

# AUTOWORK ONLINE



mamsoftware



## Mail Merge Instructions Word 2003

### Introduction

This document will take you through the basics of using mail merge with Autowork Online and Word 2003. If you have any further questions please contact our support team on 01226 352904.

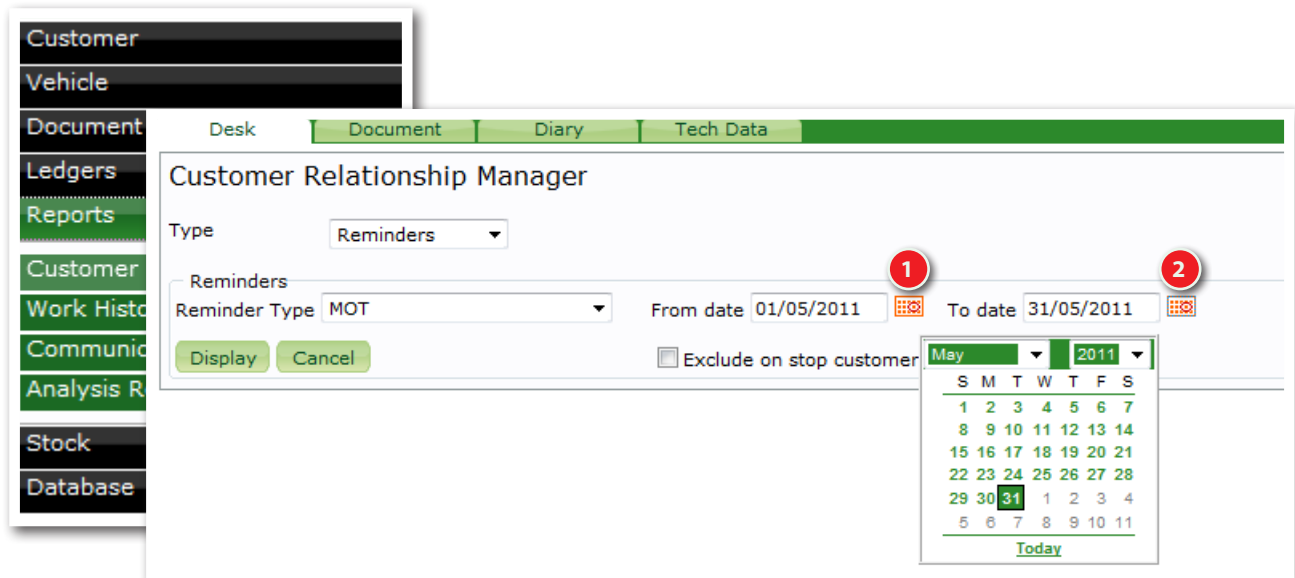
### Key features

- ▶ Selecting customers
- ▶ Exporting to file
- ▶ Merging in MS Word

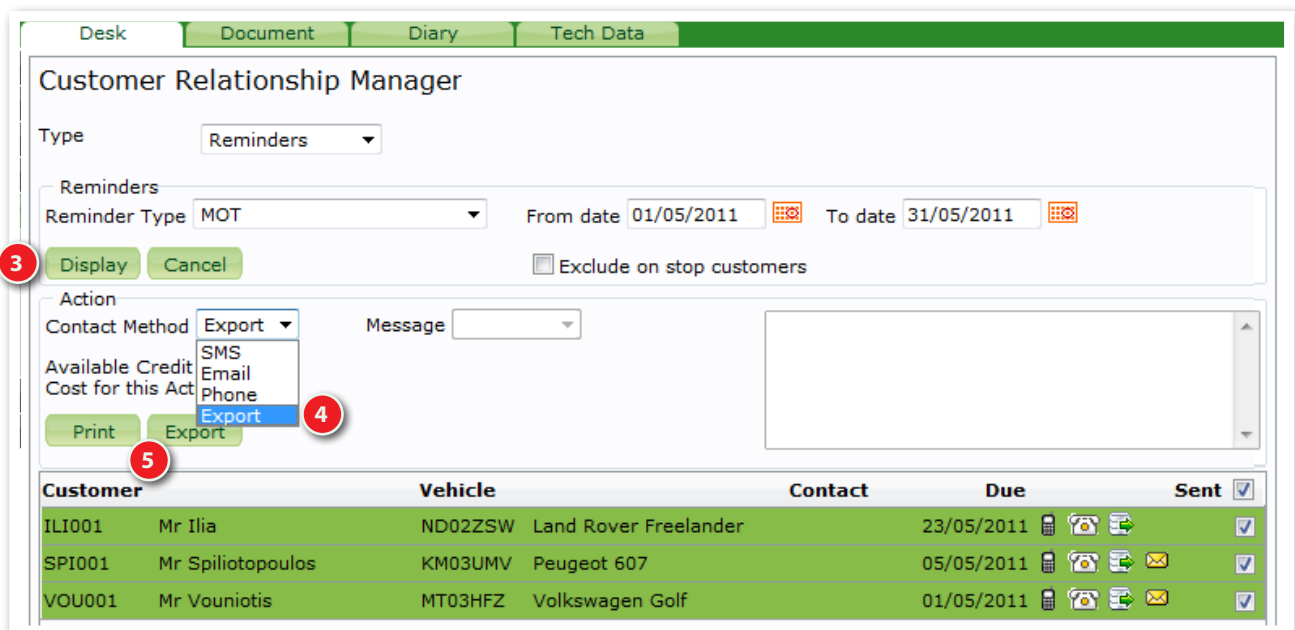
## Mail Merge Word 2003

In Autowork Online go to **Reports – Customer Relationship Manager**.

