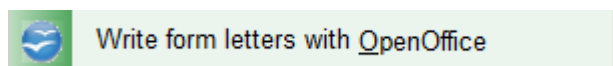
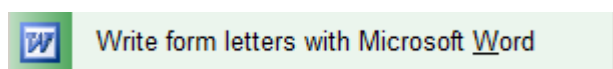


Form letters with ...

We support two office programs for creating form letters :

- [Microsoft Word](#)
- [OpenOffice](#)

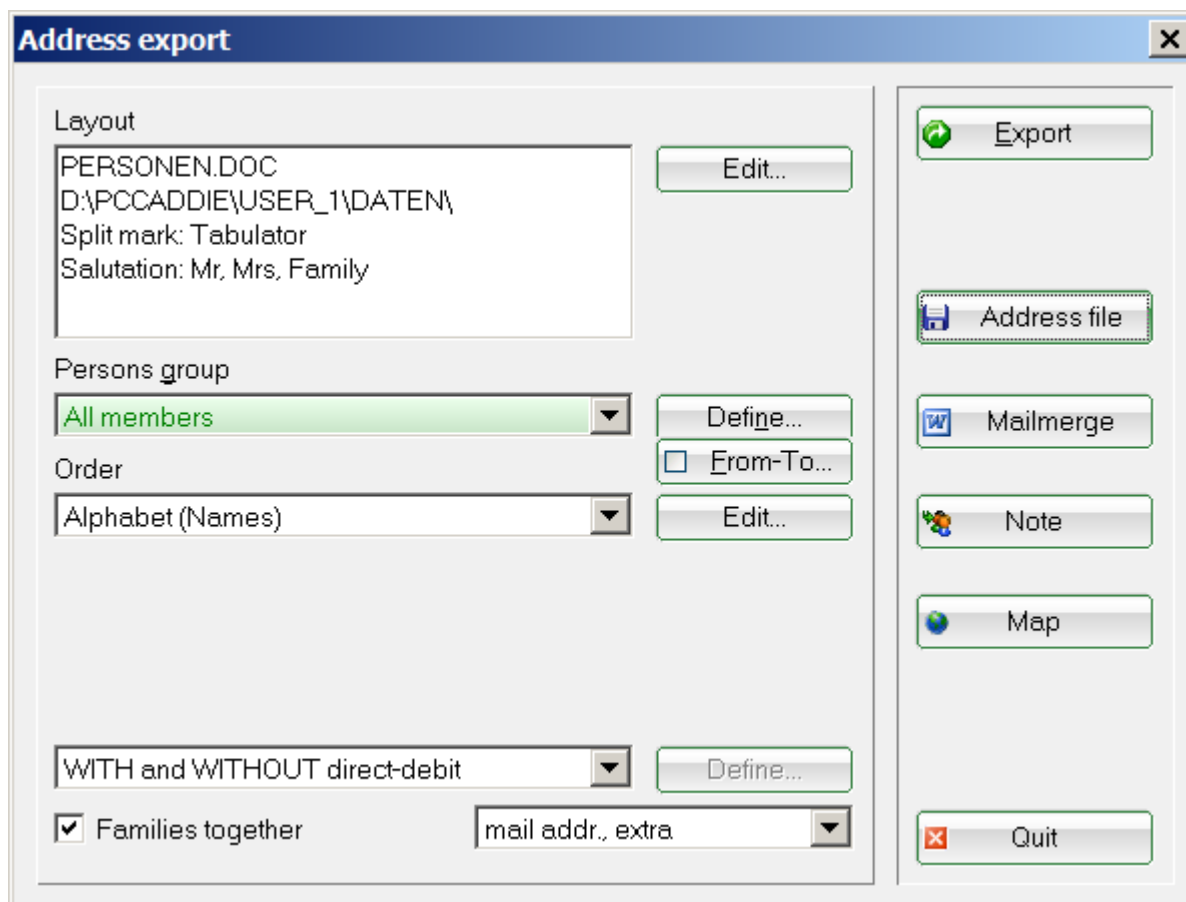
The following menu items will open via **Persons**, depending on the office program you have installed:



This article deals with topics that apply to both office programs.

