

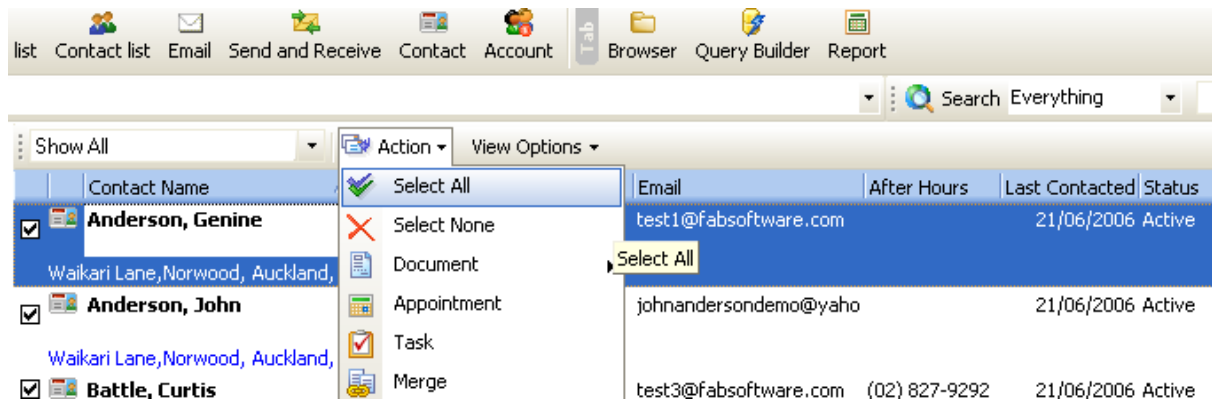
Mail Merge

Mail merging involves generating output documents (letters or reports) from a document template where the merge symbols (eg. address) are replaced with actual data. In Fort CRM merge symbols are not limited to text—the can also be used to generate tables, graphs and charts.

In this tutorial we will create a report for selected contacts using the 'Asset Allocation Bar (landscape)' document template.

Step 1: Select Contacts or Accounts

- Click on Contacts in the tree view so that the grid lists all contacts. You can filter this list using the filter functions at the top of the list. Accounts can be selected for the mail merge instead of contacts.
- Check the box beside the name of each contact that the document is to be generated for. If you wish to create a document for all contacts or accounts, click on 'Action' then 'Select All' from the top of the list.



Step 2: Select Document

- Choose 'Act on', then 'Document' and select the document required for the merge. The Document Merge screen will be displayed.

Document Merge

Template: Asset Allocation Bar (landscape) Customise

Enter the text you want to appear in the activity list Click 'Customise' to customise the template for this document run only

Merge Items

Select Role **Document Date:** 5/03/2007 11:00:26 a.m. EPSON Stylus CX5900 Series

Account

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Anderson Genine	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Anderson John	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Anderson, J & G	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Battle CD & JK	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Battle Curtis	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Battle Jenny K	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Bestor DH & T	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Bestor Derrick H	

Click these buttons to customise the output of each individual document as required

Variables

Defaults

Name	Value	Keep
Please enter an End date	5/03/2007	<input type="checkbox"/>
Include in-action transactions	Yes	<input type="checkbox"/>
Include proposed transactions	No	<input type="checkbox"/>
Include sub-accounts	No	<input type="checkbox"/>

Options

Stop on Exception

Save Documents with Errors

Create in PDF format

Merge

Step 3: Customise the Output

Document Title

The name of the template is shown at top left. This will be the title of the merge document as shown in the activity list of contact or account. This name can be changed if required, and the document will be named accordingly when merged. The original template name will remain unchanged.

