Create a Single Document

In th s tutor al we w ll create a document for a s ngle contact from the template 'Blank Letter - Contact Address'. Th s template w ll nsert the contact's name and address deta ls.

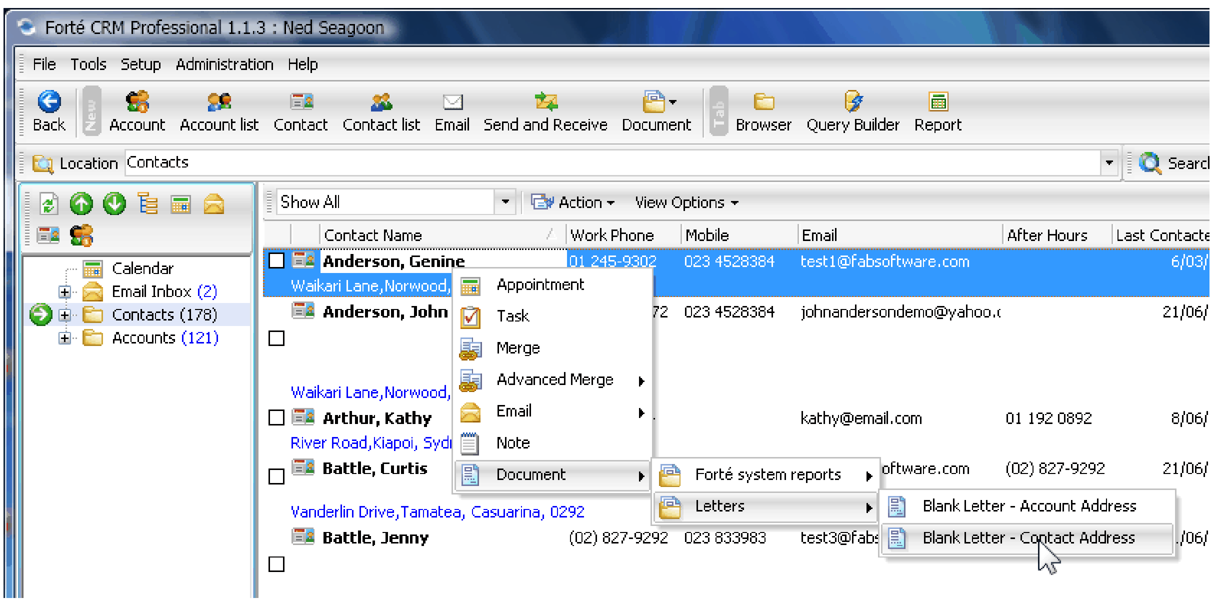
Step 1: Select the Contact and Document Template

Th s can be done n one of the follow ng ways:

M th d 1

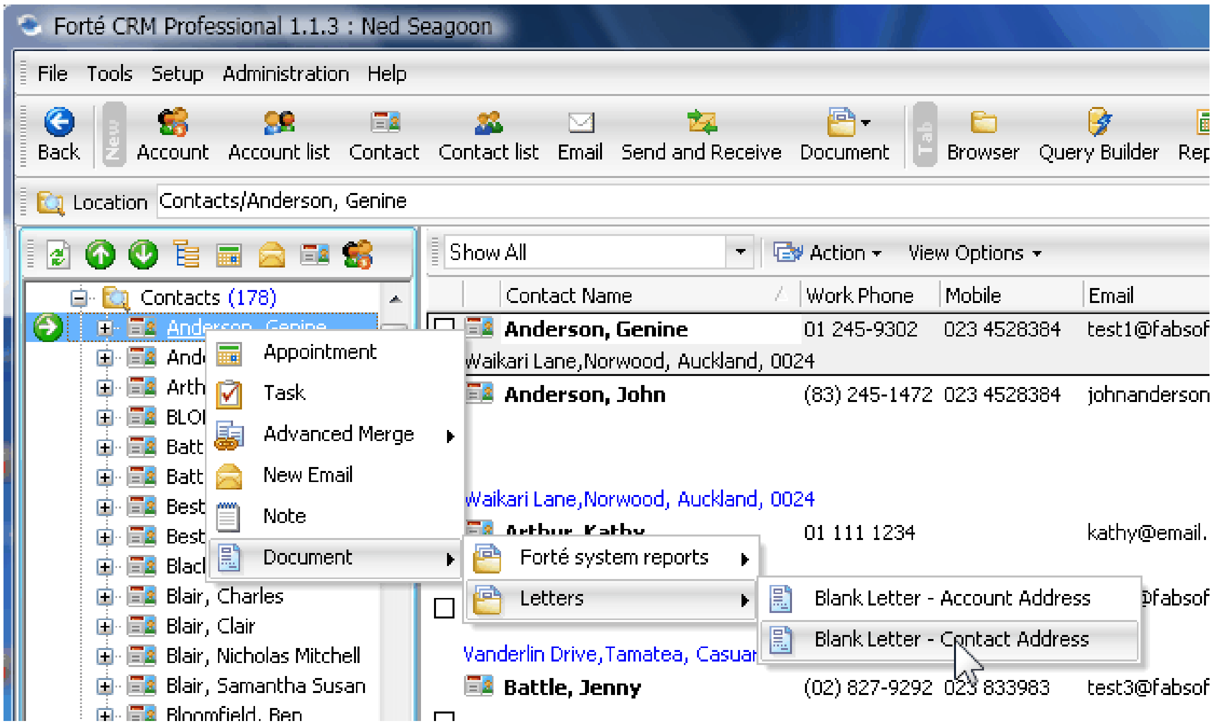
- Cl ck on Contacts n the treev ew. The gr d of contacts w ll be shown n the r ght hand v ew ng pane.
- Scroll down the gr d and r ght cl ck on the des red contact.
- Select Document and nav gate to the Blank Letter - Contact Address template.

