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:

Address export	×
Layout PERSONEN.DOC D:\PCCADDIE\USER_1\DATEN\ Split mark: Tabulator Salutation Ma. Family	Export
	a Address file
Persons group All members	👿 Mailmerge
Order Erom-To Alphabet (Names)	Note
	Map
WITH and WITHOUT direct-debit	
Families together mail addr., extra	Quit

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:

Serial letters: Test.DOC 17.12.04 16:10:16 Circular.DOC 17.12.04 16:10:16	erial letters		>
Test.DOC 17.12.04 16:10:16 Circular.DOC 17.12.04 16:10:16 ● Create new serial letter with the draft F9 ● Create new serial letter with the draft F9 ● Edit the selected serial letter F7 ● Open file of serial letters F6	Serial letters:		
Circular.DOC 17.12.04 16:10:16 Image: Circular.DOC Circular.DOC 17.12.04 Image: Circular.Doc Circular.Doc E0 Image: Circular.Doc Edit the selected serial letter E0 Image: Circular.Doc E0 E0 E0 E0 Image: Circular.Doc E0 E0 E0 E0 E0 Image: Circular.Doc E0 E0 E0 E0 E0 E0 E0 E0	TestDOC	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	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			
Image: Market Book Control Edit the selected serial letter F7 Image: Open file of serial letters F6	e	Create new serial letter with the draft	F 9
🖸 🙆 Open file of serial letters 🕞	W	Edit the selected serial letter	F7
		Open file of serial letters	F6
CUpdate list of serial letters	3	Update 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 Word 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:	✓ <u>Q</u> K
(Letter will be saved under this name.)	X <u>C</u> ancel
Use this draft for the letter:	
Empty.docx22.10.18Information1.DOC17.12.04PC CADDIE - Club empty letter.DOC17.12.04_PCC_BRF.DOC17.06.97	
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 fetch a new template with **F9**, You can update the list with the **F5**. Then confirm with **OK**. Microsoft Word will open automatically.

Golfclub Sonnenscheine.V

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

«DATESTR»

Golfclub Sonnenschein · Sonnenrain 11 · 54321 Testhausen

«SALUTATION1» «SALUTATION2» « ADDRESS ADDITIONAL INFO» « ADDRESS1»

« ADDRESS2» «COUNTRY»

«TB1»

«SALUTATION3» «SALUTATION3»

Text

Kind Regards,

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

Functions	for Letter Templates	×
	Edit your letter template in Word! The following options help you create a form letter with special functions:	
÷	Insert address field at cursor position	
+	Insert date field at cursor position	
+	Insert subject field at cursor position	
÷	Insert salutation field at cursor position	
+	Insert other field at cursor position	
81	Merge to new document	
2	Send mail merge to printer	
	Save and close letter template	
×	Close this helper function	

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.

Templates directory	×
Current directory: D:\PCCADDIE\TEMPLATE\	✓ <u>Q</u> K
New directory	× <u>C</u> ancel
Saved directories: Delete F5	
D:\PCCADDIE\TEMPLATE\(Standard order)	

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:

2			
Serial letters:		1710.04	10.10.10
Test DOC		17.12.04	16.10.16 16.10.16
Happy New Year.	doc	23.10.18	13:40:59
\$	Create new serial letter with	the draft	F:
W	Edit the selected serial	letter	F7
	Open file of serial lette	ers	FE
a	000000000000000000000000000000000000000		

Export addresses

🔒 Address file

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

Address file	×
You can open the address file in Word or copy it to another destination:	Z Quit
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: Image: Comparison Target file: PERSONEN.DOC	

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:

Annotation	×
Last printing: 18.10.18 - 11:04:14 (1 Records)	✓ Note
Record output in the following category:	X <u>C</u> ancel
Letter, general	
Additional text:	
Happy New Year	
-	
Attached document:	
Happy New Year.doc 🔊	
<u>D</u> ate: 22.10.18 <u>T</u> ime: 14:56:47	
<u>S</u> tatus: ✓ done ▼	
<u>F</u> or:	
Privat New	
Verify export list	

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			×
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
✓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
√28.09.16	09:55	TURAN	OK:3. Jura Cup / Sie wurden erfolgreich angemeldet. / Member, Paul (Membe
√28.09.16	09:55	TURAN	OK:1. Jura Cup / Sie wurden erfolgreich angemeldet. / Member, Paul (Membe
√ 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	Communication (2013) (2
	Ontione		
	<u>o</u> puons	ptrg	