Main dialogue

To create a form letter select **Persons/Form letter** with Microsoft Word. The menu item **Persons/Export addresses** will also take you to the form letters dialogue.



Pre-settings

Before creating a form letter it is necessary to define a **Persons group** and the **Order**.

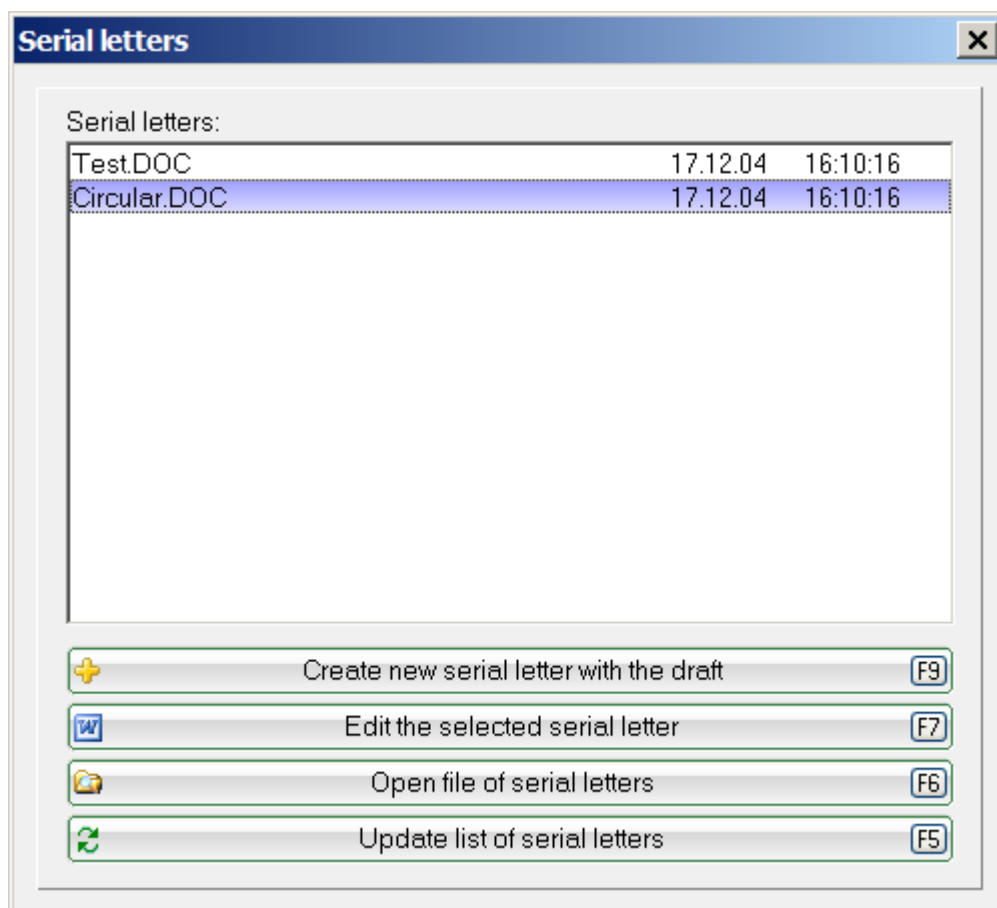


All members of your golf club receive a letter with best wishes for the New Year.

