Mail Merge

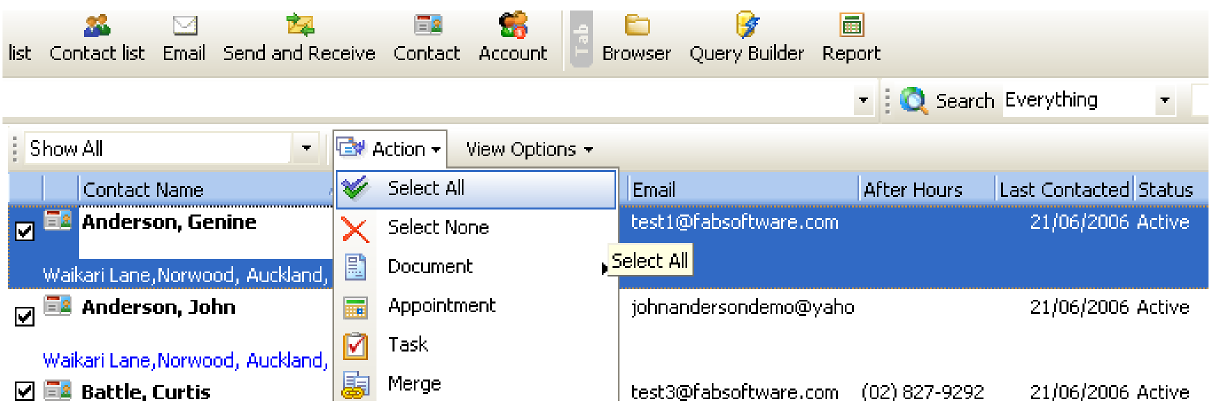
Ma l merg ng nvolves generat ng output documents (letters or reports) from a document template where the merge s mbols (eg. address) are replaced w th actual data. In Fort CRM merge s mbols are not l m ted to text—the   can also be used to generate tables, graphs and charts.

In th s tutor al we w ll create a report for selected contacts us ng the 'Asset Allocat on Bar (landscape)' document template.

Step 1: Select Contacts or Accounts

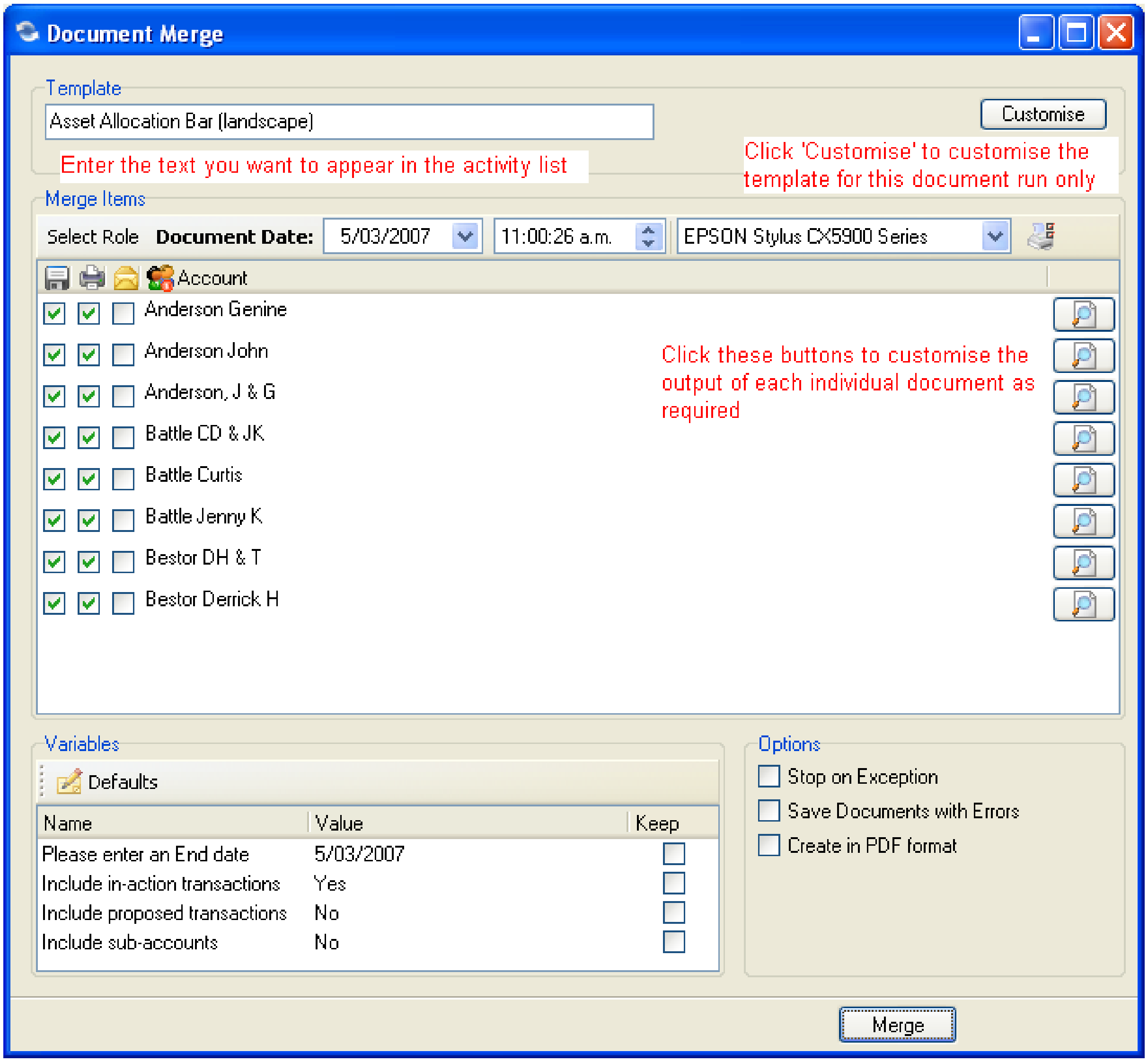
- Cl ck on Contacts n the treev ew so that the gr d l sts all contacts. You can f lter th s l st us ng the f lter funct ons at the top of the l st. Accounts can be selected for the ma l merge nstead of contacts.

