
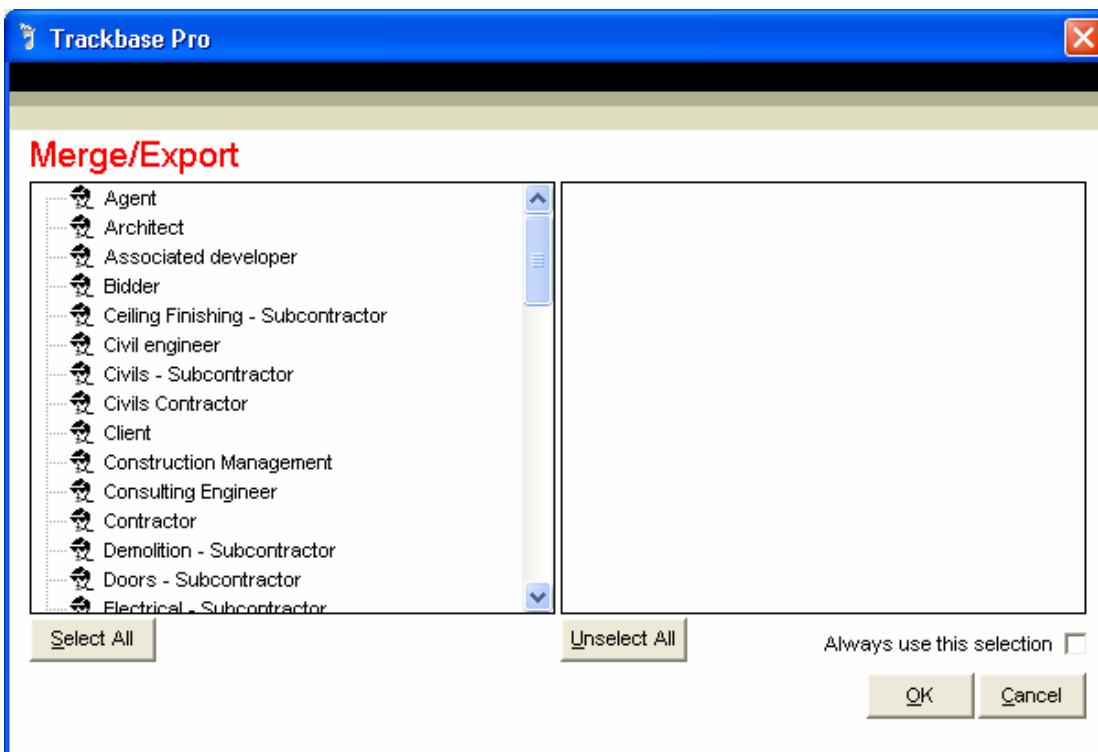


Mail Merging in Trackbase Pro

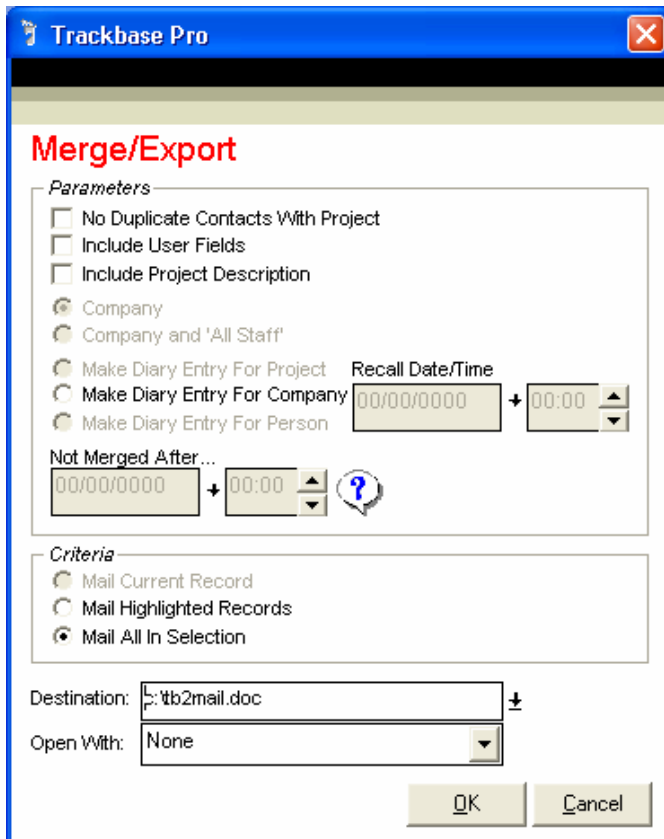
Open the selection of projects you wish to send letters to, and then click the Mail Merge icon  on the bottom toolbar.

This will open the 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 in 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:

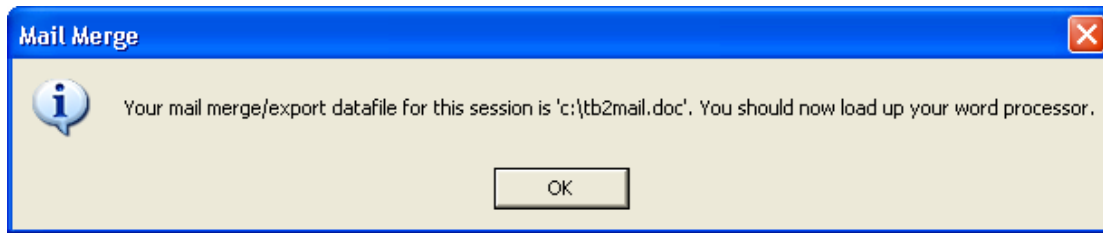


The various options are as follows:

- No Duplicate Contacts with Project – If a contact is both the Architect and the Client on a single project, he will only receive one letter from your mail merge if this box is ticked.
- Include User Fields – If you have used Text User Fields to batch set projects (for example by Rep Name) you can tick this box to use the text user fields as merge fields when setting up your letter.
- Include Project Description – Ticking this check box allows you to insert the project description text into your mail merge letter.
- Make Diary Entry For Company - This will allow you to make a diary entry for every company included in your mail merge. You can then see in your diary that you have carried out a mail merge to these contacts and you can also specify a 'follow on call' date, so that the Trackbase diary will alert you to contact these prospects regarding the information you have sent them.
- Not Merged After – By entering a date in this field, you will exclude from your mailing all contacts that have been mailed since the specified date.
- Destination – Trackbase Pro will, by default, save the file to the C:\ drive as tb2mail.doc, you can change this filename if required.
- Open With – This shows the program Trackbase will use to open the mail merge file. This can be changed by using the drop down arrow next to this box, for example, to Microsoft Word.

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 Pro automatically opens the program listed in the 'Open With' box to a blank document (in this case Microsoft Word).