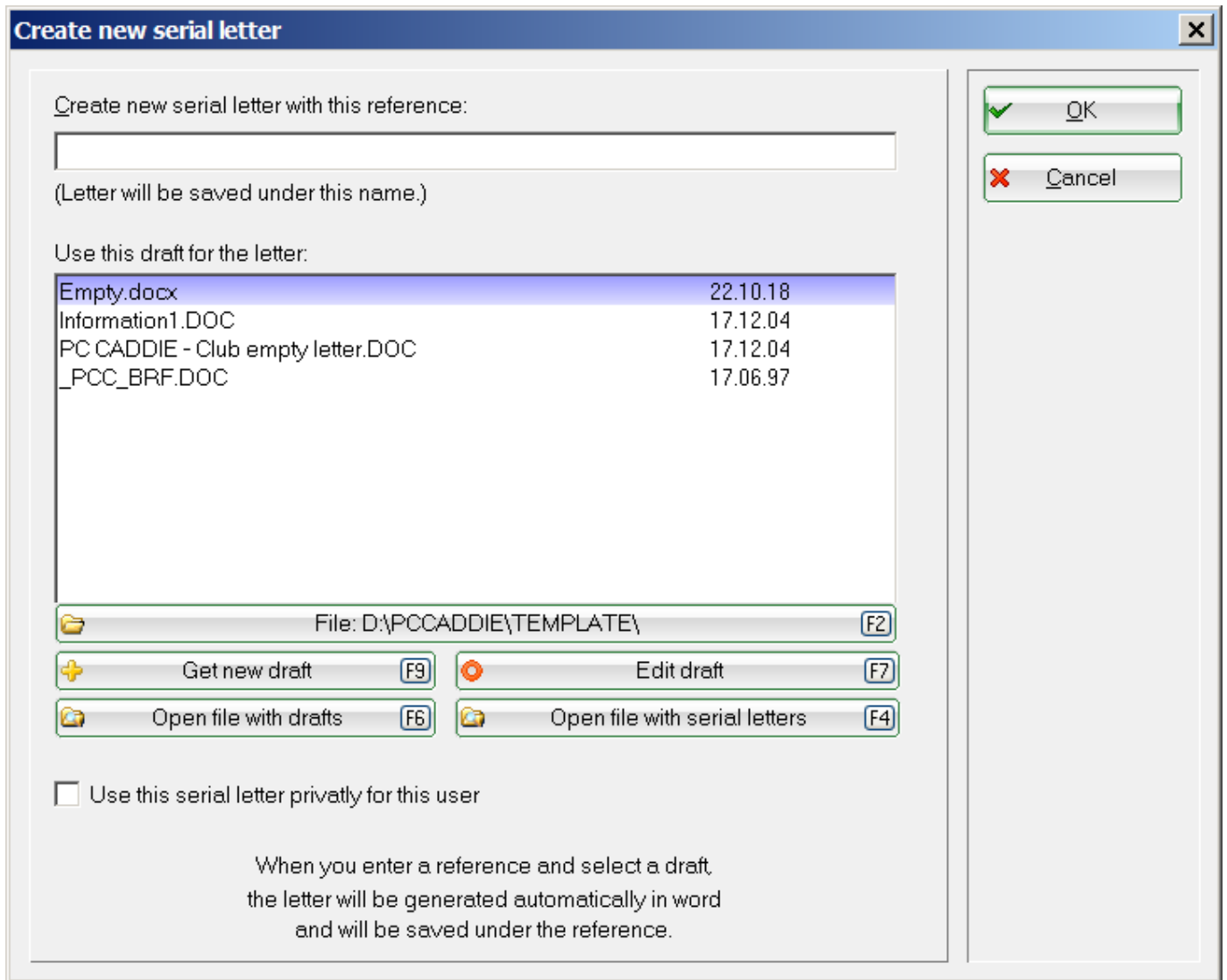
- For this example select „All members“ as the **Persons group**.
- By confirming with the button **Export**, the data will be saved to the form letter file that was set in **Layout**.
- Before creating the form letter you should make sure that you have set the document in **Layout** to be a „*.doc“-file. The directory is set as default by PC CADDIE.

