

#### 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.

f {WHOLEGD} Sales Amend Mode							
Letter Code:	TEMP	Title:	Wgd Sales Template	for Merge	Туре:	Individual	
Last Amended By:		RA		Page Depth:	72	Start Line:	1
25/03/2008	10:51:11			End Line:	72	Start Col:	10
CUSNAM           [CUSNAM           [CUSAD1           [CUSAD2           [CUSAD3           [CUSAD4           [CUSAD4           [CUSAD4           [CUSAD4           [CUSAD4           [CUSAD4           [CUSAD4           [CUSAD4           [CONEML           [VEHSTK]           [VEHSTK]           [VEHSTK]           [VEHSER           [VEHSER           [VEHREG]           [VEHRD1           [VEHNSD]           [VEHNSD]           [VEHNSD]           [VEHNSD]           [OK           Cancel	I <u><b>Field</b></u>		Eel.Lin	Customer Name Address Line 1 Address Line 2 Address Line 3 Address Line 4 Postcode Contact Name Email Address Wholegood Stock Number Wholegood Model Wholegood Registration Dat Wholegood Registration Num Wholegood Registration Dat Wholegood Registration Dat Wholegood Warranty End D Wholegood Next Service Dat	mber te		

Add all required fields using the "Field" button.

### ibcoscomputers

#### 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.

G File Transfer Details		X
File Transfer ID:	VDU1	
Transfer Type: Terminal ID:	Transfer File to Designated PC Y	
Windows Share: File Path: PC Filename:	tmp 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

 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.

	The New T Newtown	ractor Company	**** ****	
	Phone 12345		O o	
Name Ad1 Ad2 Ad3 Ad4 Postcode			April 2008	
Dear Contact			April 2000	
We are writing to thank table below. We hope any queries or commen on 01333-747474.	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 y owners' manual, if tha outstanding that are co on 01333-747472, so t	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 <i>DD-MMM-YYYY</i>	ltem/Model XX/X999	Serial Numb <b>XXX99999X</b>	oer 99	
Once again we thank future.	you for your business, an	d look forward to servi	ing you in the	
Yours sincerely,				
General Manager				

### ibcoscomputers

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".

Mail Merg	e Helper 🛛 ? 🗙				
The next s Choose the	The next step in setting up the mail merge is to specify a data source. Choose the Get Data button.				
	Main document				
	<u>Create • Edit •</u>				
<b>ว</b> ค	Form Letters Mailing Labels				
Z	Envelopes				
	<u>C</u> atalog Restore to <u>N</u> ormal Word Document				
3 the data with the document					
	Merge				
	Cancel				

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.

Mail Merg	ze Helper				
The next step in setting up the mail merge is to specify a data source. Choose the Get Data button.					
	Main document				
	<u>C</u> reate • Edit •				
	Merge type: Form Letters Main document: C:\				
2 🖻	Data source				
	Get Data 🔻				
	<u>C</u> reate Data Source				
२ 🖬	Open Data Source				
	Use Address Book ht				
	Cancel				

### ibcoscomputers gold fact sheet

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**".

## ibcoscomputers

Merge	?×
Merge to:	Merge
New document	<u>C</u> ancel
Printer Electronic mail	Check <u>E</u> rrors
When merging records	Query Options
Don't print blank lines when data fields are empty. Print blank lines when data fields are empty.	
No query options have been set.	

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.

Merge To Setup 🛛 ? 🗙			
Data field with Mail/Fax address:			
ContactEmailNo			
Mail message subject line:			
Send document as an attachment			
OK Cancel			
/			

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.

# jold fact sheet

	The New Newtown	Fractor Company	**** ****
	Phone 12345		<u>0</u>
King & Sons 47a Bracken Avenue Hurstbourne Surrey BN1 6NK			
			April 2008
Dear Mr L King			
We are writing to thank you table below. We hope that any queries or comments re on 01333-747474.	for your recent purch you are pleased with egarding the new mac	ase of the Wholegood as your purchase, and sho hine, please do contact o	shown in the ould you have our sales team
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 <b>29-JAN-2008</b>	ltem/Model <b>NF/Tractor</b>	Serial Numb <b>SN54-D643</b>	er 5