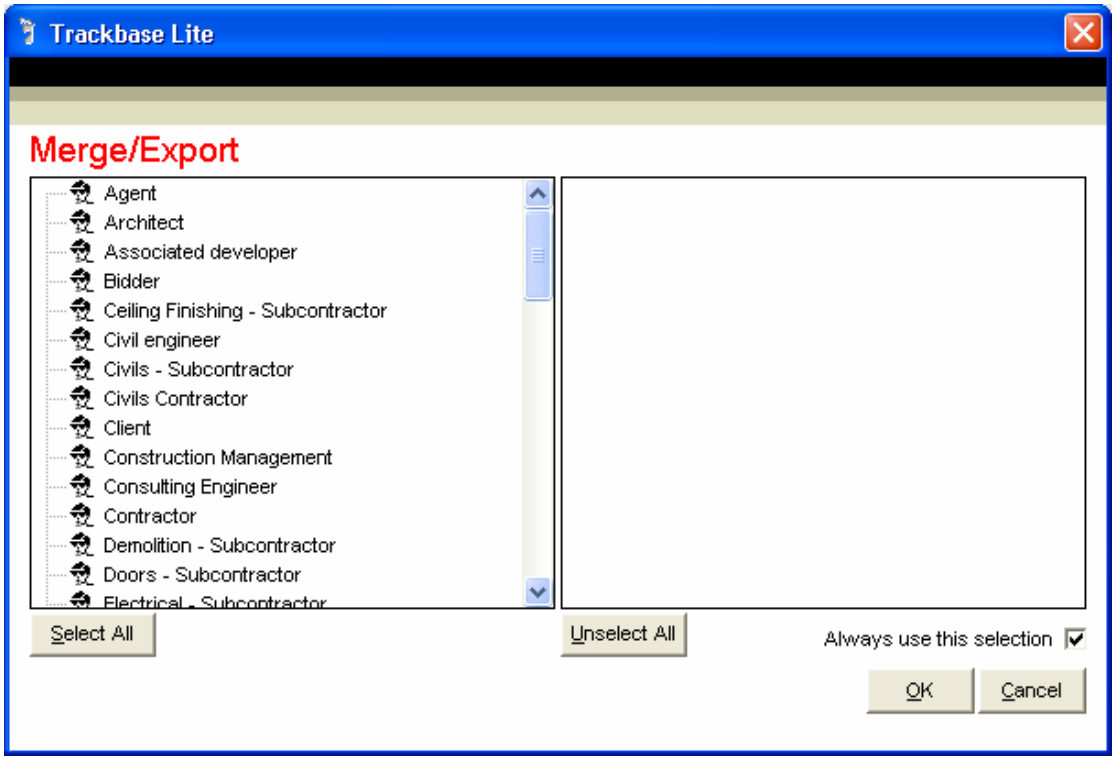
Mail Merging in Trackbase Lite

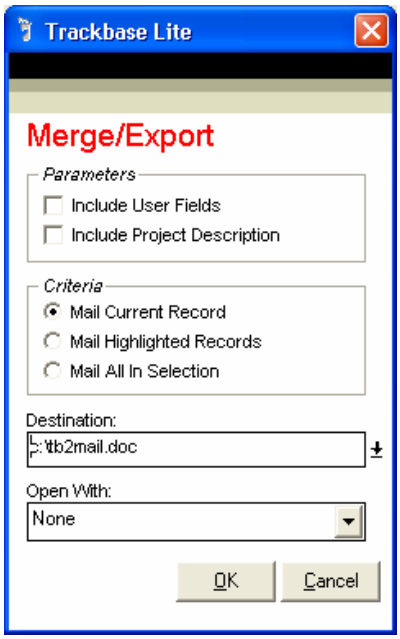
To perform a mail merge in Trackbase Lite, open the selection of projects you wish to send letters to, and then click on the Mail Merge icon on the bottom toolbar.

This will open a Merge/Export window, as shown below, where you can select which roles you would like to mail letters to. Select the roles by clicking on them on the left hand column. Or, if you wish to send letters to all roles attached to the projects in your selection, click on the 'Select All' button.

If you wish to always use the same selection of roles for future mail merges put a tick in the 'Always use this selection' checkbox in the bottom right-hand corner of the window. Click on 'OK' when you are happy with your role selection.



This will now open the main Merge/Export window as shown below.



The various options are as follows:

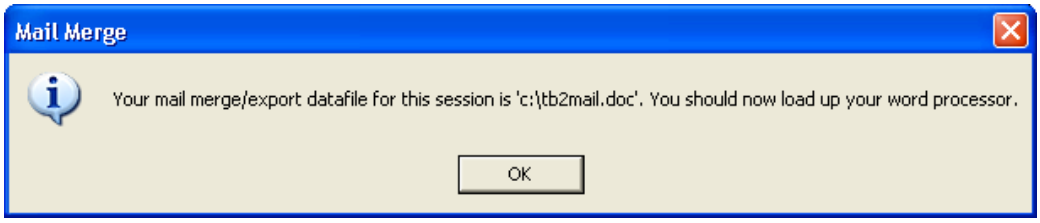
- Include User Fields – Ticking this check box allows you to insert fields from your text userfields. For example if you have allocated a rep to a project you can insert their name into your mail merge letter.

- Include Project Description – Ticking this check box allows you to insert the project description text into your mail merge letter.

- Destination – Trackbase Lite will by default save the file to the C:\ drive as tblmail.doc, you can change this filename if required

- Open With – This shows the program Trackbase Lite will use to open the mail merge file. This can be changed by using the drop down arrow next to this box.

Once you have selected your required options from this window click on the 'OK' button. A message box opens telling you that the mail merge file is ready. Click on 'OK' to continue.



Trackbase Lite automatically opens the program listed in the 'Open With' box to a blank document.

Please note: *ABI also produces Help Sheets for more details on mail merging with Lotus Word Pro, Microsoft Works or Microsoft Word XP. Please call your Account Manager on 0151 353 3500 for more details.*