Sammanfoga wordmallar

Introduktion

Sammanslagningsfunktionen i Word möjliggör att du kan skapa en mall i Word och med hjälp av Sammanfogningsfält (på samma sätt som Sammanfogningsfälten fungerar för e-post och .pdf-mallar).

OBS! Om du avser att slå ihop data från olika Datatyper i webCRM så är det smartare att exportera ut datan från webCRM via en Översikt och därefter hantera informationen.

Läs mer om Översikter

Wordversioner som stöds

Office/Word 2003 / 2007 / 2010 stöds i formaten .doc och .docx.

OBS! Sammanfogningsfält innehållandes mellanslag och specialtecken exempelvis æ,ø,å,ä,ö,ü kan orsaka problem och bör byts ut.

Sammanfogningsfält

Tillgängliga sammanfogningsfält visas i Visa alla sammanfogade fält som hittas via **Verktyg -> Mallar -> Word: Mallar**. Listan varierar beroende på vilka datatyper och fält du har visade samt vilka egenskapade fält du har.

Skapa en sammanfogad Wordmall

För att kunna använda en sammanfogad Wordmall, så måste denna först skapas i Word.

1. Öppna ett existerande dokument (eller skapa ett nytt).

2. Från Infoga, välj FÄLT?.

3. From the Field names list, select **MergeField**.

4. In the Field name text box, enter a name for the merge field.

5. Click Ok. The merge field will be displayed in the document in the format: <>.

6. To insert additional merge fields, repeat steps 2-5.

7. Save the template as type **.doc** (.docx will not work)

Upload the Word template as a **Word merge template** by browsing to **Utilities -> Templates -> Word templates** and clicking the **Plus** icon to create and upload.

For each template select Organisation, Person, Activity, Meeting, Opportunity or Delivery as **Word type**.

The Word icon for the Word merge template will appear in the documents section for the data type you have selected, for the User to run as a merge template.

Exempel

Du kan ladda ner, ändra och ladda upp vårt exempel för att testa dig fram.

