Section 10 Mail Merge

Cordell Connect has very a useful mail merge function for letters and mailing labels. Mail merges can be performed using project, company or contact information. The data source for this function will be emailed to you upon request.

The data source files are:

- ✓ ProjectMailMergeFields.txt
- ✓ CompanyMailMergeFields.txt
- ✓ ContactMailMergeFields.txt

To receive the 3 text files above, and/or to book a Mail Merge Tutorial, please contact the Connect Support team on **1800 24 36 24**. The support team will take you through the step-by-step instructions (which are also detailed in this section) on how to:

- Save the above files
- Create a letter template

It will save you time if you can create a suitable form letter in advance for your Company in Microsoft Word and save it where it is easily accessible. You may choose to format the letter for use on your company letterhead.

Tip: When you perform a mail merge, a note is automatically created for each company that has been included in the merge. So next time you view that company, you will see a note added in the company detail screen, with the mail merge details, including the mail merge template used and the date created. This allows you to see who you have already sent a letter to. You will also be able to search for companies that you have previously mail merged, by going to '**Search Notes'.** Type in a keyword word from the mail merge template, and you will see a list of companies that have been sent a certain letter.

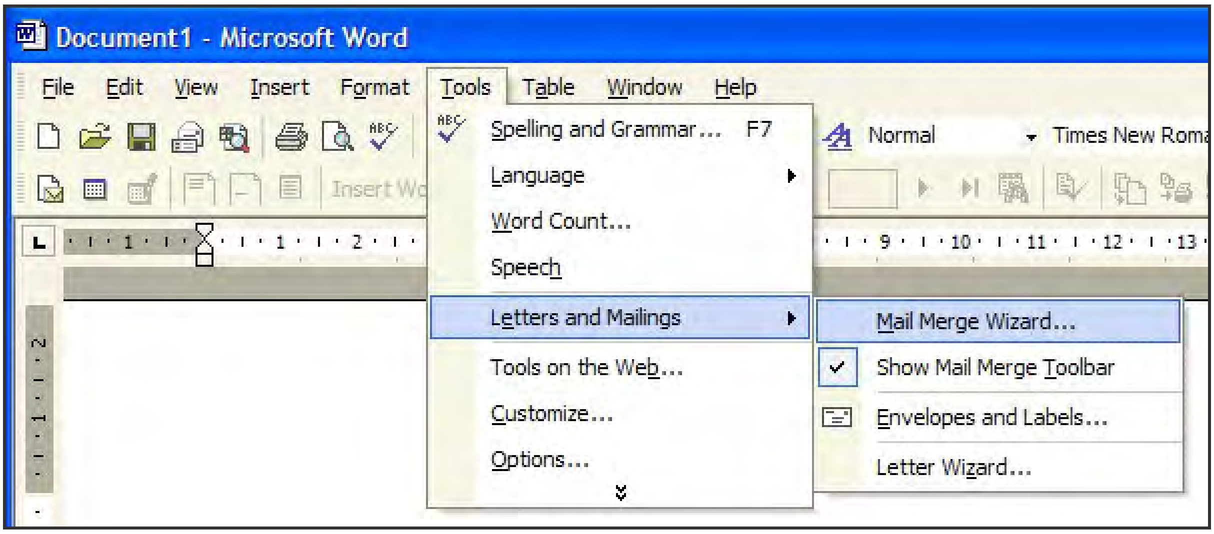
This manual will explain how to do a mail merge in Cordell Connect, using the following Windows programs:

- Windows XP
- Windows 97
- Windows Vista

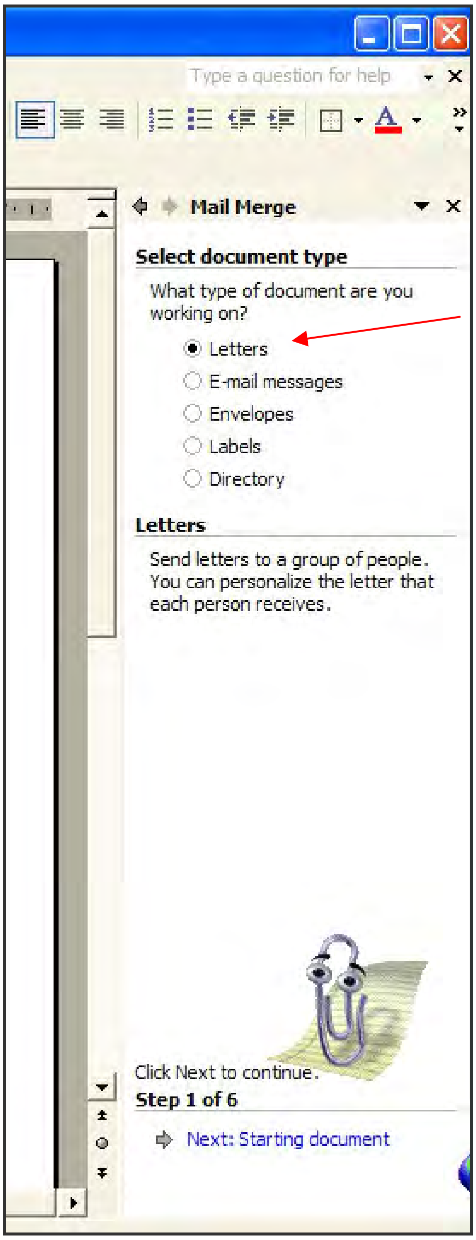
Mail Merge - For Windows XP users

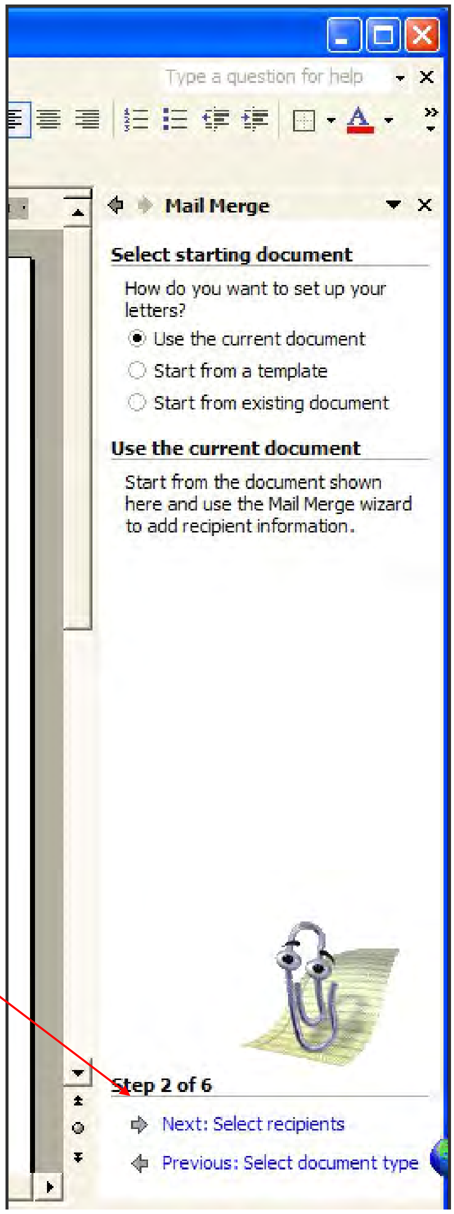
Creating a Letter Template

1. Open a blank **Microsoft Word** document.
2. To insert the Connect mail merge fields into the document, click on the **Tools** menu and select **Letters and Mailings.**
3. Make sure the **Show Mail Merge Toolbar** is ticked, if not already.



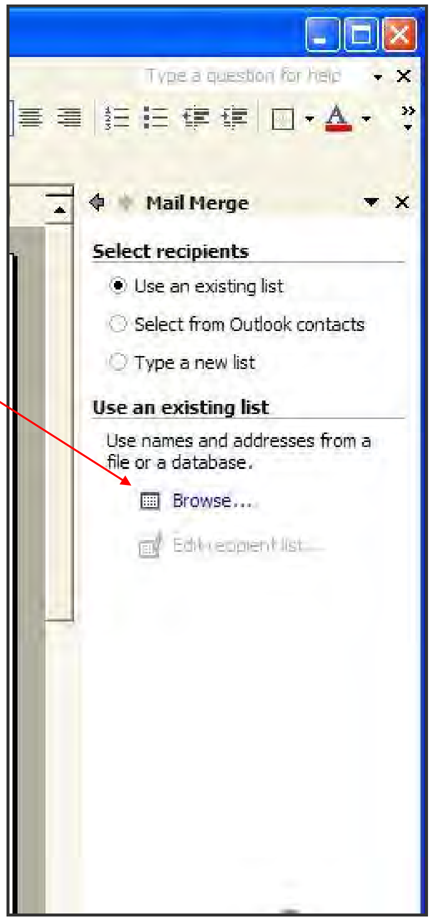
4. Click on **Mail Merge Wizard…** to start. We will primarily use the Mail Merge selection tool on the right hand side of the screen.
5. Under Select Document Type, shown below, click the circle next to **Letters** and click on **Next: Starting Document** in the bottom right hand corner. This action will get you to Step 2





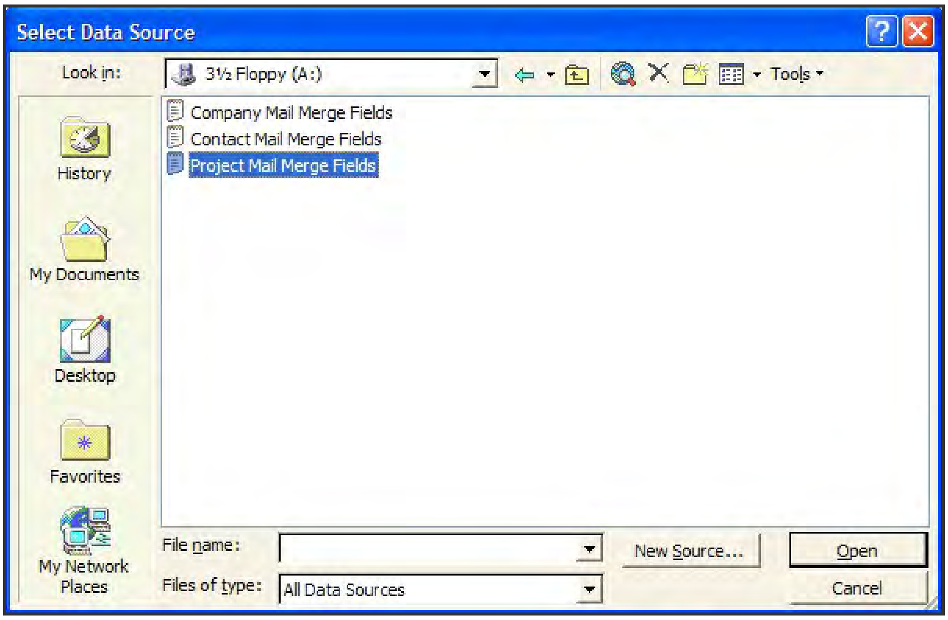
6. The next screen allows you to set up your letter. If you have already created your letter and it is open on your screen, select **Use the current document**.
7. Click on **Next: Select recipients** at the bottom to continue.

8. Under **Select recipients** choose the **Use an existing list** option.
9. The section called **Use an existing list** should now be visible. Click on the Browse... button to continue.

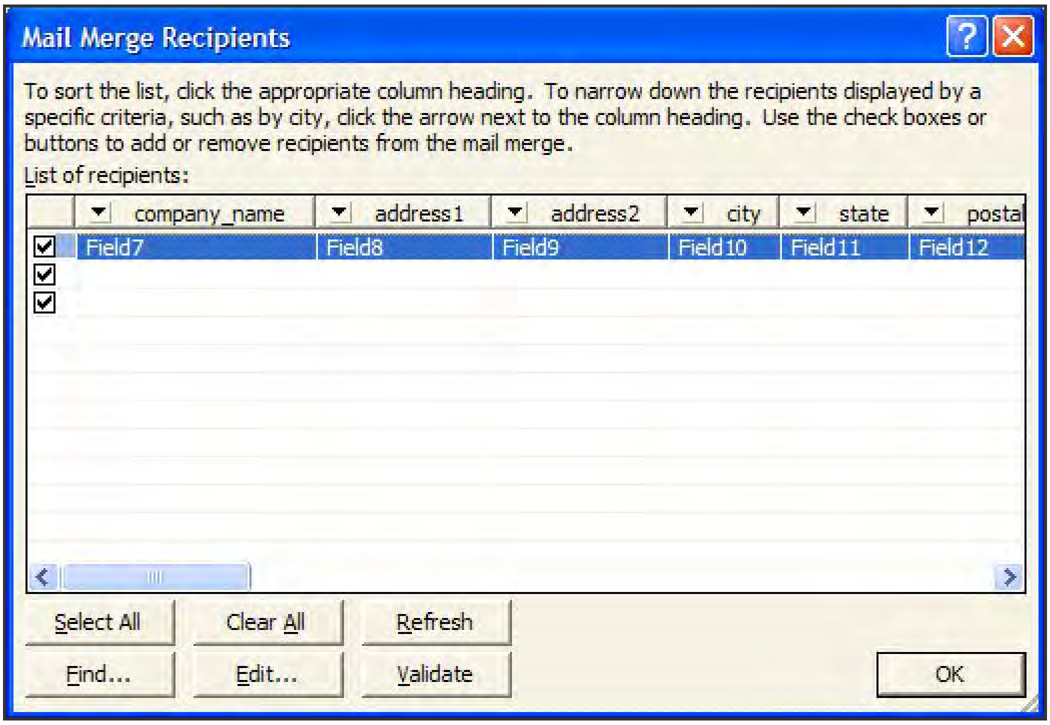


10. This should generate the **Select Data Source** screen, which allows you to load merge fields into the Word document.
11. Navigate to the directory where you saved the 3 text files mentioned at the beginning.
12. Select one of them (for example ProjectMailMergeFields.txt).

