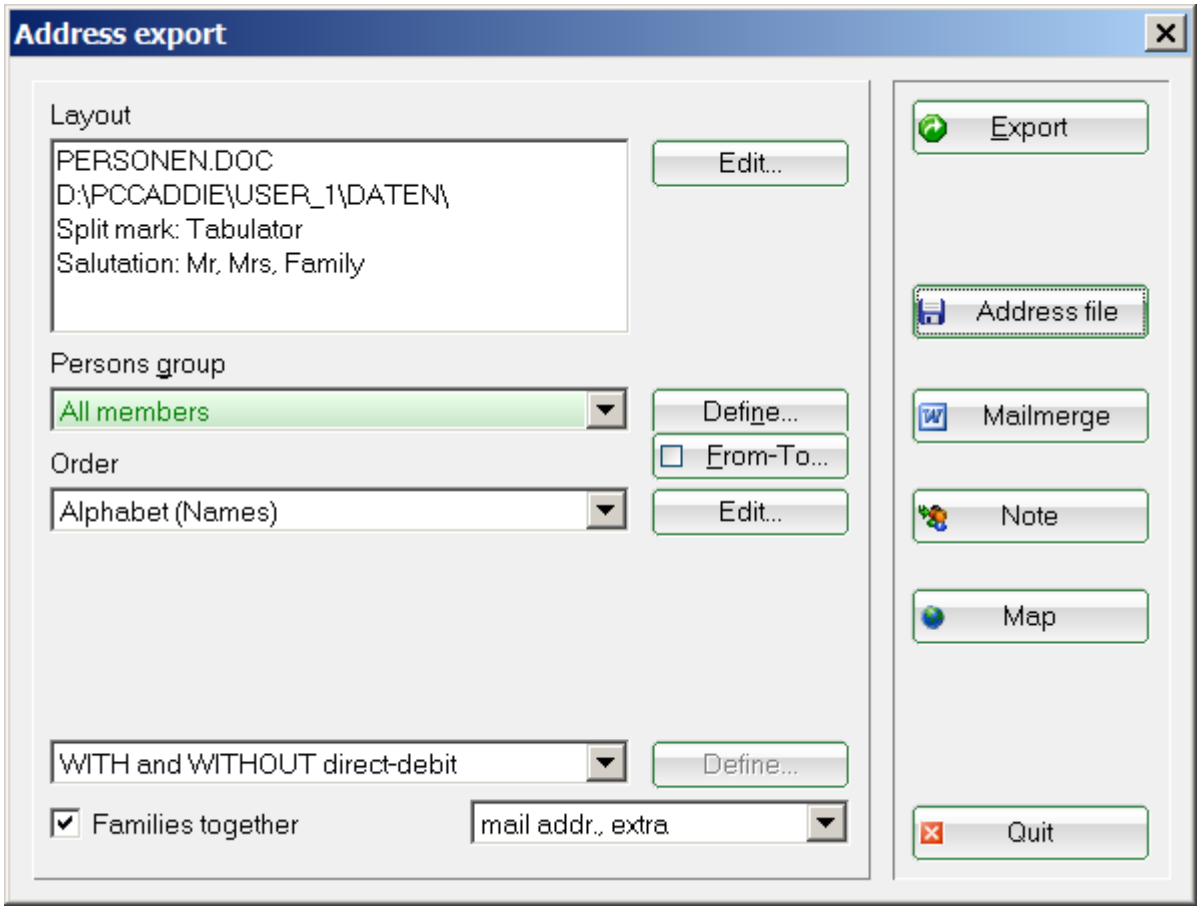
Form letters with WORD (word export)

To create a form letter, select ***People/Write mail merge with Microsoft Word.*** Use the function ***Export persons/addresses*** function also takes you to the mail merge screen:



Default settings

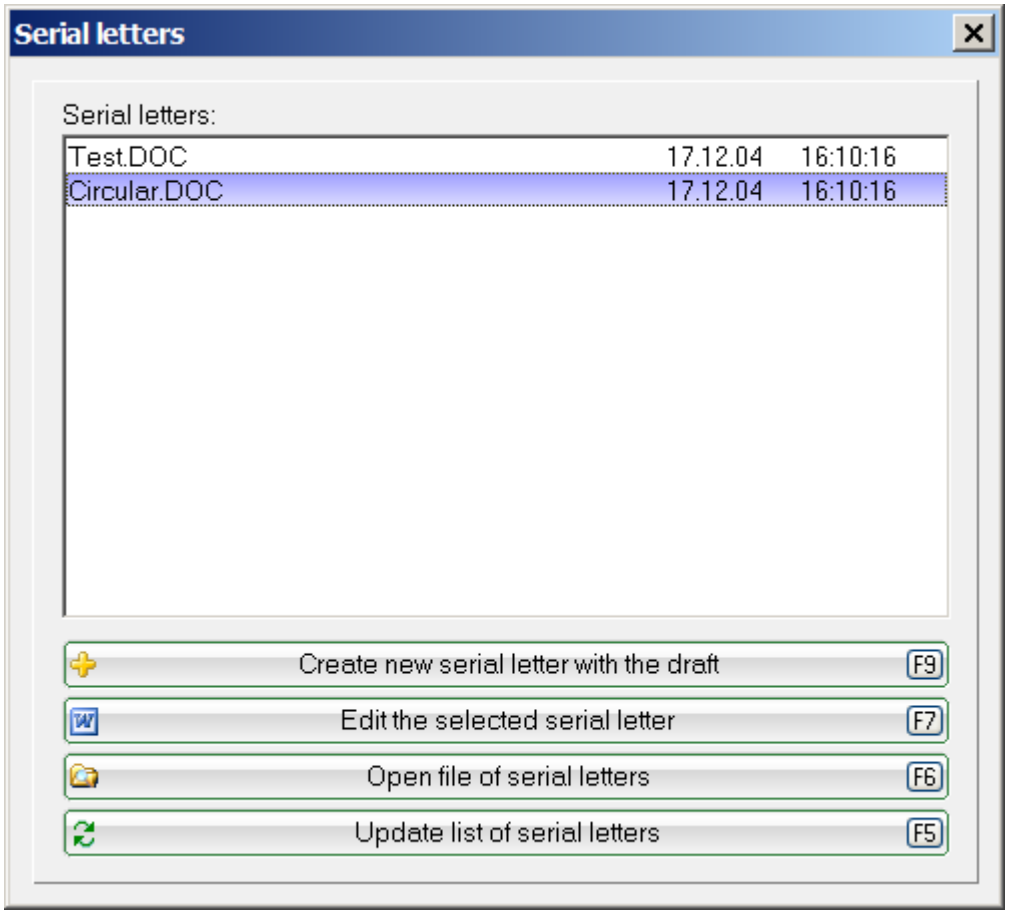
Before you create the form letter, it is necessary to create a ***group of people*** and the ***sequence*** to determine.

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

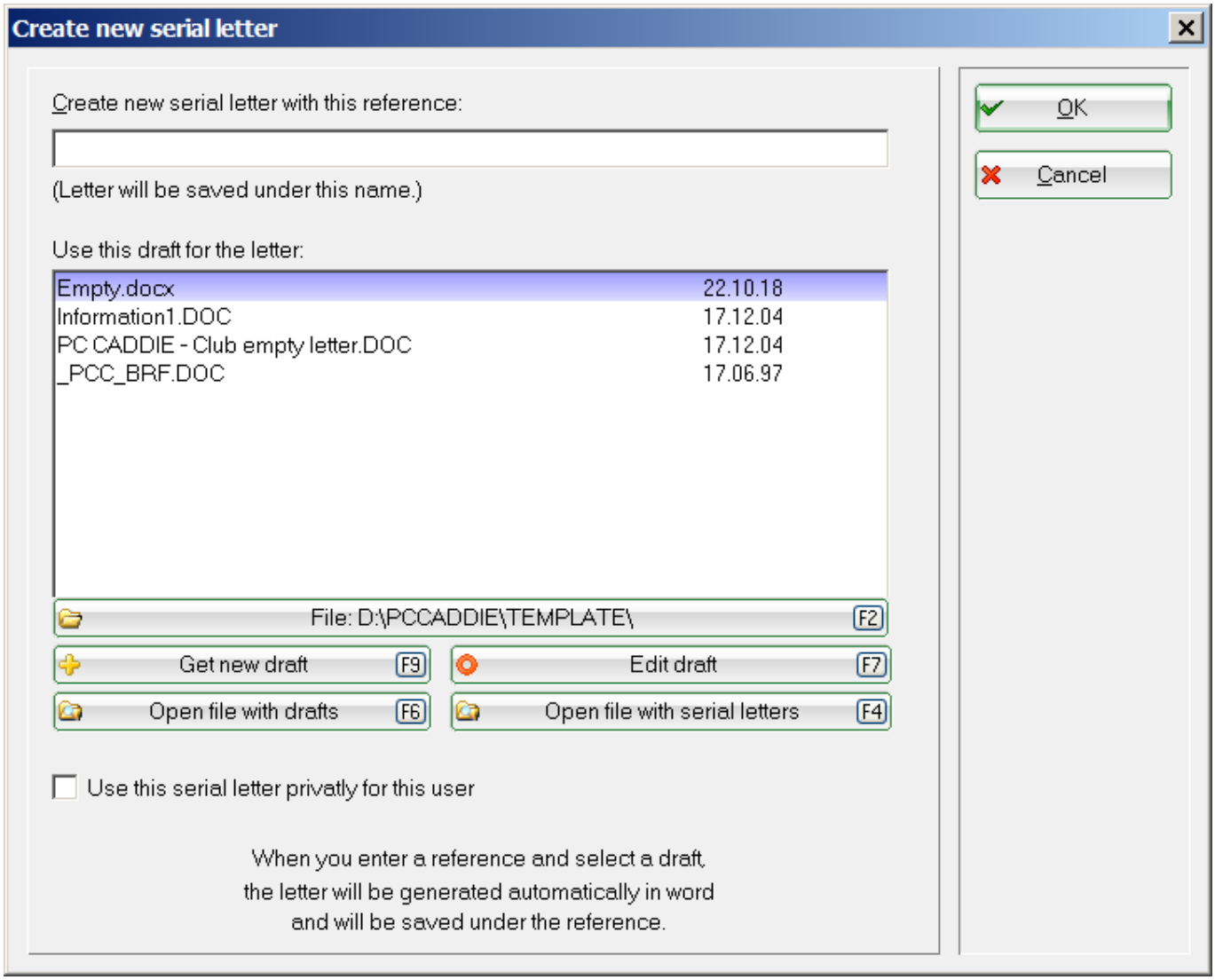
- For this example, select ***Group of people*** „All members“.
- By confirming the button ***Output*** button, the personal data for the mail merge is saved in the file selected for ***Layout*** is set.
- Under ***Layout*** you should ensure that it is a „*.doc“ document before creating a mail merge.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

