

Document Manager



Word Mail Merge in Document Manager

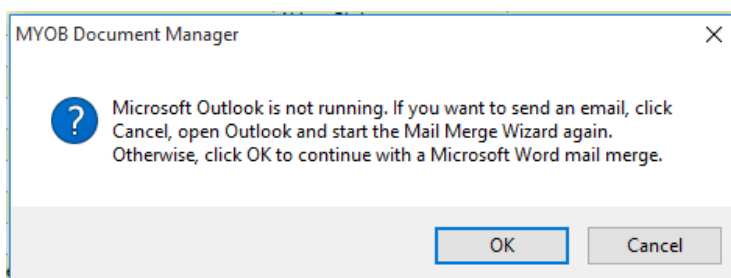
Version 5.4.27 and above

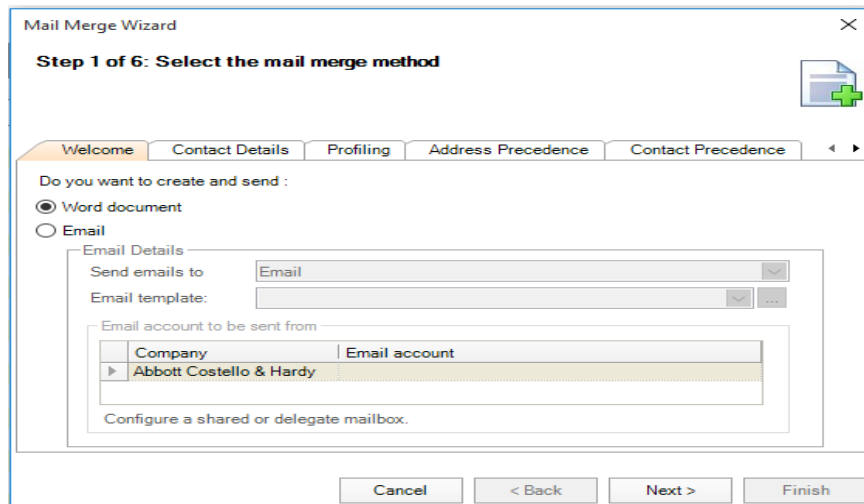
You can easily perform a mail merge from the Find Clients or Find Contacts views using the functionality provided by Document Manager.

Note that when Document Manager is installed, this mail merge functionality replaces the original mail merge functionality that was available.

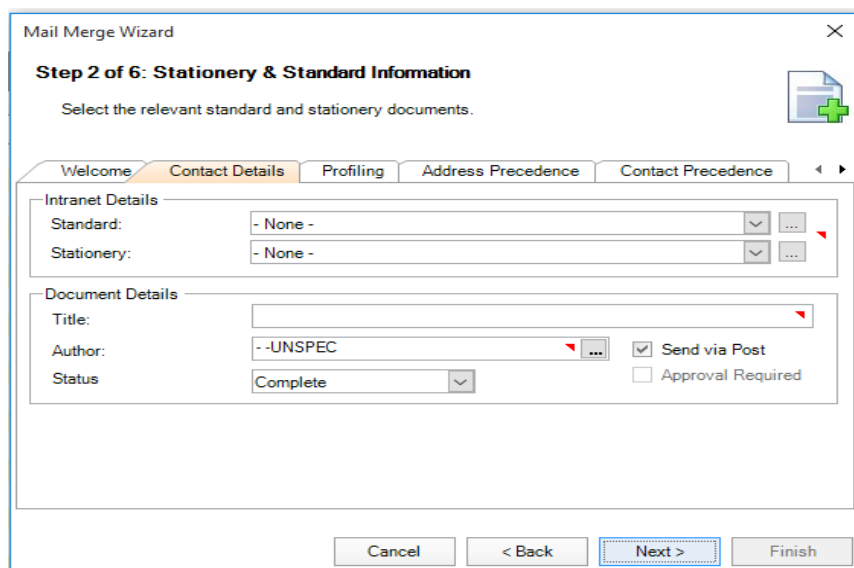
How to complete a mail merge

1. Use the Search functionality provided by the **Find Clients** or **Find Contacts** views to create a list of recipients associated with your mail merge.
2. Click the checkboxes to select clients/contacts to be included in the mail merge.
3. Click **Mail Merge Wizard** in the Documents menu on the Task Bar.
The following screen now appears if Microsoft Outlook is not running. As you are producing letters and not emailing you can just select **Okay**.