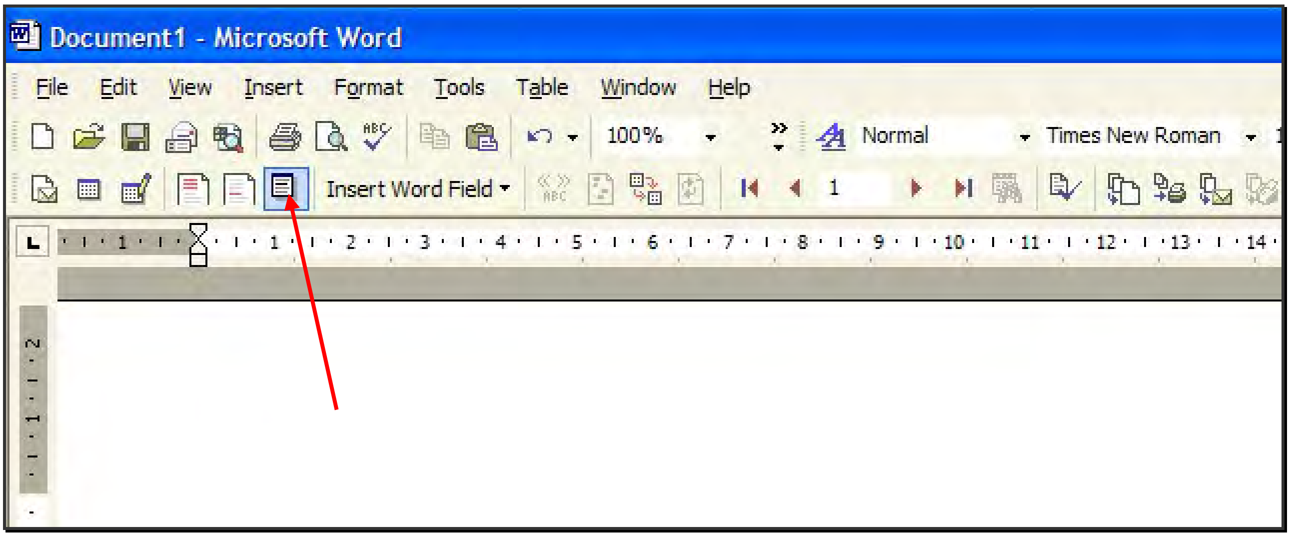
Note: The data source files should appear automatically. However, if the folder in which you saved the merge fields appears empty, you will need to select **Text Files (* .txt)** in the "files of type" box below.



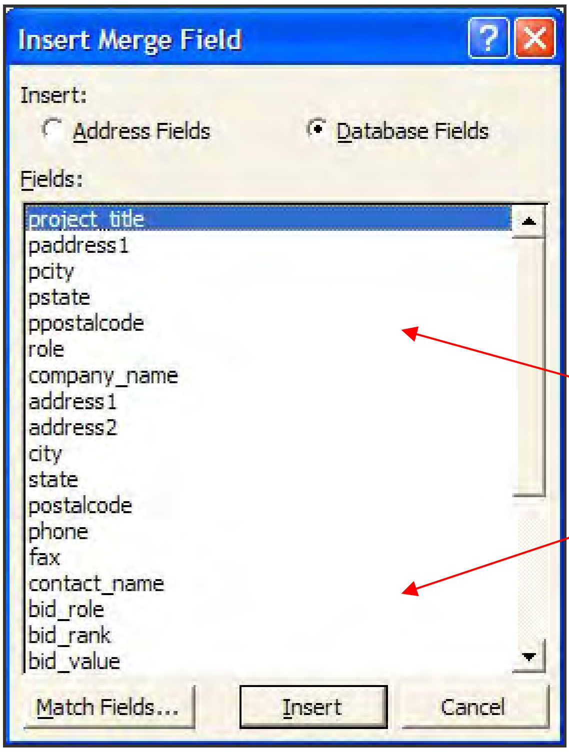
13. Once you have selected the Project Mail Merge Fields.txt document (or different depending on the type of template you want), click **Open.**
14. The screen **Mail Merge Recipients** will immediately appears on screen. **DO NOT SELECT or modify ANYTHING, just click the OK button.**



15. This should activate the **Insert Merge Field** toolbar in Microsoft Word (it was previously greyed out).
16. The icon **Insert Merge Field** is placed to the left of **Insert Word Field** button (see screen below).



17. If the icon is visible, the data source has been found and you do not need to use the mail merge wizard on the right hand side anymore.
18. By clicking on the  icon, the available "active" merge fields will displayed within the Insert Merge Field table (see below).



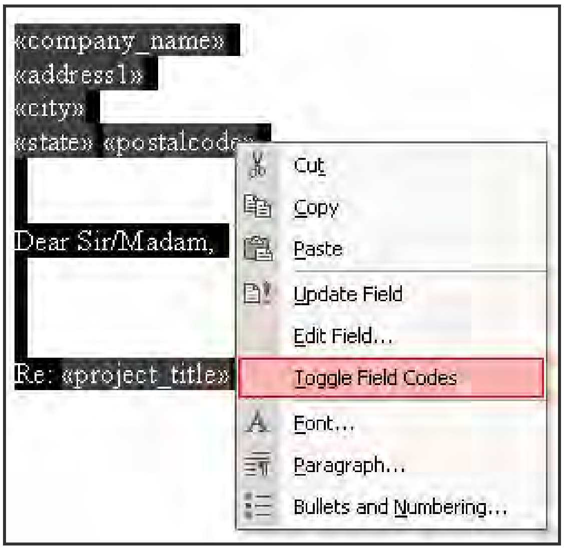
These merge fields vary according to selected txt file.

19. Make sure that the **Database Fields** option is selected.
20. Now you can start creating your own template letter by selecting the desired merge fields and pressing the insert button.
21. Keep adding merge fields until you are finished then format the letter as required. Be careful not to modify the merge fields (see the example below with formatted company address).

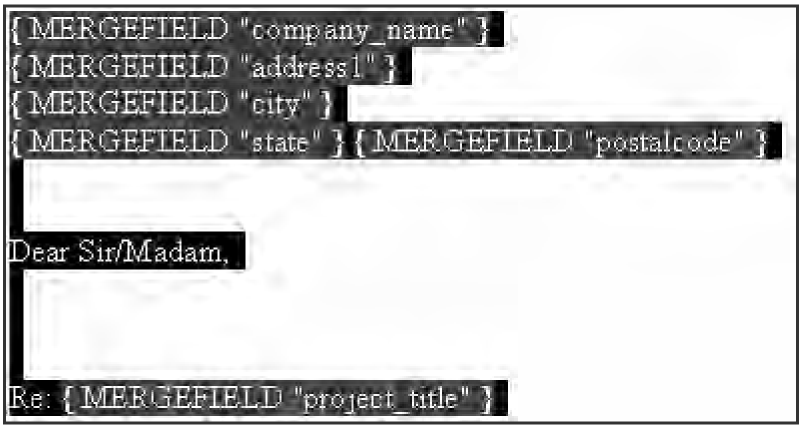
22. You can also open an existing letter and copy the selected body text into this document.

Note: Mail Merge using the Microsoft Word XP version requires additional steps to verify if the inserted generic mail merge fields are fully functional. Please keep following the steps below:

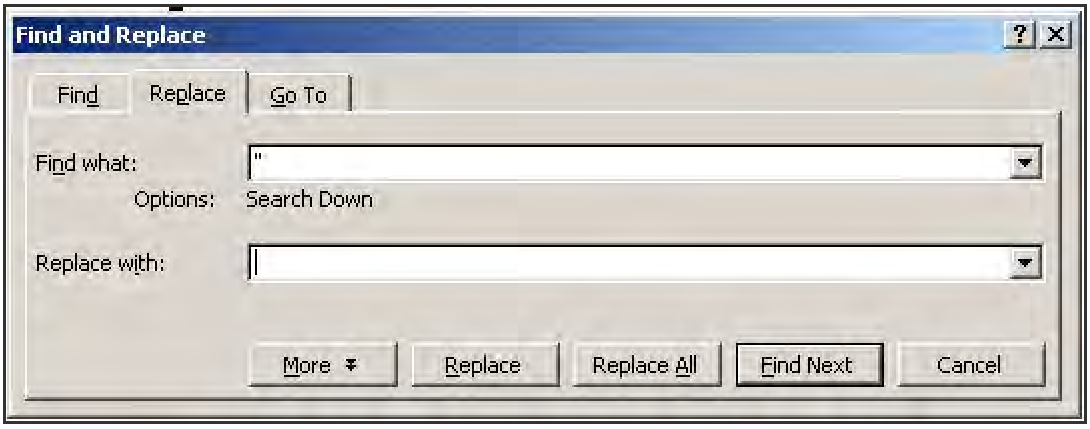
23. Select/highlight ALL inserted mail merge fields.
24. Right click on the highlighted area, then click on the **Toggle Field Codes** option.



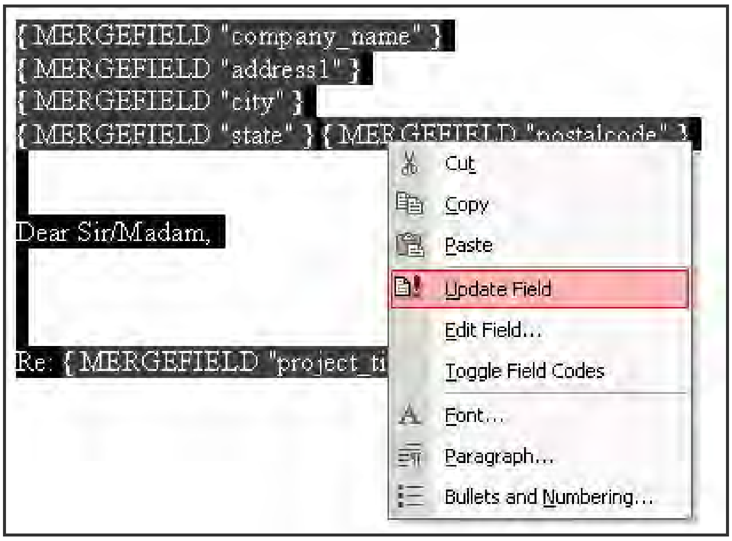
25. The mail merge fields should now appear as shown below



26. If the mail merge fields appear within quotation marks go to **Edit** then **Replace.**
27. Type **"** in the **Find What:** field.
28. Leave the **Replace With:** field blank.