Creating a form letter

Now click the button **Mailmerge**:



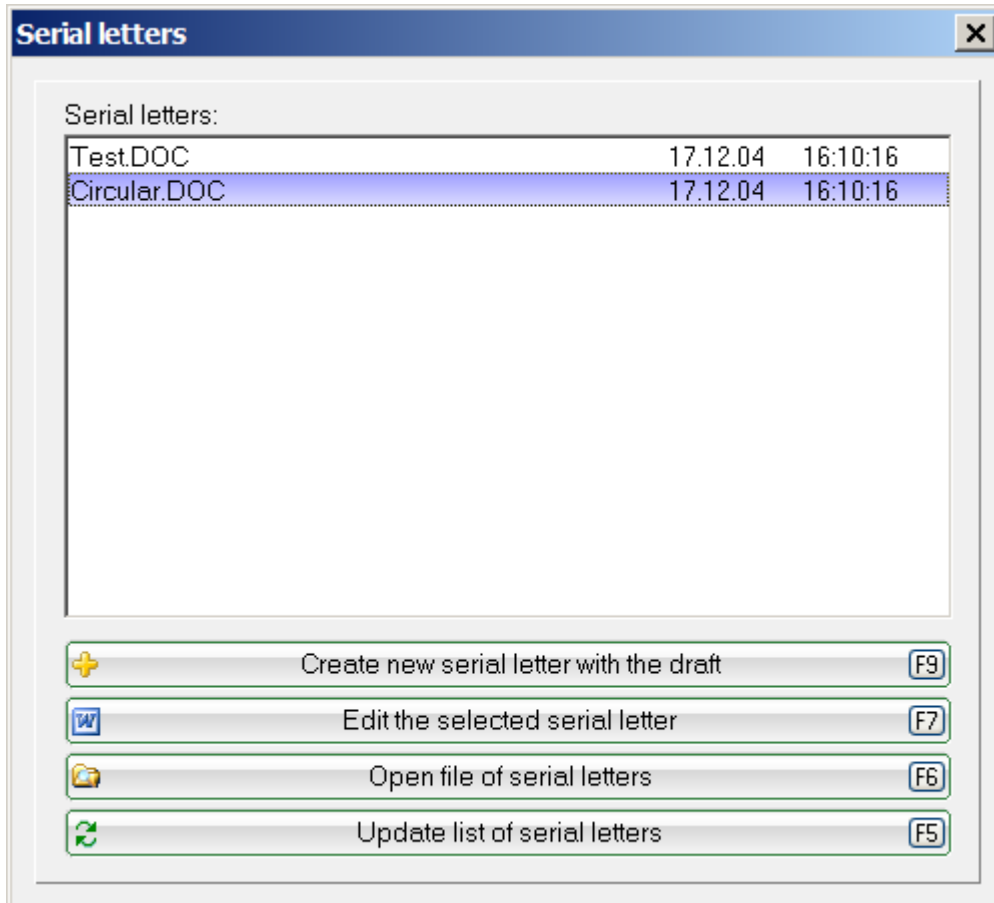
In this window you can already see the used form letters. Please click **Create new serial letter with the draft** (F9) to create a new form letter. This allows you to get any Word document from any local directory and save it as a template.



Activate the desired template and enter a **Reference*** for your form letter. In our example we use the template „PC CADDIE empty club letter“ and enter a reference such as „Happy New Year“. To edit an existing template simply click **Edit draft** (F7). The button **Open file with drafts** (F6) opens the template folder. A new template can be imported with **F9**, while **F5** lets you refresh the list. Finally, confirm with **OK**. Microsoft Word will open automatically.

Depending on the installed office program, either Microsoft Office Word or OpenOffice Writer will open.

Edit/use form letters



Select the desired form letter and click **Edit the selected serial letter**.

Edit / use form letter with...

 Microsoft Word

 OpenOffice

Print form letter

Print form letter with...