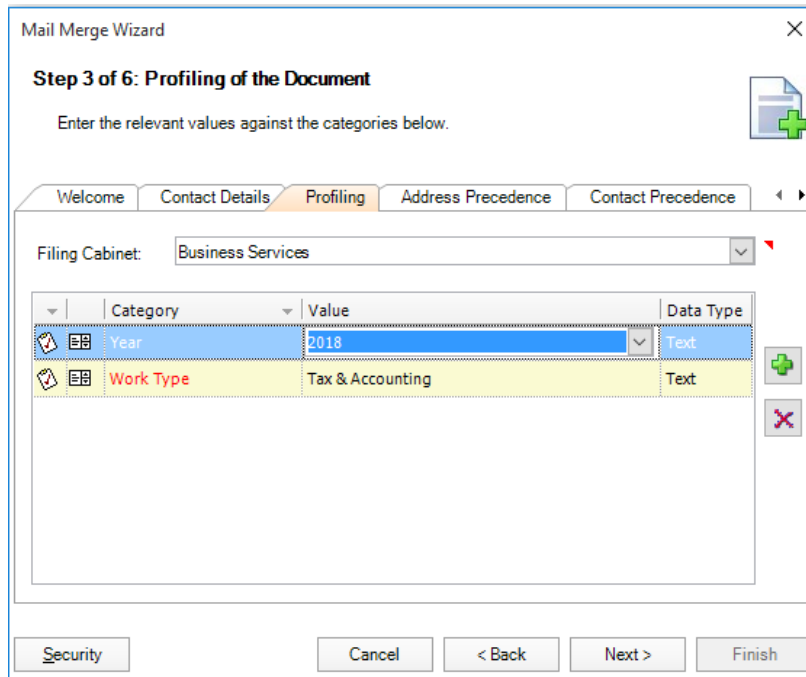


4. Step 1 of the Mail Merge Wizard is displayed.
5. Select **Word document** to print out a letter for each client.
6. Click **Next**.
Step 2 of the Mail Merge Wizard is displayed.

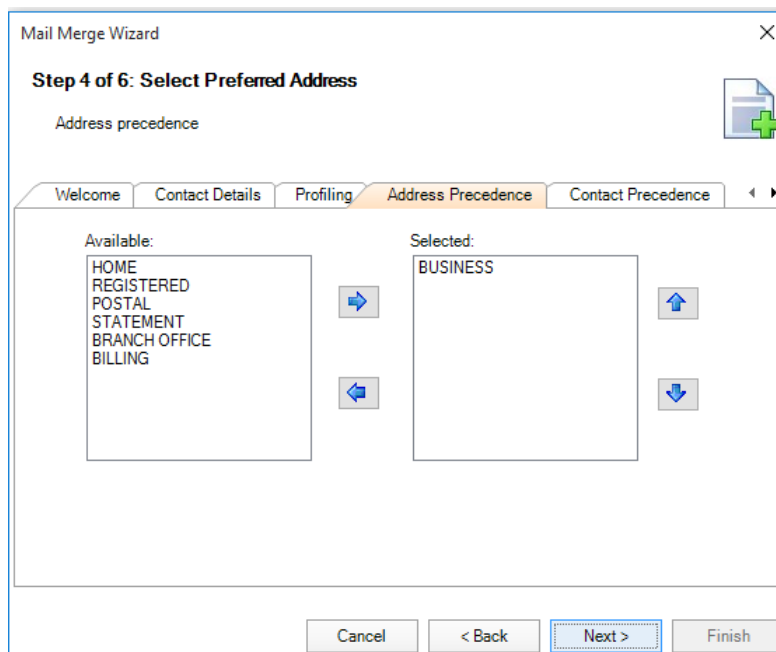


7. Select a **Standard item** from the drop-down list or use the ellipsis button to search for the item.
8. Select a **Stationery item** to apply a layout and format to the mail merge document, unless the Standard selected does not require one.
9. By default, the item's name will also populate the **Title field**. If required, edit the document name in the Title field.
10. Select the **Send via Post** check box, e.g. for a mail out, then click on the Next button.
Step 3 of the Mail Merge Wizard is displayed.

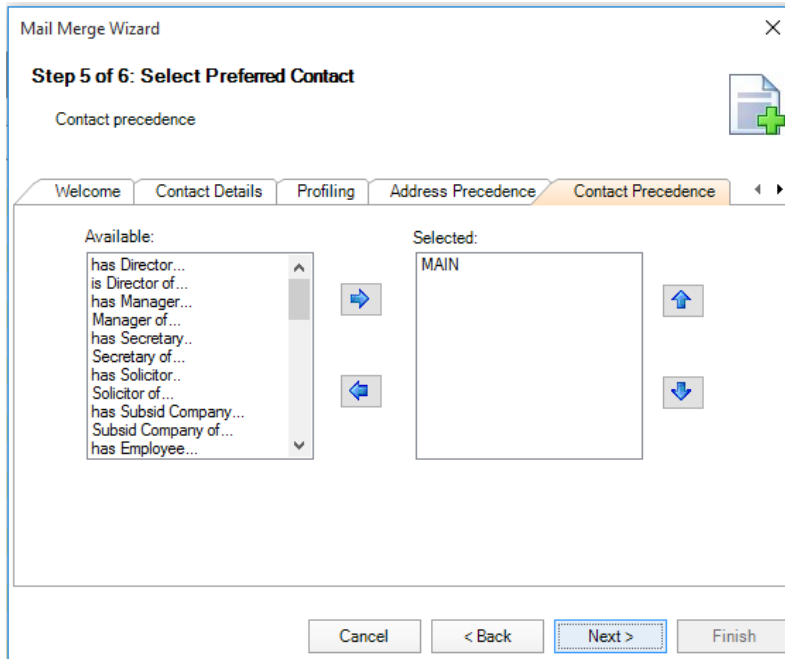
Note: By default, the **Send via Post** checkbox is ticked and **Status is Complete**, which are the recommended settings in this situation. If this checkbox is un-ticked, it means that the resulting mail merge documents are not displayed in the **Mail Centre** view after finishing the mail merge process. If the **Status** is changed to **In Progress** then they will all appear in the **My Outstanding Documents** view instead, and will need to be completed.