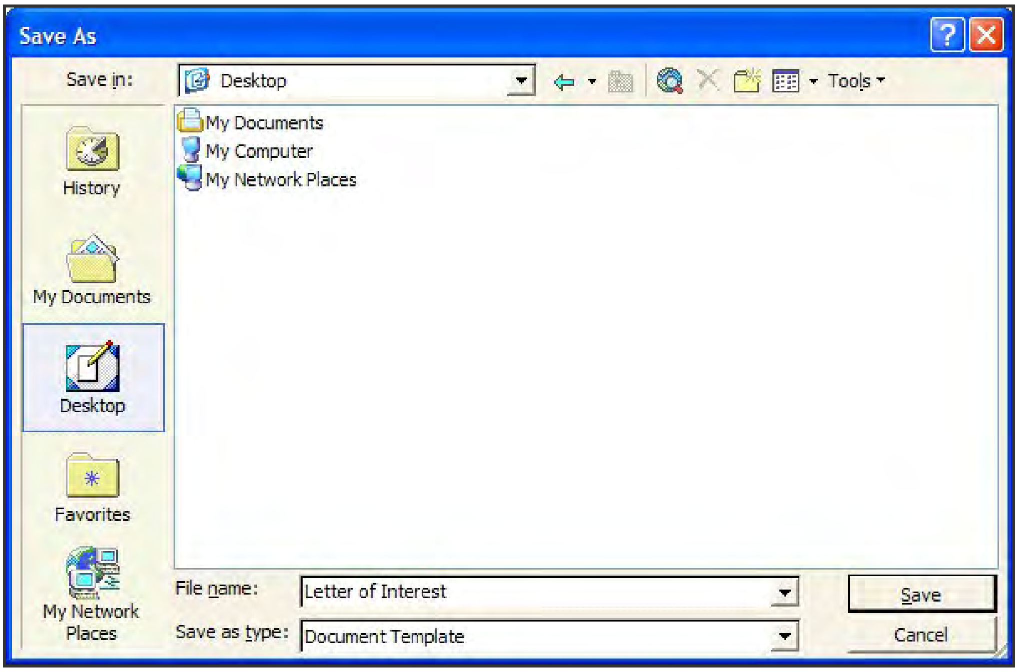
29. Click on the **Replace All** button.
30. A dialog box should display a message stating the number of replacements that were made.
31. Click the **NO** button to stop the replacements.
32. Click the **Close** button to return to the document.
33. Select/highlight the mail merge fields again.
34. Right click on the **Update Fields** option as shown below.



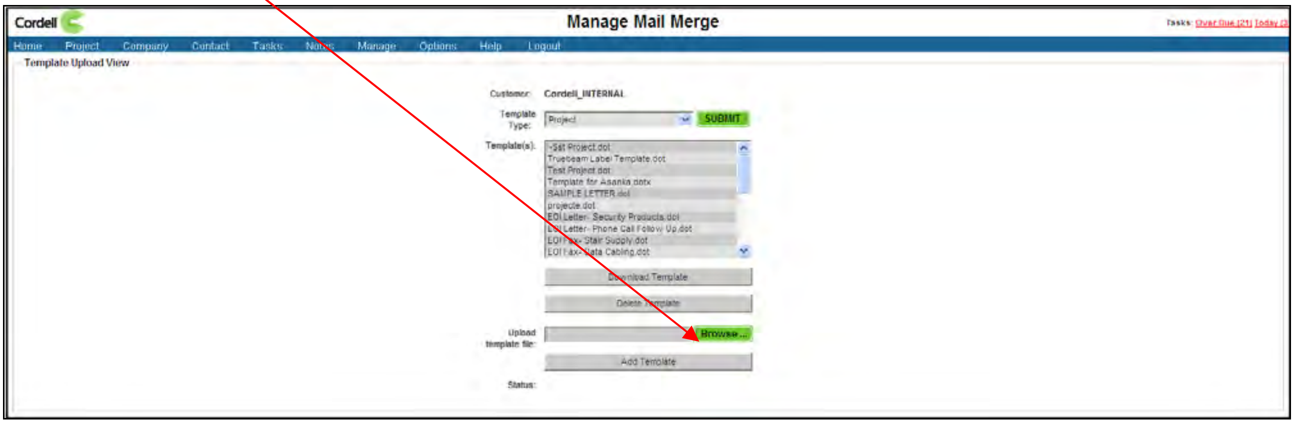
Note: If you have merge fields in your existing letter, these MUST be replaced with "active" merge fields available from the current Insert merge Field menu. Otherwise, the data source will be disabled and dysfunctional.

In addition, **MAKE SURE** that you have a space between two merge fields placed next to each other (for example, state & postal code). If not, the merge fields will not be recognised by Connect mail merge.

35. Once you have finished creating the form letter, click on **File Menu** and **Save.**
36. **Ensure that you are saving this file as a Document Template (*.dot).**

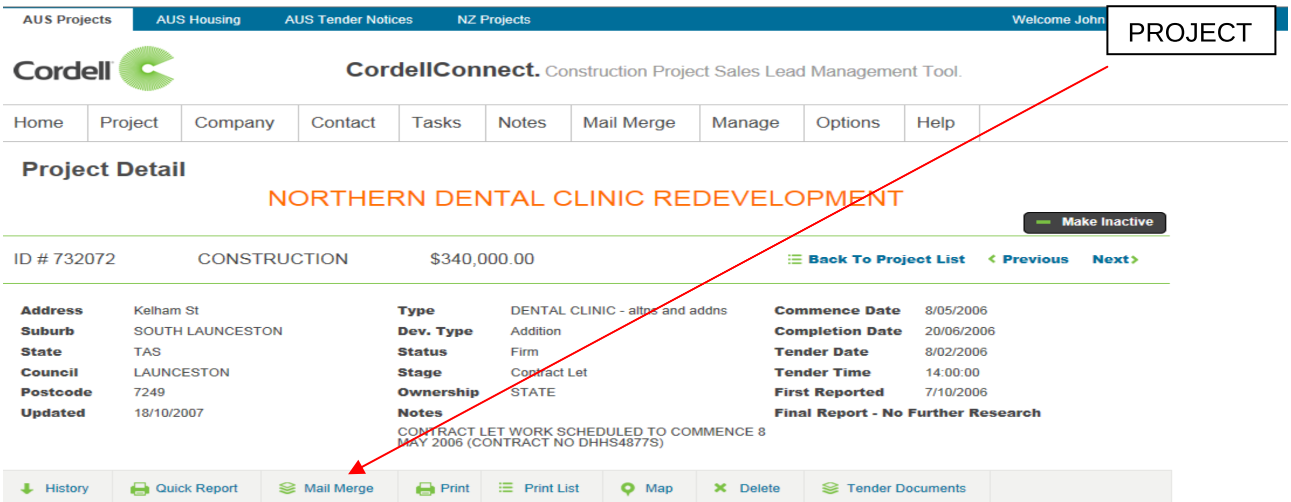


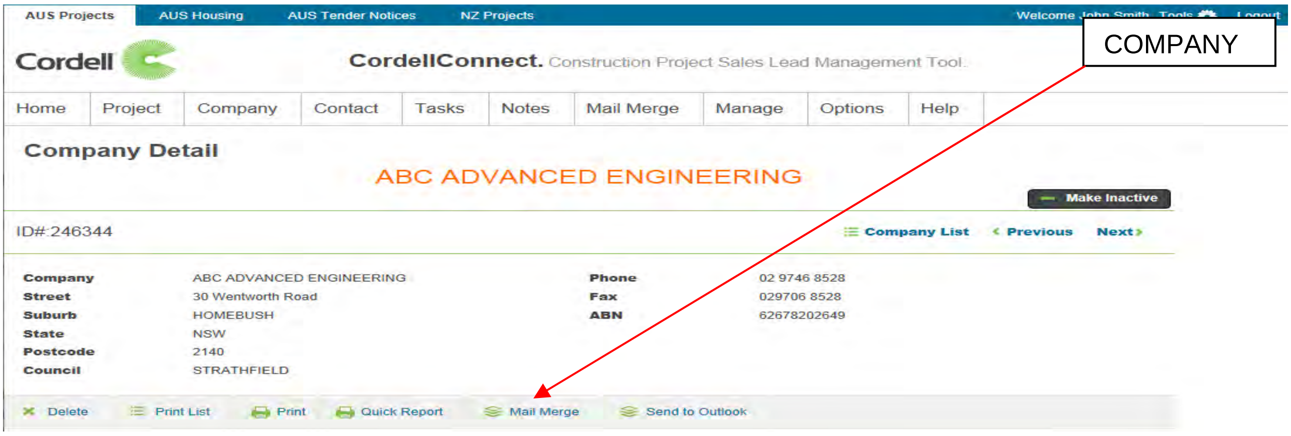
37. Log into Connect.
38. On the Menu Bar, click on **Manage** then **Manage Mail Merge**.
39. Click on the **Template Type** drop down box.
40. Select the **Project, Company or Contact** directory depending on the choice of the form letter you created.
41. Click the **Browse** button.

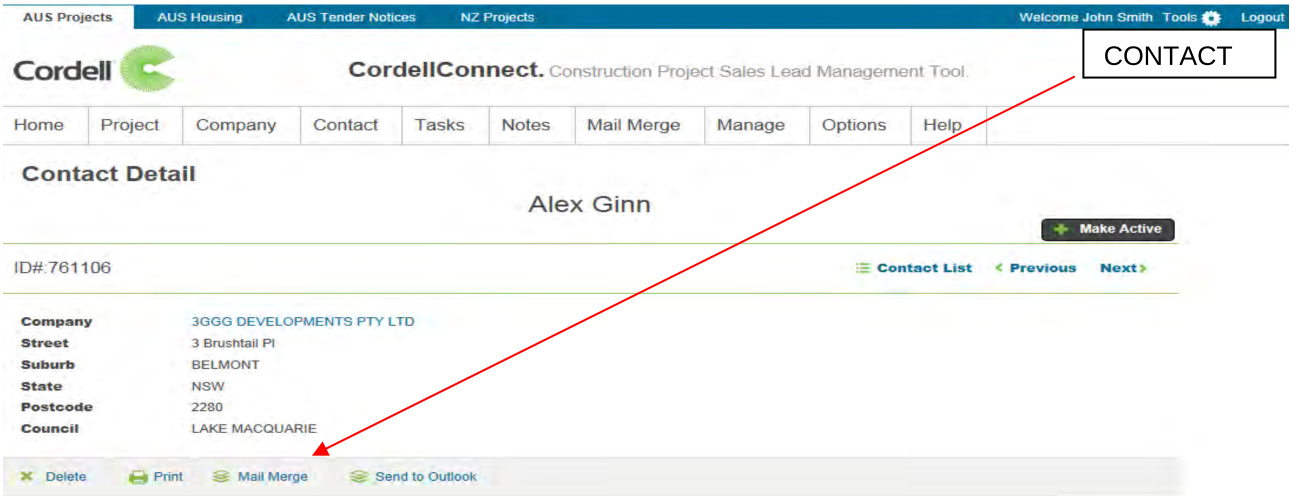


42. Find the location of the template you created in the steps above (Remember the **.dot** extension).
43. Once you have found your template click on the document and click the **Add Template** button.
44. Connect will respond with a note saying **File uploaded successfully.**

Your template has been saved and you can start using the mail merge facilities available in Connect. The **Mail Merge** buttons are visible at all screens - **Project, Company and Contact**. The mail merge function will be triggered once you click the button.



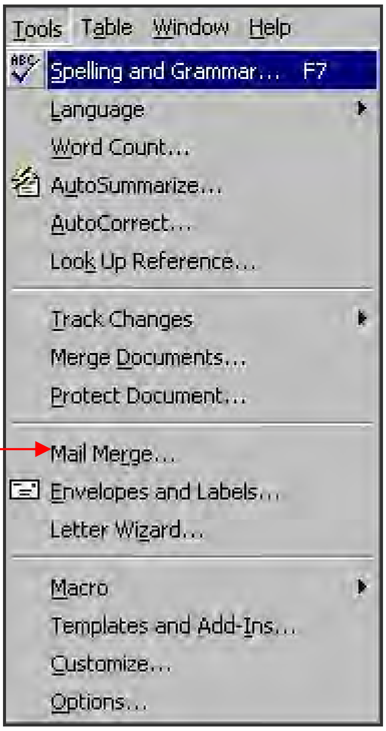




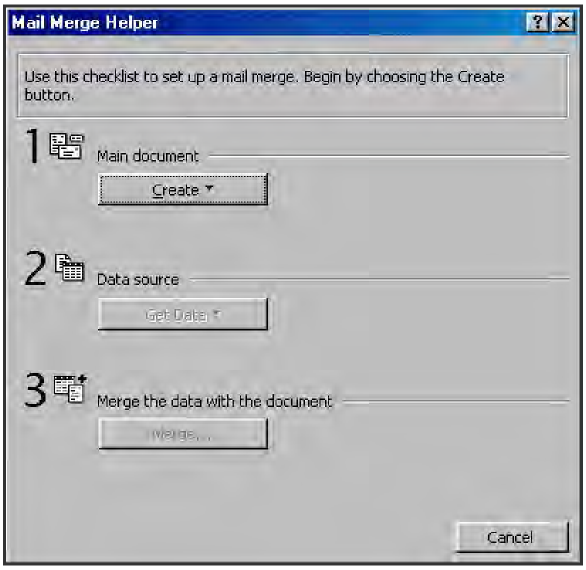
If you have any questions about mail merge, please do not hesitate to contact one of our experienced Connect consultants on **1800 24 36 24**.