The mage below shows select ng the template for the contact **G n n   And rs n** from the contact gr d.



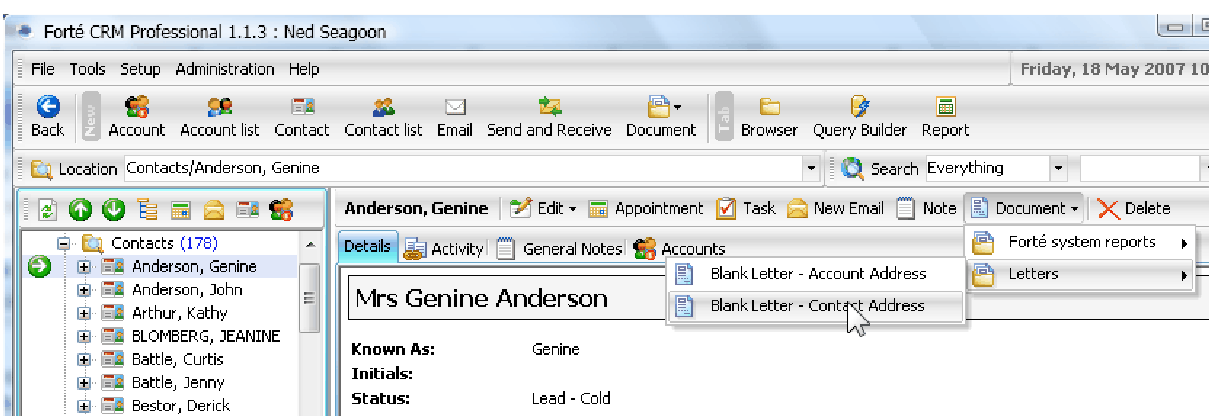
M th d 2

- Expand the Contact folder n the treev ew to reveal the contacts by cl ck ng on the '+' symbol.
- R ght cl ck on the contact des red contact.
- Select Document and nav gate to the Blank Letter - Contact Address template.