- Check the box bes de the name of each contact that the document s to be generated for. If   ou w sh to create a document for all contacts or accounts, cl ck on 'Act on' then 'Select All' from the top of the l st.



Step 2: Select Document

- Choose 'Act on', then 'Document' and select the document requ red for the merge. The Document Merge screen w ll be d spla ed.



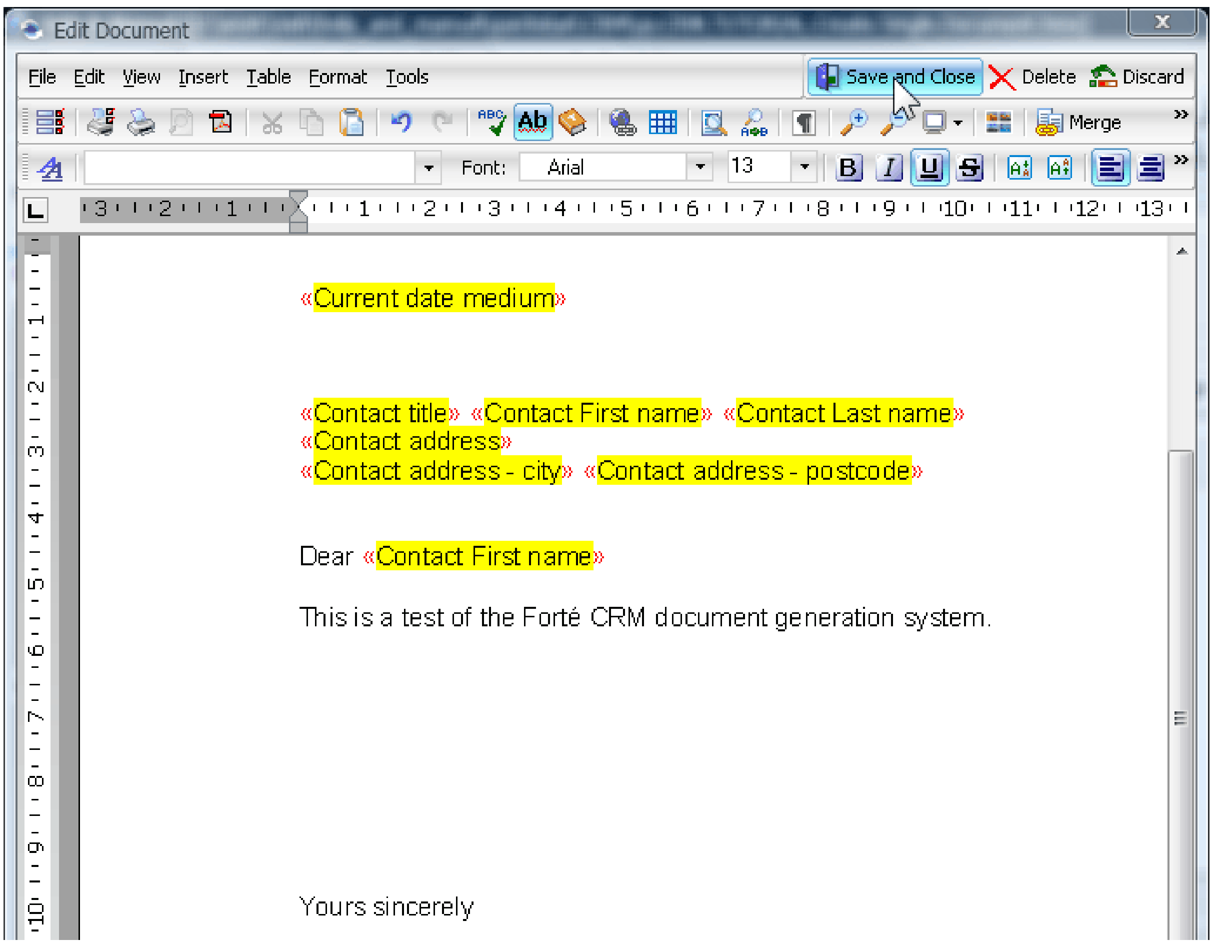
Step 3: Customise the Output

D   um nt T tl
The name of the template s shown at top left. Th s w ll be the t tle of the merge document as shown n the act v t   l st of contact or account. Th s name can be changed f requ red, and the document w ll be named accord ngl   when merged. The or g nal template name w ll rema n unchanged.