Create mail merge

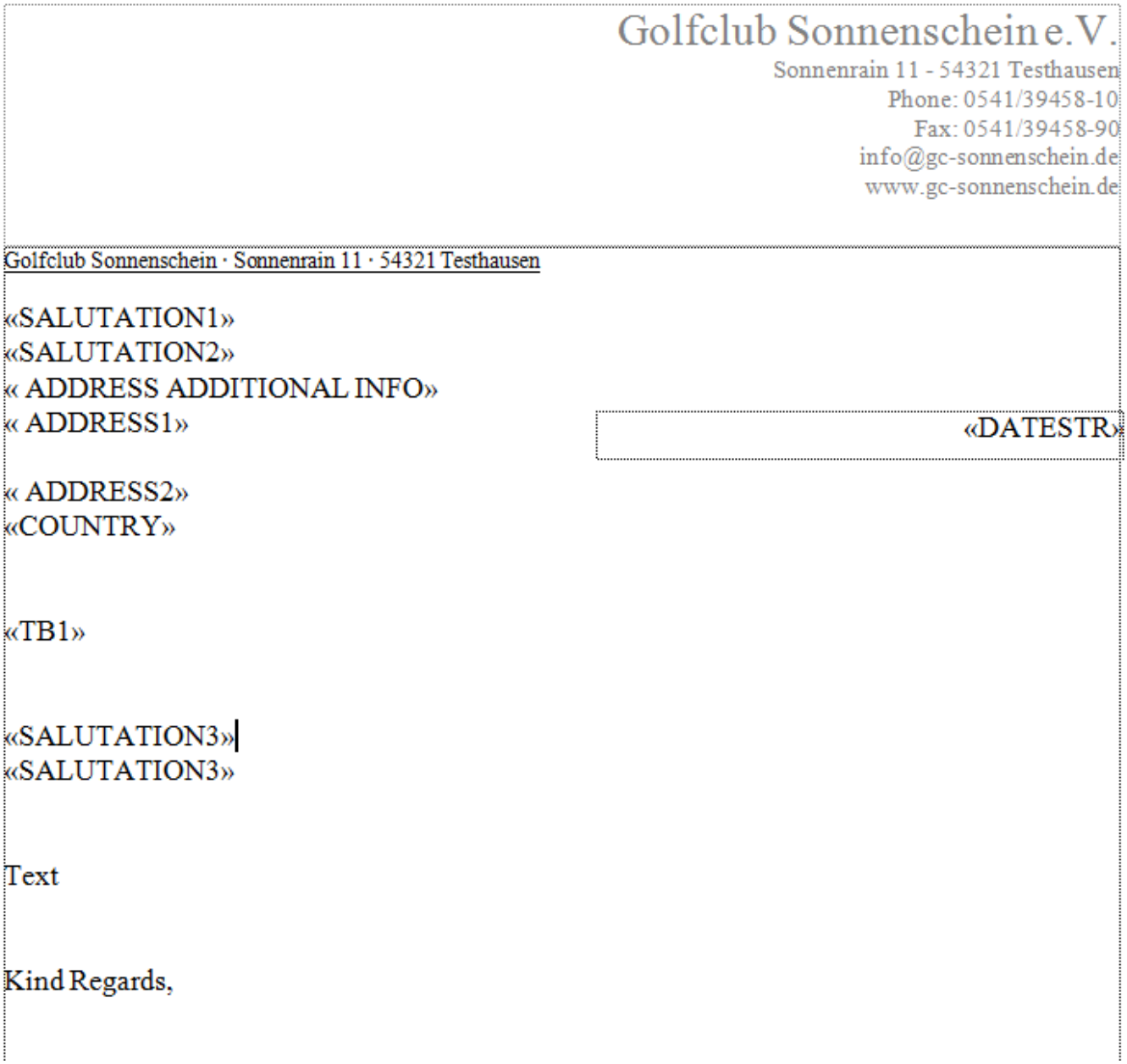
Now click on the button ***Serienbrief:***



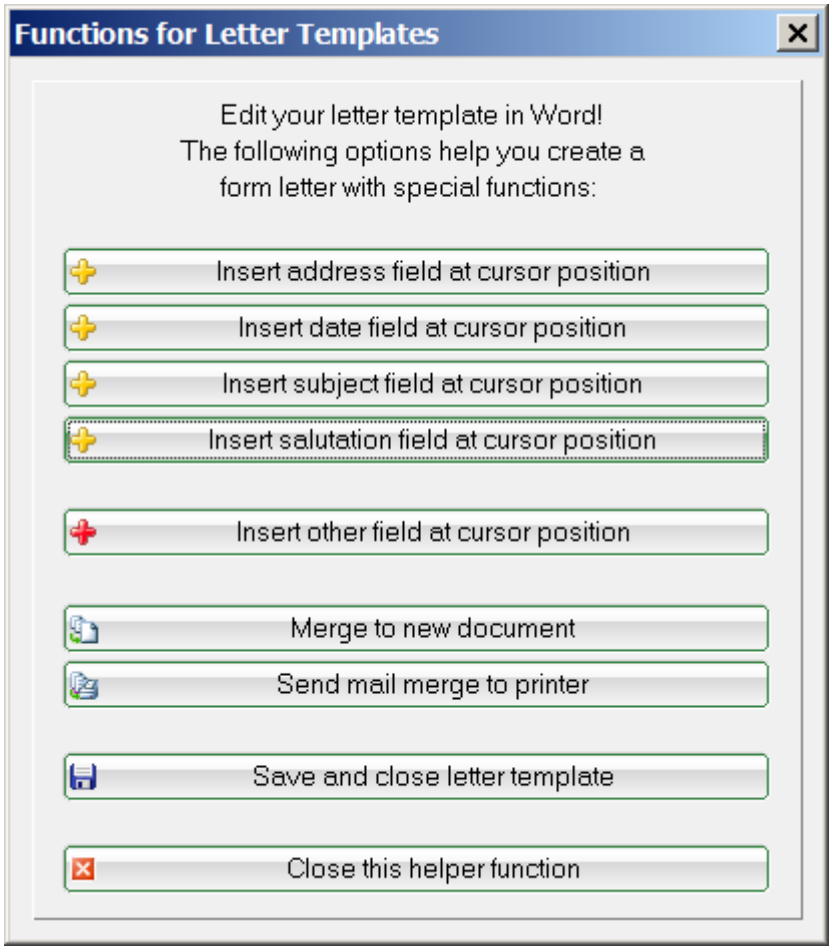
In this window you can see the mail merge letters already in use. To create a new form letter, please click on ***Create new mail merge based on a template*** (F9). This allows you to retrieve any Word document from any path on your computer and then save it as a template.



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 fetch a new template with ***F9,*** You can update the list with the ***F5.*** Then confirm with ***OK.*** Microsoft Word will open automatically.