Select the type of reminder required and enter the dates required **From** (1) and **To** (2).



Click **Display** (3) to show all reminders for the selected date range and change the **Contact Method** option to **Export** (4). This will change all exportable customers to green.

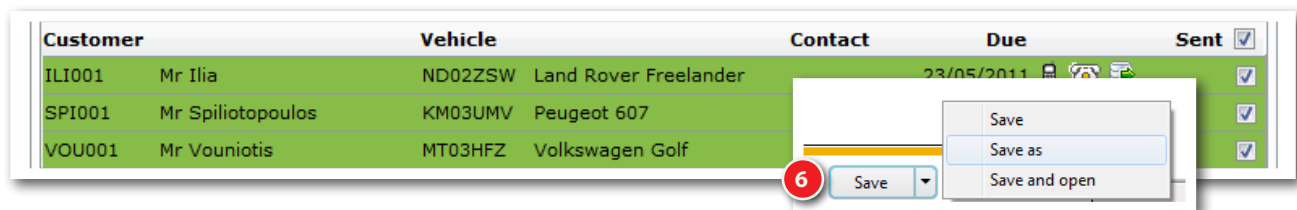


Customer	Vehicle	Contact	Due	Sent
ILI001	Mr Iliia ND02ZSW	Land Rover Freelander	23/05/2011	<input checked="" type="checkbox"/>
SPI001	Mr Spiliotopoulos KM03UMV	Peugeot 607	05/05/2011	<input checked="" type="checkbox"/>
VOU001	Mr Vouniotis MT03HFZ	Volkswagen Golf	01/05/2011	<input checked="" type="checkbox"/>