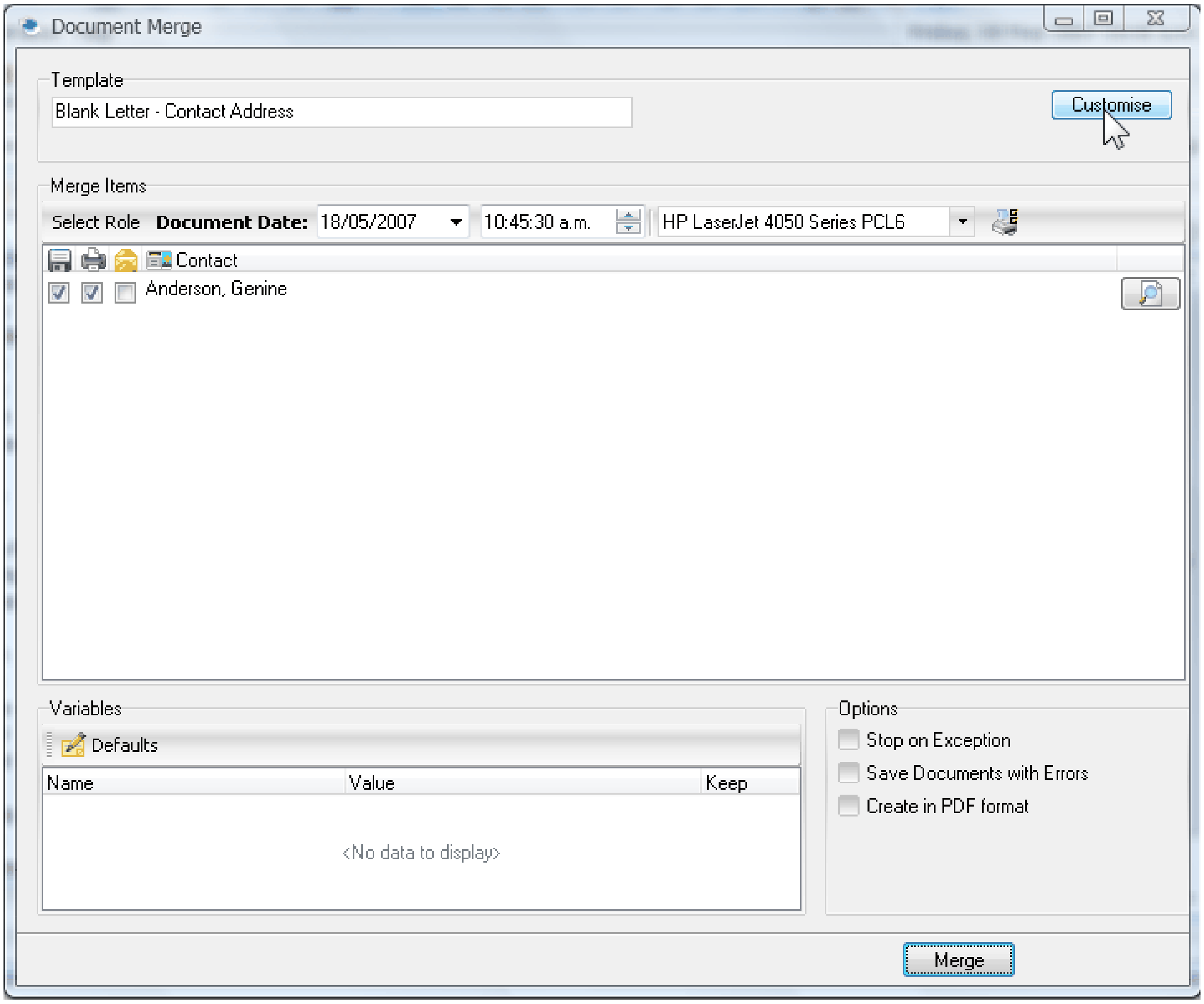
M th d 3

If the contact deta ls are v s ble n the r ght v ew ng pane (e ther by cl ck ng once on the contact n the treev ew, or by double cl ck ng on the contact n the gr d) then the document template can be found by cl ck ng the Document button and nav gat ng the menu to the Blank Letter - Contact Address template.



Step 2: Customise the Output

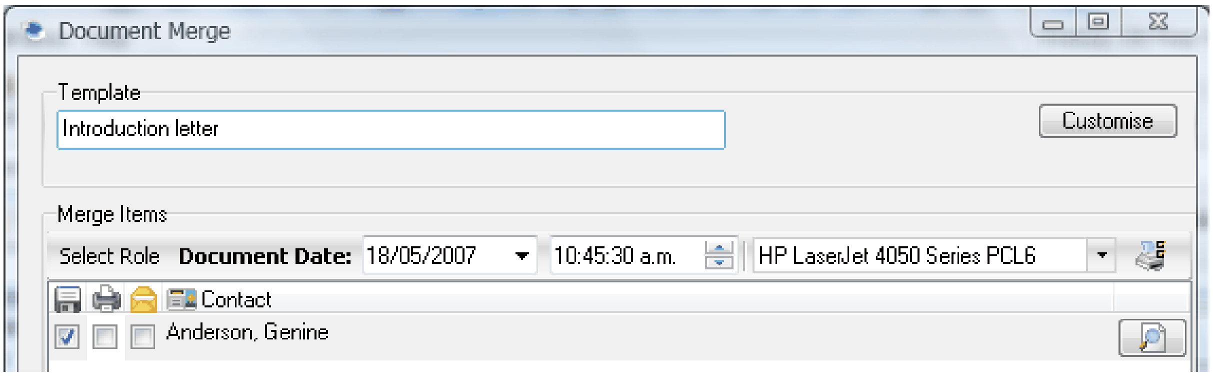
After the document template has been selected as descr bed n Step 1, the Document Merge w ndow w ll appear.

