Quick guide

PRO.FILE 8.7
Creation and administration of serial letters with mail merge

This quick guide is to give you a short overview of the functions for the creation and administration of serial letters via the integration PRO.FILE – Microsoft Word VSTO. For detailed information please see the operation manual of the integration. This description assumes that the basic "Mail Merge" functions of Word are known.

The serial letter function of the integration – an overview

The PRO.FILE integration for MS Word supports the administration of serial letter documents and data sources via the PRO.FILE database. It is possible to store serial letter documents and Excel data sources in PRO.FILE and to also use this data separately for the creation of new serial letter documents.

You have different options. You can

- store a **new serial letter in PRO.FILE**

  If this serial letter contains a new Excel data source, or a source that has not yet been saved to PRO.FILE, this data source is also stored in PRO.FILE.

- open **existing serial letter document from PRO.FILE** for editing

  In such case, the Excel data source linked to this serial letter is also loaded from PRO.FILE and is made available to the serial letter document.

- **create** a new serial letter in Word and link it to an already existing Excel data source from PRO.FILE.

- **change or remove the data source** assigned to the serial letter document. The link in PRO.FILE is removed and the connection between the serial letter and the data source no longer exists. In the next step, you can select and link a new data source.

Note:

Only Excel data sources can be used as data sources for serial letters in PRO.FILE!

Basic explanations for the work with serial letters in PRO.FILE

When using serial letters with PRO.FILE, it is important to know that always two documents are used in such case.

- The **main document** contains the merge fields, via which the respective data records (e.g. name, title, address, …) are displayed when the corresponding serial letters are produced, as well as general information, such as "We hereby would like to invite you…", which always remains the same in each letter.

- The second document is the **Excel data source** and contains the information that is to be different in each letter, e.g. the name and address of the recipients.
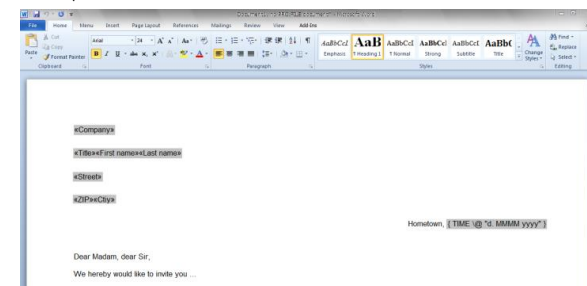
PRO.FILE saves these two files under different document descriptions. It is thus possible to use an Excel data source, saved in PRO.FILE, for the creation of another serial letter document.

How is a new serial letter created and saved to PRO.FILE?

The creation of a new serial letter and the saving to PRO.FILE takes place in two basic steps.

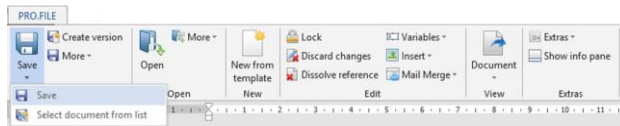1. Create a serial letter in MS Word

    - Create the main document in Microsoft Word, containing the information to be repeated on each copy of the serial letter (e.g. "Dear Madam, dear Sir – Kind regards"). For information on the creation of such a letter, please refer to the Microsoft Word online help.

    - You then have to specify the data source that contains the data for filling in the data fields in the actual serial letter. This data source contains, for example, the name and address of each letter recipient. You can either create a new data source in MS Excel or assign an existing data source that is already saved in PRO.FILE (for this latter option please see the section "How to link Excel data sources from PRO.FILE to a new serial letter").

- You now have to insert the desired **mail merge data fields** into your main document. These fields serve as place holders and specify the location at which data from the data source is to be inserted into the serial letter.
- The data from the Excel data source then has to be **connected** to the main document in Word. Each data record from the Excel data source results in one serial letter copy.

2. Save the serial letter to PRO.FILE

- Make sure that your **main document**, which contains the mail merge fields, is **activated** in Word. Then select the function "**Save**" from the PRO.FILE menu in the Word menu bar.

- The **Checkin Wizard** is displayed, prompting you to specify a document description for the main document of the serial letter.
- Save the document in PRO.FILE, following the regular saving process via the wizard.
- PRO.FILE now checks whether an Excel data source exists for this main document. If this is the case, the Checkin wizard is displayed again, so that you can save this Excel document as well.

Note:

When working with Office 2007/2010, both files, the main Word document and the MS Excel data source, need to be open for this saving process.

How is a serial letter document opened from PRO.FILE?

