

## CRM Mail Merge using Gold and Microsoft ® Word

This document assumes some knowledge of Gold 6, CRM/Sales Prospecting, and Microsoft ® Word

### Creating a Basic Template

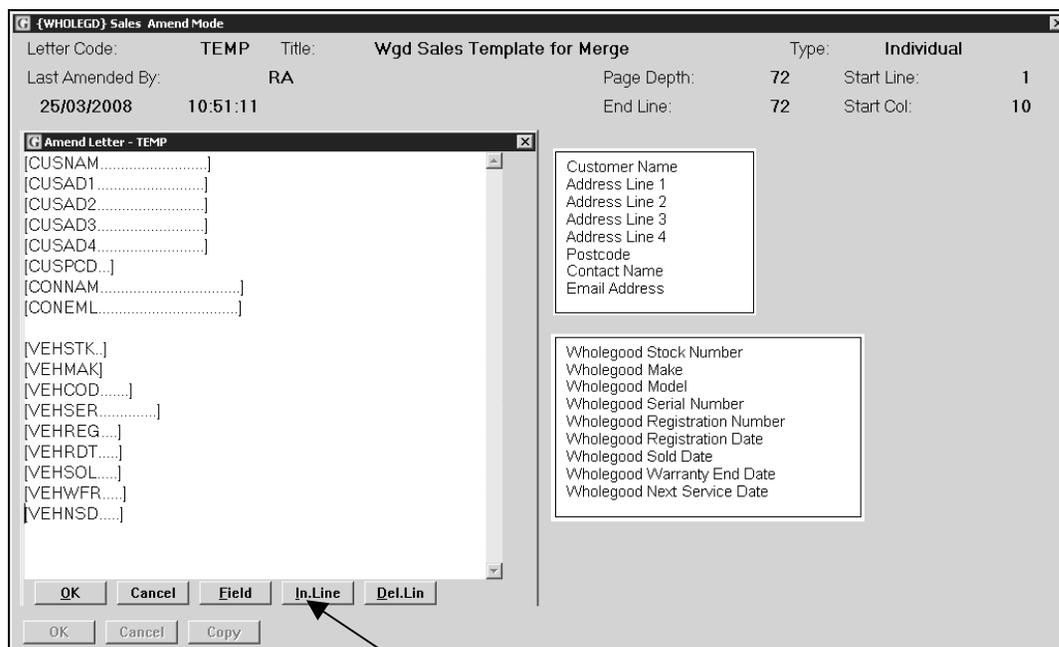
(CRM/Sales Prospecting, Create Mailshot Letter)

The template letter is made up of fields relating to customer data such as name and address, email etc and, if required, sales information such as wholegood sold date, service dates or warranty dates, workshop or parts sales information.

Select a letter type: **Customer/Prospect**  
**Serial Number Item**  
**Wholegood Sales**  
**Workshop Sales**  
**Part Sales**  
**Wholegood Competitive**

This example is based on Wholegood Sales.

The template does not need to include any letter text as this will be created in Microsoft Word.



Add all required fields using the “Field” button.

### Mailshot Extract

(CRM/Sales Prospecting, CRM Extract / Print Mailshot)

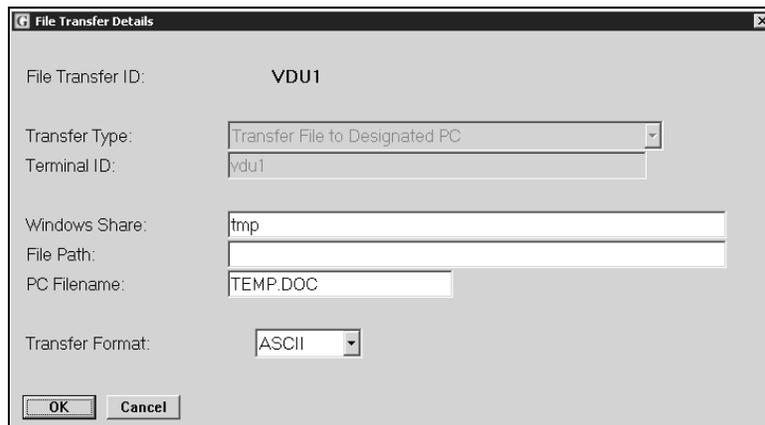
Create a mailshot extract using the template letter created.

Ranges may be entered to restrict the mailshot to, for example, a range of wholegood sold dates, warranty end dates or service dates.

Once the extract has been created, the option to "Export to PC" should be selected.

The Extract file must be exported with a file name \*. doc, (e.g. **TEMP.DOC**).

The standard Gold file export options are used to export the file to pc. In this example: to a designated PC.



