

# AUTOWORK ONLINE



mamsoftware



## Mail Merge Instructions Word 2007 - 2010

### Introduction

This document will take you through the basics of using mail merge with Autowork Online and Word 2007 - 2010. If you have any further questions please contact our support team on 01226 352904.

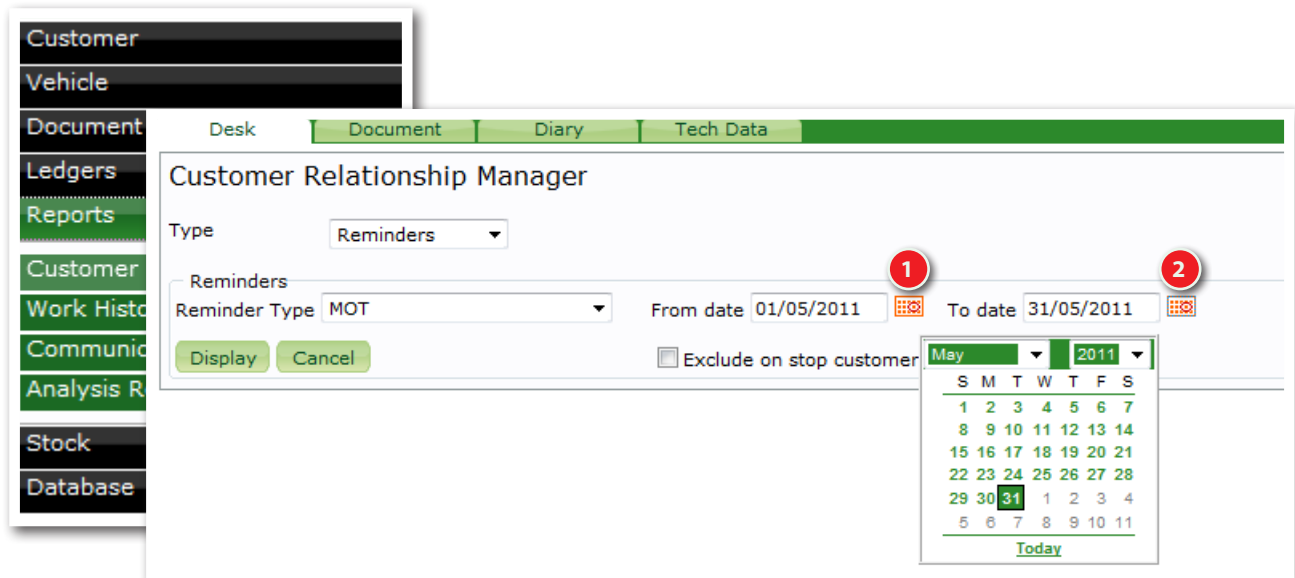
### Key features

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

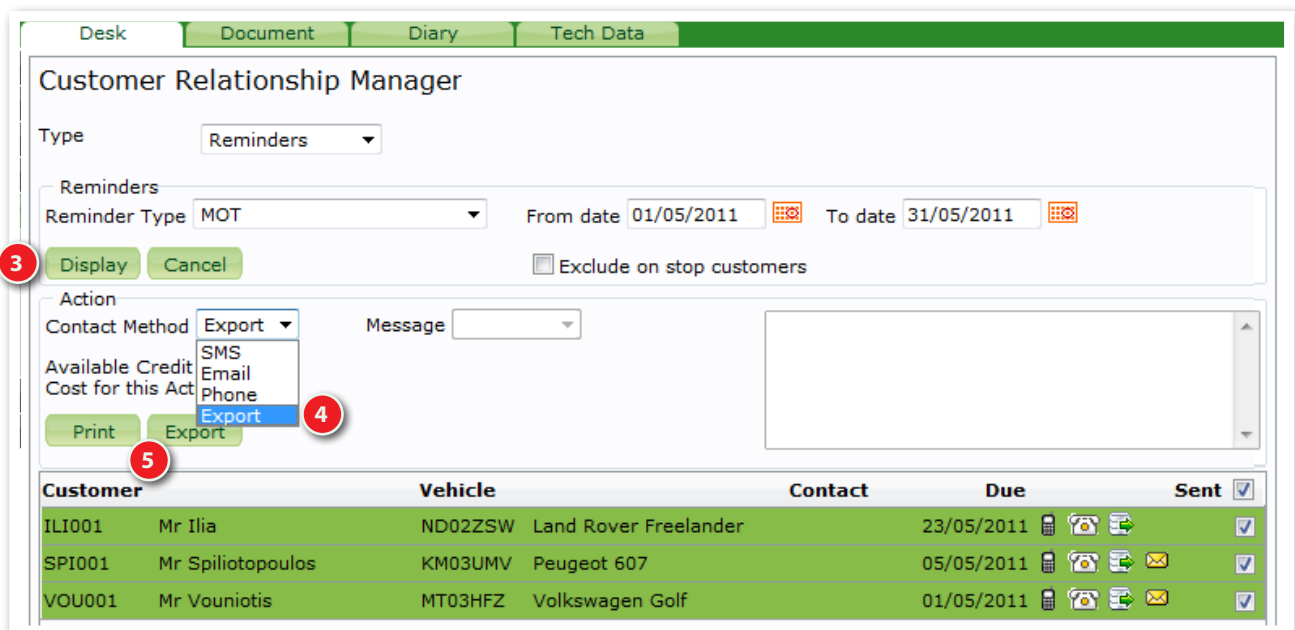