The opening of a serial letter from PRO.FILE is made in the same way like opening a "regular" Word document from PRO.FILE.
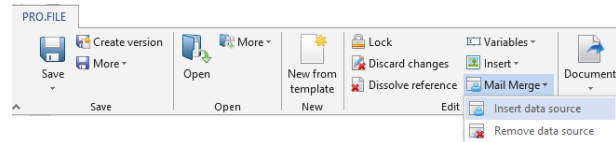
When a serial letter document is opened from PRO.FILE, the integration checks out the MS Excel data source connected to the Word document as well and supervises it.

If the serial letter document is checked out "**for modification**", the Word document and the connected Excel document are locked in PRO.FILE for other users.
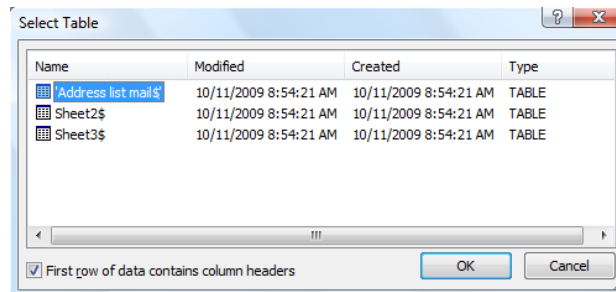
How to link Excel data sources from PRO.FILE to a new serial letter

For the linking of an Excel data source, which is already saved in PRO.FILE, to a new Word serial letter document proceed as follows:
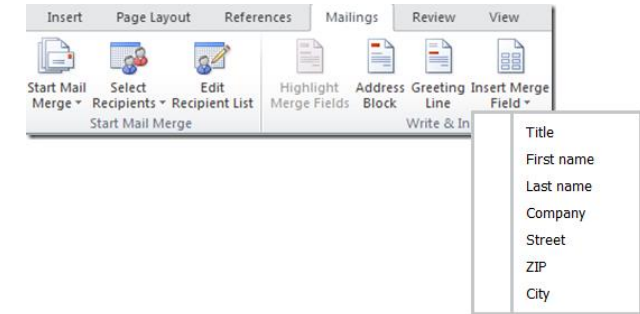
- Make sure that your **main document**, which contains the mail merge fields, is **activated** in Word. Select the function "**Insert data source**" from the menu "PRO.FILE" => "Edit" => "Mail merge" of the integration in Word.

- The Checkout wizard of PRO.FILE is displayed. Select the desired Excel data source and click <**Open**>.
- In the Word dialog that is then displayed, please select the desired data sheet, which contains the serial letter data, from the Excel file. Please also indicate whether the data sheet contains column headings in the first row or not and confirm your selection with <**OK**>.
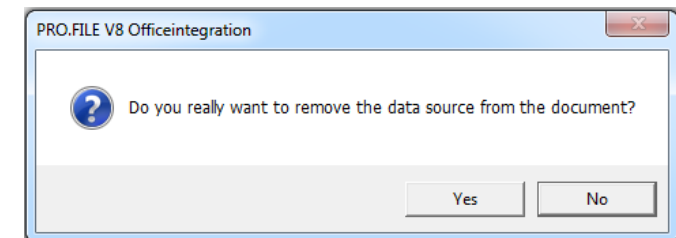

- The data source is now linked to the serial letter document. PRO.FILE writes this link into the document structure and supervises it.
- Select now the tab "**Mailings**" in Word. You can now place the serial letter data fields, which are defined in your data source, within the Word document.

- You can now use the regular Word functions to make further editing steps to your letter document.

How to remove the data source from a serial letter document

You have opened a saved serial letter from PRO.FILE, to which a database source, which is also saved in PRO.FILE, is assigned. If you want to remove this data source from the serial letter, select the function "**Remove data source**" from the menu "PRO.FILE" => "Edit" => "Mail merge" of the integration in Word. The integration now displays a dialog, asking you whether you really want to cut off the link to the connected data source.

Confirm this dialog with <**Yes**>. The link between the serial letter document and the Excel data source, which was recorded in PRO.FILE, is now removed. The serial letter now no longer has a data source assigned.

Quick guides for operation manuals

To make the usage of PRO.FILE and its modules as easy as possible, the basic functions of the module are explained in this leaflet.

- If you want to use this guide as a pamphlet, you can print it double-sided (duplex: Flip on Short Edge) and fold the sheet along the dotted lines, so that page "1" faces upwards (see image below).

- Alternatively you can use the sheet without folding, e.g. as laminated desktop pad.