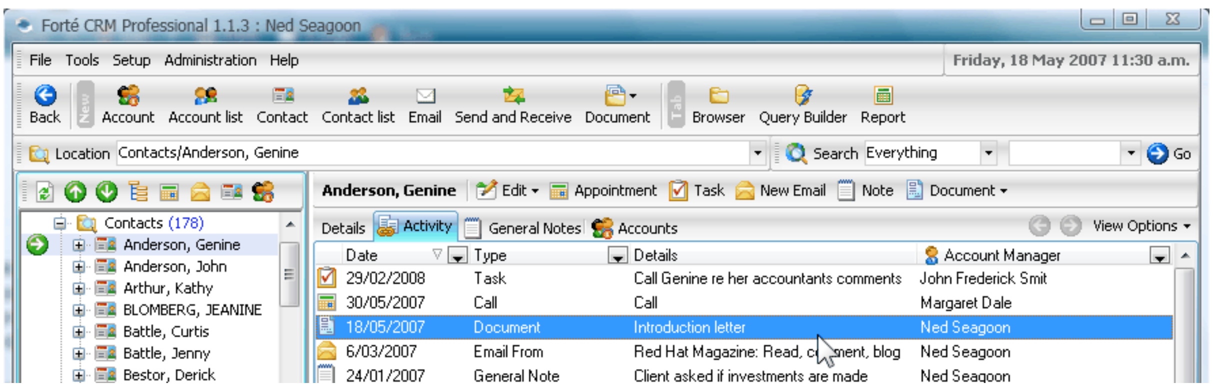


Var abl s
Some templates may have var ables def ned. These are values that are set at the t me of document creat on, and replace the correspond ng merge symbols n the document. Var ables nclude th ngs l ke start date and currency type. Var ables are ava lable for ed t ng at the bottom of the Document Merge w ndow. You can revert to the default values by cl ck ng on the 'Defaults' button. The letter template we are us ng n th s example does not have any var ables def ned.

D cum nt T tl

The document w ll be created w th the t tle that s entered n the 'Template' f eld at the top of the Document Merge w ndow. Th s w ll be the name of the document as shown n the contact's act v ty l st. Ed t th s f requ red so that the document s eas ly dent f ed. As the Blank Letter - Contact Address template s a general letter layout w thout any text, and we are wr t ng an ntroduct on letter, the t tle of the document has been changed to 'Introduct on Letter'. If you have set up a template for a standard Introduct on Letter th s template would be used nstead and the document t tle would not requ re chang ng.