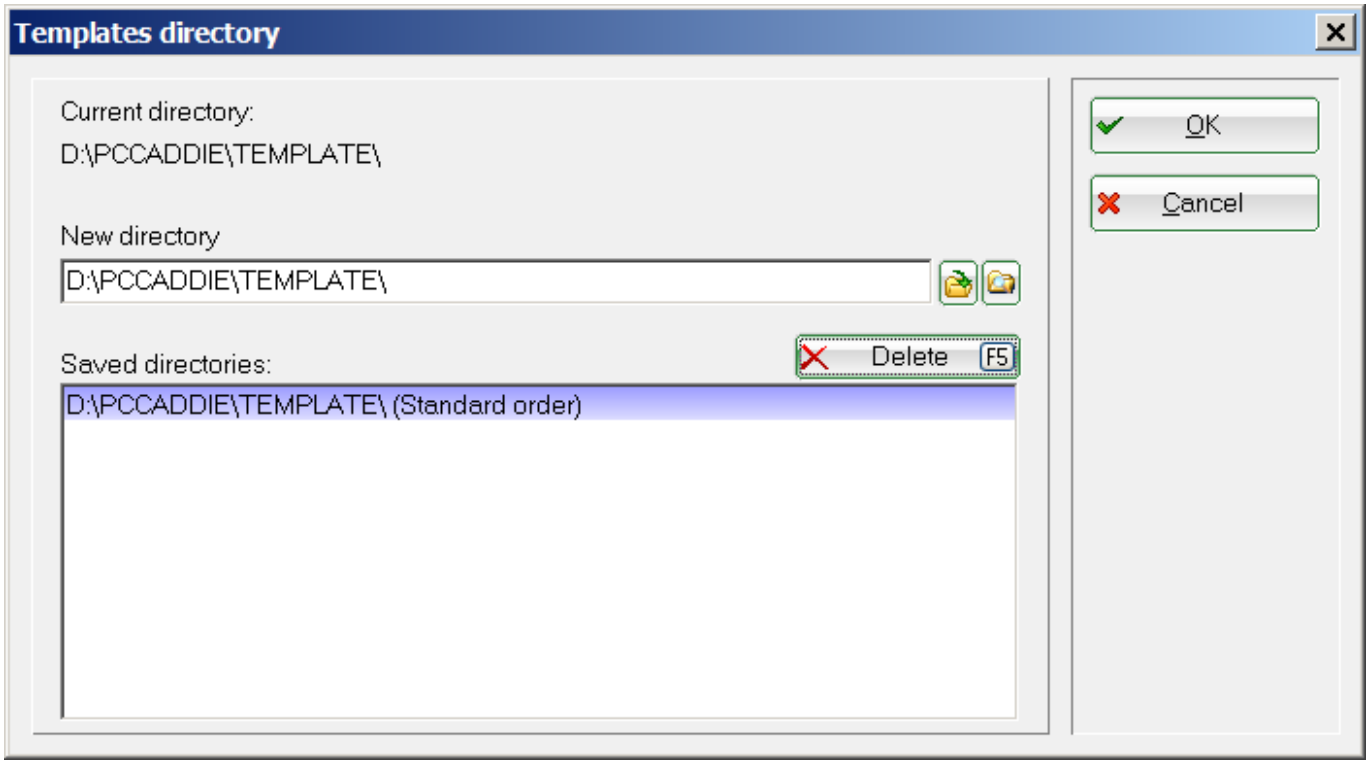


The PC CADDIE mail merge manager appears next to the document:



Position the cursor on a specific position and you can then use PC CADDIE to either ***address fields,*** the ***date***a ***subject***the ***salutation*** or a ***other field*** into the form letter. With the button ***Merge into a new document*** the data is linked and you receive a preview of the mail merge. For the field ***<Adresse1>*** field, for example, the person's address that was entered in the person mask for the 1st address will be used. Of course, you can also change the text and formatting of the template in these Word documents. Click on ***Save template and close***to save the changes in the template.

All templates are saved by PC CADDIE in the „Template“ folder. You will find the form letters in the „Mailmerge“ folder.



Print mail merge

Once you have made all the changes, you can print the mail merge by clicking the ***Merge into a new document*** button to copy it to a new document. You will then see all the letters at a glance (i.e. for the selected group of people and in the previously defined order). The letter can be printed directly from this document.



Golfclub Sonnenschein e.V.
Sonnenrain 11 - 54321 Testhausen
Phone: 0541/39458-10
Fax: 0541/39458-90
info@gc-sonnenschein.de
www.gc-sonnenschein.de

Golfclub Sonnenschein · Sonnenrain 11 · 54321 Testhausen

Mr. Tester Timo

123445 Example address

23 October 2018

Happy New Year

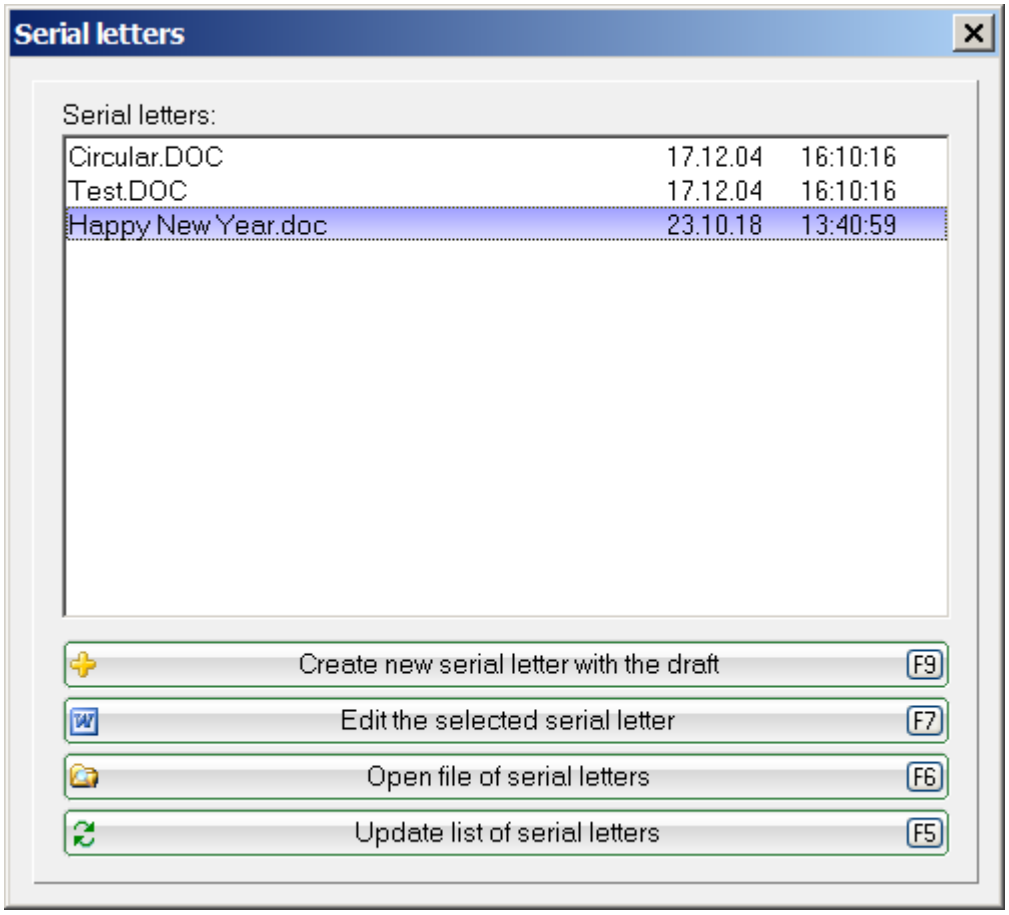
Dear Mr Tester Timo,

Text

Kind Regards,

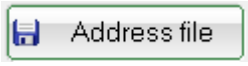
😉 It is always a good idea to print a test page first to check whether the document fits on your stationery and whether the address appears correctly in the address window.

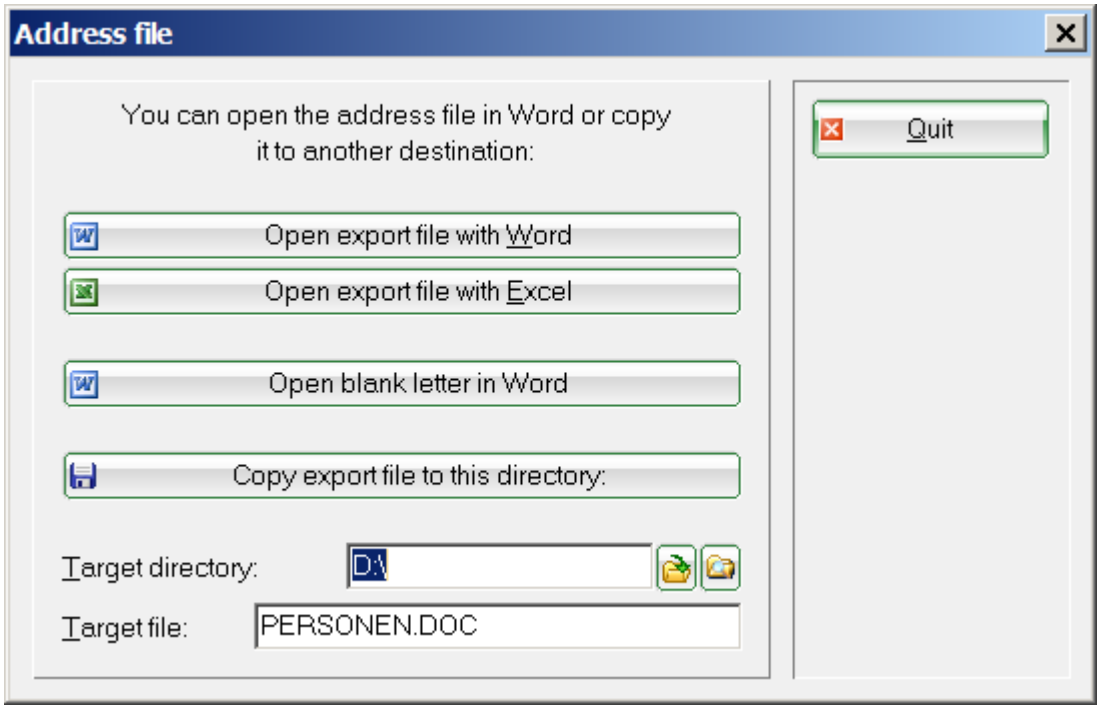
If you think it is unnecessary to look through all the letters again, you can also send the print directly to the printer using the ***Send mail merge to the printer*** button. If you have only changed the template but do not want to perform any other action, you can save the template with ***Save and close template*** to exit the template. You will return to the selection window for the mail merge - noted with the subject „Happy New Year“ that you entered previously:



Export addresses

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

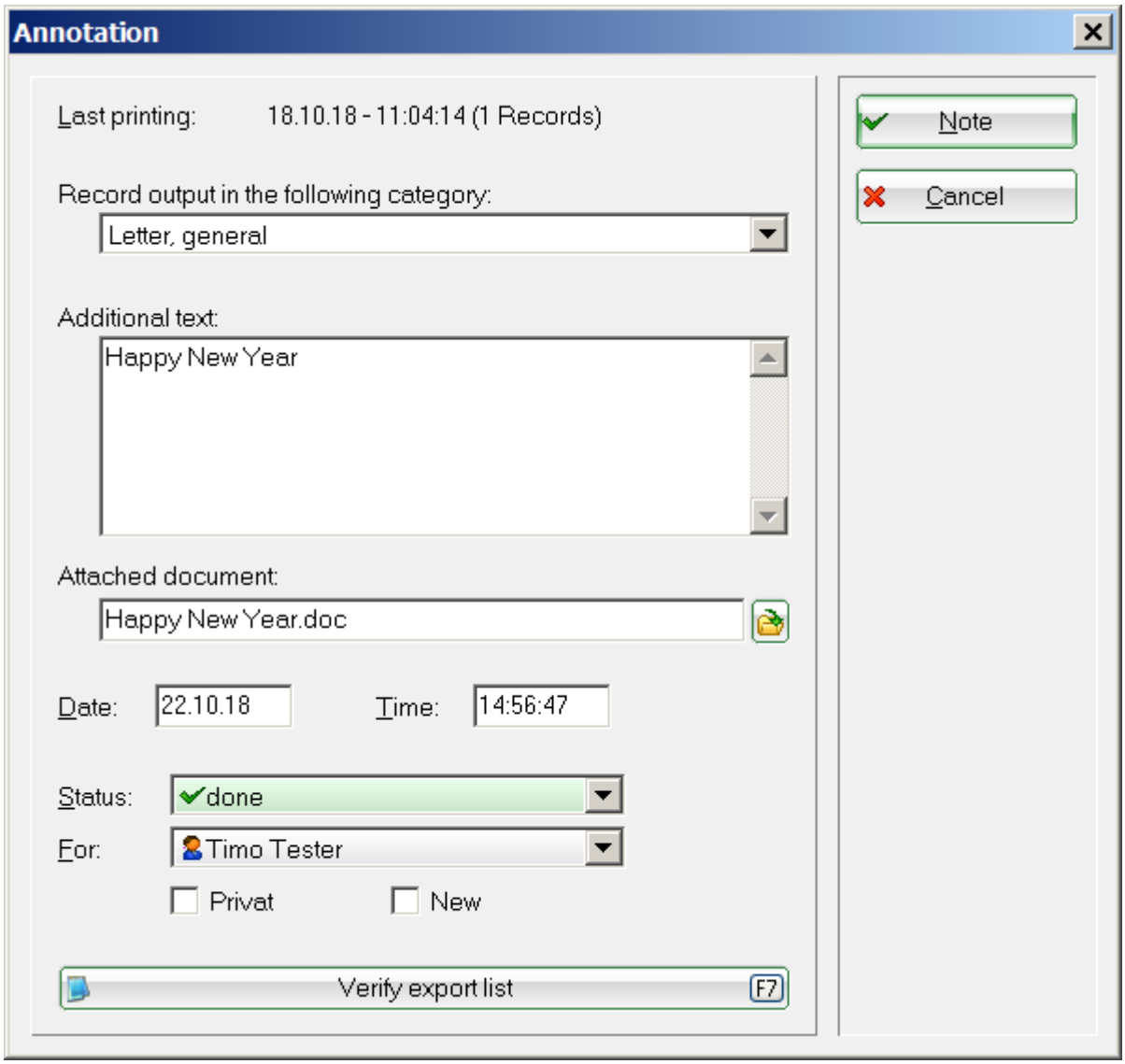




You have the option of exporting the addresses either to Word or Excel. The export file in Excel is particularly recommended if you want to print out the addresses or use them for other purposes. Please remember that this is an HTML file and you will have to save it again as an Excel file. You can also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

Annotate form letter

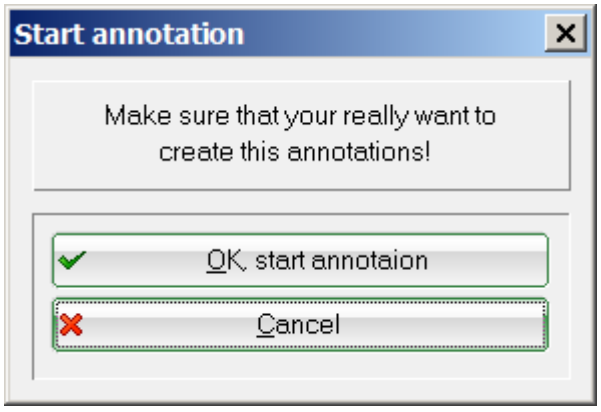
If you are working with the module CRM\DMS , you can note the form letter in each person mask to complete it. The button ***Note*** button makes this possible:



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

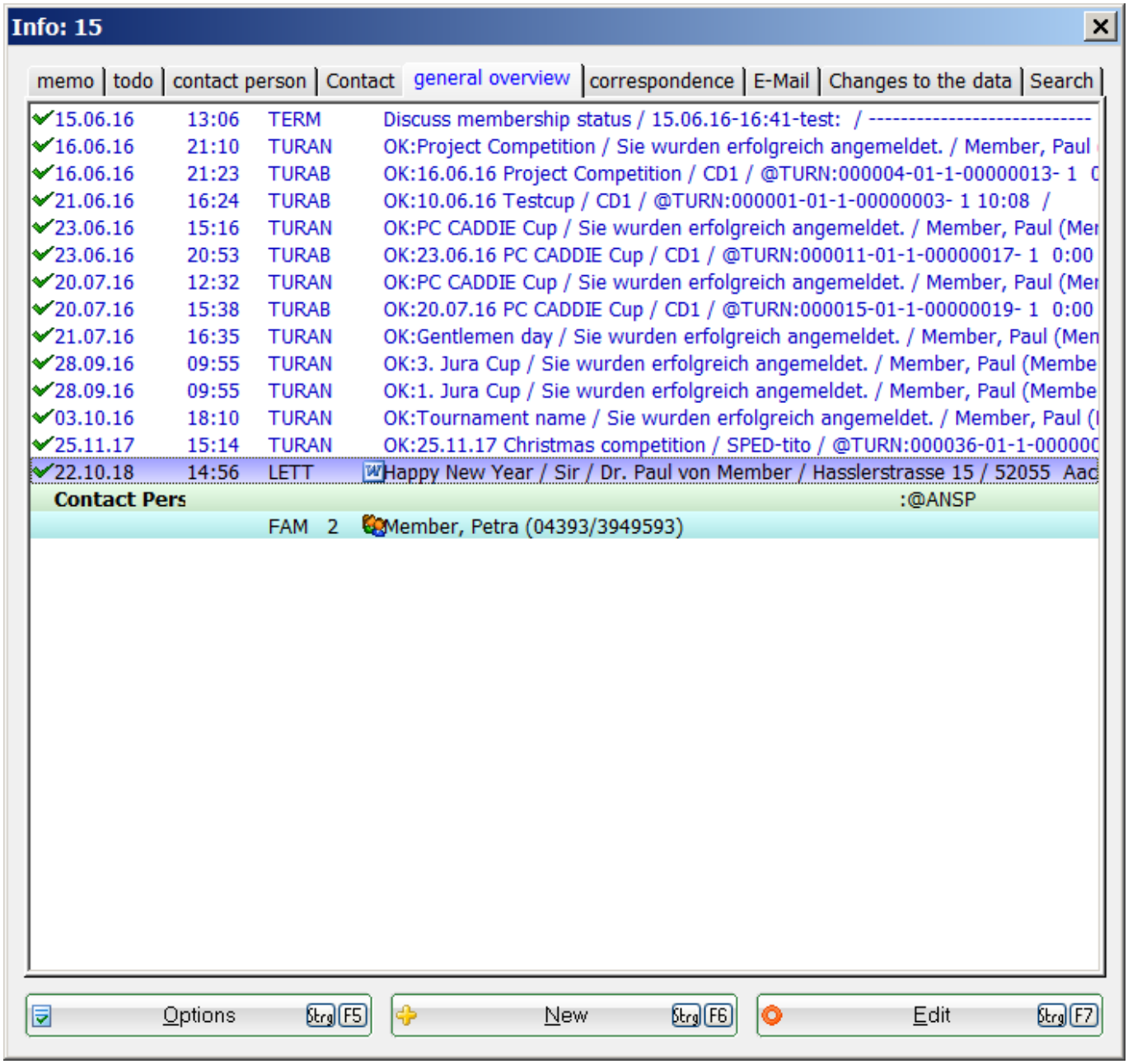
Specify the category under which the letter is to be annotated, the text of the annotation and then attach the desired document. The button ***Check export list*** (F7) shows for which persons a note is created.