Mail Merge - For Windows 97 users

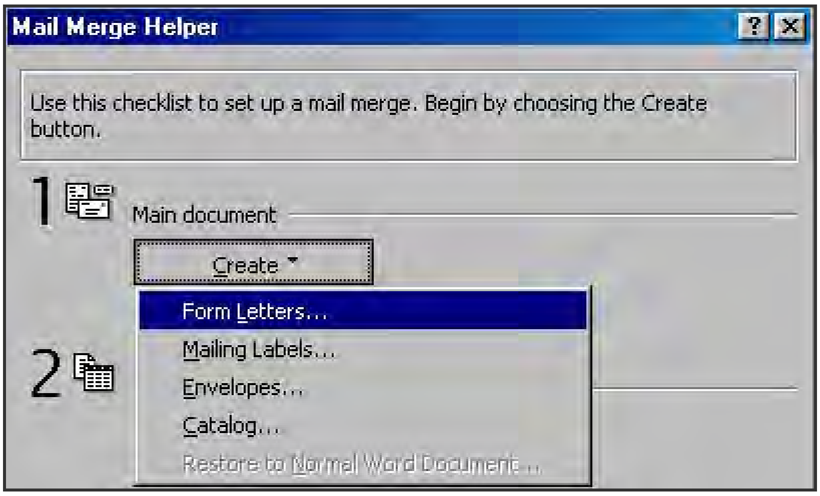
1. Open a blank **Microsoft Word** document.
2. To insert the Connect merge fields into the document, click onto the **Tools** menu and select **Mail Merge.**



3. The Mail Merge Helper dialog box will appear on the screen. Follow the screen shots below.

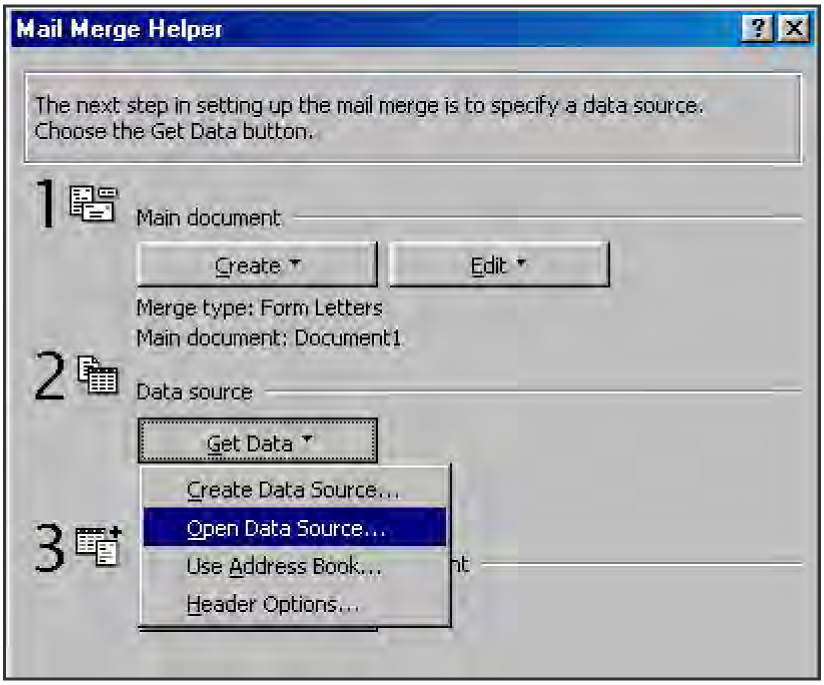


4. Click on **Create.**

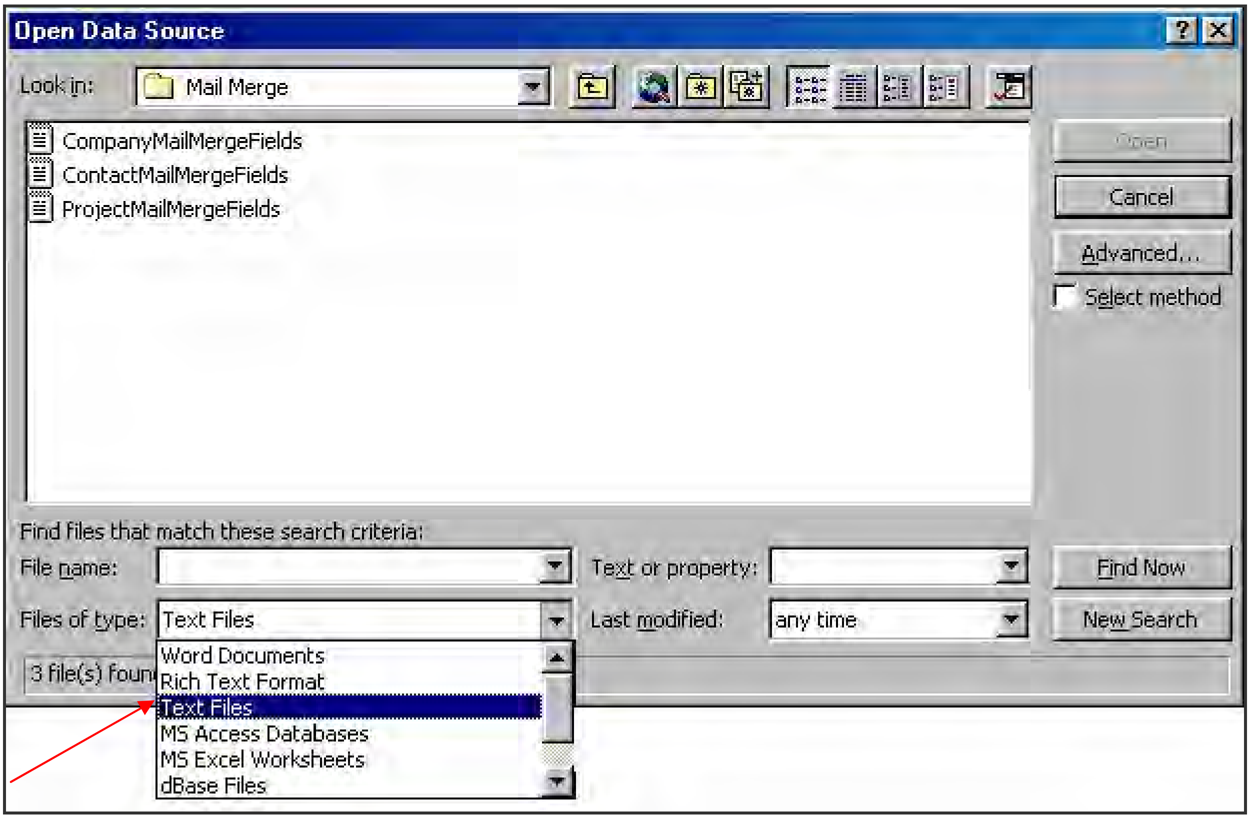


5. Click on **Form Letters….**

6. Click **Active Window.**



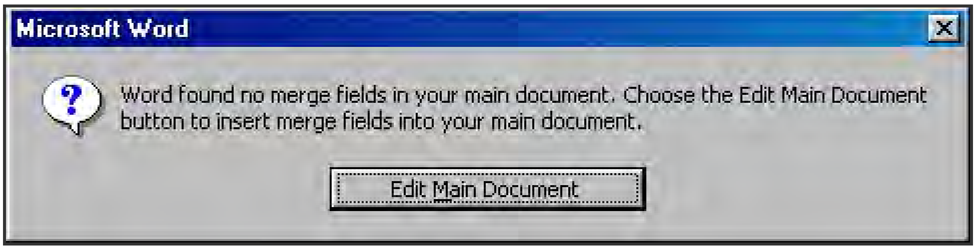
7. Click on **Get Data** then **Open Data Source.** The following screen will appear:



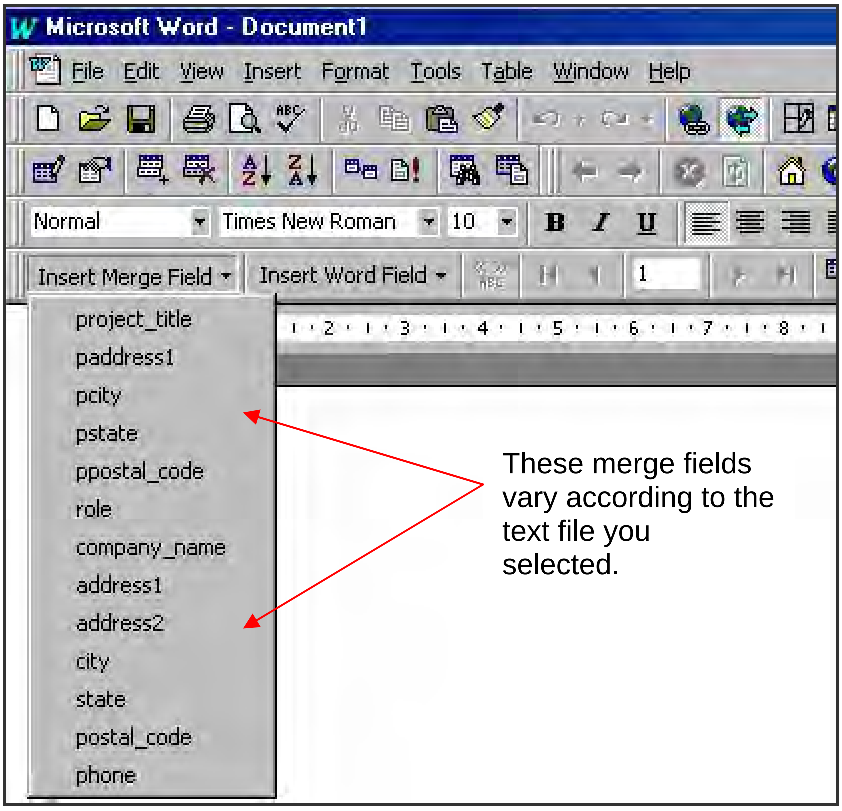
8. Open to the directory where you saved the 3 text files mentioned at the beginning of this section.
9. Select one of them (for example ProjectMailMergeFilds.txt)

Note: When you open the data source, you **MUST** change the type of files by selecting **Text Files * .txt).** If you forget to do this, the folder in which you saved the merge fields will appear empty.

10. Once you have selected your ProjectMailMergeFields.txt document (or different depending on the type of template you want) click on **Open.**
11. Click on **Edit Main Document** to insert fields into your form letter.



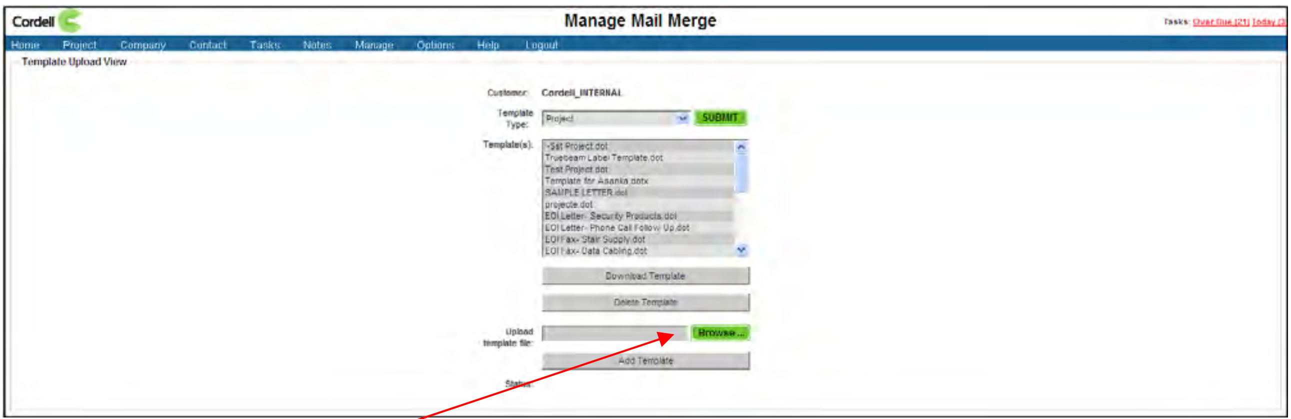
12. This should display the **Insert Merge Field** button on the Mail Merge toolbar in Microsoft Word (it was previously greyed out).
13. When you click on the **Insert Merge Field** button, the Connect mail merge fields will appear in the Insert Merge Field drop down menu.



14. Click on the relevant fields you want to add to your form letter. Keep adding merge fields until you have completed the form letter.
15. You can also open your existing letter and copy the body of the selected text into this document.