 Microsoft Word

 OpenOffice

Annotation of form letters

If you are working with the [CRM\DMS](#) module you can record the form letter in each person mask. The button **Note** makes this possible:

Annotation [X]

Last printing: 18.10.18 - 11:04:14 (1 Records)

Record output in the following category:
Letter, general

Additional text:
Happy New Year

Attached document:
Happy New Year.doc

Date: 22.10.18 Time: 14:56:47

Status: done

For: Timo Tester

Privat New

Verify export list [F7]

Note [X] Cancel

At the top of the image you can see the current data that is being suggested for annotation.

Define the category where the letter should be recorded, the text of the annotation and finally add the document. The button **Verify export list** (F7) will show you the people for which this annotation will be created.

After you have made all entries you can launch the annotation process using the button **Note**:

Start annotation [X]

Make sure that your really want to create this annotations!

OK, start annotaion

Cancel

Confirm this dialogue again with **OK, start annotation**.

PC CADDIE will record the following annotation in each person mask of the relevant group of persons:

The screenshot shows a window titled "Info: 15" with a menu bar containing "memo", "todo", "contact person", "Contact", "general overview", "correspondence", "E-Mail", "Changes to the data", and "Search". The main area displays a list of messages with columns for date, time, sender, and subject. The selected message is dated 22.10.18 at 14:56, sent by LETT, with the subject "Happy New Year / Sir / Dr. Paul von Member / Hasslerstrasse 15 / 52055 Aac". Below the list, the "Contact Pers" section shows "FAM 2" and "Member, Petra (04393/3949593)". The bottom toolbar includes "Options" (F5), "New" (F6), and "Edit" (F7).

Date	Time	Sender	Subject
15.06.16	13:06	TERM	Discuss membership status / 15.06.16-16:41-test: / -----
16.06.16	21:10	TURAN	OK:Project Competition / Sie wurden erfolgreich angemeldet. / Member, Paul
16.06.16	21:23	TURAB	OK:16.06.16 Project Competition / CD1 / @TURN:000004-01-1-00000013- 1 C
21.06.16	16:24	TURAB	OK:10.06.16 Testcup / CD1 / @TURN:000001-01-1-00000003- 1 10:08 /
23.06.16	15:16	TURAN	OK:PC CADDIE Cup / Sie wurden erfolgreich angemeldet. / Member, Paul (Mer
23.06.16	20:53	TURAB	OK:23.06.16 PC CADDIE Cup / CD1 / @TURN:000011-01-1-00000017- 1 0:00
20.07.16	12:32	TURAN	OK:PC CADDIE Cup / Sie wurden erfolgreich angemeldet. / Member, Paul (Mer
20.07.16	15:38	TURAB	OK:20.07.16 PC CADDIE Cup / CD1 / @TURN:000015-01-1-00000019- 1 0:00
21.07.16	16:35	TURAN	OK:Gentlemen day / Sie wurden erfolgreich angemeldet. / Member, Paul (Men
28.09.16	09:55	TURAN	OK:3. Jura Cup / Sie wurden erfolgreich angemeldet. / Member, Paul (Membe
28.09.16	09:55	TURAN	OK:1. Jura Cup / Sie wurden erfolgreich angemeldet. / Member, Paul (Membe
03.10.16	18:10	TURAN	OK:Tournament name / Sie wurden erfolgreich angemeldet. / Member, Paul (I
25.11.17	15:14	TURAN	OK:25.11.17 Christmas competition / SPED-tito / @TURN:000036-01-1-000000
22.10.18	14:56	LETT	Happy New Year / Sir / Dr. Paul von Member / Hasslerstrasse 15 / 52055 Aac