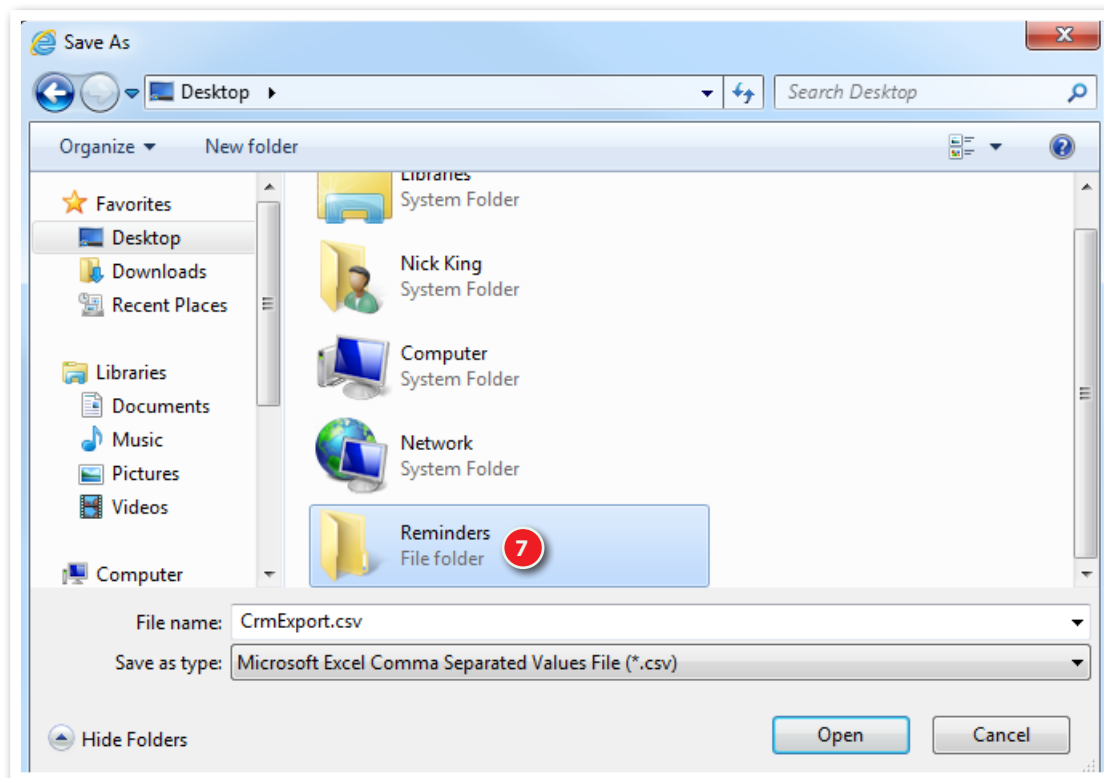
Click the **Export** (5) button to create the CrmExport.csv file that has been extracted from Autowork Online.

## Mail Merge Word 2003

Click the **Save** button (6) to download this file from the internet to your PC.