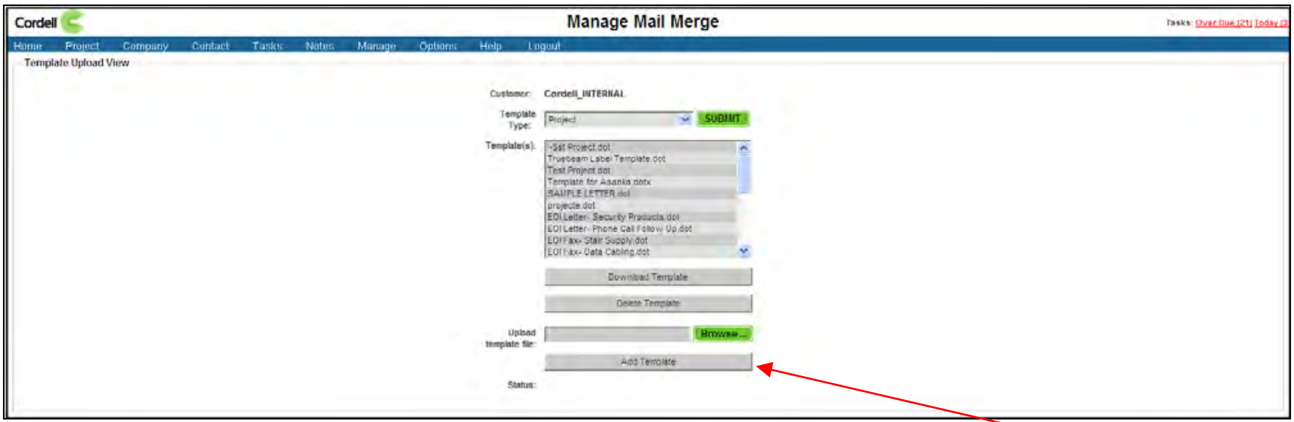
Note: If you have merge fields in your existing letter, these **MUST** be replaced with "active" merge fields available from current **Insert Merge Field** menu. Otherwise, the data source will be disabled.

16. Once you have finished creating the form letter, click on **File Menu** and **Save.**
17. Ensure that you save this file as **a Document Template (*.dot).**
18. Log into Connect with Sales Manager permission.
19. On the Menu Bar, click on **Manage** then **Manage Mail Merge.**
20. Click on the **Template Type** drop down box.
21. Select **Project, Company or Contact** depending on the choice of the form letter you created in the steps above.



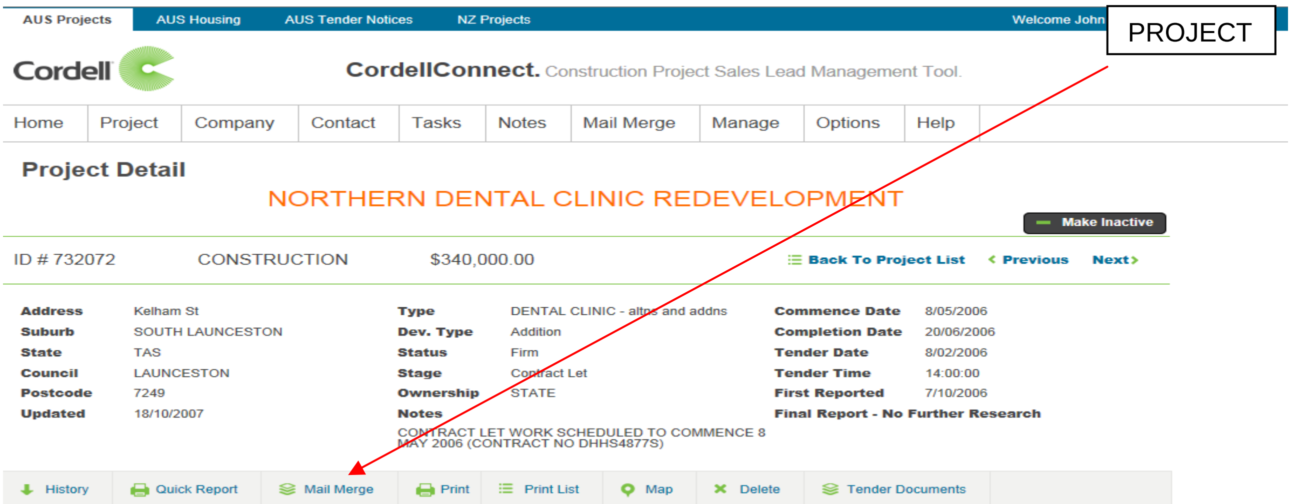
22. Click the **Browse** button.

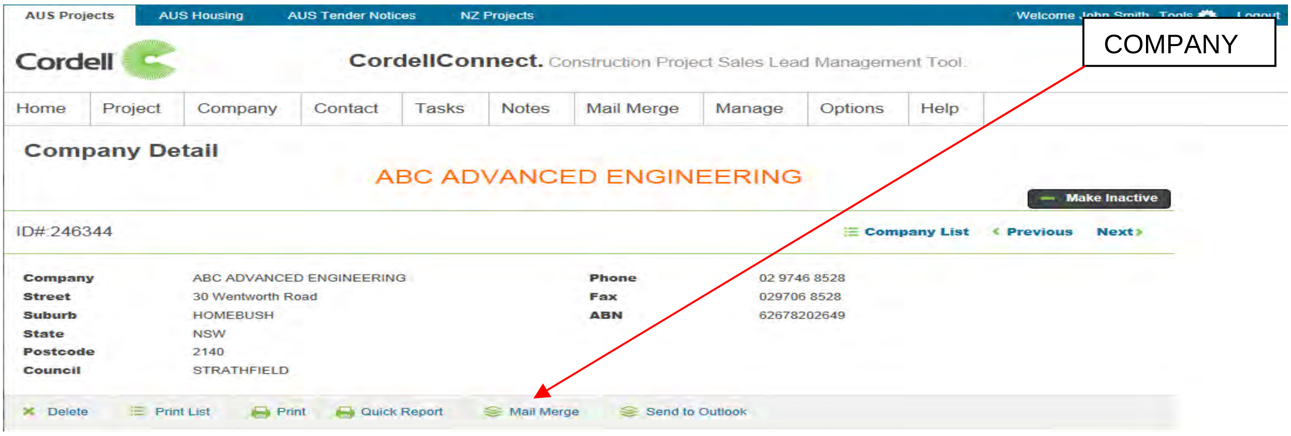
Find the location of the template you created in the steps above (Remember the **.dot** extension).

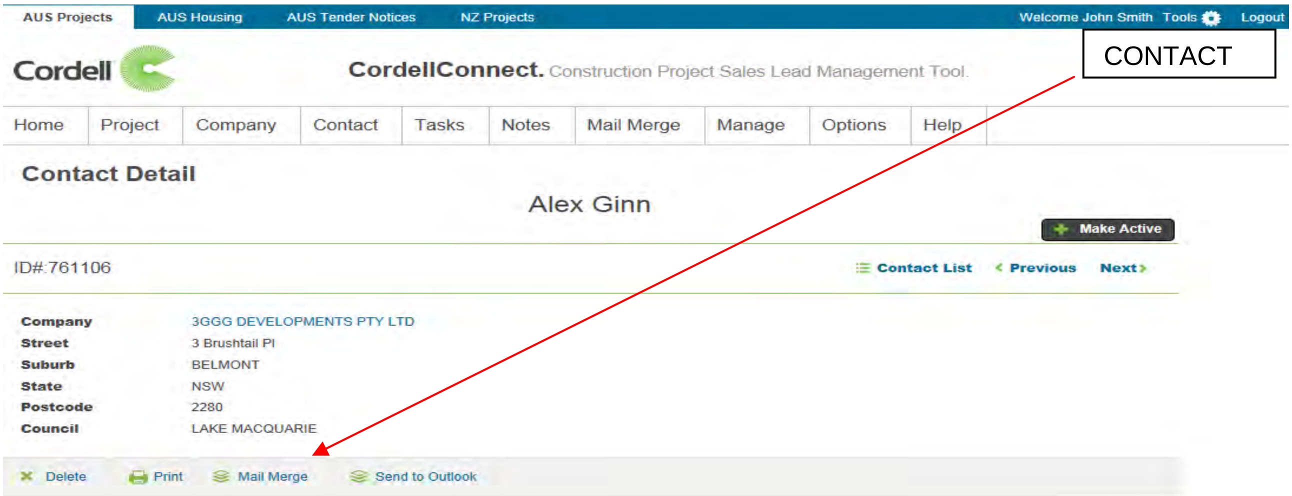


23. Once you have found your template click on the template name and then click the **Add Template** button.
24. Connect will respond with a note saying **File uploaded successfully.**

25. Your template has been saved and you can start using the mail merge facilities available in Connect. The **Mail Merge** buttons are visible on all screens - **Project, Company and Contact**. The mail merge function will be triggered once you press the button.

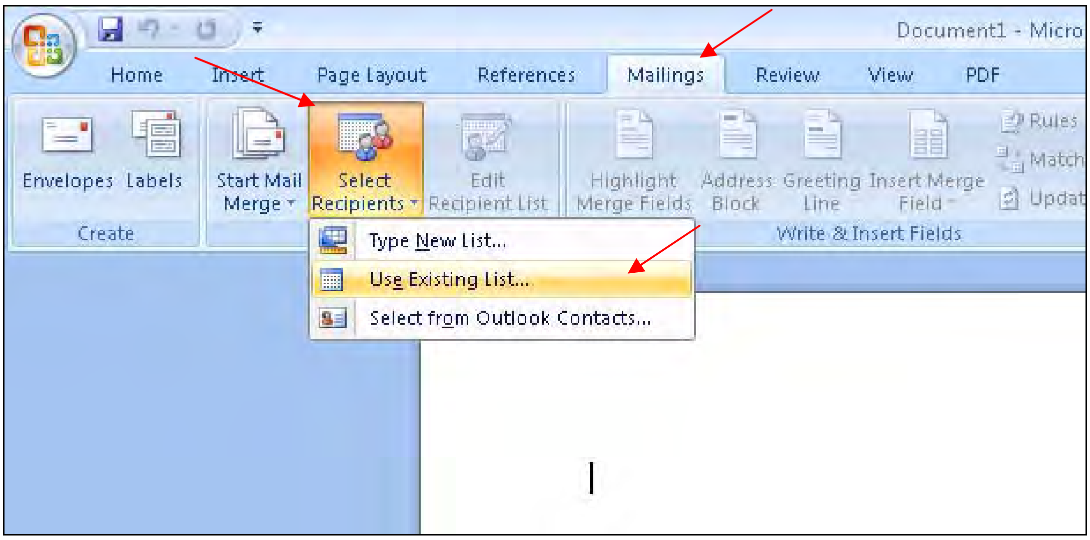






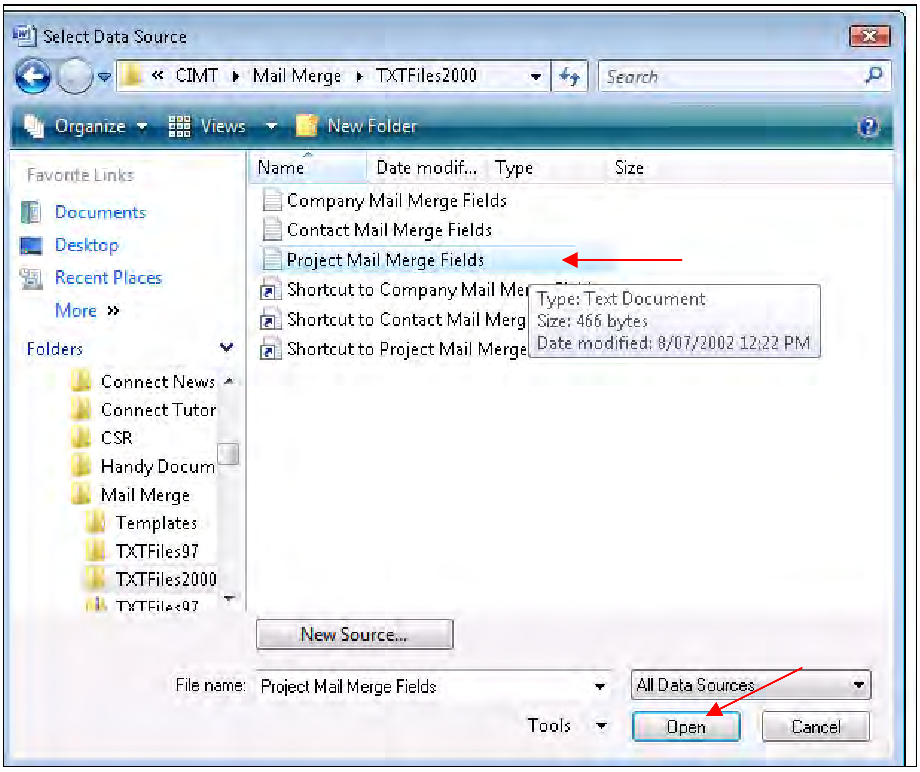
Mail Merge - For Vista users

1. Open a blank **Microsoft Word** template.
2. To insert the Connect mail merge fields into the document, click on the **Mailings** menu and click **Select Recipients** and then click **Use Existing List.**