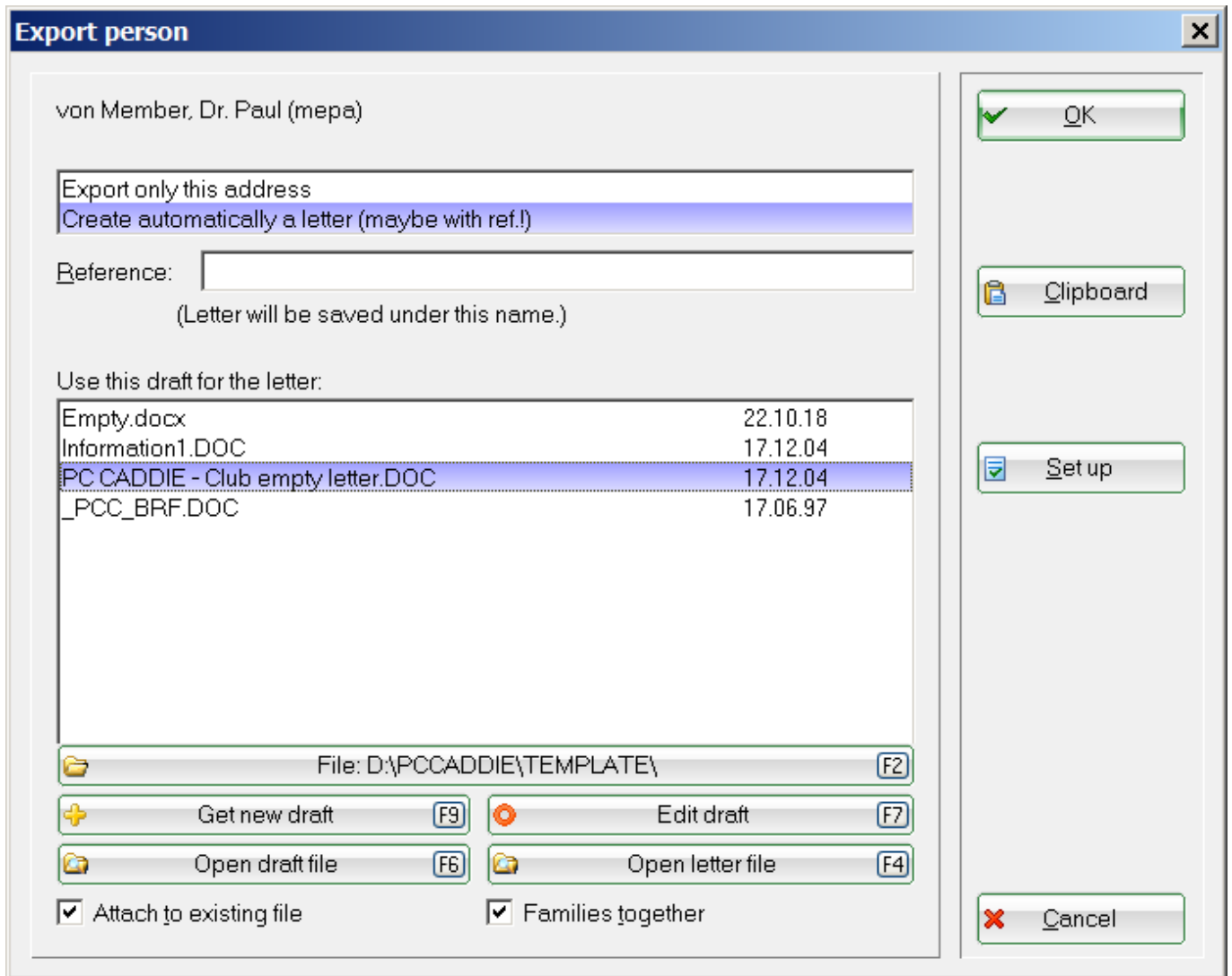
Contact Pers :@ANSP

FAM 2 Member, Petra (04393/3949593)

Options (F5) + New (F6) Edit (F7)



Create a single letter using a template

To create a single letter with a template, select a person and then click the button **Export** in the person mask:



Activate the option „Create automatically a letter“ and select a template for the letter. This dialogue is set up the same way as the dialogue for form letters. Have you made all changes, click **OK**. Then your office program opens - the merge fields in our template are already filled correctly for „Günter Ackermann“. You can now proceed as usual with the Word document. After closing the document the following window with the attached file opens:

Info: PC CADDIE - Club empty letter.DOC

Address: Member, von, Dr. Paul  


Contact person: **F3**

Project: **F4**

Category:

Subject:

Fixed date: Time: Duration:

Follow-up: Time: 



For: From: Timo Tester

Visible: Done:

Status: on:

Created: Changed:

Show in staff timetable New entry

Attachment:  

F6 **F7**

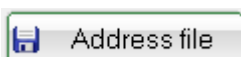
F12
 F11
 F9

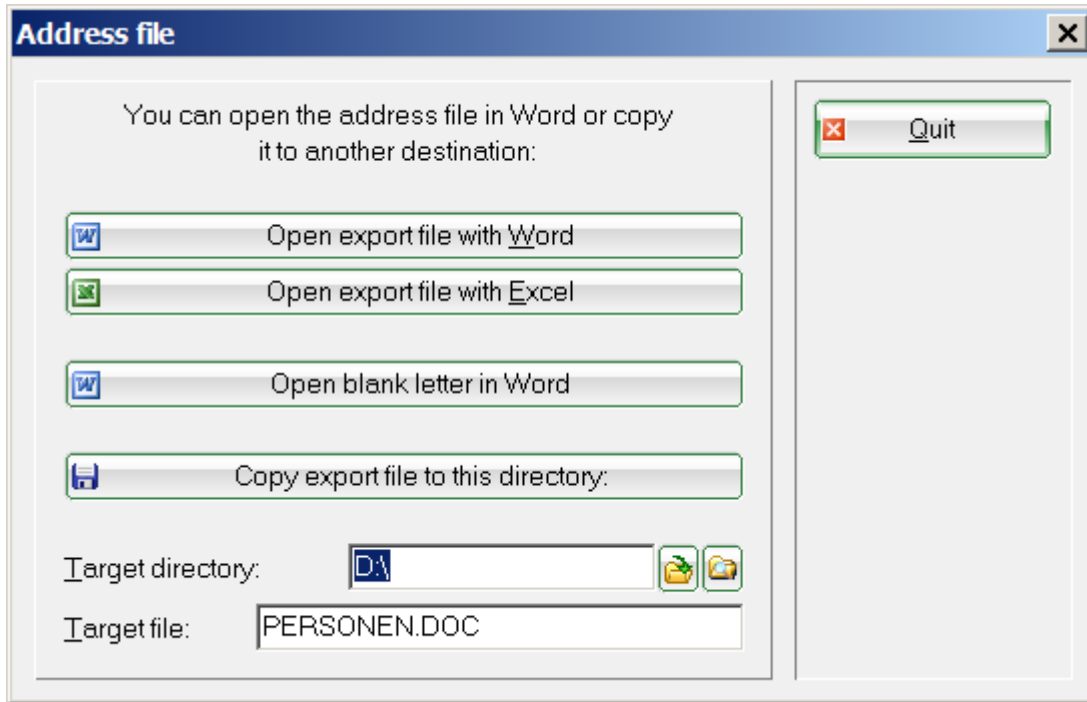
 F5

Make all the necessary entries according to your wishes and exit the window with **OK** (F12). The document has now been saved to the person mask of „Günter Ackermann“.

