „PC CADDIE empty club letter“ and enter a subject such as „Happy New Year“. To edit an existing template simply click **Edit template** (F7). The button **Open template folder** (F6) opens the template folder. A new template can be imported with **F9** and **F5** lets you refresh the list. Finally confirm with **OK**. Microsoft Word will open automatically.

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Sonnenrain 11 - 54321 Testhausen

Phone: 0541/39458-10

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Golfclub Sonnenschein · Sonnenrain 11 · 54321 Testhausen

«SALUTATION1»

«SALUTATION2»

« ADDRESS ADDITIONAL INFO»

« ADDRESS1»

«DATESTR»

« ADDRESS2»

«COUNTRY»

«TB1»

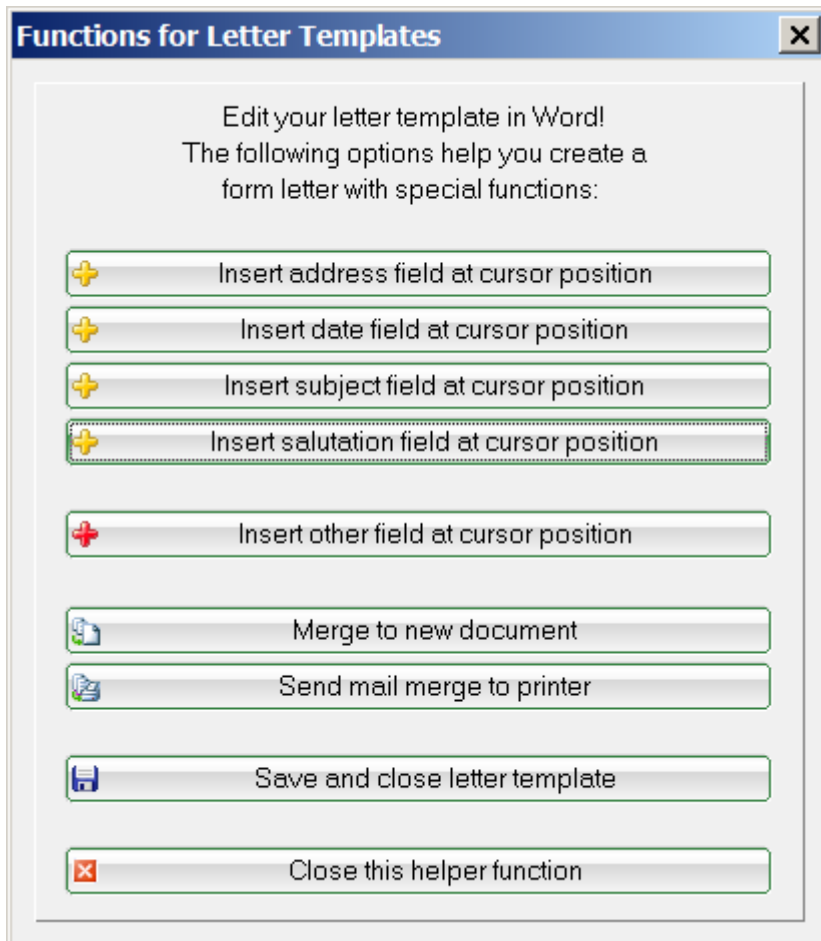
«SALUTATION3»|

«SALUTATION3»

Text

Kind Regards,

The PC CADDIE form letter manager will appear next to the document:

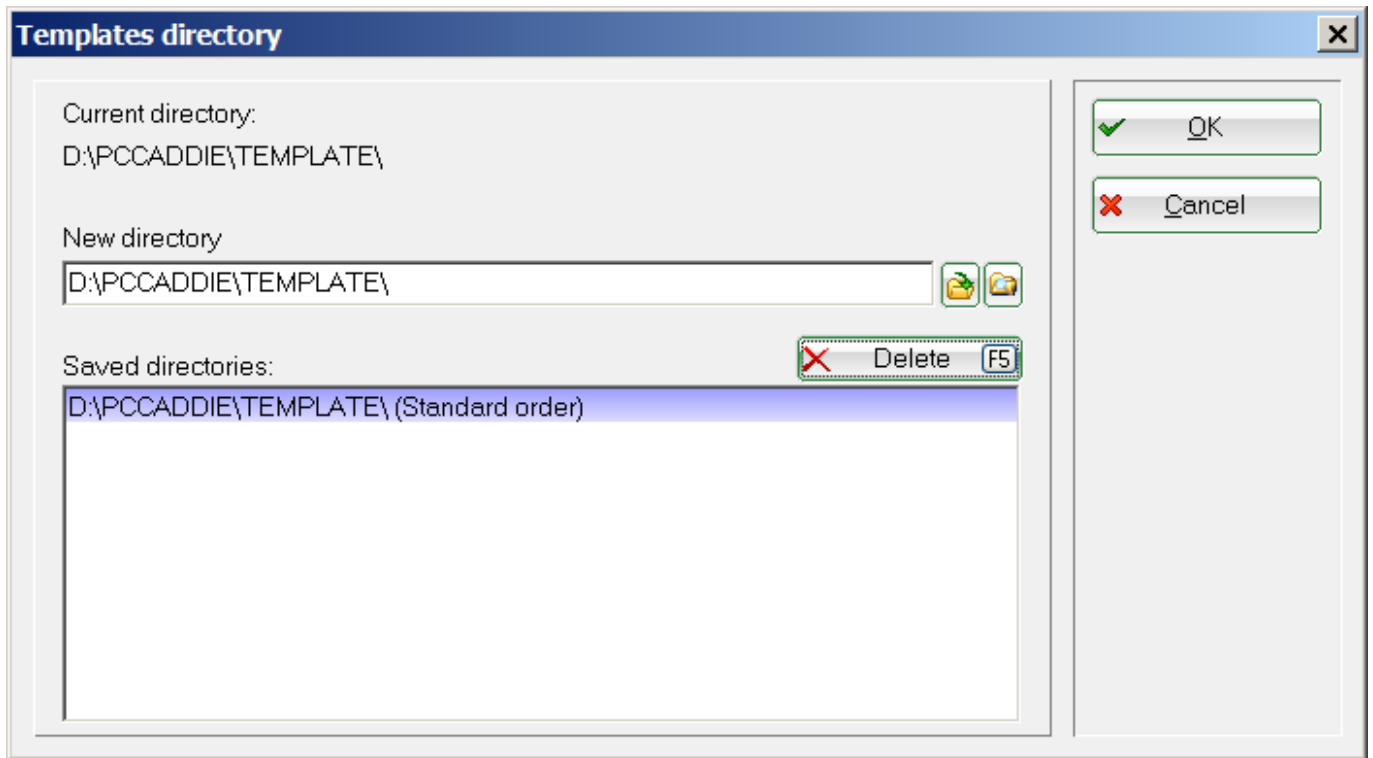


Position your cursor at a specific point and with the help of PC CADDIE you can then insert either **Address fields**, the **date**, a **subject**, a **salutation** or a **misc. field** to your form letter.

The button **Merge to new document** will join the data and you will get a preview of your form letter. The merge field **<Address1>** will then use the address of the person that was entered under the 1st address in the person's mask. Of course you can change the text and format of the template in these Word documents. Click **Save and exit template** to save your changes to the template.



All templates will be saved by PC CADDIE in the folder „Template“. The form letters can be found in the folder „Mailmerge“.



Print form letter

Have all changes been made you can copy the form letter into a new document using the button **Merge to new document**. You will then see all letters at once (that is for the selected group of persons and the chosen order). The letter can then be printed out from this document.

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Mr. Tester Timo

123445 Example address

23 October 2018

Happy New Year

Dear Mr Tester Timo,

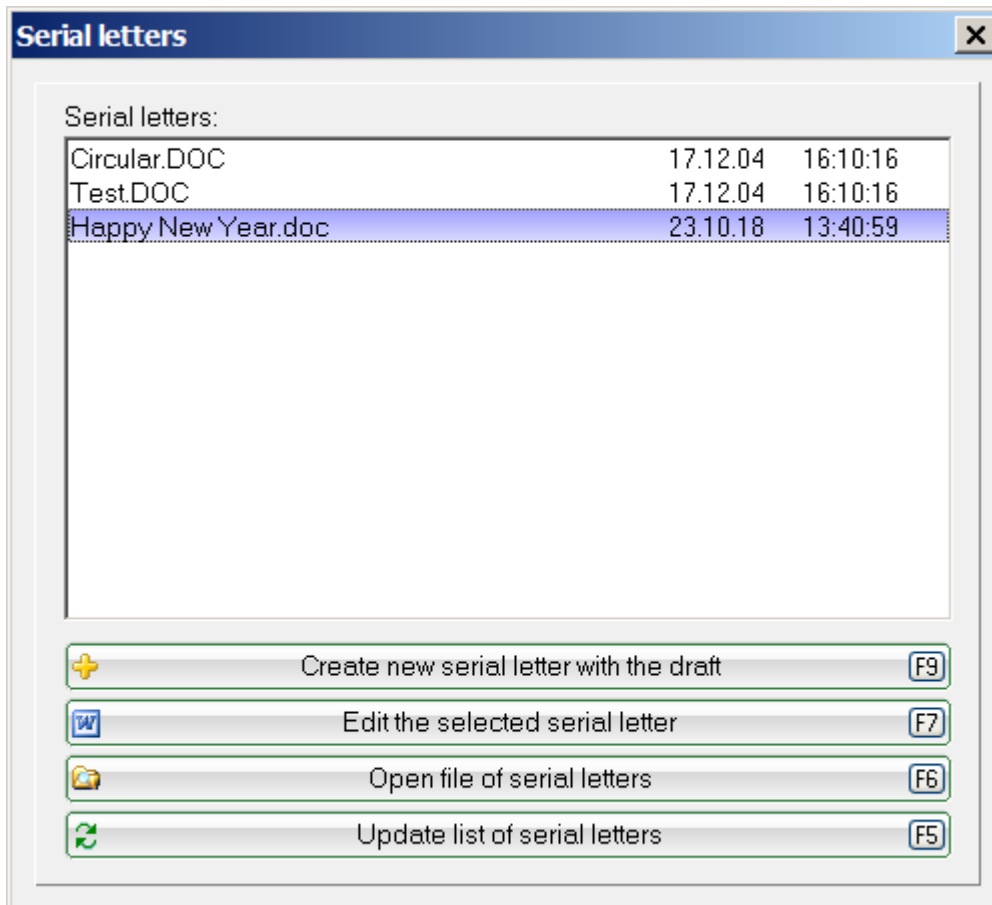
Text

Kind Regards,



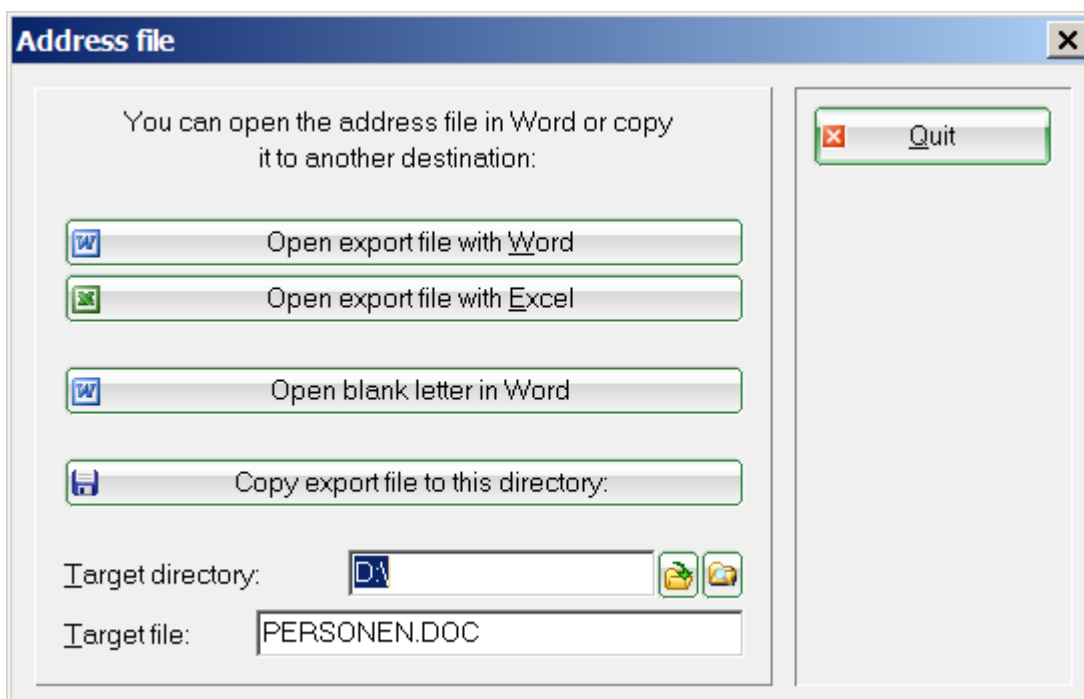
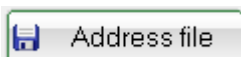
At this point it would be wise to print a test page of one letter to check if the document fits onto your letter paper and if the address field fits into the address window.

If you see no need to check all the letters again you can start the print directly using the button **Send Mail Merge to printer**. In case you have only changed the template but do not want to make any other actions you can exit the template via **Save and exit template**. You will get back to the selection window for form letters - now containing the form letter with the subject „Happy New Year“ which you have just created:



Export addresses

Click the button **Address file** to export addresses:



You have the option to either export addresses to Word or Excel, especially the export file to Excel is recommendable in case you want to print them out or use them in any other way. Please remember that it will be an HTML file and you will have to save it as an Excel file. You can also copy the file into any desired target or open an empty letter.

Annotation of form letters

If you are working with the [CRM/DMS](#) module you can record the form letter in each person mask. The button **Note** makes it possible:

Annotation

Last printing: 18.10.18 - 11:04:14 (1 Records)

Record output in the following category:
Letter, general

Additional text:
Happy New Year

Attached document:
Happy New Year.doc

Date: 22.10.18 Time: 14:56:47

Status: done

For: Timo Tester

Privat New

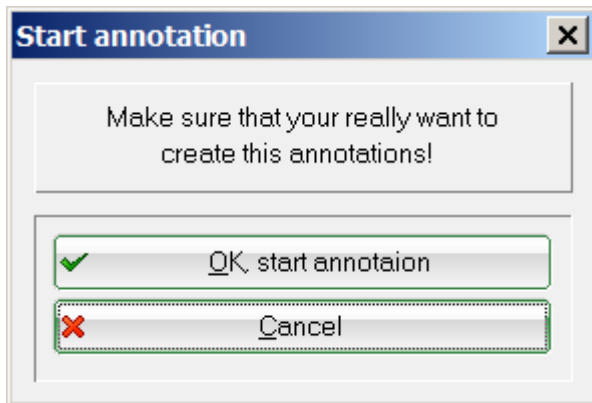
Verify export list (F7)

Note Cancel

At the top of the image you can see the current data that is being suggested for annotation.

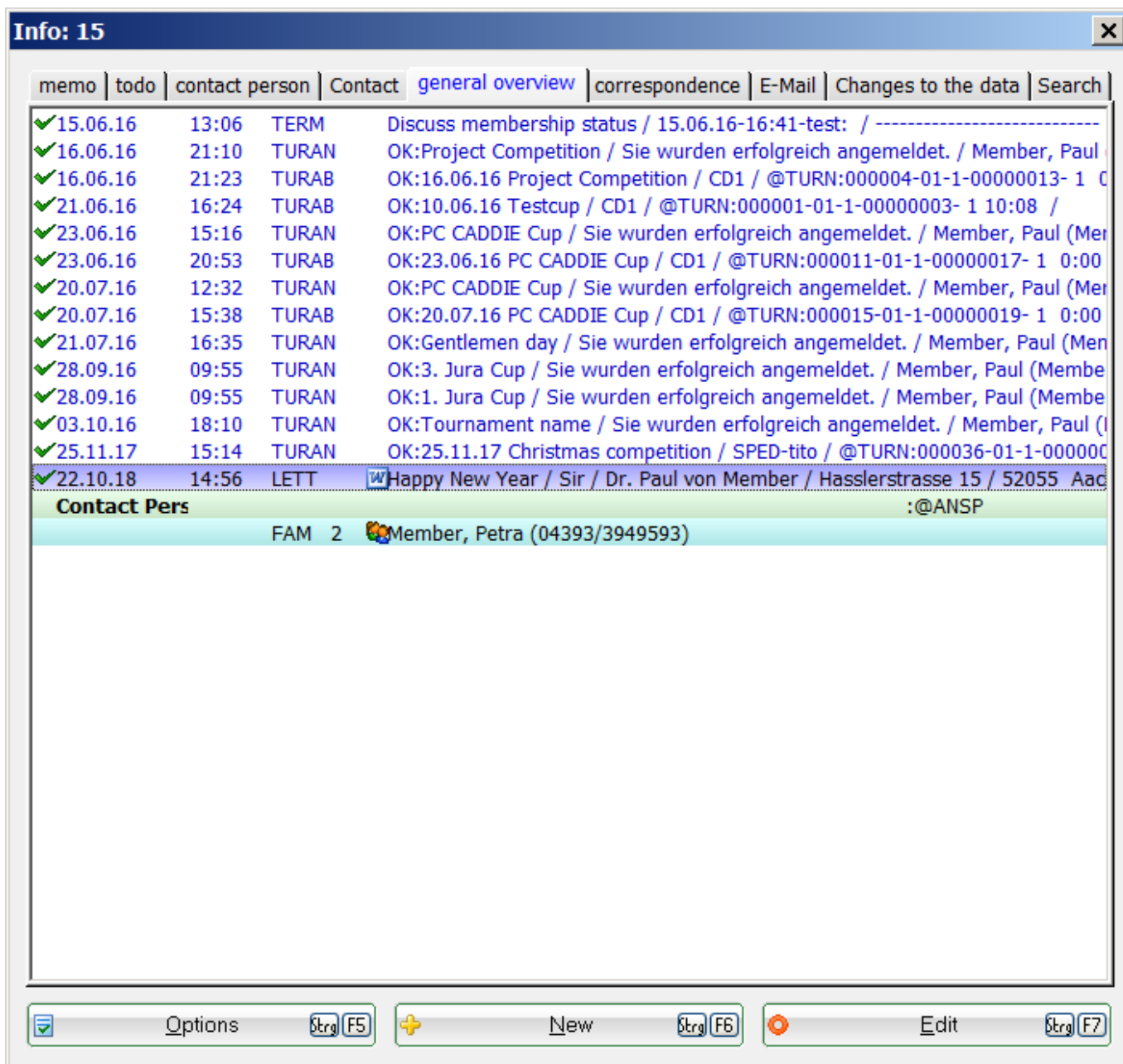
Define the category where the letter should be recorded, the text of the annotation and finally add the document. The button **Verify export list** (F7) will show you the people for which this annotation will be created.

After you have made all entries you can launch the annotation process using the button **Note**:



Confirm this dialogue again with **OK, start annotation.**

In each person mask of the relevant group of persons PC CADDIE will record the following annotation:



Create a single letter using a template

To create a single letter with a template, select a person and then click the button **Export** in the person mask:

von Member, Dr. Paul (mepa)

Export only this address
 Create automatically a letter (maybe with ref.)

Reference:

(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.DOC	17.06.97

File: D:\PCCADDIE\TEMPLATE\ F2

+ Get new draft F9 ○ Edit draft F7



📁 Open draft file F6 📁 Open letter file F4

Attach to existing file Families together

✓ OK
📄 Clipboard
☑ Set up
✗ Cancel

Activate the option „Automatically create letter“ and select a template for the letter. This dialogue is set up the same way as the dialogue for form letters. Have you made all changes, click **OK**. Then Microsoft Word opens - the merge fields in our template are already filled correctly for „Paul Member“. You can now proceed as usual with the Word document. After closing Word the following window with the attached file will appear:

Info: PC CADDIE - Club empty letter.DOC [X]

Address: Member, von, Dr. Paul  


Contact person: (F3)

Project: (F4)

Category:

Subject:

Fixed date: Time: Duration:

Follow-up: Time: 



For: From: Timo Tester

Visible: Done:

Status: on:

Created: Changed:

Show in staff timetable New entry

Attachment:  

(F6) (F7)

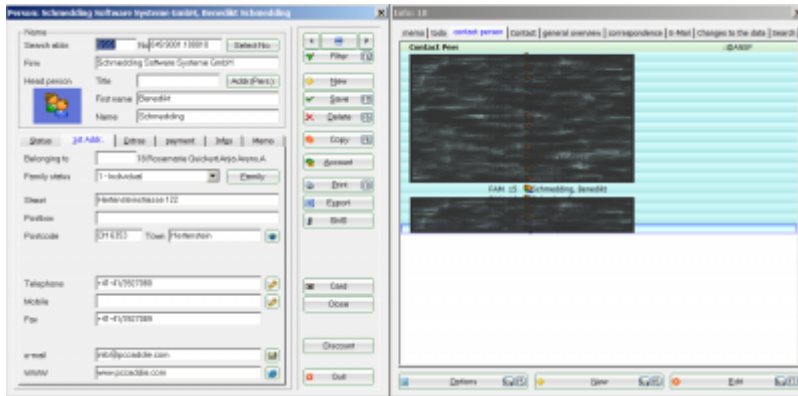
(F12)
 (F11)
 (F9)

 (F5)

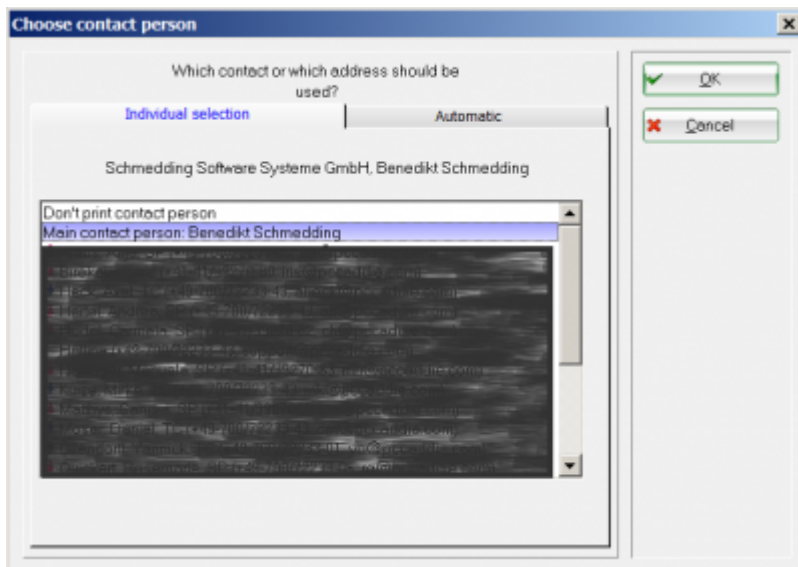
Make all necessary entries according to your wishes and exit the window with **OK** (F12). The document has now been saved to the person mask of „Paul Member“.

Use clipboard

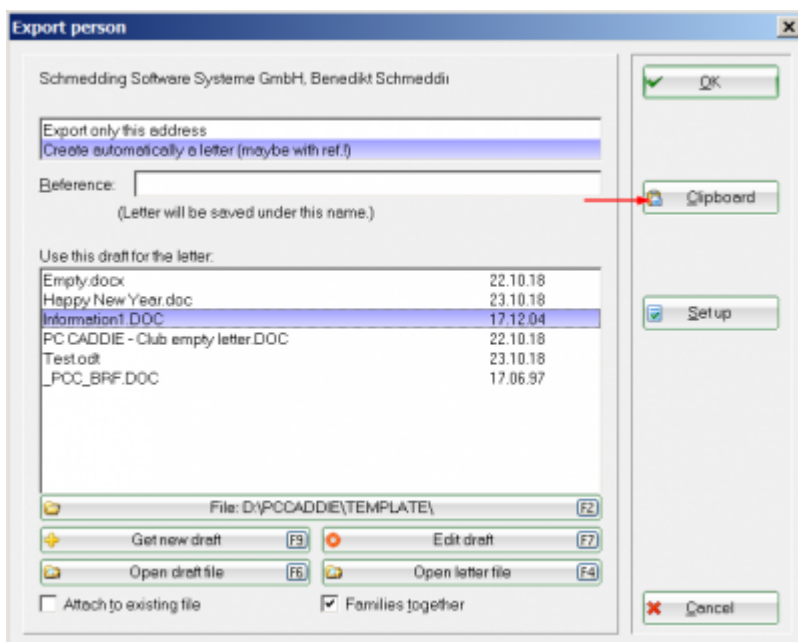
The button **Clipboard** allows you to quickly copy contact data into another document. The name, telephone and e-mail address, as well as the function are copied. An example: Call the person whose data you need, and click on the button **Export**.



Click on the contact person and then on **OK**.



Now click on the button Clipboard. Thus, the data is stored in memory and can be copied to another document.