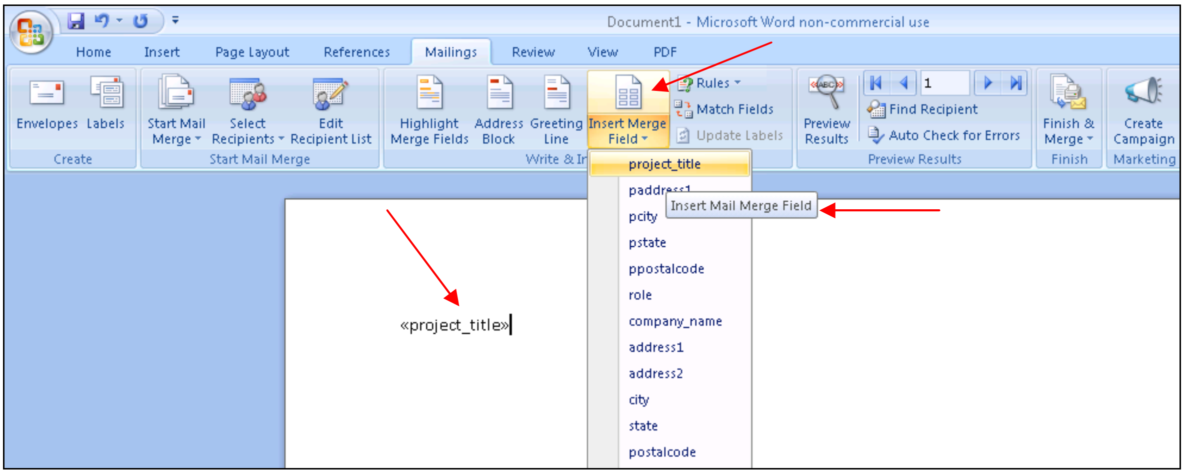


3. This should generate the **Select Data Source** screen, which allows you to load merge fields in to the word document.
4. Navigate to the directory where you saved the 3 text files mentioned at the beginning.

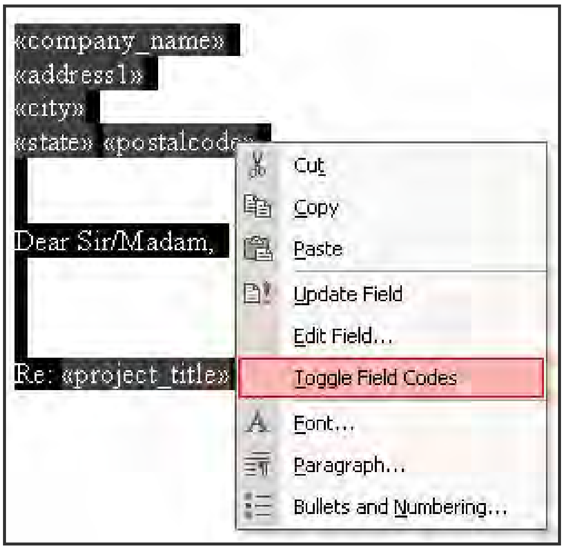
5. Select one of them (for example ProjectMailMergeFields) and click **Open.**



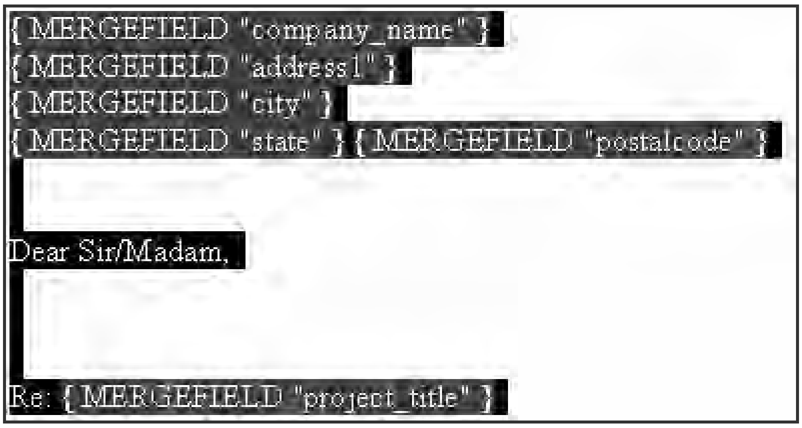
6. This should activate the **Insert Merge Field** toolbar. Click on **Insert Merge Field** and a menu will drop down with all the available merge fields for your letter.
7. You can now start creating your letter by selecting the desired mail merge fields. Keep adding the fields until you are finished then format your letter as required.



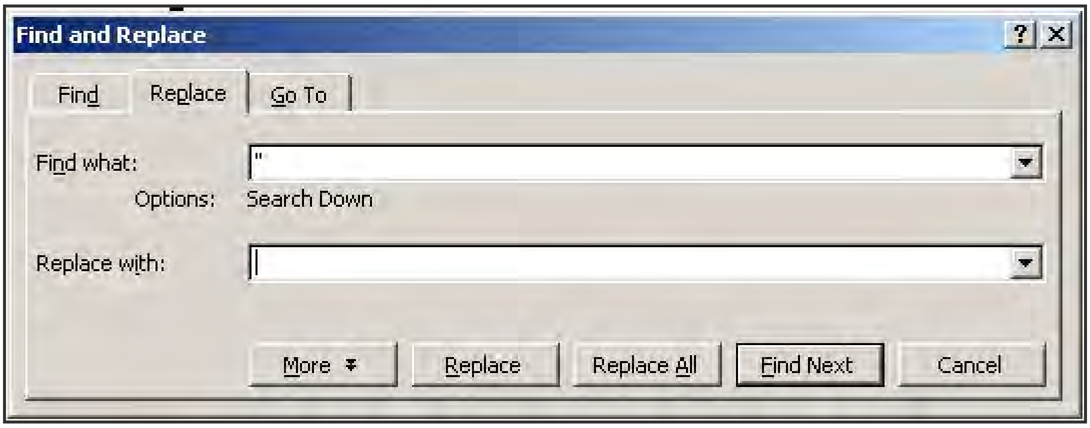
8. Select/highlight ALL inserted mail merge fields.
9. Right click on the highlighted area, then click on the **Toggle Field Codes** option.



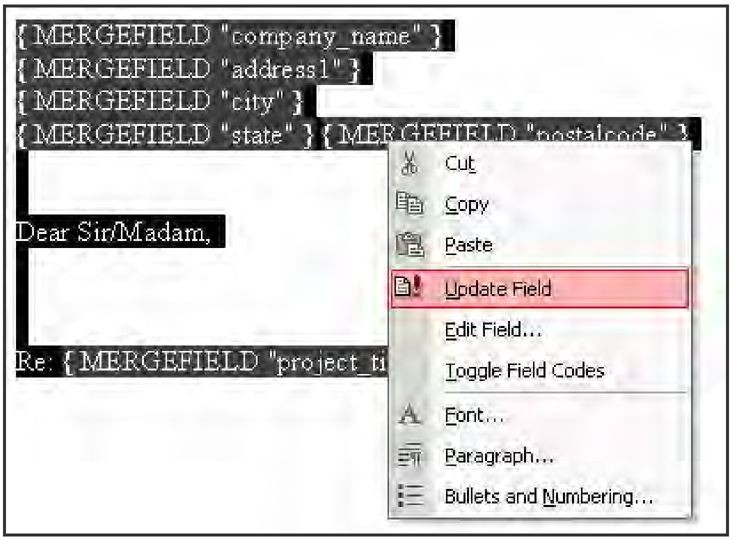
10. The mail merge fields should now appear as shown below



11. If the mail merge fields appear within quotation marks go to **Edit** then **Replace.**
12. Type **"** in the **Find What:** field.
13. Leave the **Replace With:** field blank.

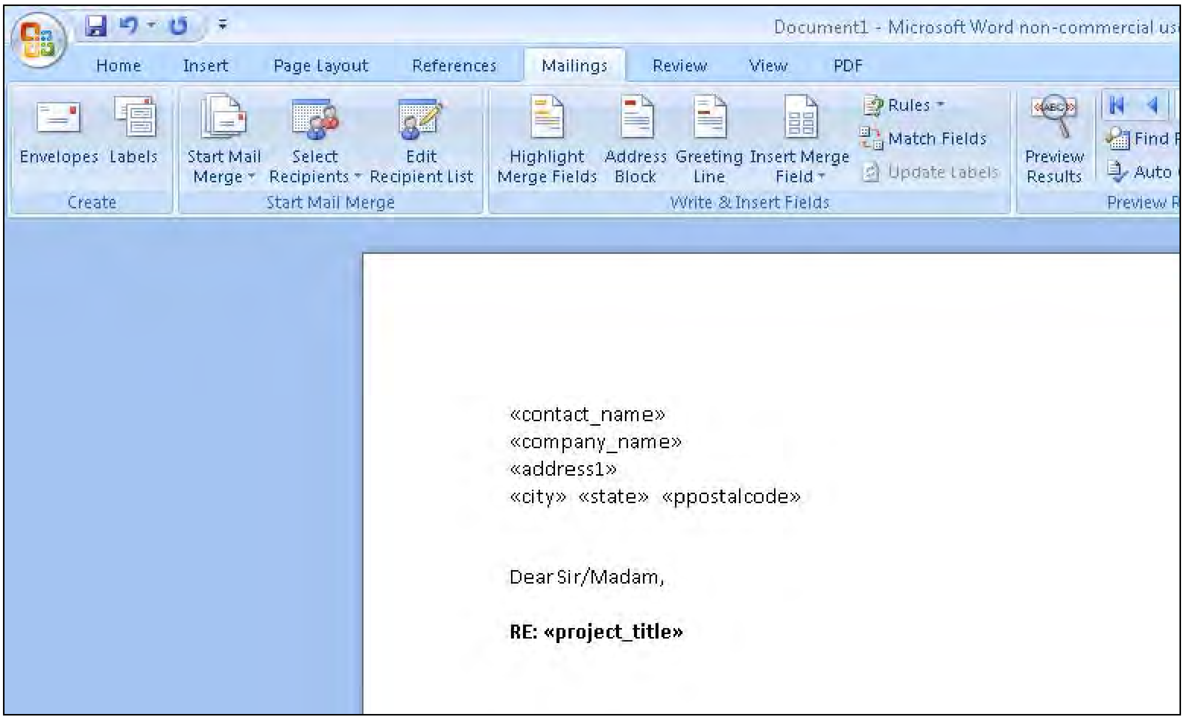


14. Click on the **Replace All** button.
15. A dialog box should display a message stating the number of replacements that were made.
16. Click the **NO** button to stop the replacements.
17. Click the **Close** button to return to the document.
18. Select/highlight the mail merge fields again.
19. Right click on the **Update Fields** option as shown below.

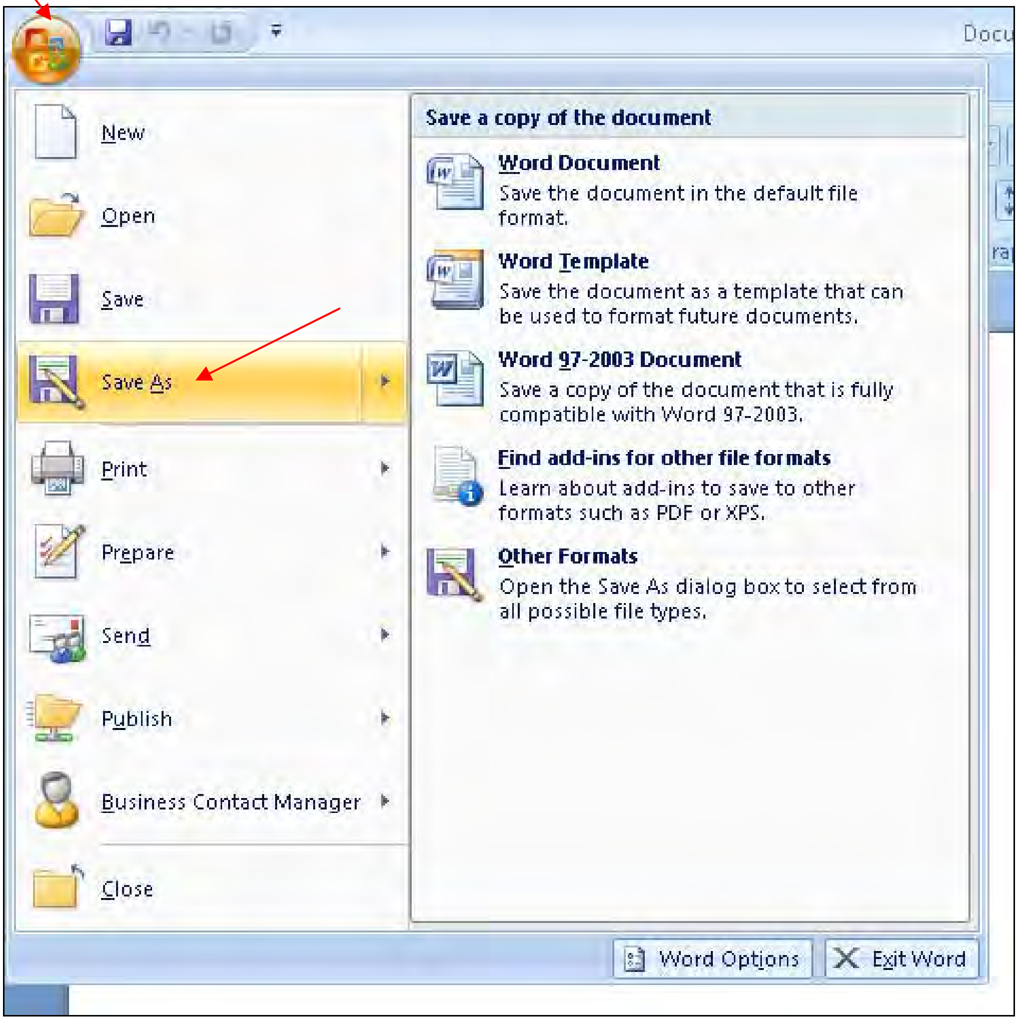


Note: If you have merge fields in your existing letter, these MUST be replaced with "active" merge fields available from the current Insert merge Field menu. Otherwise, the data source will be disabled and dysfunctional.