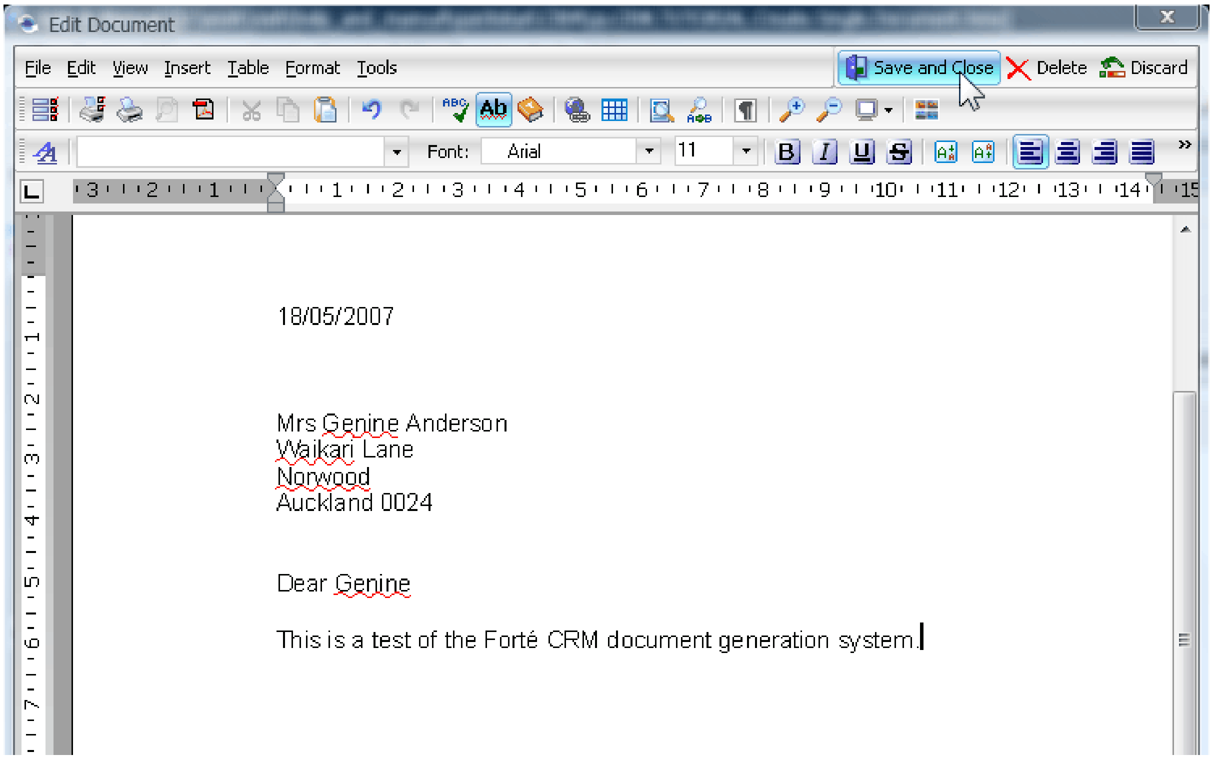
Var abl s
Var ables are values or opt ons, such as end date, that are set at the t me of document creat on (merge). If an of the merge s mbols have var ables or opt ons, these are ava lable for ed t ng at the bottom of the screen. You can revert to the default values b cl ck ng the 'Defaults' button.

D um nt C nt nt
A l st of account/contact comb nat ons that th s letter or report has been created for w ll be shown. The output can be custom sed for nd v dual contacts or accounts or for all documents n the merge.

Cl ck the Custom se button f ou w sh to ed t the document template or add new merge f elds before merg ng. These changes w ll appl to all documents n the merge. Note: the changes made to the template are onl appl ed to the current ma l merge. The template s not permanentl changed. Make the requ red changes and cl ck 'Save and Close'.



To ed t nd v dual documents n the merge, select the requ red contact or account and cl ck the 'Prev ew' button on the far r ght. A w ndow w ll appear show ng the document w th deta ls from the selected contact or account merged nto the template. The document can be ed ted. Make the requ red changes and cl ck 'Save and Close'.



Step 4: Save and Print the Documents

To save the document n the act v t   l st for each contact or account, t ck the save column.
To pr nt the document, t ck the pr nt column.
The ema l feature has not been mplemented   et.

N t   Cl ck ng the d sk or pr nter con w ll t ck or unt ck all tems n the l st.

Select the requ red pr nter from the drop down box at the top of the Document Merge screen. The pr nter propert es can be set b   cl ck ng the con next to the pr nter select on.

Cl ck the Merge button to create, pr nt and save the document for each selected contact or account.