Create individual letter using a template

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

xport per	son					×
∨on Mer	nber, Dr. Paul (mepa)					<u>0</u> K
Export of	only this address					
Create a	automatically a letter (m	aybe with	i ref.!)			
<u>R</u> eferen	ce:					Olivela a sud
	(Letter will be saved	l under thi	s name.)			<u>C</u> iipboard
Use this	draft for the letter:					
Empty.c	docx			22.10.18		
PC CAE	tion I.DUC DIF - Club empty letter	DOC		17.12.04		<u>S</u> et up
_PCC_E	BRF.DOC			17.06.97)
2	File: D	:\PCCAD	DIE\TEM	PLATE\	F2	
~	Get new draft	F9	0	Edit draft	F7	
(2)	Open draft file	F6		Open letter file	F4	
	to existing file		Eami	lies together		Cancol
	shite existing me		i i ann	nee redemen		Cancel

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:

Info: PC CADDIE - Club enpty letter.DOC	×
Address: mepa Member; von, Dr. Paul Contact person: Select €3 Project: F4 Category Letter, general	 ✓ <u>O</u>K FI2 ✓ Save F11 ✓ Done F9
Subject: PC CADDIE - Club enpty letter.DOC	🗀 Project
1234 Example (Families together)	<u>C</u> heckback <u>Answer</u> <u>Stamp</u>
▼ ▼	● 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	Private F5 Private
Eor: Status: Otodo Erom: Timo Tester	
<u>C</u> reated: <u>C</u> hanged: Show in <u>s</u> taff timetable ▼ New entry	
Attachment C:\Users\monstruletul\Documents\an PC CADDIE\Member, von, open attachment F6 open address F7	X Cancel

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*.

Person: Schmedding	J Software Systeme GmbH, Benedikt Schmedding	×	Info: 18
-Name			memo todo contact person Contact general overview correspondence E-Mail Changes to the data Search
Firm	Schmedding Software Systeme GmbH	Y Filter F12	Contact Pers :@ANSP
Head person	Title Addr.(Pers.)	🔶 <u>N</u> ew	PAN A Generation PAN 5 Cysterio Money
2	First name Benedikt	✓ Save F11	griefen of grindel, Cosmela
	Name Schmedding	× Delete F5	SAME OF DRV INTERNATION
<u>S</u> tatus <u>1</u> st A	ddr. <u>E</u> xtras payment Inf <u>o</u> s Memo	📀 Copy F6	PANETO CONTRACTOR AND A C
Belonging to	18:Rosemarie Quickert, Anja Arens, A	Sccount	1011 12 Thouland, Michael
Family status	1 - Individual	Print F8	EAM 15 Cochandi Jacovista EAM 15 Cochandi Jacovista
Street	Hertensteinstrasse 122	Export	
Postbox		SMS	FAM 12 OSonntag, Stephanie FAM 18 OSonkie Steranie
Postcode	CH 6353 Town Hertenstein		
Telephone	+41-41/3927080	Card	
Mobile		Close	
Fax	+41-41/3927089		
		Discount	
e-mail	info@pccaddie.com	Discount	
www	www.pccaddie.com	Quit	

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

Choose contact person		×	
Which contact or which addre used?	Which contact or which address should be used?		
Individual selection	Automatic	X Cancel	
Schmedding Software Systeme GmbH	. Benedikt Schmedding		
Don't print contact person			
8 Birekoven his (+41-41/39270-80, iris@peccade b leck evel 11 (+49-700/22213-41, apack@ne	letcom) resuluire com)		
1 Hertel, Andreo, SP (+49 700/72233 43:off-cup	caddia.com)		
Hodel Camera, 3P (eq. 51/2427) 12, ch@pr Infime (e48-700/7223) 42, support@macandia	cadelie.com)		
in Follow in Manuela, SP (+41-41/29270) by mile	2pecaddie.com)		
Matthys, Sandra, SP (141–41/9807000 million	addie comi cedidie.comi		
Muser Daniel, FC(+49-/09/7223-41, chitopre	caddie.com)		
& Otherhold, Frankrik, SP (149-700/79733-05 m			

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

xport person	×
Schmedding Software Systeme GmbH, Benedikt Schmeddii	<u>м ок</u>
Export only this address Create automatically a letter (maybe with ref.)	
Reference:	Clipboard
Use this draft for the letter:	
Empty.docx 22.10.18 Happy New Year.doc 23.10.18	Setun
PC CADDIE - Club empty letter.DOC 22.10.18 Test.odt 23.10.18 _PCC_BRF.DOC 17.06.97	
File: D:\PCCADDIE\TEMPLATE\	
🔶 Get new draft F9 📀 Edit draft F7	
😂 Open draft file F6 😂 Open letter file F4	
☐ Attach to existing file ✓ Families together	X Cancel

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

Schmedding Software Systeme GmbH	
att. of Sir Benedikt Schmedding	
Hertensteinstrasse 122	
6353 Hertenstein	
SWITZERLAND	
Telephone: +41-41/3927080	
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.