11. Select a **Filing Cabinet** from the dropdown list.
12. If Category items are displayed, enter values in the relevant fields if required, then click on the **Next** button.
Step 4 of the Mail Merge Wizard is displayed.



13. The system will default to your Primary address type. This can be changed if required by using the arrow buttons.
14. Select **Next** to continue.
Step 5 of the Mail Merge Wizard is displayed.

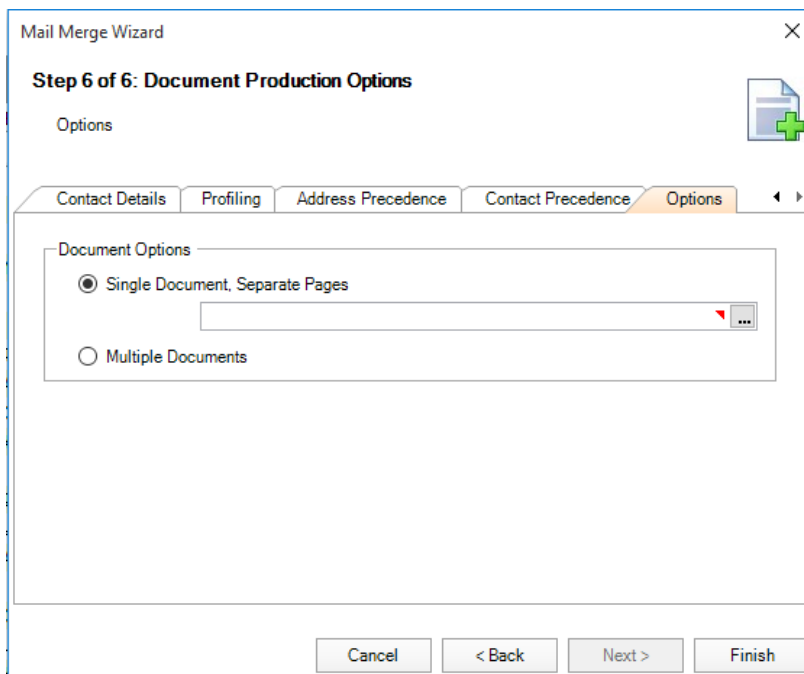


15. Select the contact precedence – the system defaults to Main.

Note: This can be changed to have another association type above MAIN – for example, “has mailing contact”, where the system will address the letter to that person at the company.

16. Click **Next**.

Step 6 of the Mail Merge Wizard is displayed.

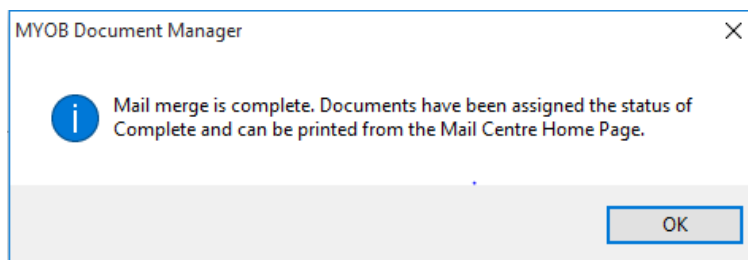


17. This step requires you to select either one of two options that determine how your mail merge documents are created and saved.

If you are creating a single document with separate pages saved against one contact or client, (e.g. against an administration “client” used for mailing labels), click the **Single Document Separate Pages** button, and then select the contact or client using the adjacent ellipsis button.

Alternatively, if you are creating multiple documents saved against the originally selected mail merge list, click the **Multiple Documents** button. This will create individual documents that will be saved to the individual client records.

When you have made the required selection, click **Finish**. Once all documents have been produced, the following window is displayed, providing you previously selected **Send via Post** in Step 2 of the wizard.



Click **OK** to close the window. Go to the **Awaiting Dispatch** view on the Mail Centre (from the drop-list under the Documents button), and it will display the documents available to be printed as required.