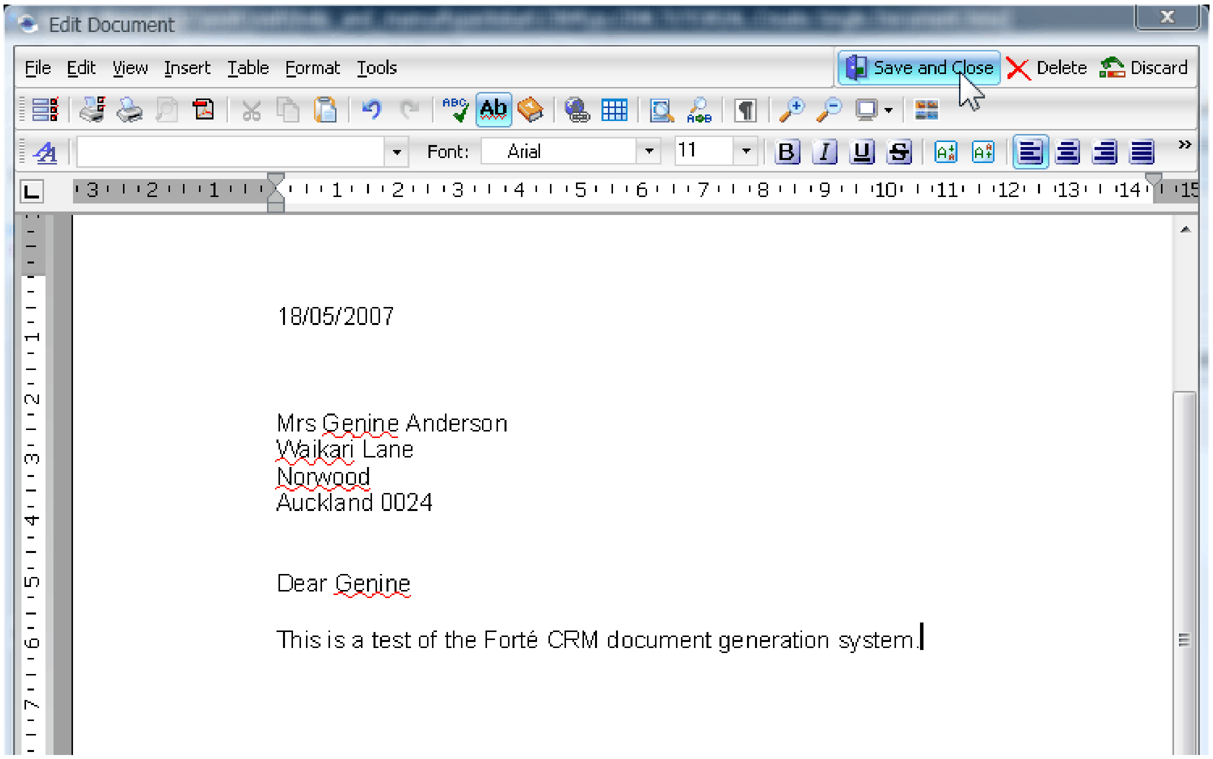




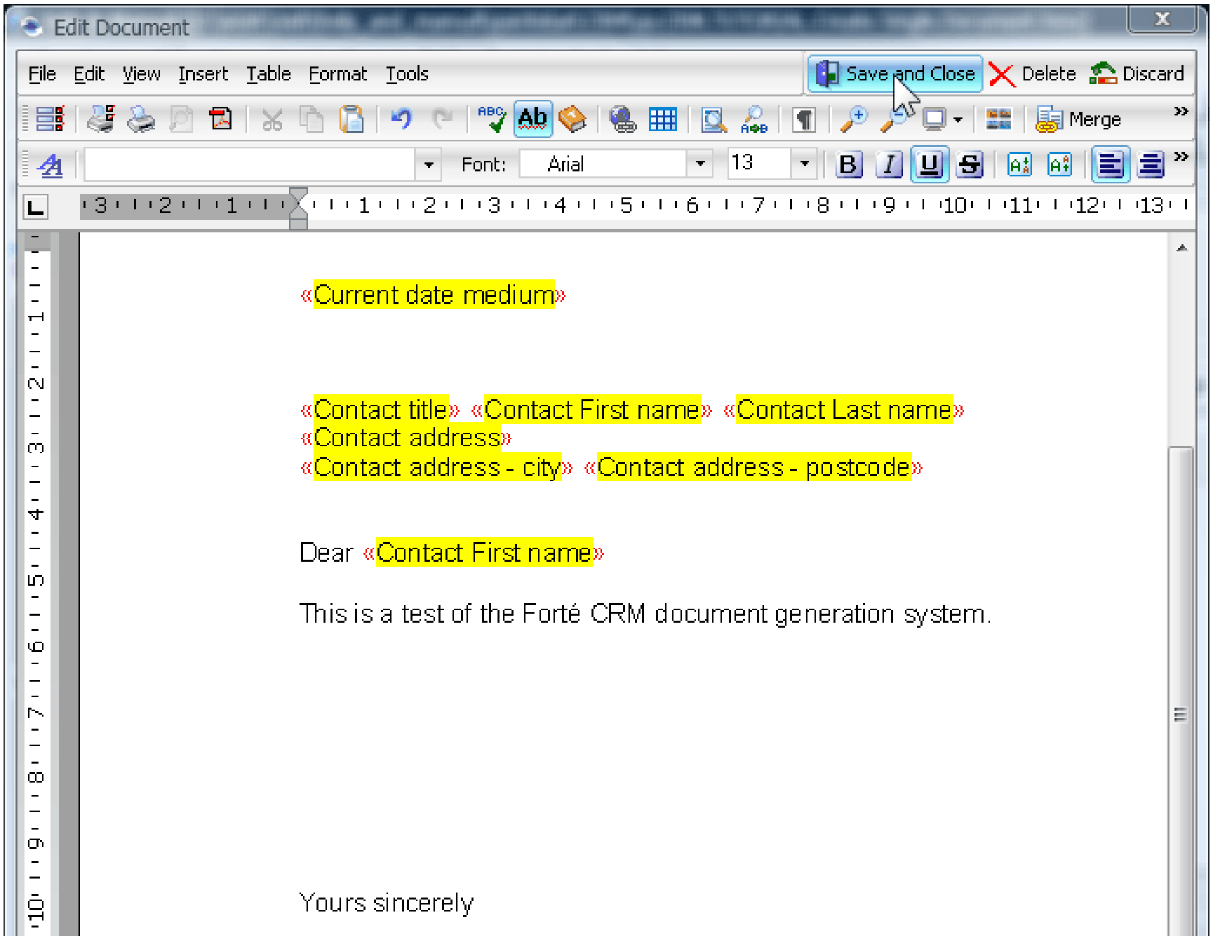
D cum nt C nt nt
As the template 'Blank Letter - Contact Address' conta ns no text, the output needs to be custom sed. Depend ng on the content of the template be ng used th s step may not be requ red. There are two ways the output may be custom sed.