PCCADDIE											_	<u> </u>	<
Goo → 📜 🕶 Computer	▼ Local Disk (D:) ▼	PCC	CADDIE 🔻				- [5 Search	h PCCAE	DIE		2	2
Organize 🔻 🚞 Open	Include in library	•	Share with 🔻 🛛 Burn	New folder							•	0	
🚴 monstruletul		Nam	ne 🔺		Date modifi	ed	Туре		Size			-	
Computer	-		ATTACHED		22.10.2018	3 15:14	File folder						
Local Disk (C.)			DATEN		22.10.2018	3 15:21	File folder						
Sdi8426a7e987	0440426700		DRUCKER		21.11.2016	5 20:07	File folder						
1	bb4c520784		FONTS		22.07.2015	5 16:11	File folder						
- Di Adis			FTP		22.07.2015	5 16:11	File folder						
Lan PC CADDIE			GRAPHICS		19.02.2018	3 12:46	File folder						
The Anome	and the second sec		HTML		29.08.2018	8 19:04	File folder						
books			IMPORT		26.09.2018	8 11:21	File folder						
Buletine			INDEX		15.10.2018	8 14:08	File folder						
e870e6409a11d	ee3d3		INFO		22.07.2015	5 16:11	File folder						
chi Emi			INTRANET		22.10.2018	8 09:49	File folder						
miFromC	-		LEADER		25.07.2016	5 16:19	File folder						
- Comes			MAIL		22.07.2015	5 16:11	File folder						
mails			MAILMERGE		22.10.2018	3 14:40	File folder						
in My eBecks			Mustermann	Date created: 22.07	29.09.2018	18:15	File folder					_	
MyterstAppTest			PICTURES	Size: 57,0 KB	.2013 10.11	12:56	File folder						
			SERVICE	Folders: test, test\$, Files: Circular, Test	tito, tito\$	14:39	File folder						
PCCADDIE Photos			SERVICES		16.10.2018	10:33	File folder						
			SICHER01		19.02.2018	8 12:38	File folder						
Program Files			SICHER02		02.10.2018	3 11:26	File folder						
Program Files (x8			SICHER03		19.02.2018	3 12:37	File folder						
(core)(1)(S)		• ル	TEMPLATE		22.10.2018	3 15:11	File folder						•
MAILMERGE File folder	Date modified: 22.	10.20)18 14:40										

Save template only visible for certain users

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

Export person	×
von Member, Dr. Paul (mepa)	✓ <u>Q</u> K
Export only this address Create automatically a letter (maybe with ref.!) Reference:	Clipboard
Use this draft for the letter: Empty.docx 22.10.18 Information1.DOC 17.12.04	Setup
PCCADDIE - Club empty letter.DOC 17.12.04 _PCC_BRF.DOC 17.06.97	
File: D:\PCCADDIE\TEMPLATE\	
🔶 🚺 Get new draft 🛛 🕞 🔷 Edit draft 🕞	
🗀 Open draft file F6 🞑 Open letter file F4	
Attach to existing file Families together	X <u>C</u> ancel

1. get new template



2. select the template

New draft	×
Where do you get the new draft from? D:\PCCADDIE\TEXTE\TI000001.docx	
How do you want to name the new draft? TI000001.docx	X <u>C</u> ancel
Assigne to this category:	
Save this draft privat for this user	
Edith the new draft afterwards	

- 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):

	Functions for Letter Templates	Select the field		×		
	Edit your letter template in Word! The following options help you create a form letter with special functions:		Typ: Personen Felder STAMMVORG GRUPPE		✓ <u>Q</u> K	
«ADDRESS1»	🔶 Insert address field at cursor position		INFO1 INFO2			
«ADDRESS2»	Insert date field at cursor position		INF03 INF04			
«ADDRESSEXTRA»	Insert salutation field at cursor position		INF06 INF07			
«ADDRESS1» «ADDRESS2»	Insert other field at cursor position		INF08 GESCHLECHT MERKMAL1 MERKMAL2			
«COUNTRY»	S Merge to new document		MERKMAL3			
	2 Send mail merge to printer		CLUBNR CLUBCO			
«ADDRESS4»	Save and close letter template		MAIL1 MAIL2	•		
«ADDRESS3»	Close this helper function					
Please check if you	are using the box <mark>«INFO2».</mark>					