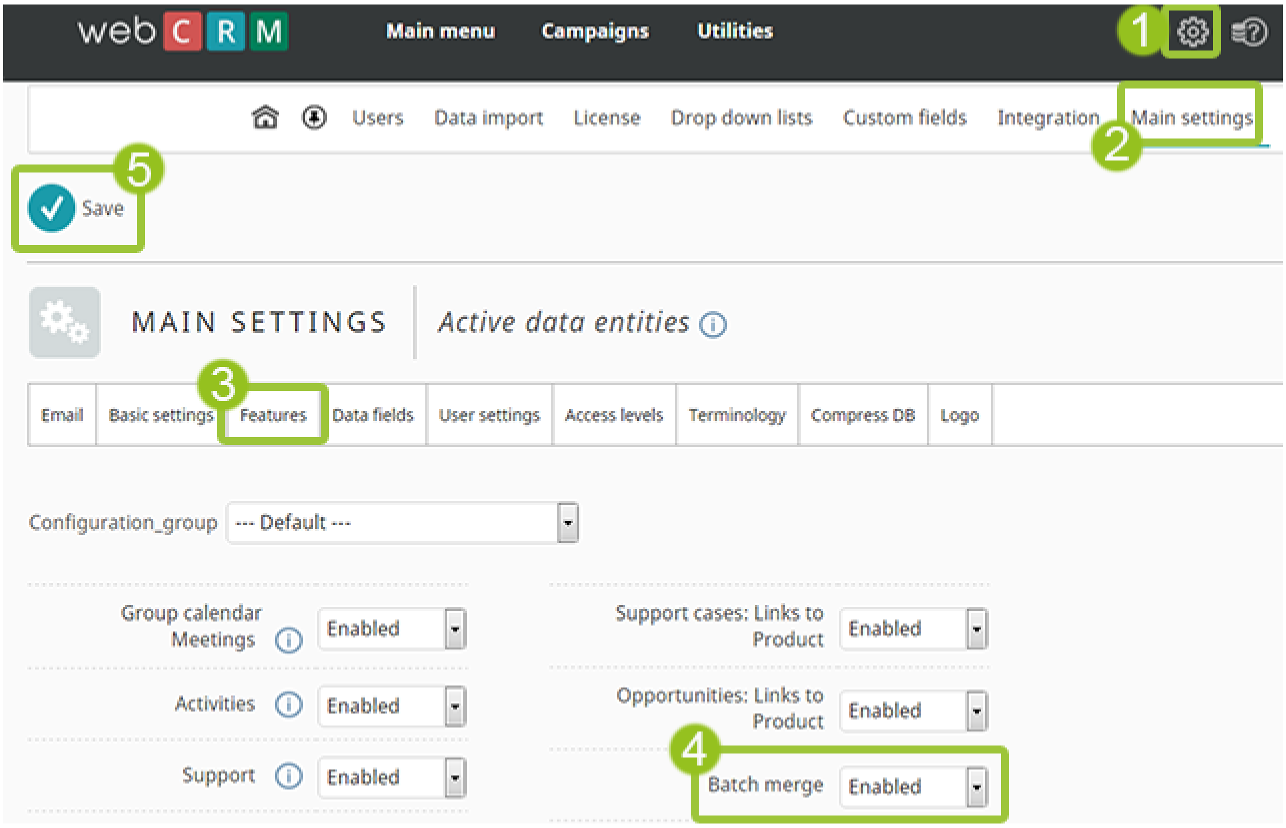
Batch merge Documents

The Word Merge function in the webCRM system lets you merge Data for a specific Organisation, Person, Activity, Meeting, Opportunity or Delivery with a Word document you have up-loaded to webCRM.

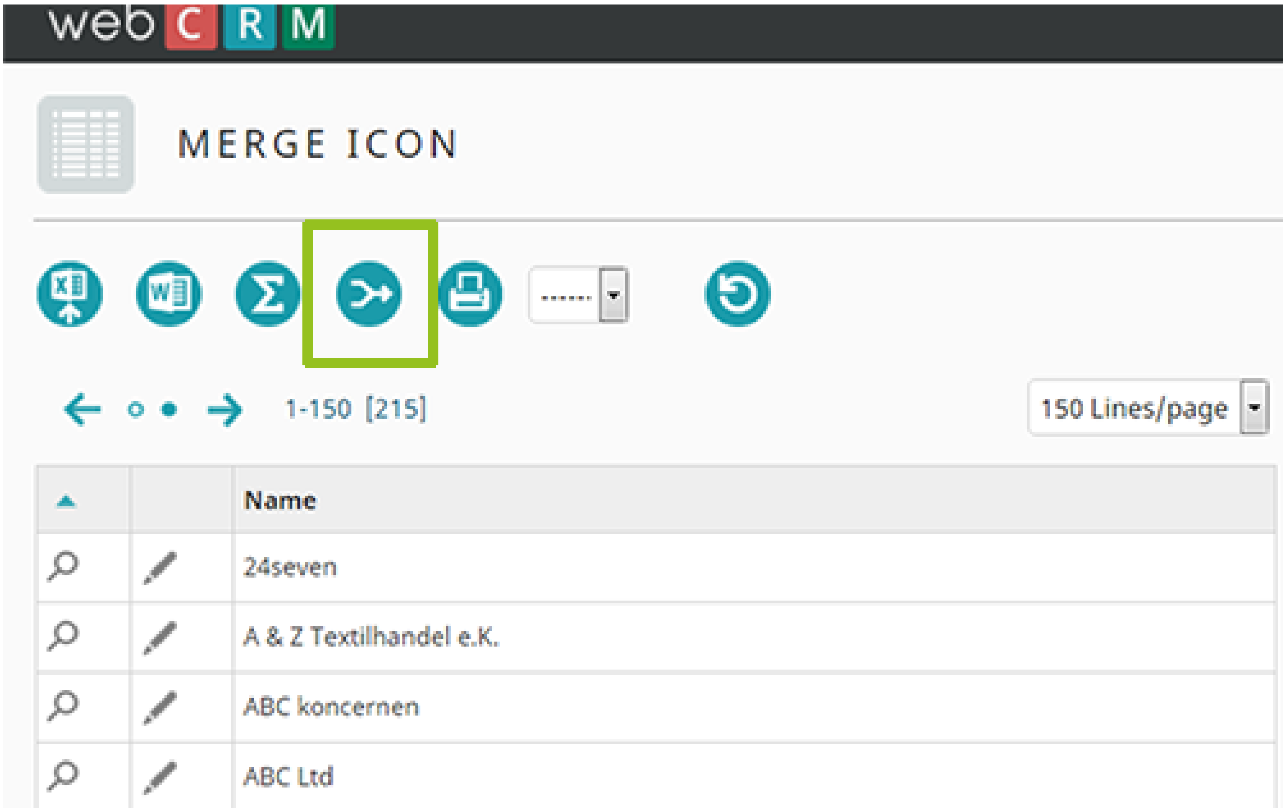
However it is also possible to merge to a group of records, and this is done via Reports.

To start working with Batch merge Word documents, browse to **Configuration -> Main settings -> Features** and enable the Batch merge functionality.