M th d 1 (recommended)

Cl ck the prev ew button  and a w ndow w ll appear w th the deta ls of the selected contact merged nto the template. Make the requ red changes and cl ck 'Save and Close'.

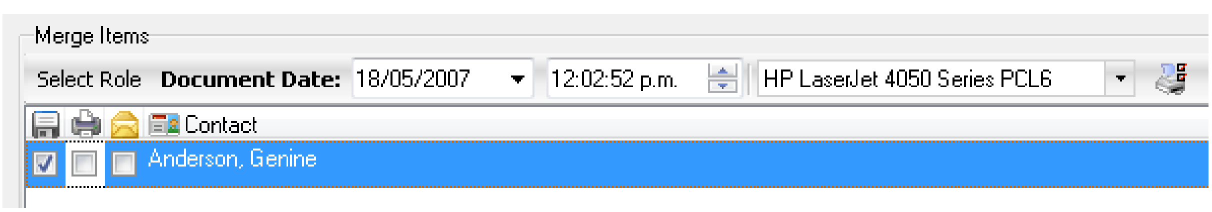


M th d 2
To alter the template cl ck 'Custom se'. After the changes have been made cl ck 'Save and Close'. Note: the changes made to the template are only appl ed to the current ma l merge. The template s not permanently changed. Th s method s more useful when perform ng a ma l merge for more than one contact as the template s mod f ed for all contacts n the merge.



Step 3: Save and Print the Document

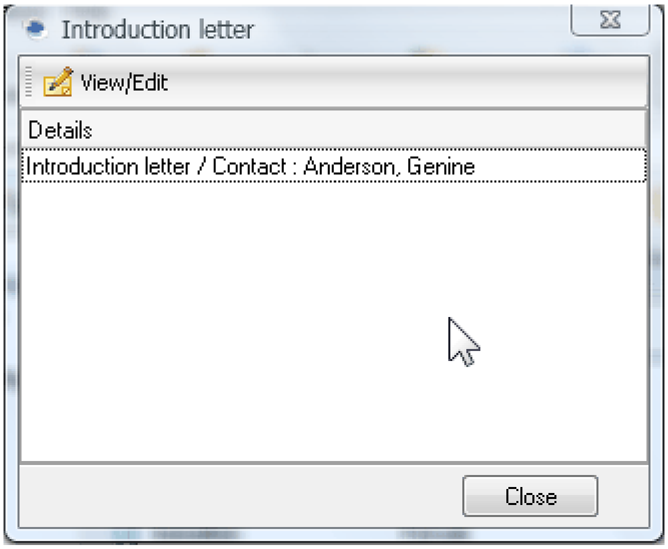
The f nal step s to pr nt and/or save the document. To save the document n the contact's act v ty l st, t ck the save column next to the contact's name. If you w sh to pr nt the document t ck the pr nt column . Select the pr nter from the drop down box at the top of the Document Merge screen. The pr nter propert es can be set by cl ck ng the con next to the pr nter select on.



Cl ck the Merge button n the bottom r ght of the w ndow to create/save/pr nt the document.

Report Manager

After the document has been created the Report Manager w ndow w ll appear. Th s l sts all the documents created n the merge. In th s case only one document w ll be l sted.



The report manager can be accessed at anyt me from the ma n Forté menu by select ng Tools → Report Manager. The report manager l sts the most recent merges.