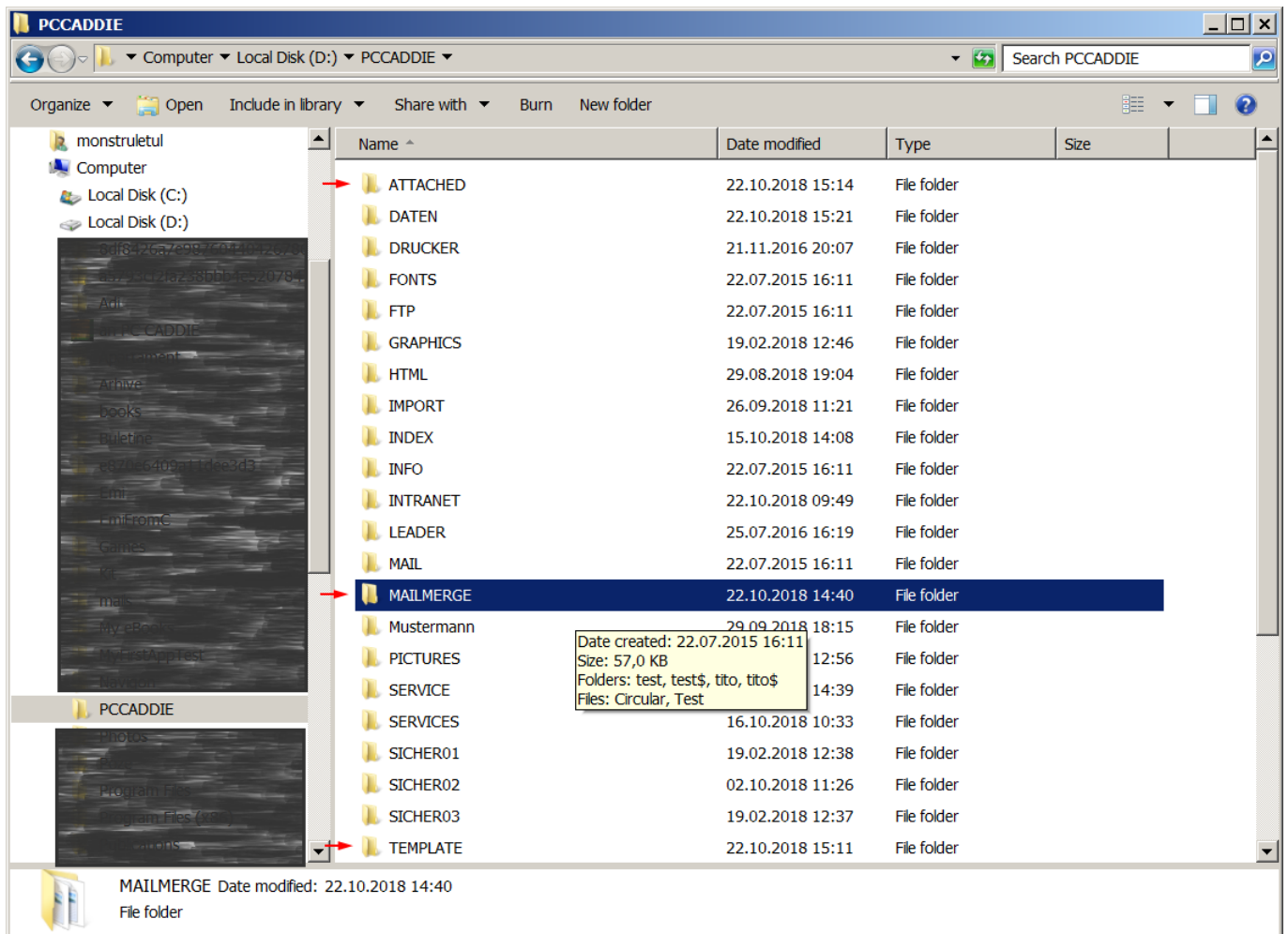
Open your document (mail, letter, person sheet or other) and insert the data using CTRL + V.

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Storage locations for different documents

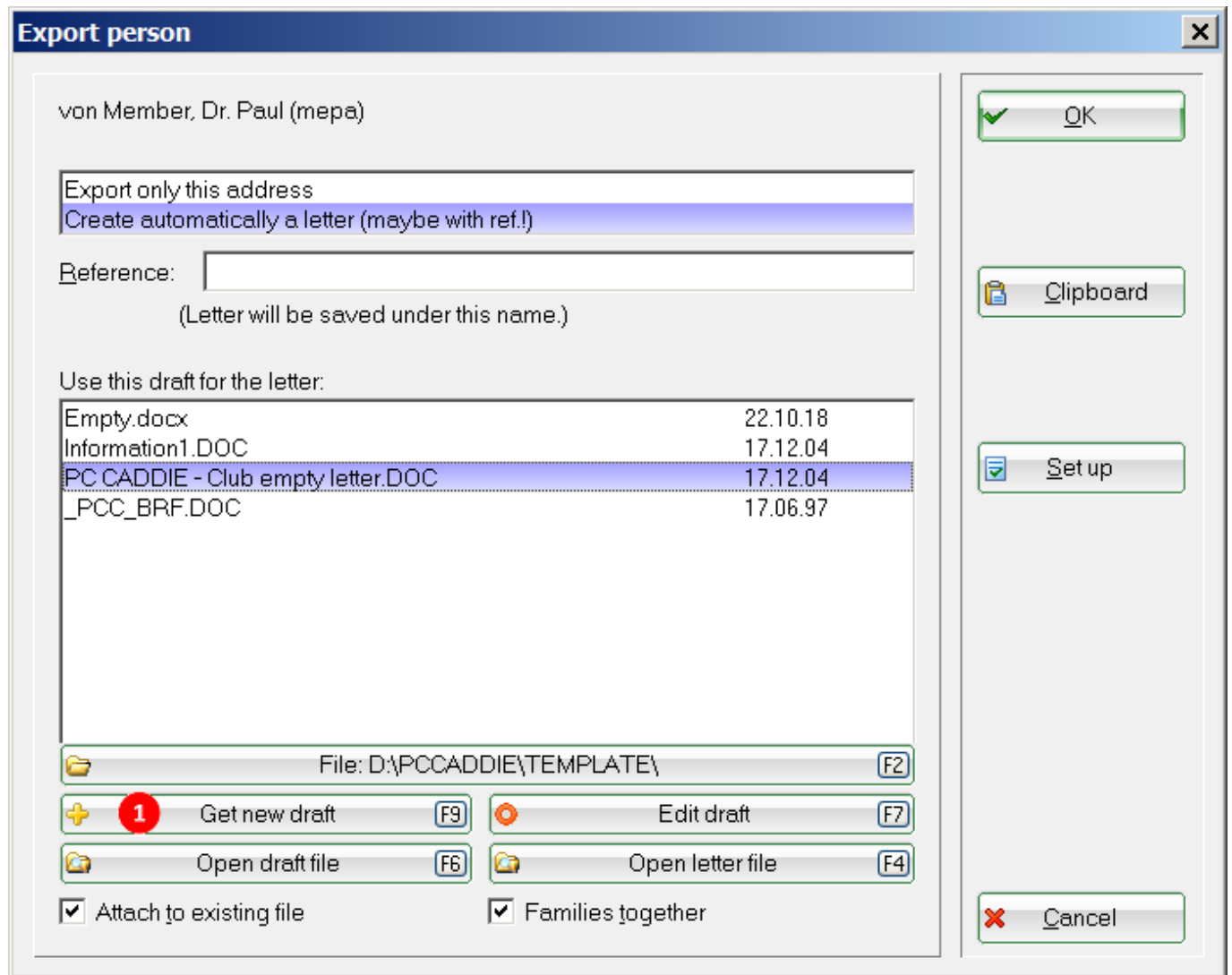
In PC CADDIE documents are saved in different folders. In the folder „Attached“ you can find all single letters. The folder „Mailmerge“ contains all form letters and the folder „Template“ is being used for templates.



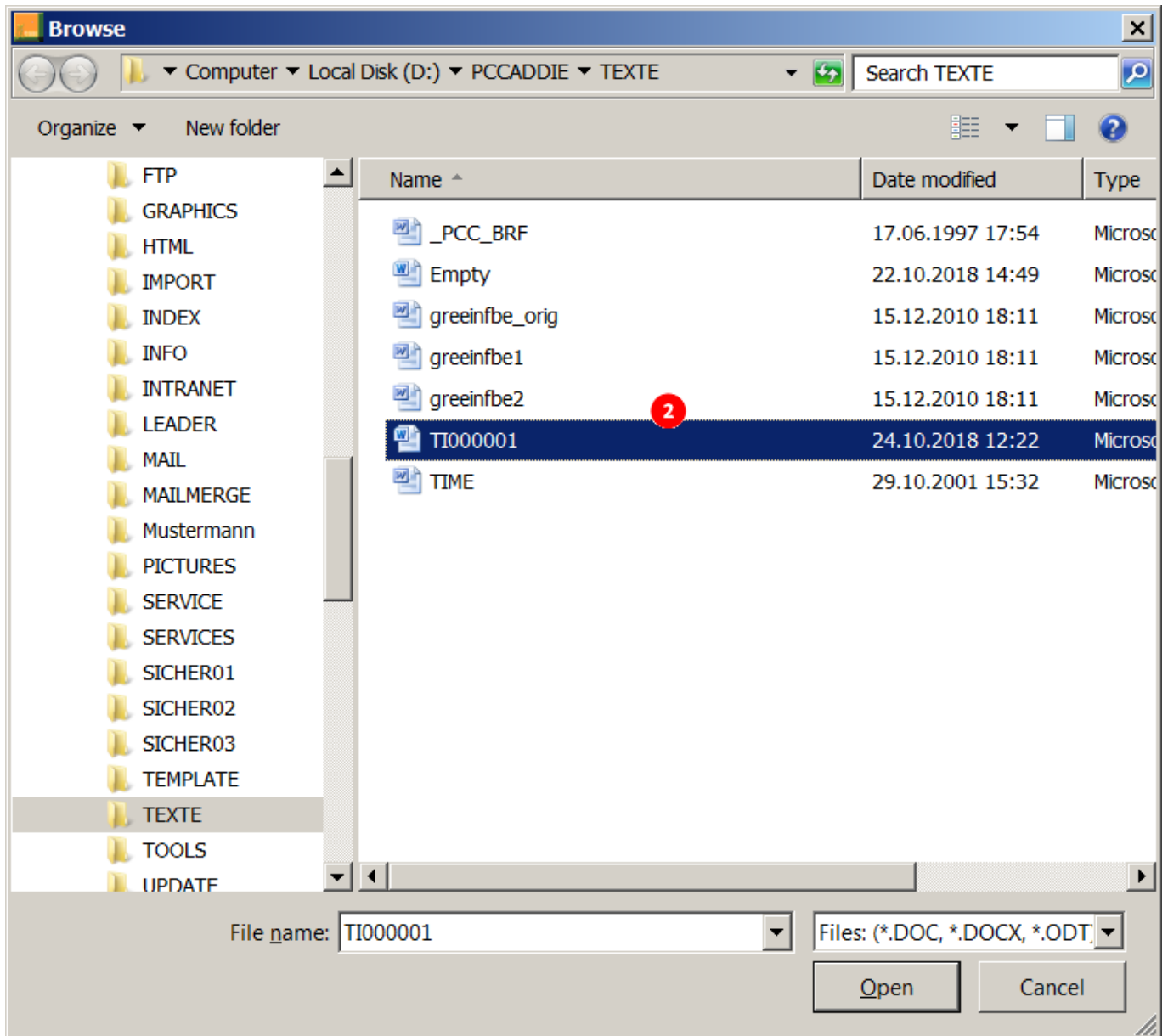
Restrict the templates to specific users

Some templates should not be visible to all employees, for example the ones regarding human

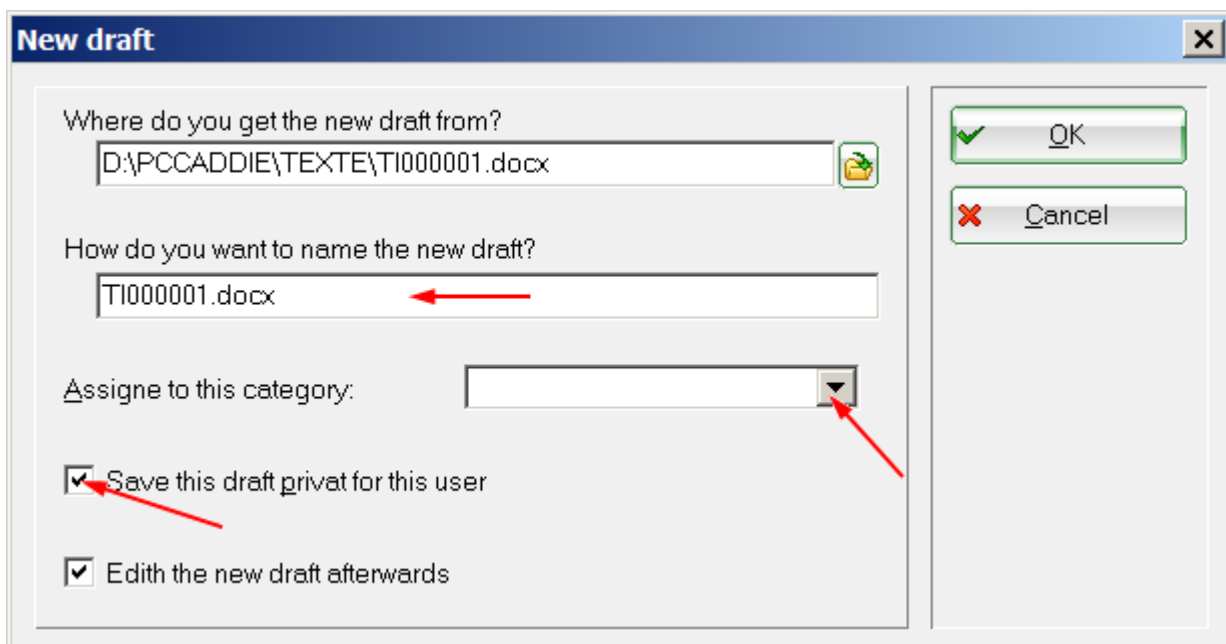
resources.



1. Get a new template



2. Select the template



- What would you like to call the template? - Here you can rename it.
- Assign to this category - Select a category from CRM that is automatically assigned to the letter.
- Save this template privately for the user - As soon as the check mark is set here, this template will only be visible to the registered person, yourself.

Form letter examples

Boxes and key numbers

Important:

- The letters must be revised manually for persons, who have several box numbers in an additional field, since in this case the key numbers cannot be clearly assigned to the different boxes for a letter!
- A **special parameter** is needed for the export of the key numbers, which you can request from support@pccaddie.com. The parameter is not generally included in the update, because this would slow down the process. It should therefore be deactivated after creating a letter with key numbers!
- Only with the special parameter are the **Fields for the key numbers** available as part of **Other fields**.

The boxes are organized in the [Info field 2](#).

«ADDRESS1»
«ADDRESS2»
«ADRESSEXTRA»
«ADDRESS1»
«ADDRESS2»
«COUNTRY»
«ADDRESS4»
«ADDRESS3»

Please check if you are using the box **«INFO2»**.