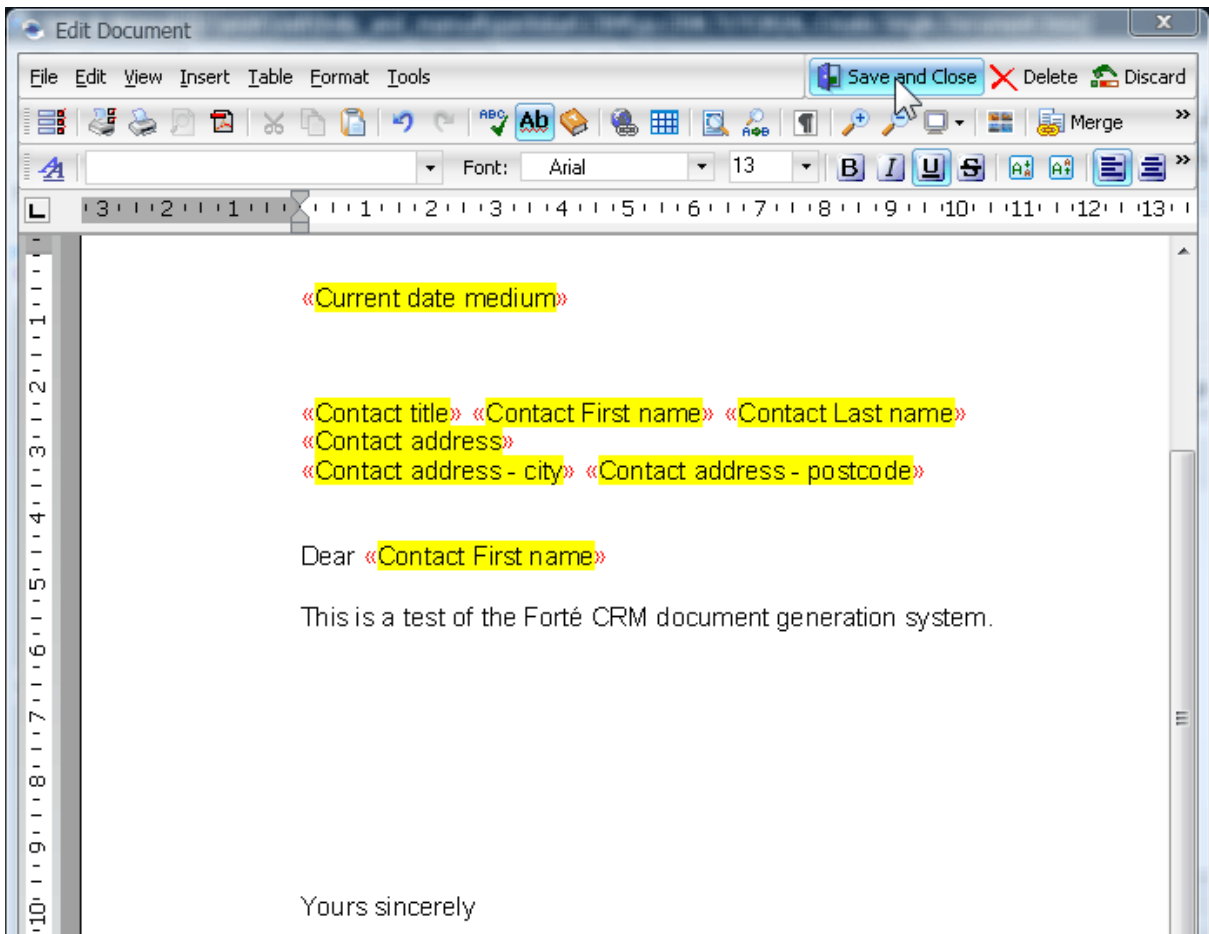
Variables


Variables are values or options, such as end date, that are set at the time of document creation (merge). If any of the merge symbols have variables or options, these are available for editing at the bottom of the screen. You can revert to the default values by clicking the 'Defaults' button.