File Transfer ID: VDU1

Transfer Type: Transfer File to Designated PC

Terminal ID: vdu1

Windows Share: tmp

File Path:

PC Filename: TEMP.DOC

Transfer Format: ASCII

OK Cancel

A file TEMP.DOC will be created in the tmp directory of the specified pc.

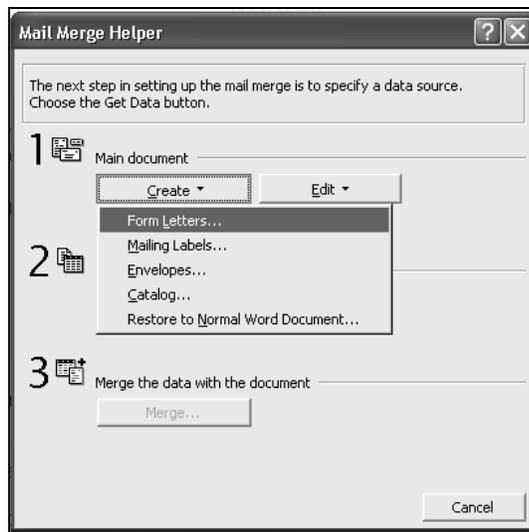
## Creating a Mail Merge letter in Word

1. Create a letter to be sent to new Wholegood Customers. Initially this will contain no Mail Merge fields, but it is useful to mark their positions in the letter. In the example, they are shown in *italic* text, but this is not necessary.

<b>The New Tractor Company</b> <b>Newtown</b>		
Phone 12345		
<i>Name</i>		
<i>Ad1</i>		
<i>Ad2</i>		
<i>Ad3</i>		
<i>Ad4</i>		
<i>Postcode</i>		
		April 2008
Dear <i>Contact</i>		
<p>We are writing to thank you for your recent purchase of the Wholegood as shown in the table below. We hope that you are pleased with your purchase, and should you have any queries or comments regarding the new machine, please do contact our sales team on 01333-747474.</p>		
<p>We would encourage you to make sure the machine has its first service as shown in the owners' manual, if that has not already been done. Should you have any matters outstanding that are covered by the warranty please do contact our Service Department on 01333-747472, so that we can attend to them.</p>		
Date of Sale	Item/Model	Serial Number
<i>DD-MMM-YYYY</i>	<i>XX/X999</i>	<i>XXX9999X99</i>
<p>Once again we thank you for your business, and look forward to serving you in the future.</p>		
Yours sincerely,		
General Manager		

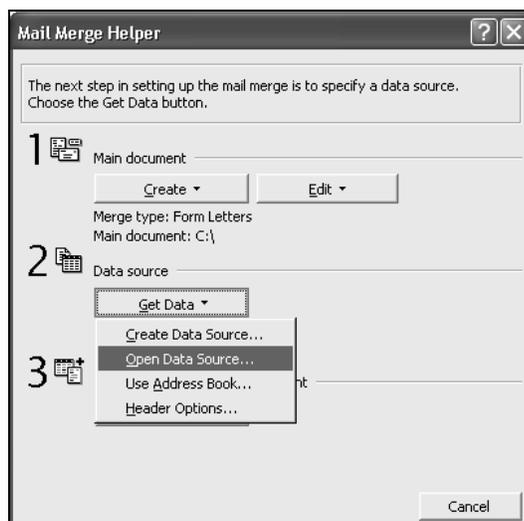
2. The next stage is to insert the Merge Fields into the letter.

In Word, with the base letter open, select Tools, Mail Merge, then “Create”. Select “Form Letters” then “Active Window”.

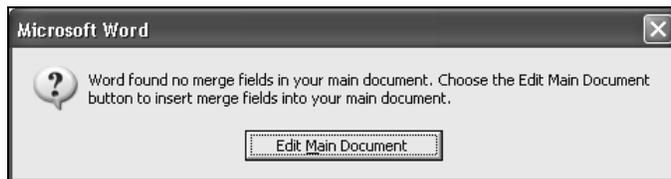


*Note: the Word screenshots will differ dependent upon the version of Word in use.*

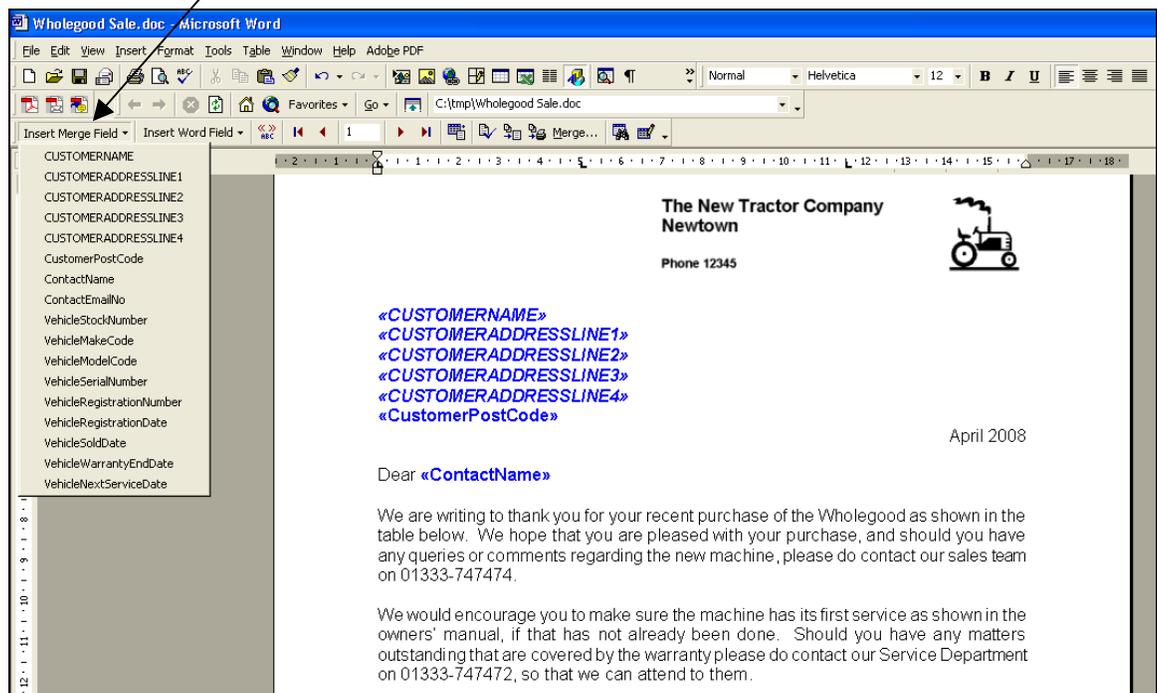
3. The next step prompts for the source of the data to be merged, or Data Source. Select Open Data Source, and browse to find the file exported from Gold, for example C:\tmp\TEMP.DOC.



4. If this is the first time that the main document has been used for merging, a warning will be displayed that no merge fields exist, and allow the document to be edited.

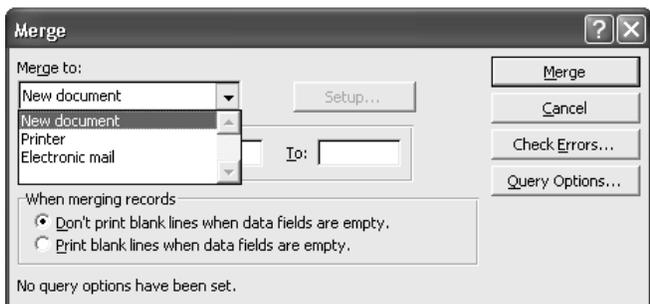


5. Use "Insert Merge Field" to enter the required fields into the letter or replace the text used to indicate field positions.



The font and style of the merge fields can be set in the same way as for normal text, by highlighting and then selecting the required font.

6. Once all the fields have been entered, the mail merge may be run to produce the mail shot letters. From the Tools menu, select Mail Merge then "Merge".



The letters can be merged direct to a printer or to a new document where they can be reviewed and printed.

To email the mailshot, the "Electronic Mail" option can be selected. The "Setup" button allows the field containing the email addresses to be selected and a subject line to be added.



The letter can either be sent as an attachment to the email or as body text. If sent as an attachment the text appears exactly as per the original letter. If sent as body text the formatting is lost and only basic text sent.

7. If the merge was to the document, this will contain one or more pages for each Customer, or in this case, each wholegood sale. A sample of a final letter is shown below.

**The New Tractor Company  
Newtown**

Phone 12345



*King & Sons  
47a Bracken Avenue  
Hurstbourne  
Surrey  
BN1 6NK*

April 2008

Dear **Mr L King**

We are writing to thank you for your recent purchase of the Wholegood as shown in the table below. We hope that you are pleased with your purchase, and should you have any queries or comments regarding the new machine, please do contact our sales team on 01333-747474.

We would encourage you to make sure the machine has its first service as shown in the owners' manual, if that has not already been done. Should you have any matters outstanding that are covered by the warranty please do contact our Service Department on 01333-747472, so that we can attend to them.

Date of Sale	Item/Model	Serial Number
<b>29-JAN-2008</b>	<b>NF/Tractor</b>	<b>SN54-D6435</b>