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



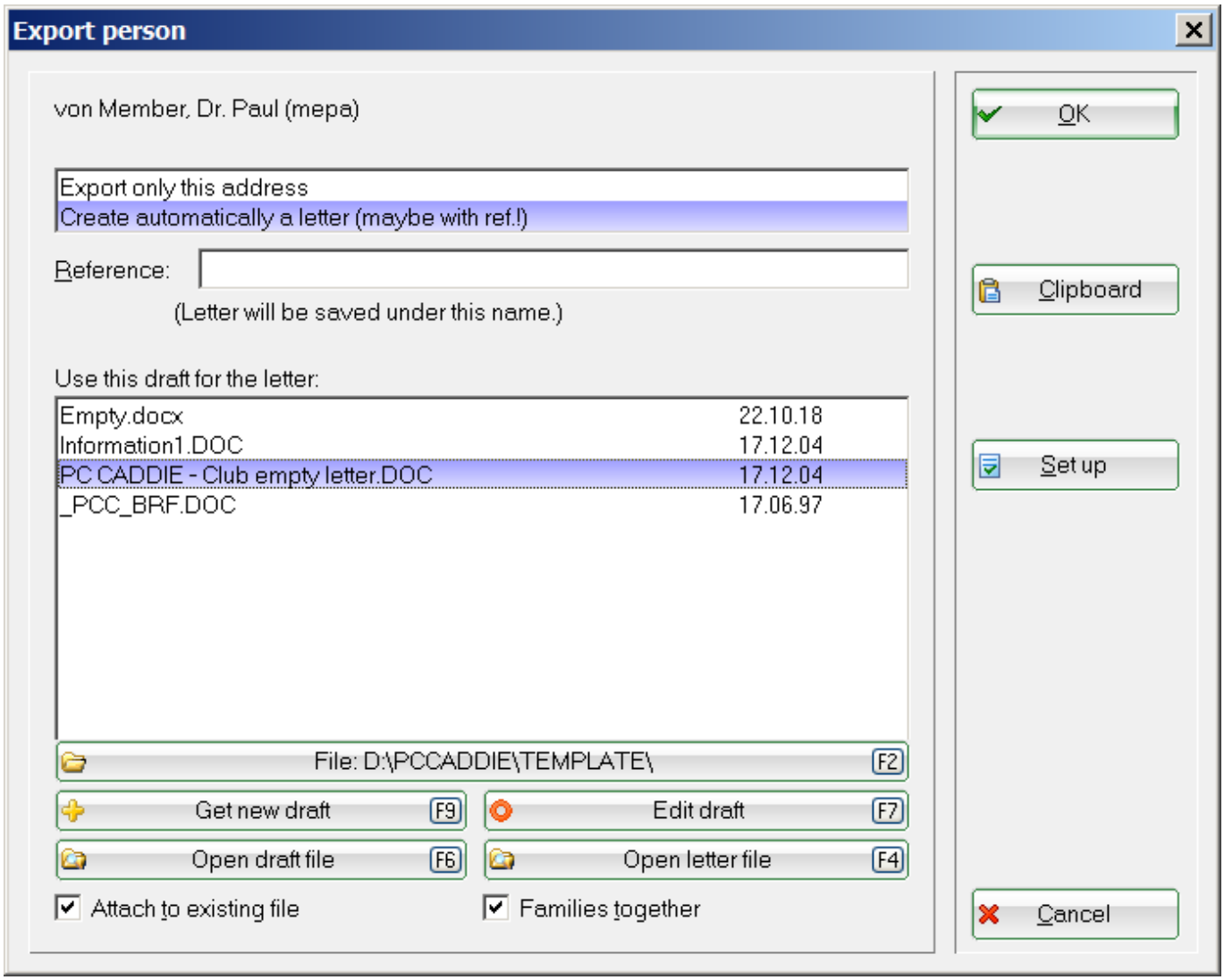
Confirm this dialogue again with ***OK, start annotation.***

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

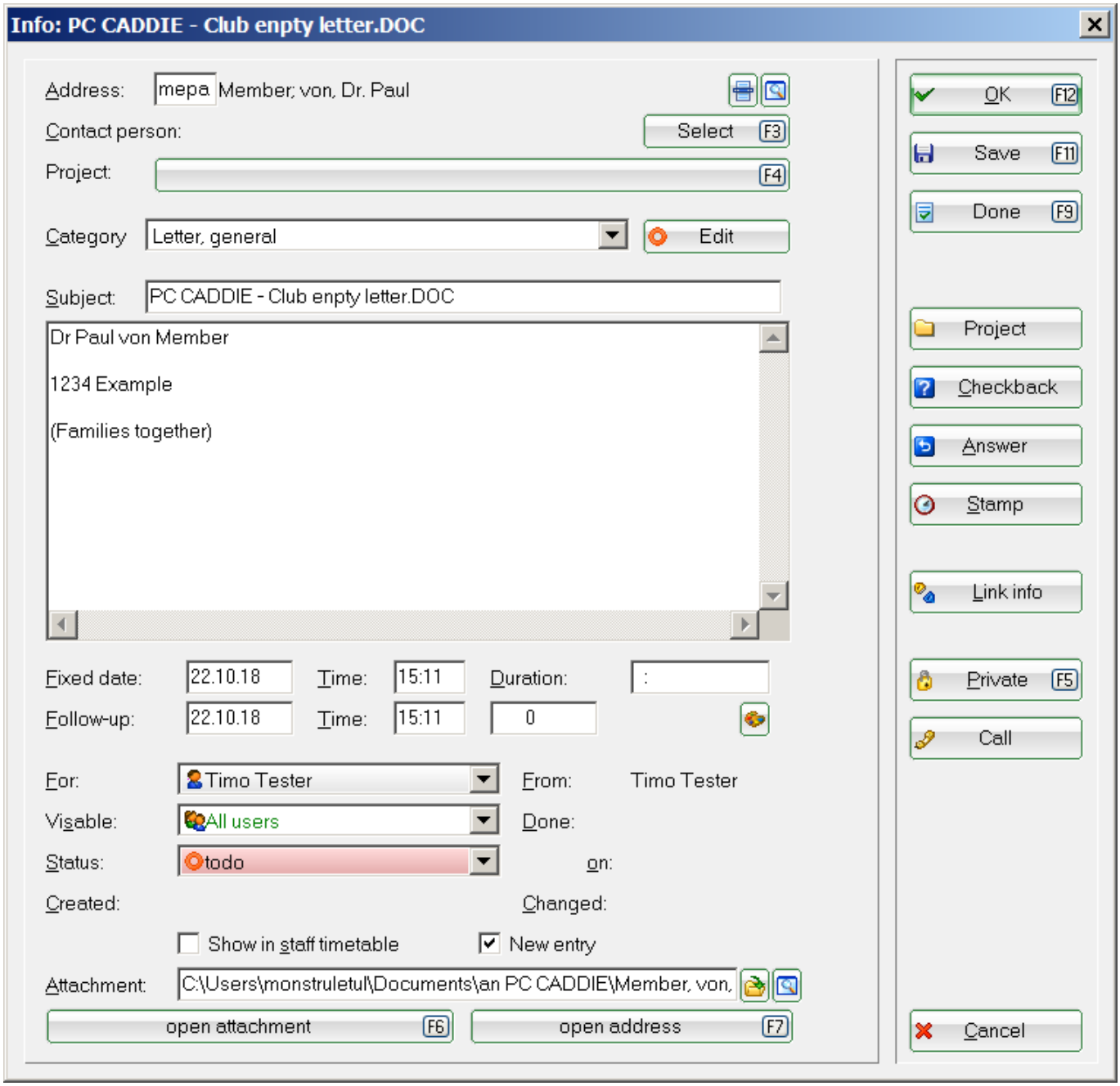


Create individual letter using a template

To create an individual letter using a template, call up a person and click on ***Word/Export:***