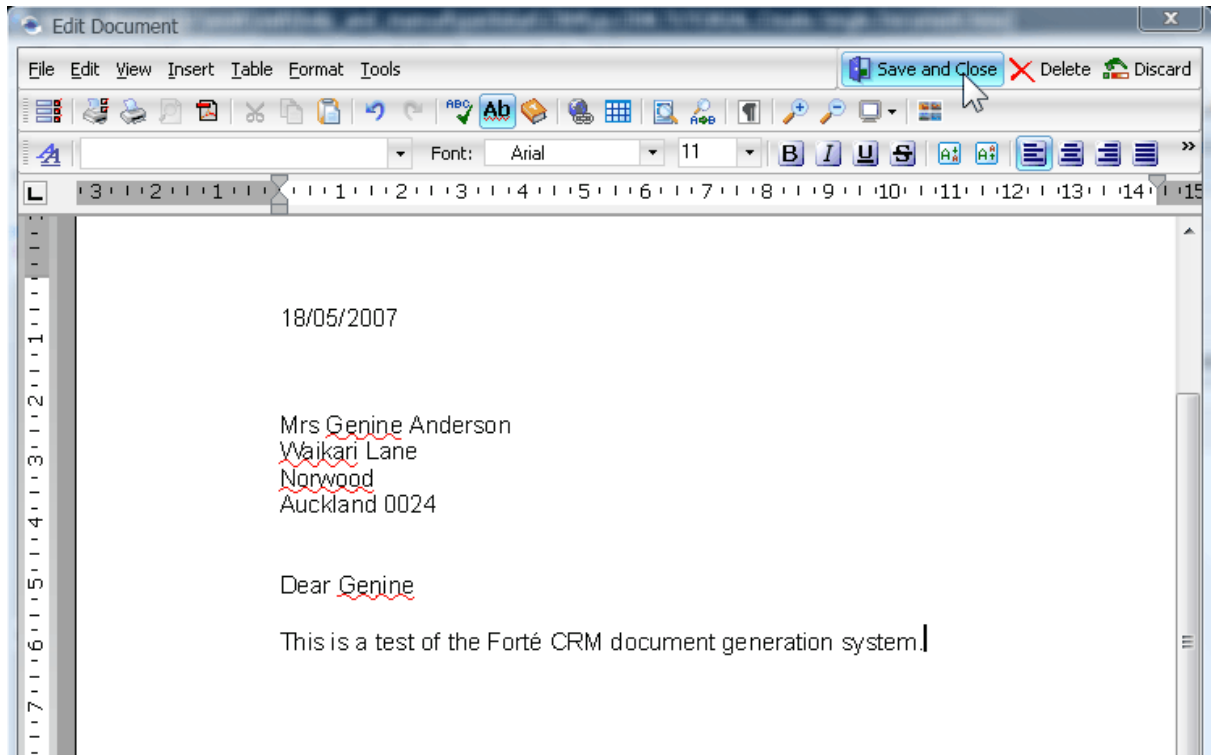
Document Content

A list of account/contact combinations that this letter or report has been created for will be shown. The output can be customized for individual contacts or accounts or for all documents in the merge.


Click the Customise button if you wish to edit the document template or add new merge fields before merging. These changes will apply to all documents in the merge. Note: the changes made to the template are only applied to the current mail merge. The template is not permanently changed. Make the required changes and click 'Save and Close'.




To edit individual documents in the merge, select the required contact or account and click the 'Preview' button  on the far right. A window will appear showing the document with details from the selected contact or account merged into the template. The document can be edited. Make the required changes and click 'Save and Close'.




Step 4: Save and Print the Documents

To save the document in the active list for each contact or account, click the  save column.

To print the document, click the  print column. The email feature has not been implemented yet.

Note Clicking the desktop printer icon will tick or untick all items in the list.

Select the required printer from the drop down box at the top of the Document Merge screen. The printer properties can be set by clicking the icon  next to the printer selection.

Click the Merge button to create, print and save the document for each selected contact or account.