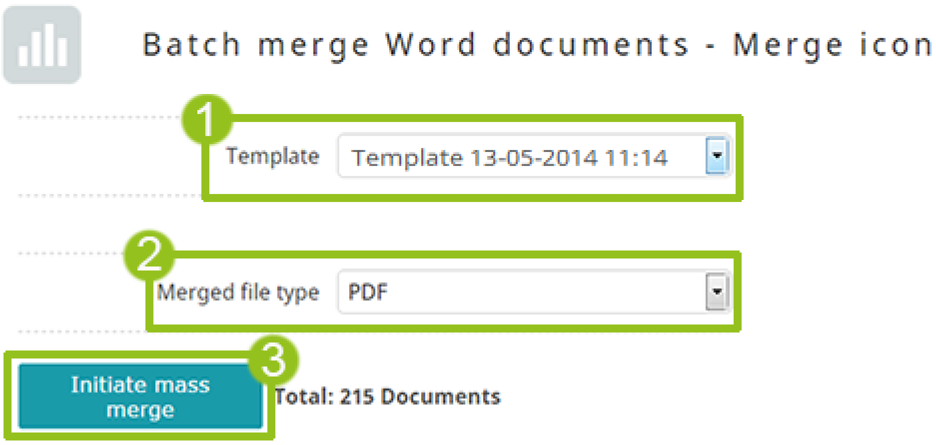
Click **Save** to apply your changes.



The Report will display a Batch merge Word documents icon.

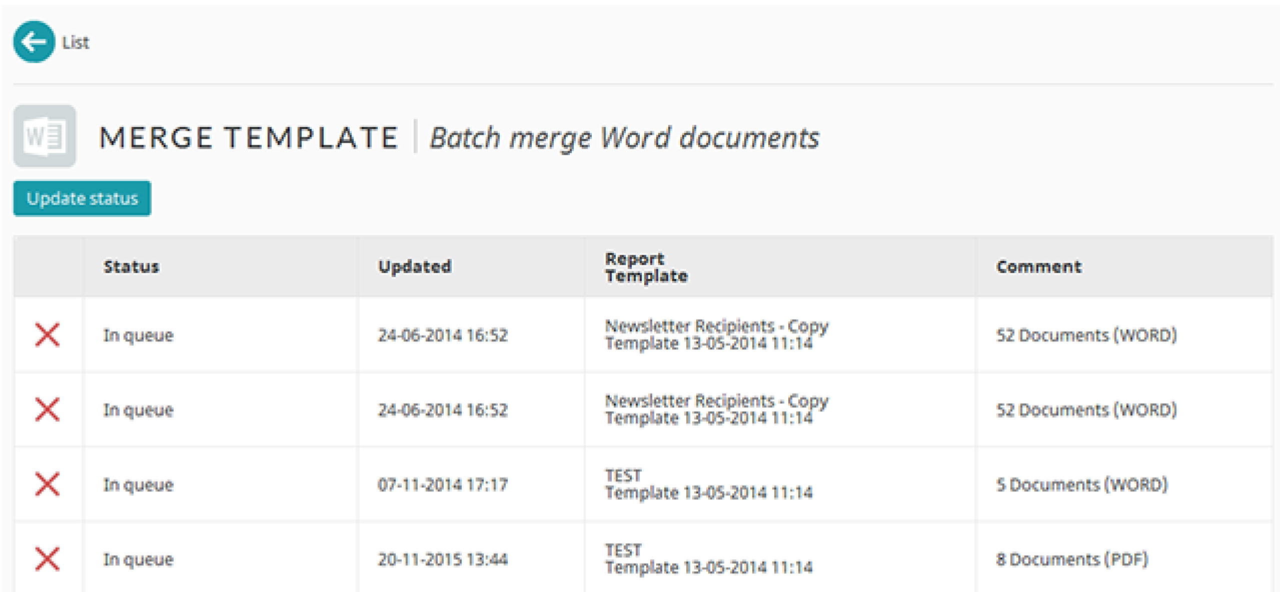


Select the Word template to use as well as the output format (Word or PDF) and click the **Initiate mass merge** button.



Because this process can take some time it behaves like Data import, and the Mass merge process is queued.

To monitor the progress browse to **Utilities -> Templates -> Word templates** and click **Status: Batch merge Word documents**. You will see batch merges listed, and you can **Update Status** if the current merge is still being processed.



When completed the Merged documents can be seen like all other Documents, linked to the records.

The description for the Merged document is preceded by “M*” for easy recognition.

Mass email with Mass merged documents

It is possible to attach Mass merged documents when sending Mass emails.

Usually you will use the same Reports for sending mass emails – but it may be a different Report.

Always select the **Attach mass merged** option first. This will refresh the Reports and indicate Documents found. The system will look for the description text for the Documents to be attached.

NOTE: If you have changed the description of a Merged document after it has been merged it will not be available for attachment.