Export addresses

Click the button **Address file** in the [Main dialogue](#) to export addresses:



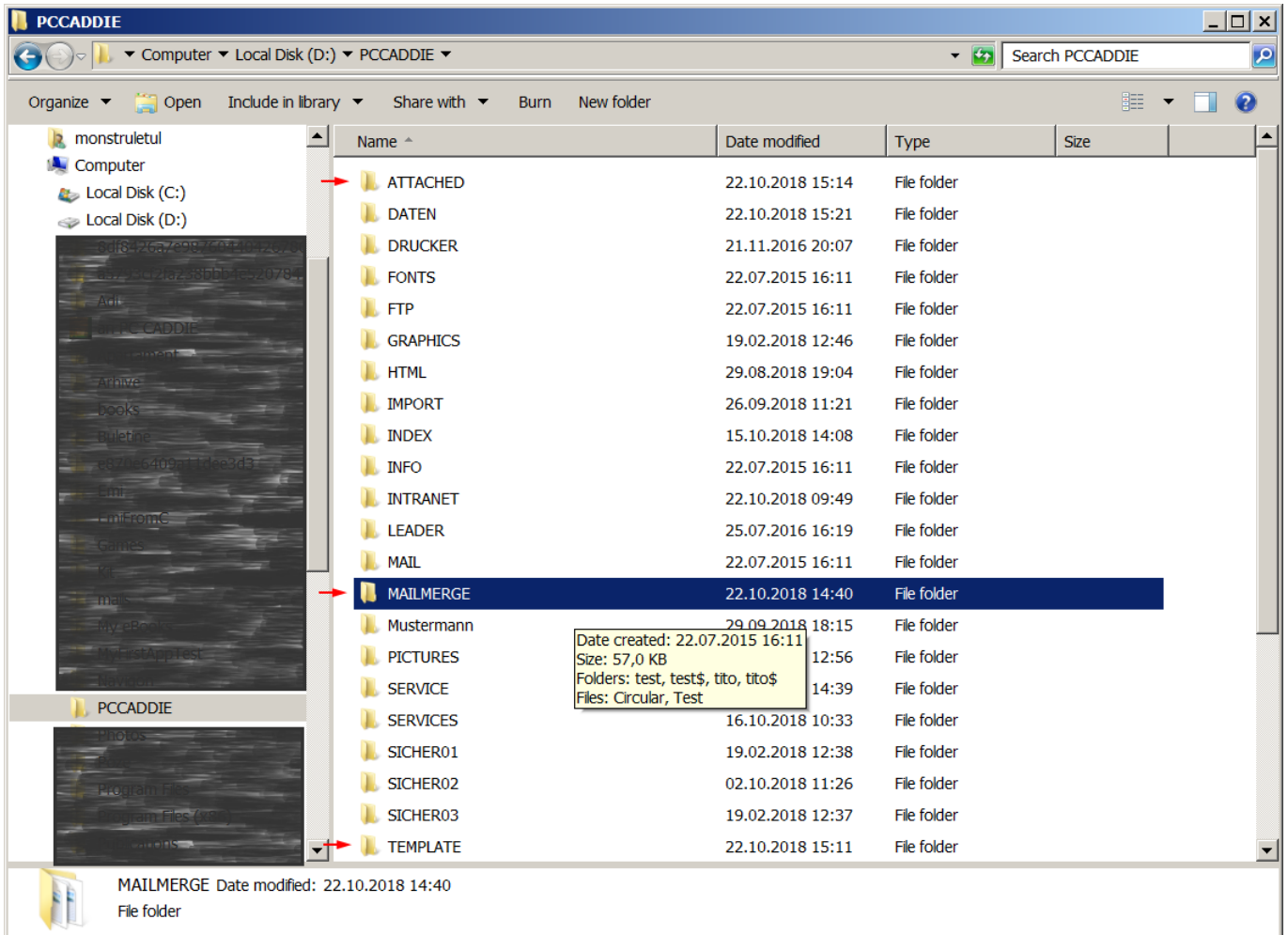


You have the option to either export addresses to Word or Excel; exporting to Excel is recommended in case you want to print them out or use them in any other way. Please remember that it will be an HTML file and you will have to save as an Excel file. You can also copy the file into any desired target or open an empty letter.

Storage locations for documents

PC CADDIE saves the documents in different folders.

Folder	Content
Attached	single letters
Mailmerge	form letters
Template	templates



Further information on **Storage locations for documents** for:

