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MAKING CRM MAKE SENSE

Infor CRM Enhancements **Import Word Docs as Mail Merge Templates**

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1.0 OVERVIEW

Provision

- Provides the ability to import Word documents as mail merge templates

Bundle Contents

The following plugins are supplied or updated in this bundle.

Plugin Type	Item
Forms System:	ImportWordTemplate
Menus System:	ImportWordTemplaes

Updated:
(None)

Impact Analysis

None of the additions will alter the system in any way and can be easily removed without issue.

Installation

Simply install the bundle as normal – all plugins are unique and the bundle will update the scripts as necessary.

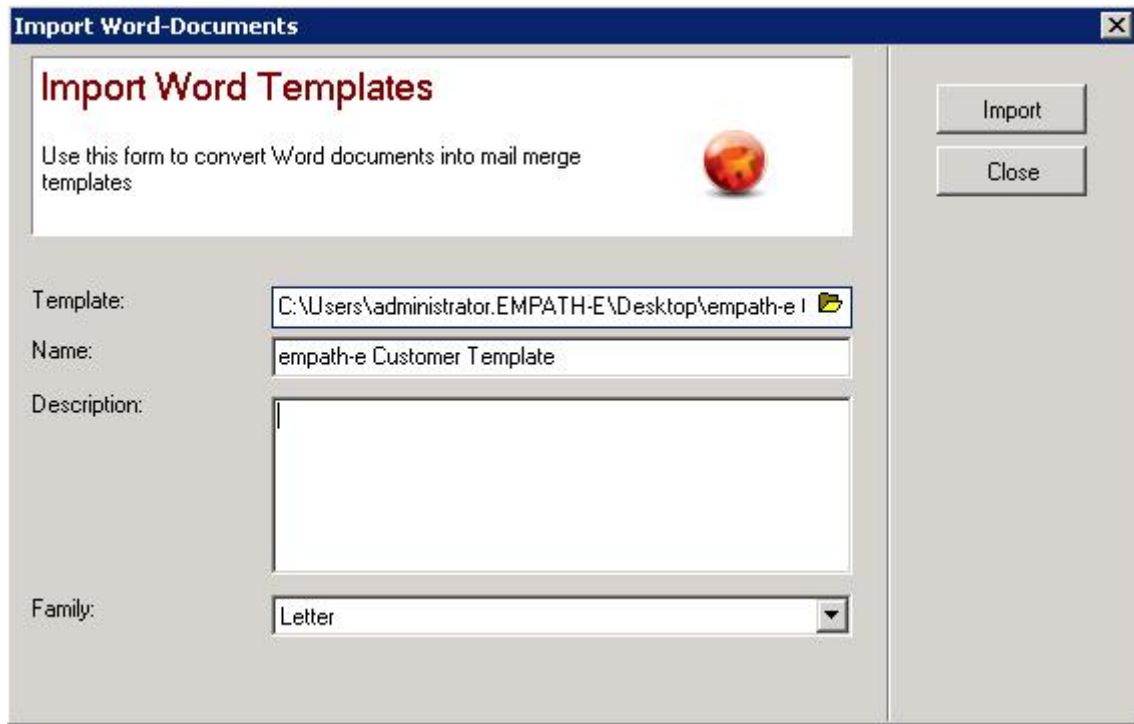
Post Bundle Install

Installing the bundle completes the installation.