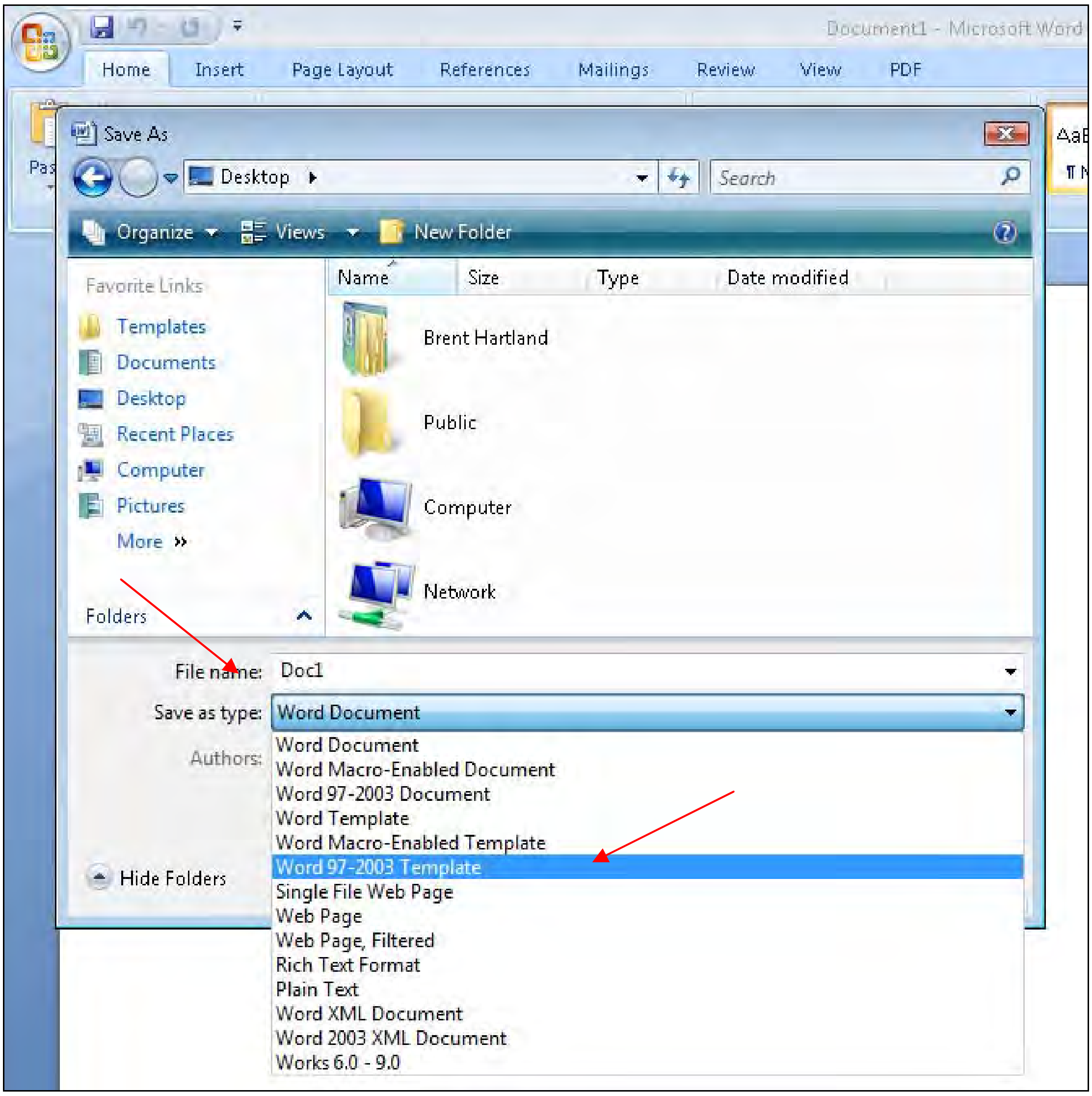
In addition, **MAKE SURE** that you have a space between two merge fields placed next to each other (for example, state & postal code). If not, the merge fields will not be recognised by Connect mail merge.



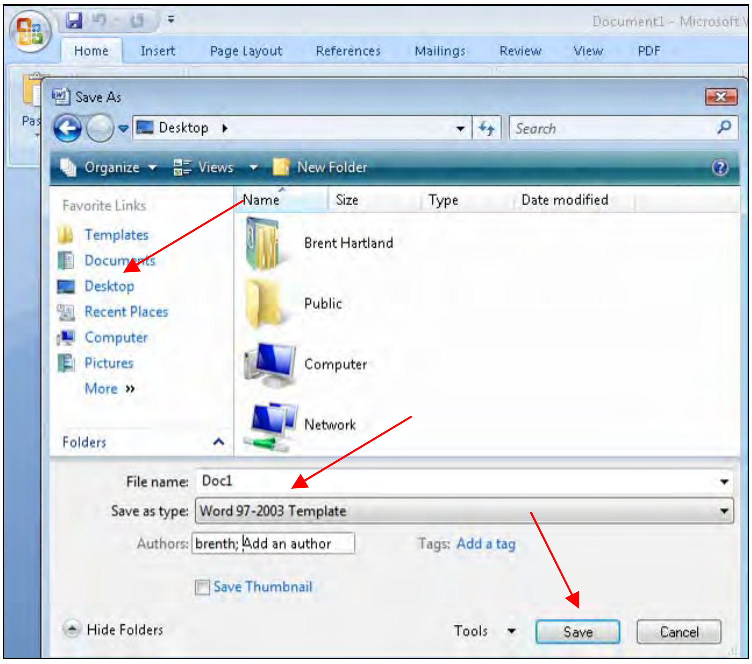
20. Once you have finished creating your letter, click on the **Office Button**, then click **Save As.**



21. This should open the **Save As** screen.
22. Choose **Save As Type** then select **Word 97 – 2003 Template.**



23. Give the file a name in the **File Name** section, then select where you wish to save the file i.e. Desktop or my computer and click **Save.**



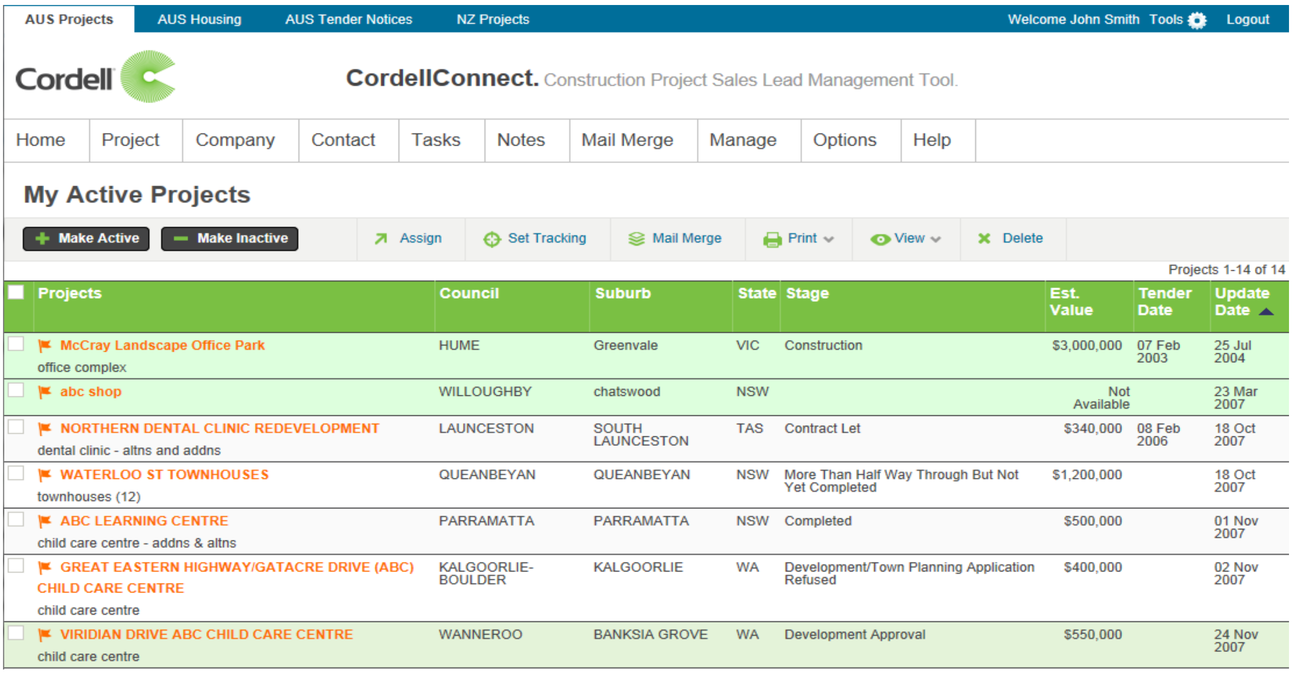
24. The letter is now ready for uploading into Connect.

Mail Merge in bulk

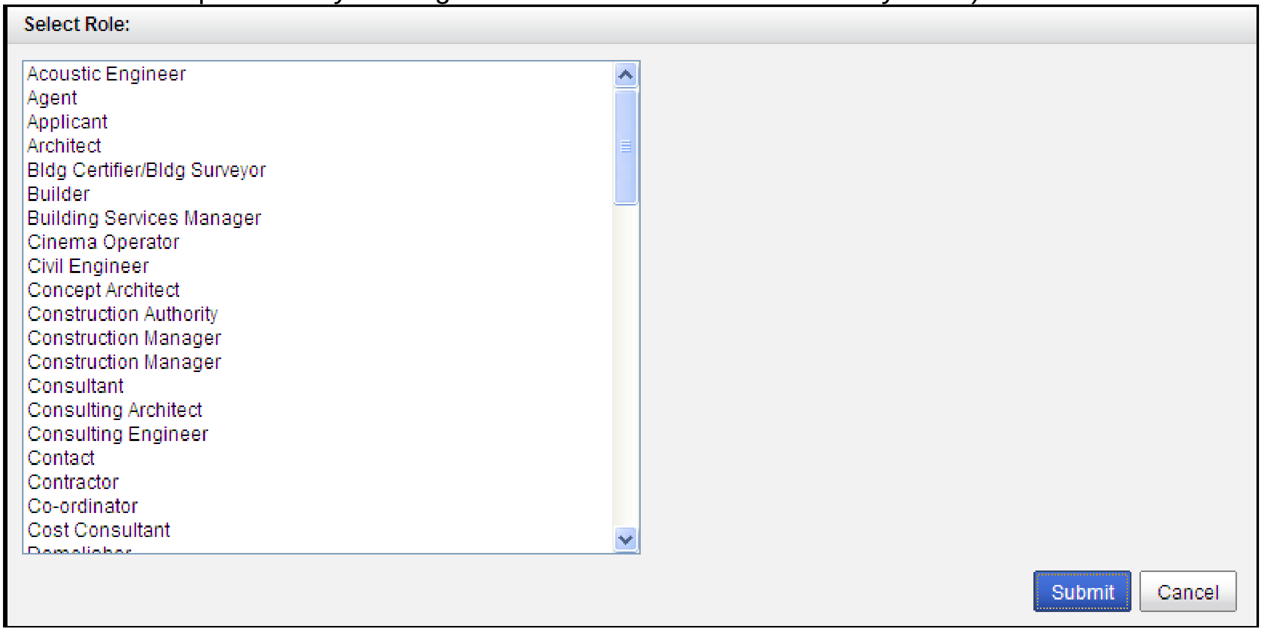
Mail Merge in bulk is also available from Project, Company or Contact screens (used for generating promotional materials, flyers, brochures etc). For Project bulk mail merge, because you cannot post a letter to a project, you will need to select a common role for each project that the letter will be addressed to.