## Mail Merge Word 2007 - 2010










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.

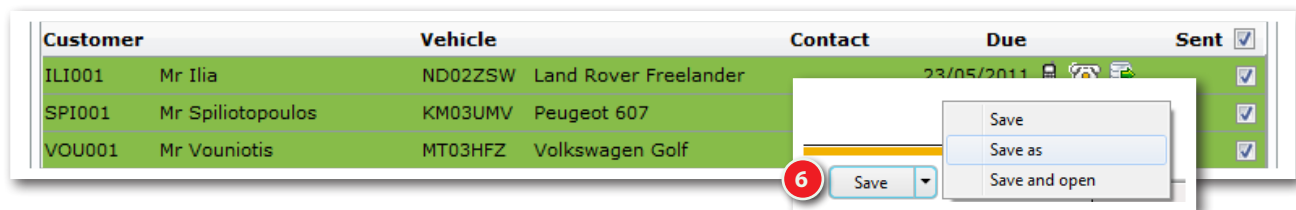


Customer	Vehicle	Contact	Due	Sent
ILI001	Mr Iliia ND02ZSW Land Rover Freelander	23/05/2011	  	<input checked="" type="checkbox"/>
SPI001	Mr Spiliotopoulos KM03UMV Peugeot 607	05/05/2011	  	<input checked="" type="checkbox"/>
VOU001	Mr Vouniotis MT03HFZ Volkswagen Golf	01/05/2011	  	<input checked=""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

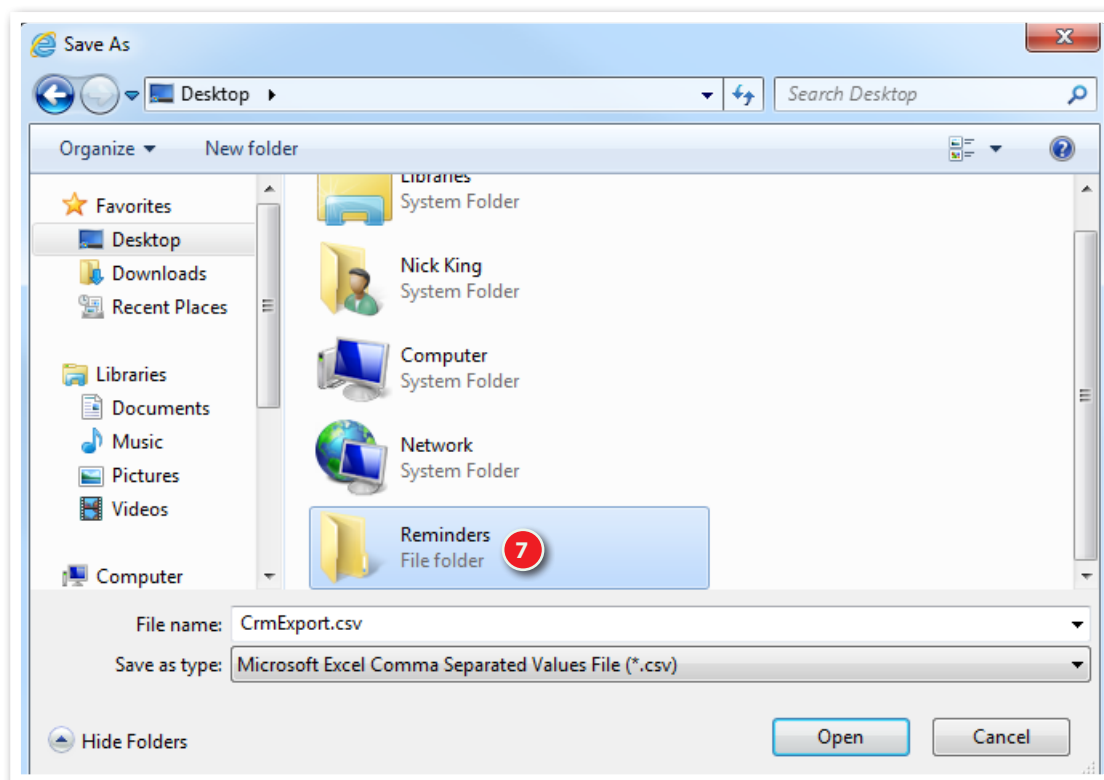
Click the **Export** (5) button to create the CrmExport.csv file that has been extracted from Autowork Online.

## Mail Merge Word 2007 - 2010

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

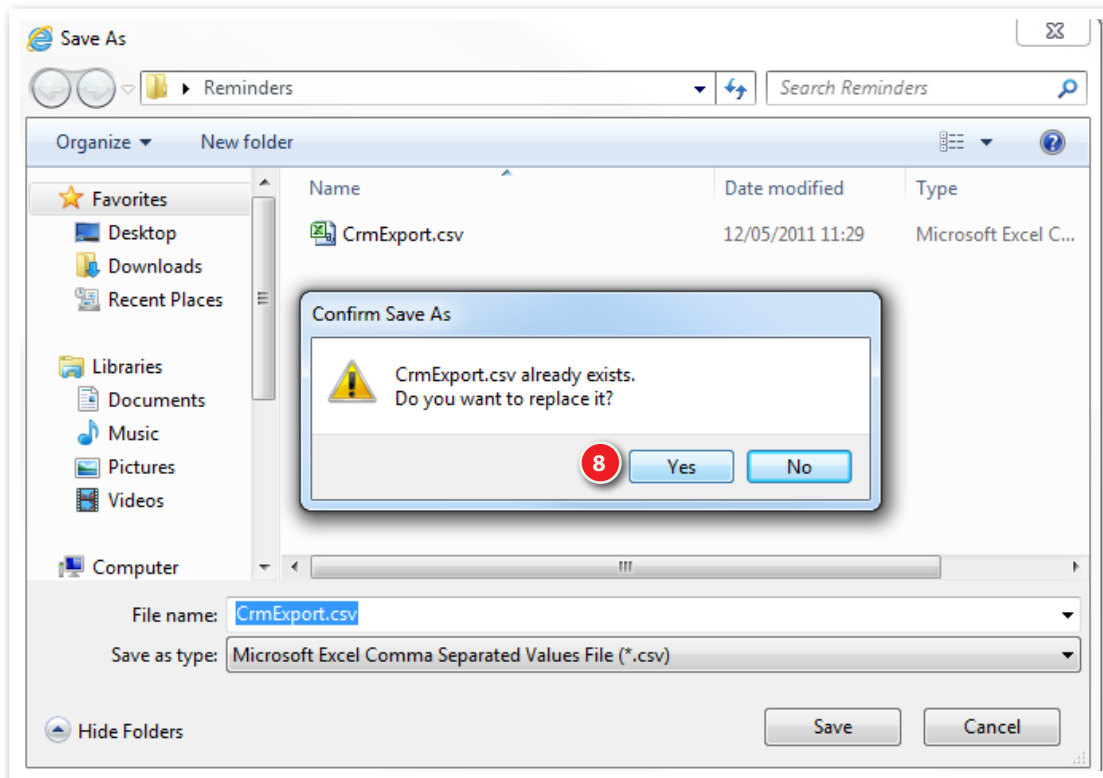


The file needs to be saved to the Autowork Online Reminders folder located on the PC Desktop. In the download window, select **Desktop**. Double click **Reminders** (7) to open the folder.

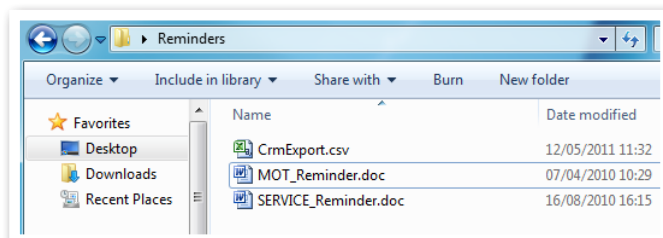


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If the file has been downloaded before you should see the existing file, in this instance you will be warned that the file already exists. Would you like to replace it? Select Yes (8).

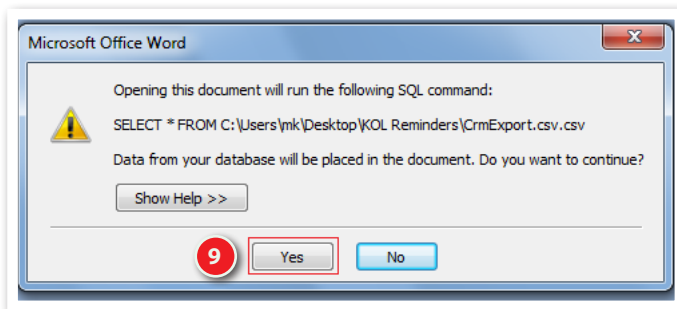


When the download is complete close the Download box and minimise Autowork Online.



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

## Mail Merge Word 2007 - 2010

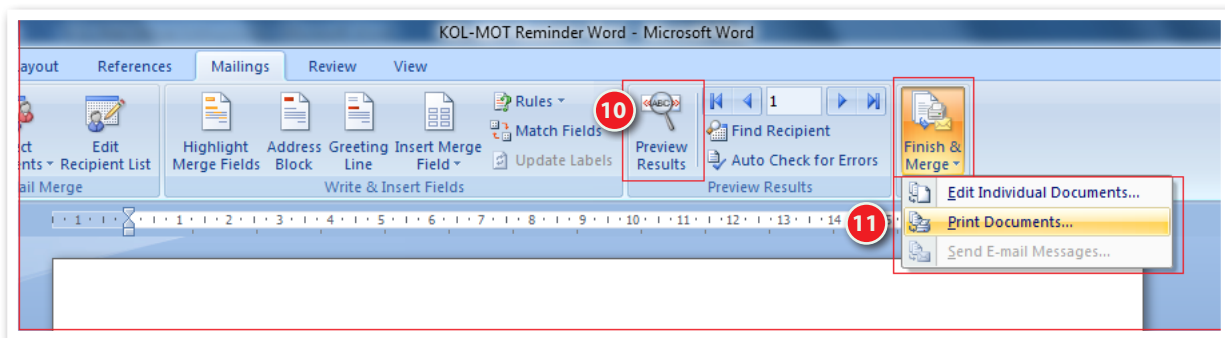


Say **Yes** to run the required sql command (9) – the letter will then open.

From the Menu Tabs in Word 2007 select **Merge**.

On the Merge Menu select **Preview Results** (10). This will import the data into the letter.

To Print the letters select **Merge & Finish - Print Documents** (11).



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