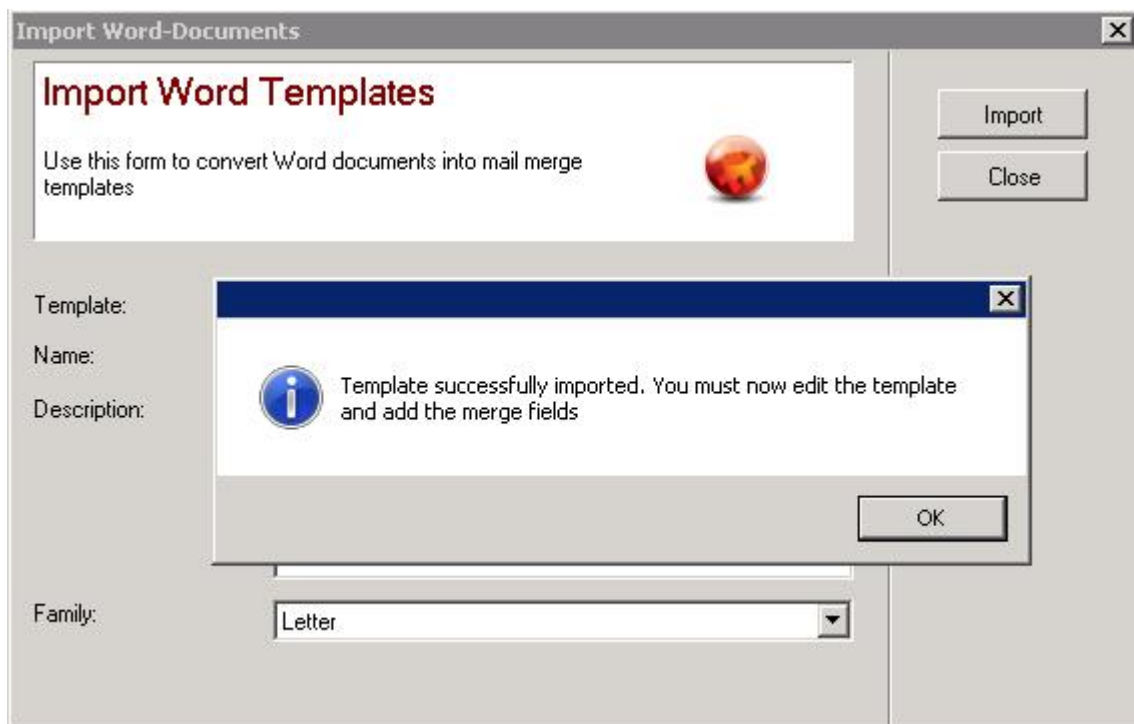


2.0 IMPORT WORD DOCUMENTS

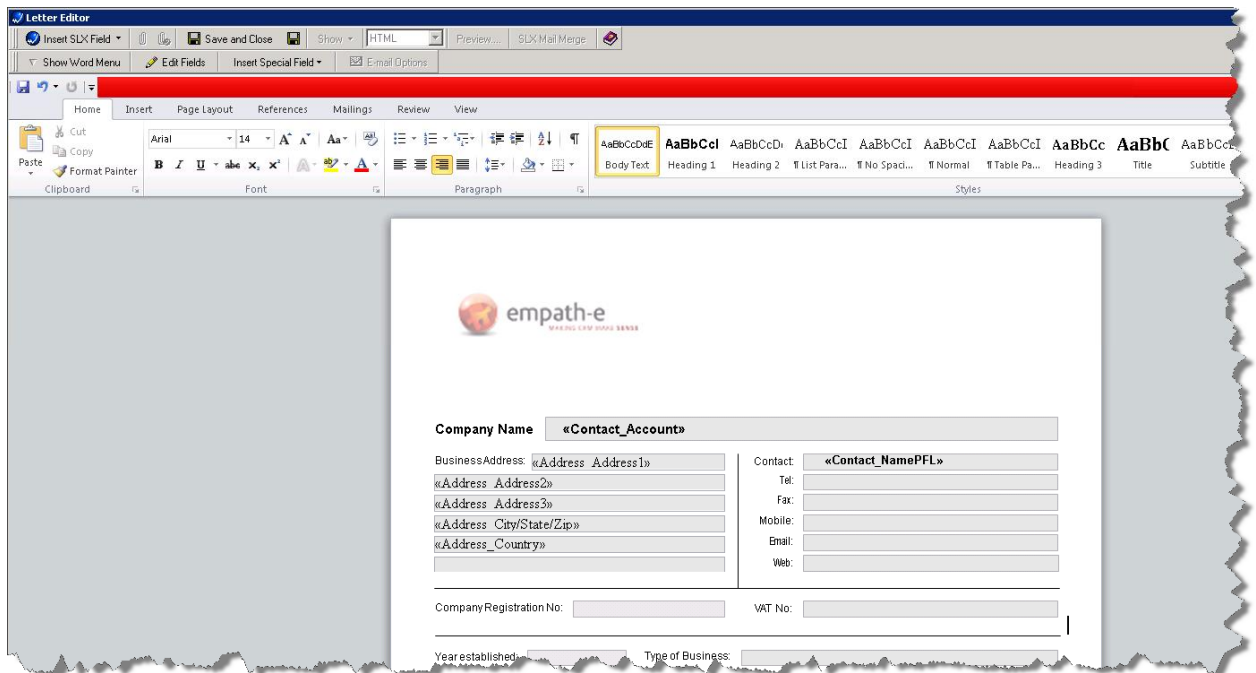
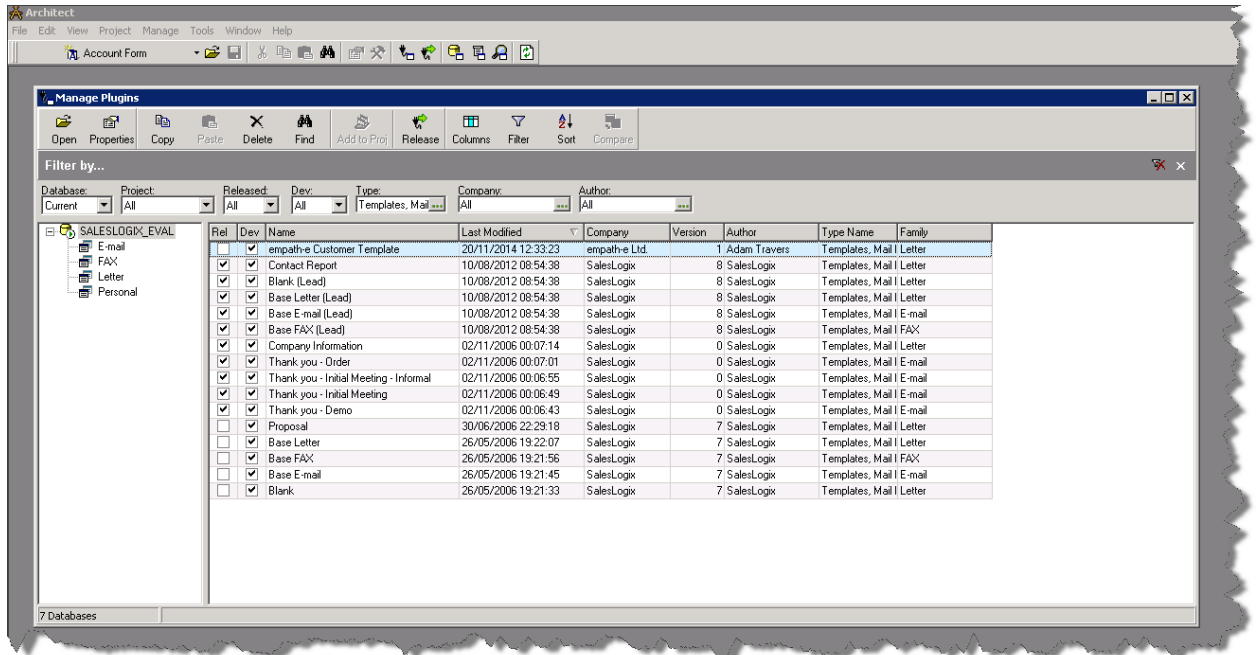
Login to the Infor CRM client as a user and go to Write | Templates Utilities | Import Word – Templates and the following is displayed:



Using the Template option browse to the Word document that you want to import. Provide a Template Name and also a Description if required. Within the Family drop down list select the Family category that you want the template to reside under. Click Import!



Once complete you will now have the ability to add the necessary mail merge fields to the imported template ready to merge.





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