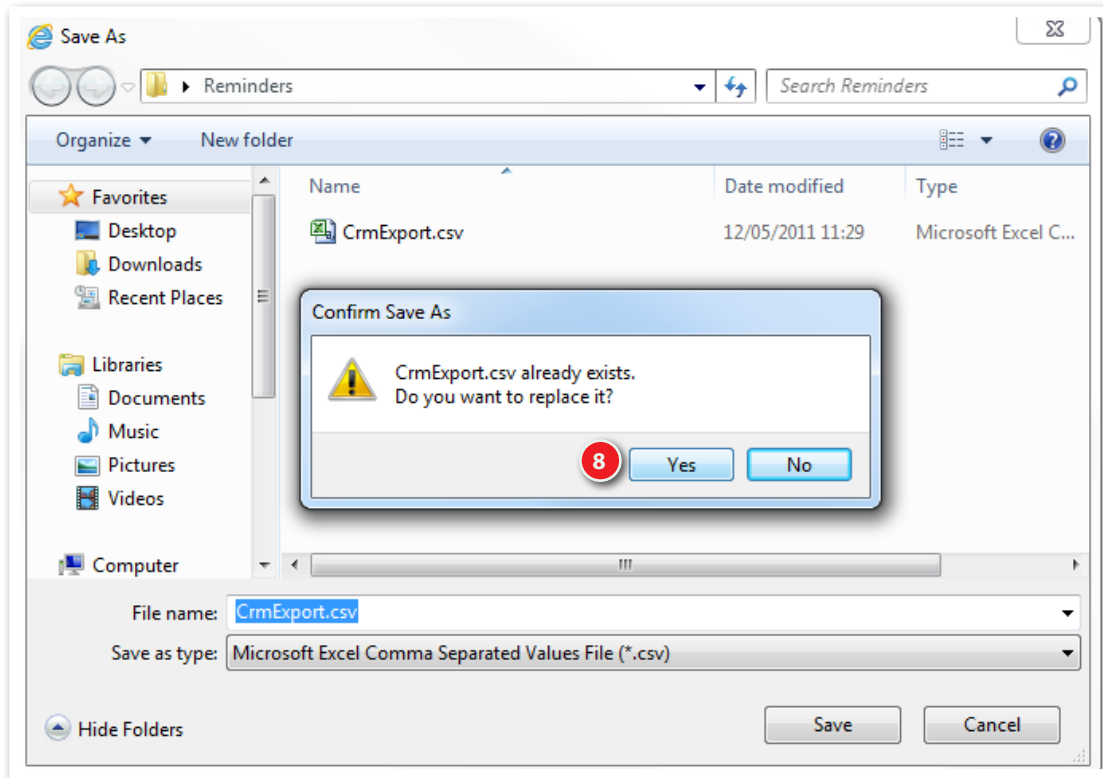


The file needs to be saved to the Autowork Online Reminders folder located on the PC Desktop. In the download window, select **Desktop**. Double click **Reminders** (7) to open the folder.

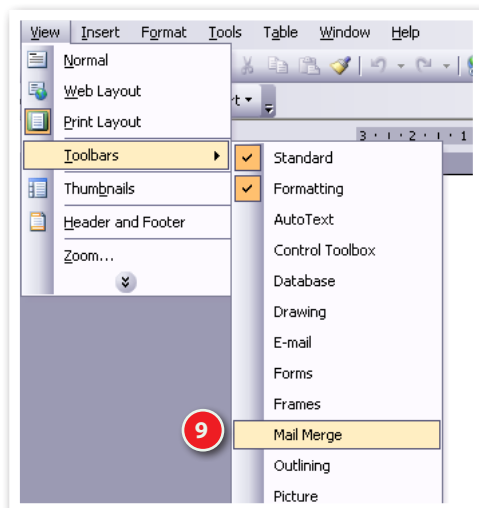


## Mail Merge Word 2003

If the file has been downloaded before you should see the existing file, in this instance you will be warned that the file already exists. Do you want to replace it? Select Yes (8).

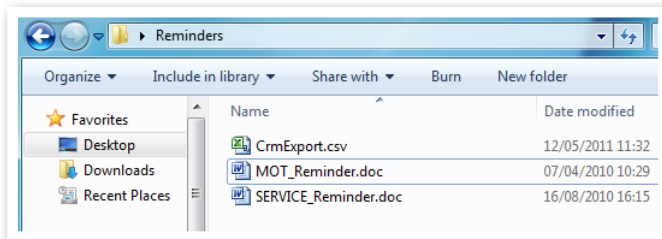


When the download is complete close the Download box and minimise Autowork Online.

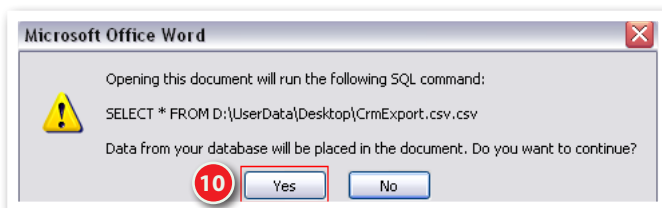


*Note: Before merging any data open Word 2003 and turn on the Mail Merge Toolbar (9) then close Word again. The mail merge tool bar will then open for merge documents.*

## Mail Merge Word 2003



Go to the PC Desktop and open the Autowork Online Reminders folder. Open the required letter.



Say **Yes** to run the required sql command (10) and the letter will open.

When the letter opens use the mail merge tool bar to edit recipients, add additional merge fields, merge data, preview results and merge to printer.



Edit recipients



Insert merge field



Merge data



Merge to printer

When all the letters are printed close Word and say **NO** to save changes.

This document was correct at time of going to print. However, MAM Software operates a policy of continuous product development. MAM therefore reserves the right to change specifications of the items featured in this publication at any time and without notice. For the latest product information, please call 01226 352900