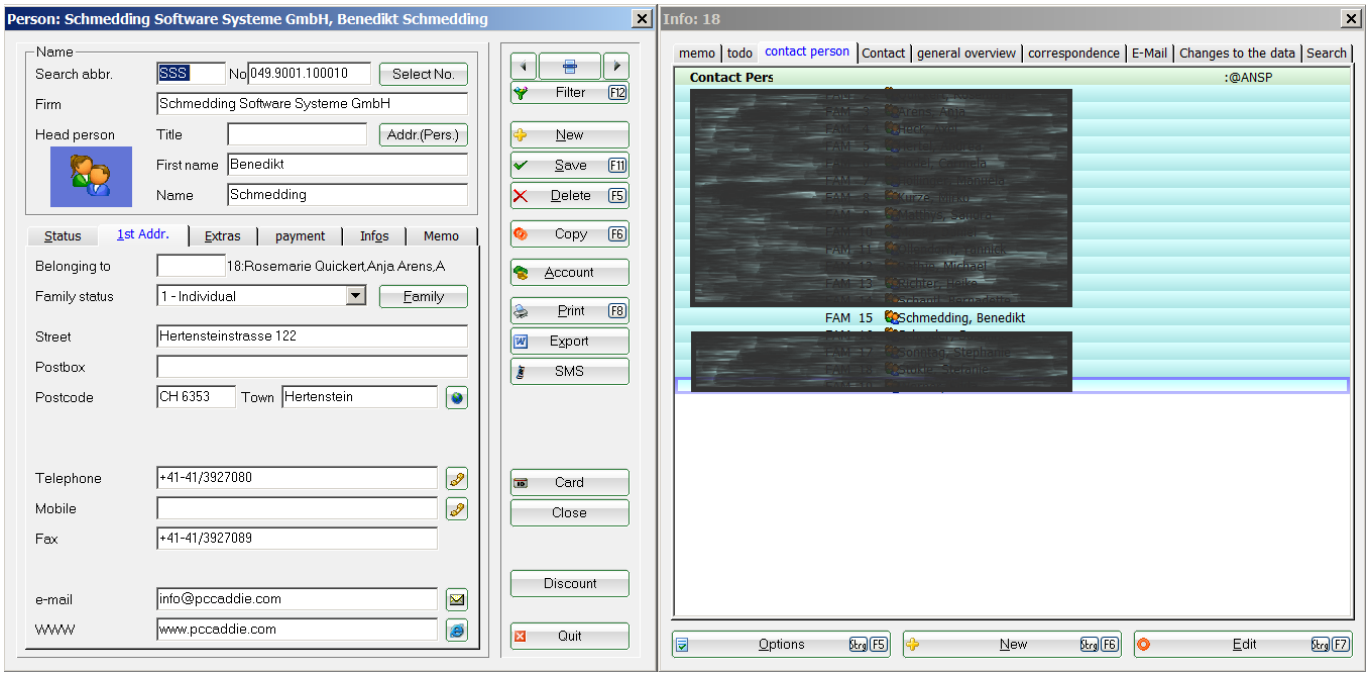
Activate the „Automatically create a letter“ option and specify a template for the letter. This dialogue is structured in the same way as the dialogue for serial letters. Once you have made all the changes, click ***OK.*** Microsoft Word will then open and the template fields in our example are already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



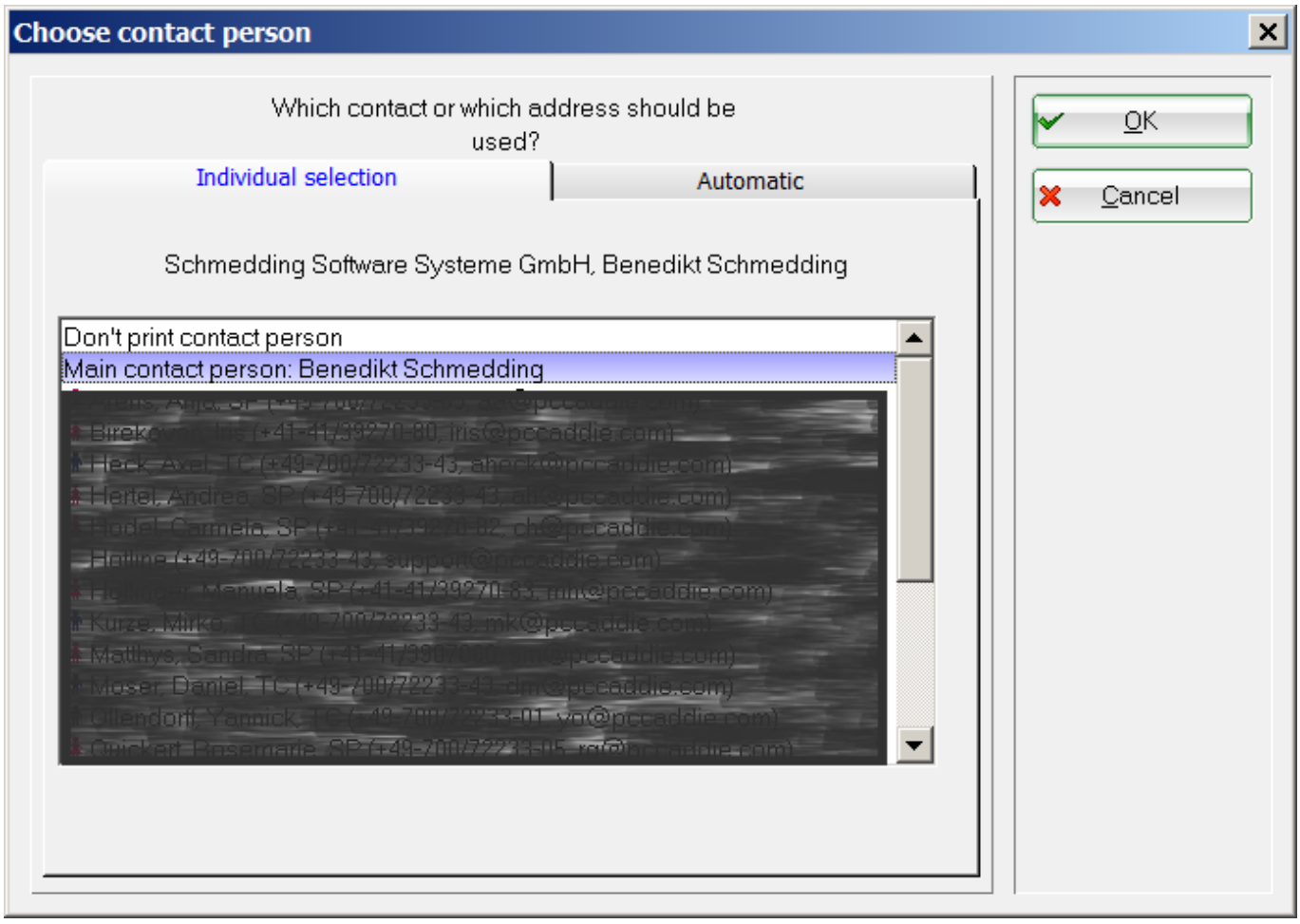
Make all the required entries according to your needs and exit the window with ***OK*** (F12). The document has now been saved in the person mask for „Hans Muster“.

Using the clipboard

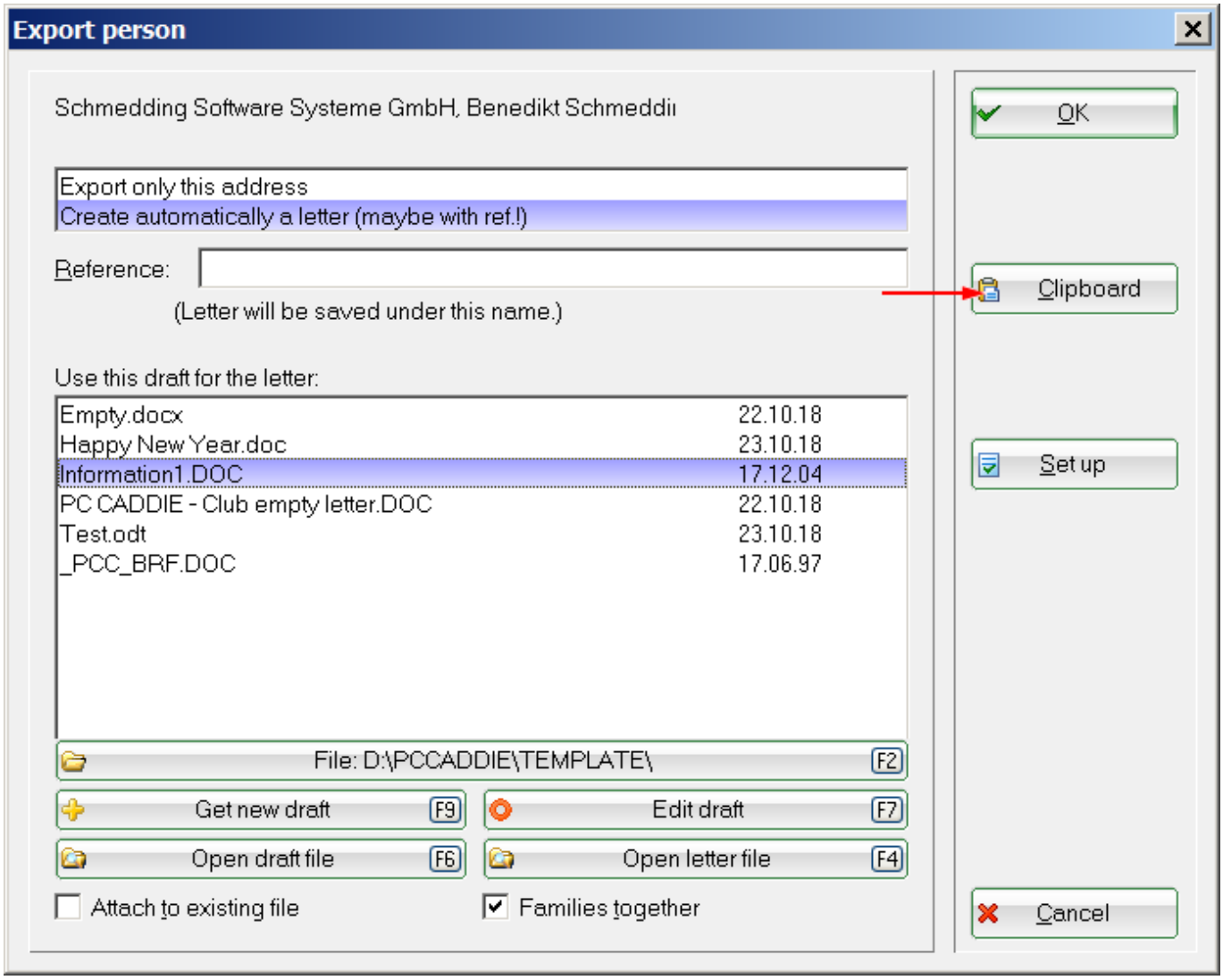
With the button ***Clipboard*** button allows you to quickly copy contact data to another document. The name, telephone number and email address as well as the function are transferred here. Example: Call up the person whose data you need and click on the button ***Word export*** or ***Writer export***.



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



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



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

Schmedding Software Systeme GmbH

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6353 Hertenstein

SWITZERLAND

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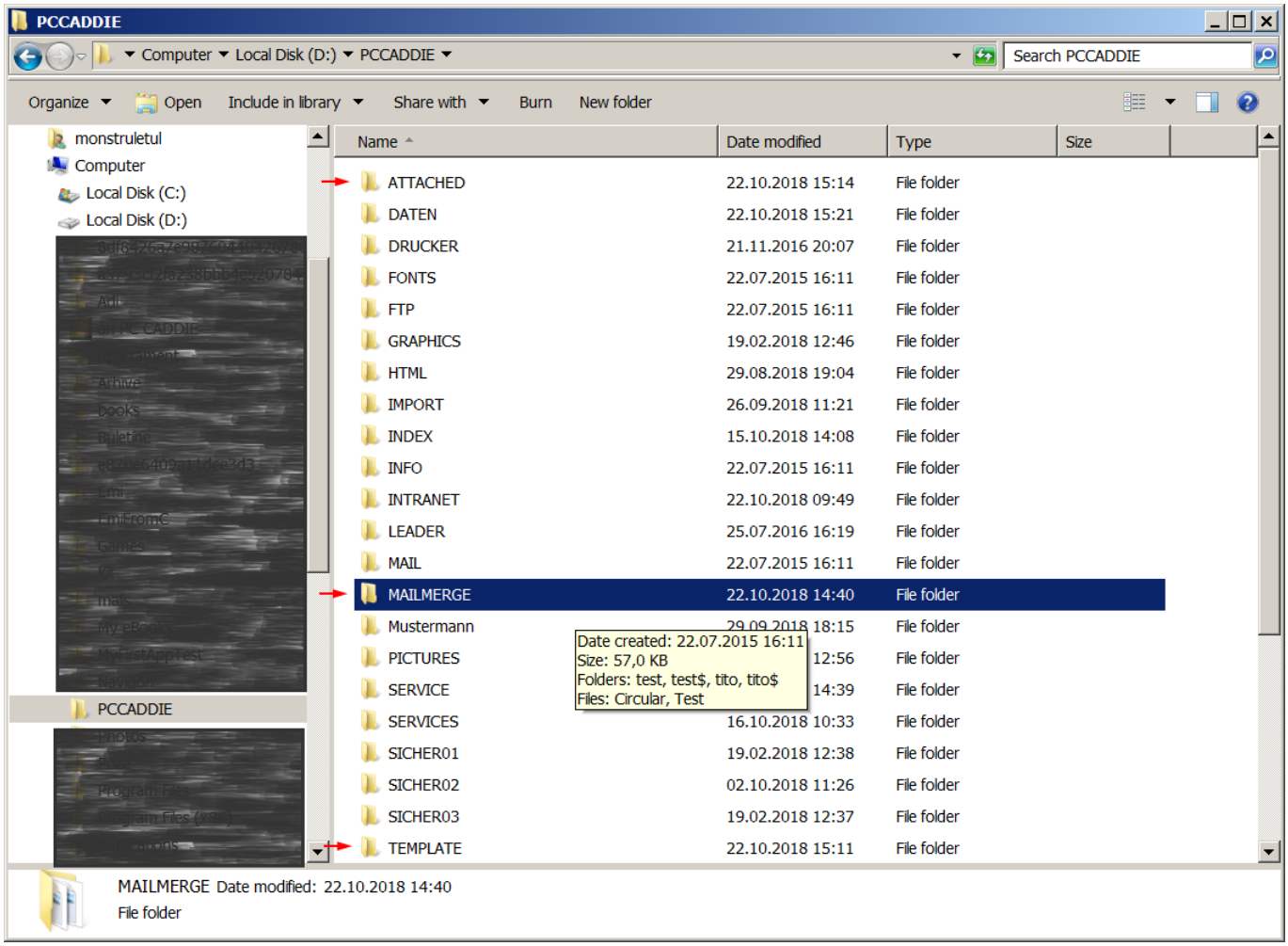
Fax: +41-41/3927089

www.pccaddie.com

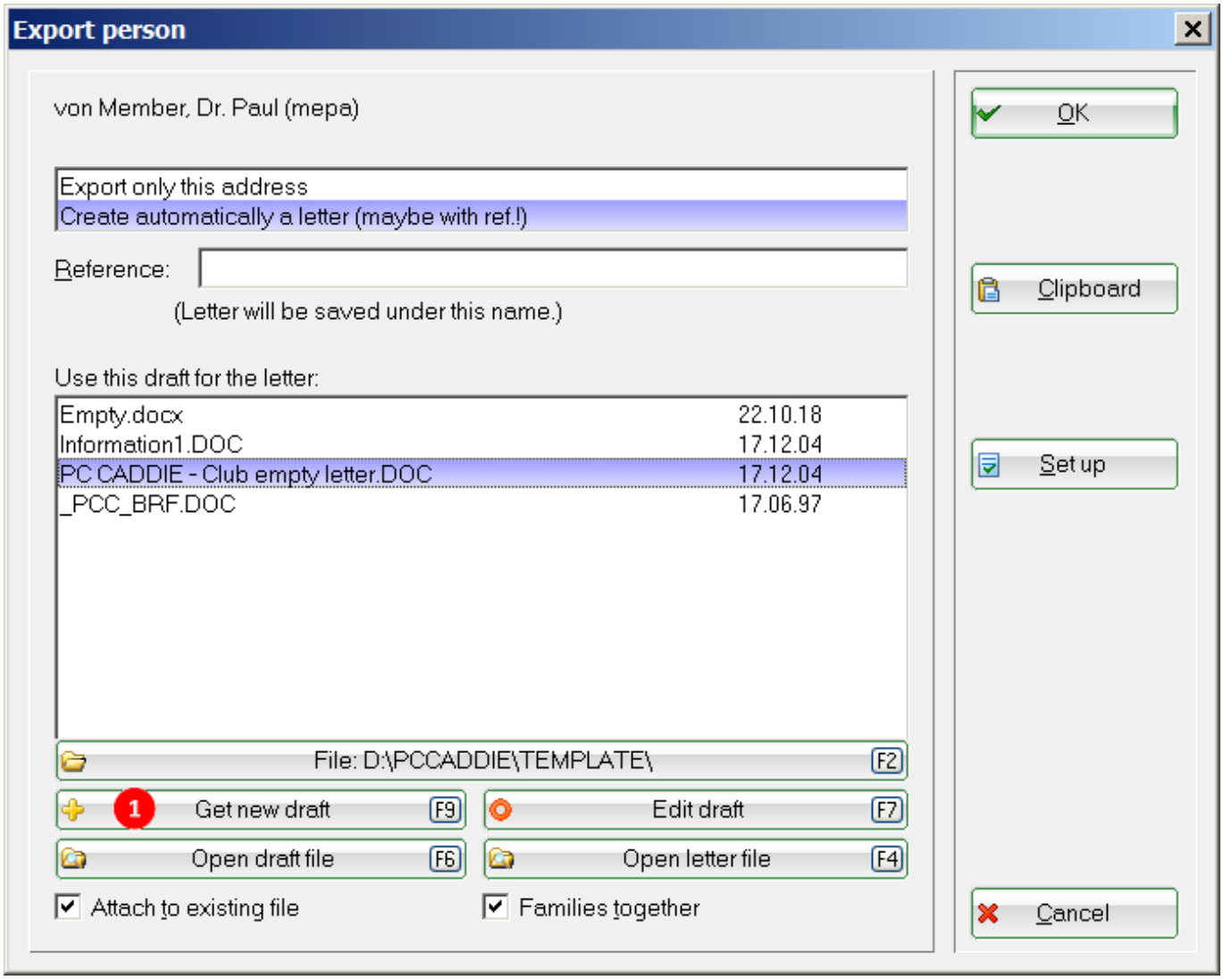
Storage locations for the various documents

In PC CADDIE, documents are saved in different folders. You will find all individual letters in the „Attached“ folder. The „Mailmerge“ folder contains all serial letters and the „Template“ folder is used by PC CADDIE for the templates.

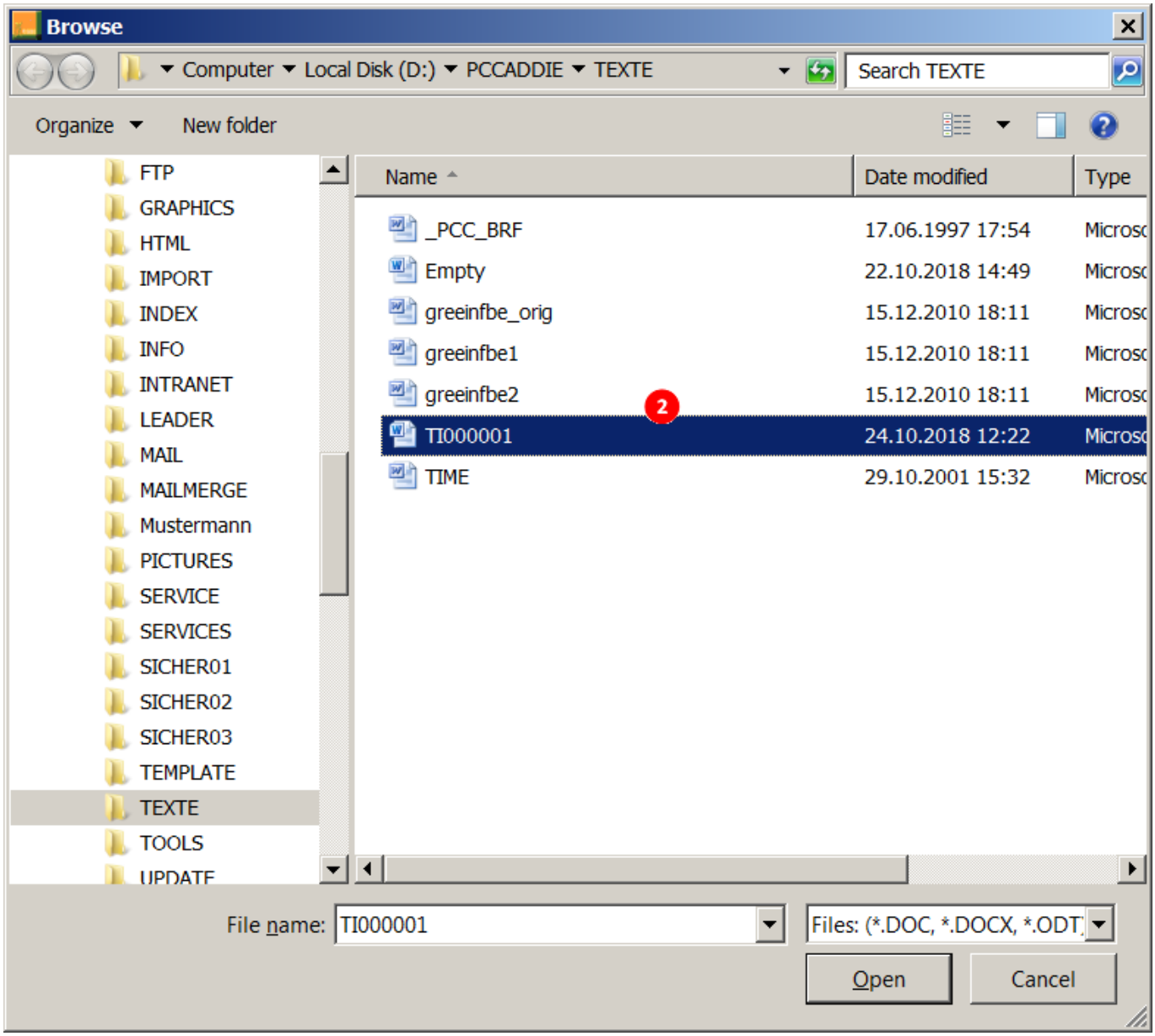


Save template only visible for certain users

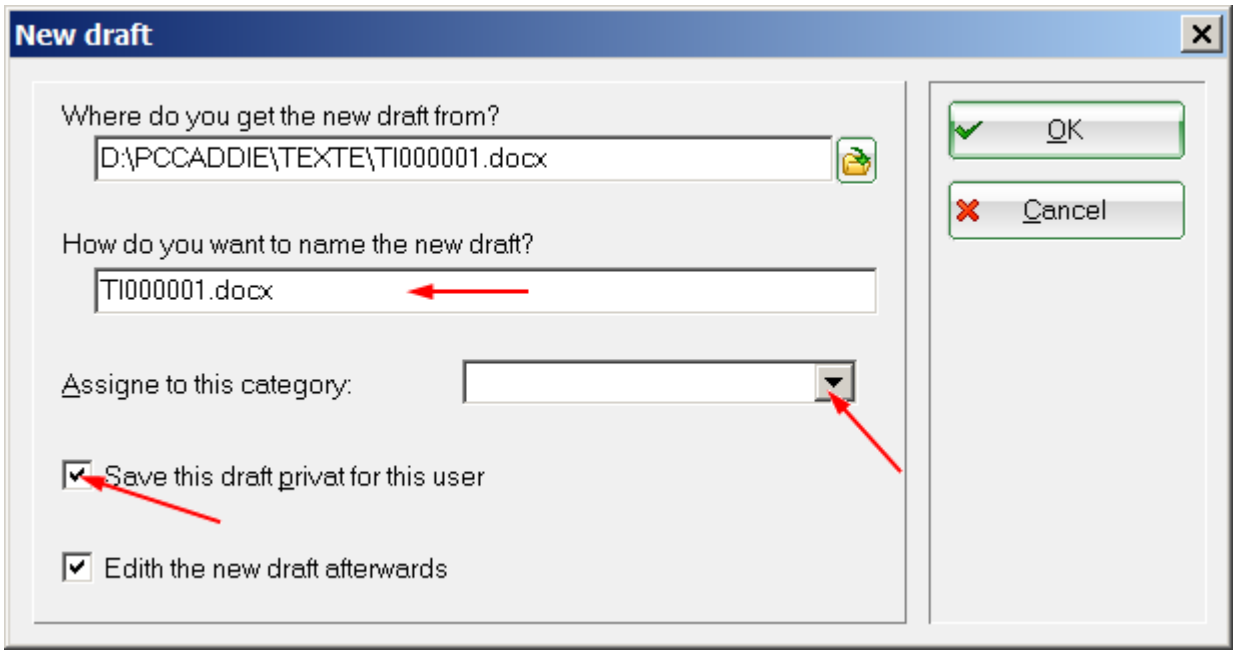
Some templates should not be visible to all employees, e.g. in HR.



1. get new template



2. select the template



- What would you like to call the template? - You can assign a different name here.

- Assign to this category - Here you select a category from the CRM that is automatically assigned to the letter.

- Save this template privately for the user - As soon as this box is ticked, this template is only visible to the person logged in, i.e. you.

Mail merge examples

Boxes and key numbers

Wichtig:

- For persons who have several box numbers in an additional field, the letters must be revised manually, as the key numbers can no longer be clearly assigned to the different boxes for a letter!
- For the export of the key numbers, a ***special parameter*** which you can request from support@pccaddie.com . The parameter is not generally included in the update, as this generally slows down the export. It should therefore be deactivated again after creating a letter with key numbers!
- Only with the special parameter are the ***fields for the key numbers*** for the ***other fields*** in the mail merge function.

In our example, the letter is created with Open Office (instead of Word), here the „windows“ look slightly different than in Word.
The boxes are organised in Info field 2 organised. The INFOKEY fields are the fields for the key numbers (which are only available with the special parameter):