To mail merge in bulk from the Project List view:

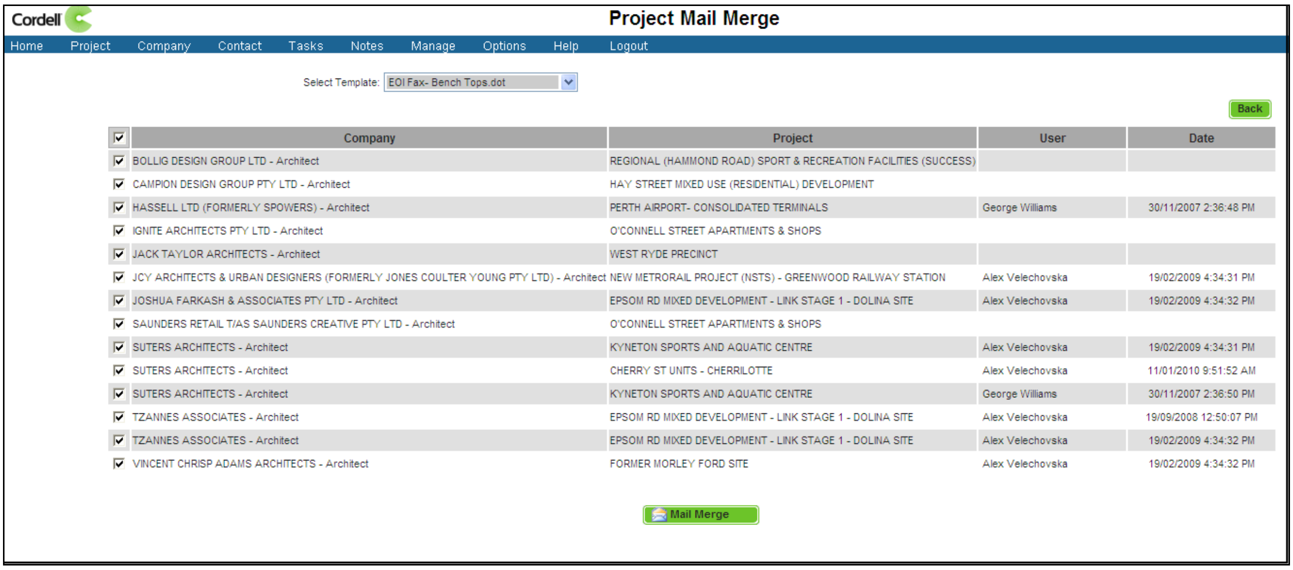
1. Navigate to any Project List view, it could be the **My Active Projects** list or the **My Projects** list or it could be the results of a search.
2. Place a tick next to all the Projects you want to include in the mail merge. If you want to include every project, place a tick in the very top box.



3. Click the **Mail Merge** button. Another window labelled as **Select Role:** will appear (you can select multiple roles by holding down the **'Ctrl' button** on the keyboard).

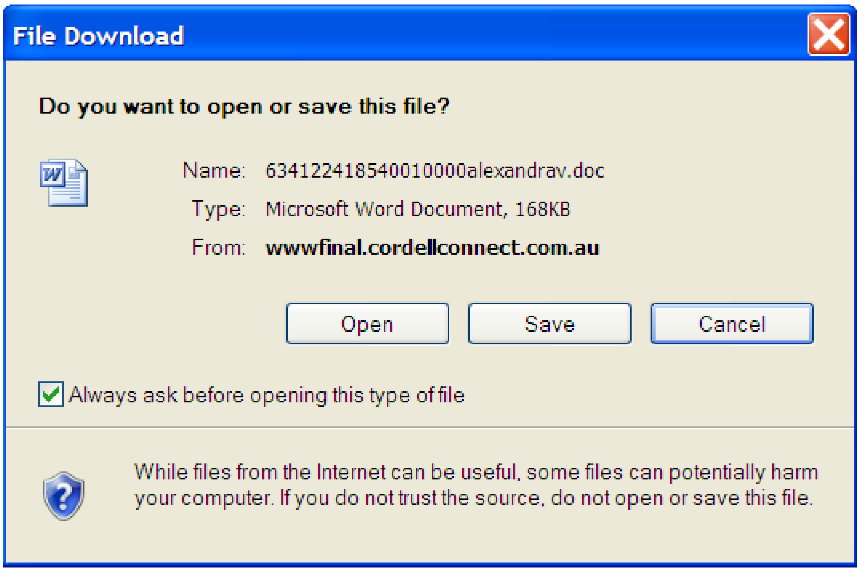


4. After you made your selection, click on **Submit** button.
5. The Project Mail Merge screen will be displayed. In that screen a list of the Companies matching the selected role for the relevant projects will be shown.



Company	Project	User	Date
BOLLIG DESIGN GROUP LTD - Architect	REGIONAL (HAMMOND ROAD) SPORT & RECREATION FACILITIES (SUCCESS)		
CAMPION DESIGN GROUP PTY LTD - Architect	HAY STREET MIXED USE (RESIDENTIAL) DEVELOPMENT		
HASSELL LTD (FORMERLY SPOWERS) - Architect	PERTH AIRPORT- CONSOLIDATED TERMINALS	George Williams	30/11/2007 2:36:48 PM
IGNITE ARCHITECTS PTY LTD - Architect	O'CONNELL STREET APARTMENTS & SHOPS		
JACK TAYLOR ARCHITECTS - Architect	WEST RYDE PRECINCT		
JCY ARCHITECTS & URBAN DESIGNERS (FORMERLY JONES COULTER YOUNG PTY LTD) - Architect	NEW METRORAIL PROJECT (NSTS) - GREENWOOD RAILWAY STATION	Alex Velechovska	19/02/2009 4:34:31 PM
JOSHUA FARKASH & ASSOCIATES PTY LTD - Architect	EPSOM RD MIXED DEVELOPMENT - LINK STAGE 1 - DOLINA SITE	Alex Velechovska	19/02/2009 4:34:32 PM
SAUNDERS RETAIL T/AS SAUNDERS CREATIVE PTY LTD - Architect	O'CONNELL STREET APARTMENTS & SHOPS		
SUTERS ARCHITECTS - Architect	KYNETON SPORTS AND AQUATIC CENTRE	Alex Velechovska	19/02/2009 4:34:31 PM
SUTERS ARCHITECTS - Architect	CHERRY ST UNITS - CHERRILOTTE	Alex Velechovska	11/01/2010 9:51:52 AM
SUTERS ARCHITECTS - Architect	KYNETON SPORTS AND AQUATIC CENTRE	George Williams	30/11/2007 2:36:50 PM
TZANNES ASSOCIATES - Architect	EPSOM RD MIXED DEVELOPMENT - LINK STAGE 1 - DOLINA SITE	Alex Velechovska	19/09/2008 12:50:07 PM
TZANNES ASSOCIATES - Architect	EPSOM RD MIXED DEVELOPMENT - LINK STAGE 1 - DOLINA SITE	Alex Velechovska	19/02/2009 4:34:32 PM
VINCENT CHRISP ADAMS ARCHITECTS - Architect	FORMER MORLEY FORD SITE	Alex Velechovska	19/02/2009 4:34:32 PM

6. At the top of the Project Mail Merge screen, select the template you wish to use (to Add a template, refer to Section 8, Management Console).
7. Check the box next to the companies you wish to mail merge to, if you want to include all of the companies, place a tick in the top box.
8. The **Mail Merge** button will now be visible. Click on the button.
9. **File Download** screen will appear
10. If you choose to save the file first click on the Save button
11. Alternatively, click on Open button to view the mail merged letter.



12. Using the full functionality of MS Word document, the mail merged file is not locked for editing. Therefore, you can still adjust/modify any of the information displayed.
13. As soon as mail merge is completed – an automatic trace is placed, including the Connect user name and the Date & Time of the mail merge. This control protects Connect users from template duplication & improves records traceability.

The same process is used for performing a bulk mail merge from the Company or Contact List view. However, you will not be prompted to select a role, as in step 3 above.

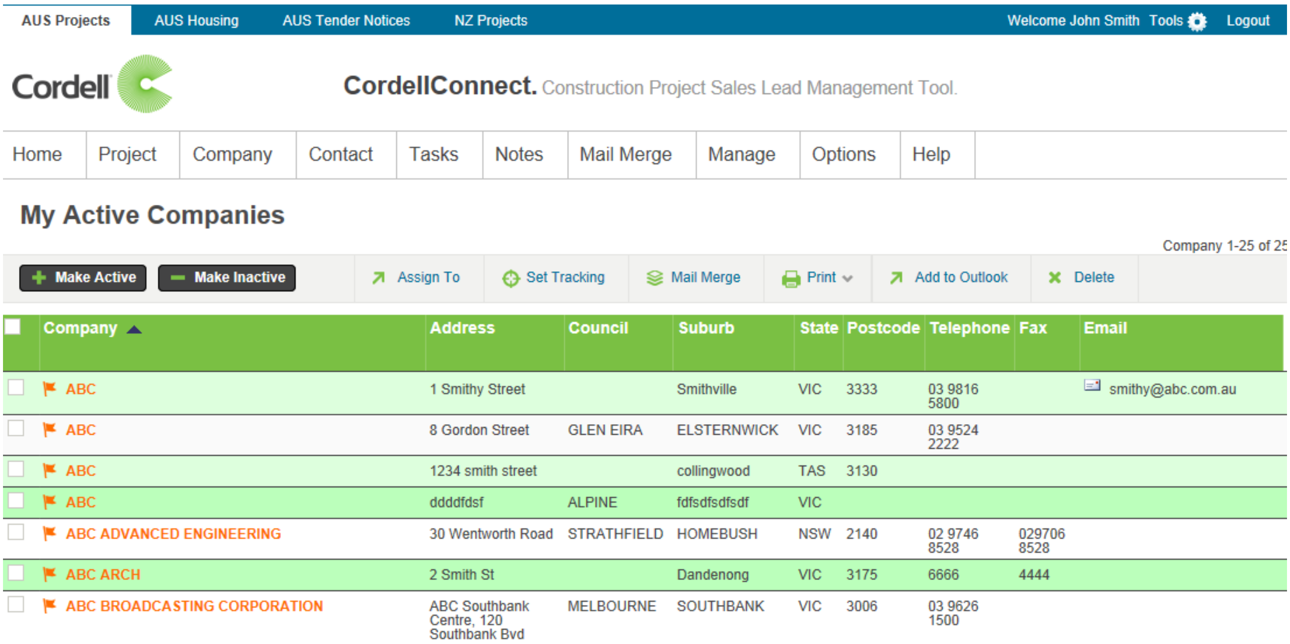
If you have any questions, please do not hesitate to contact one of our experienced Connect consultants on **1800 24 36 24**.

Mail Merge to Outlook

Another of many features of Cordell Connect is the ability to mail merge email addresses on records to Microsoft Outlook. The process is very similar to creating a letter mail merge.

To **mail merge email addresses to Outlook from the Company list view**:

1. Navigate to any Company List view, it could be the **My Active Companies** list or the **My Companies** list or it could be the results of a search.
2. Place a tick next to all the companies you want to include in the mail merge to Outlook. If you want to include every company in the list, place a tick in the very top box.



3. Click the **Mail Merge to Outlook** button. The Company Mail Merge to Outlook screen will be displayed. In the list you will see only companies that have email addresses (so the list might not contain as many records as your original list).
4. At the top of the Company Mail Merge to Outlook screen, select the template you wish to use (to Add a template, refer to *Section 8*, Management Console).
5. Check the box next to the companies you wish to mail merge to, if you want to include all of the companies, place a tick in the top box.
6. The **Mail Merge** button will now be visible. Click the Mail Merge button.
7. A new window will open showing your email message plus the list of companies and their email addresses.
8. To send the emails immediately, click **Email ALL**. To send a draft to Outlook, where you can send the emails later, click **Send to Outlook Draft**. To cancel the task, click **Cancel/Close.**
9. As soon as mail merge is completed – an automatic trace is placed, including the Connect user name and the Date & Time of the mail merge. This control protects Connect users from template duplication.

Follow the same process to mail merge email addresses to Outlook from the **Contact list view.**