

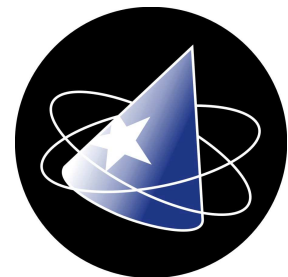
## How To Guide...

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# Mail Merging

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## Wiztec Business Suite & WizHR 5



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## Mail Merge - Overview

### Introduction

WBS allows you to create letters, memos and correspondence from within the system. WBS comes with over 30 standard employment letter templates, including contracts of employment, warning letters, appointment letters and many more. As well as using standard letters, you can create your own letter templates or modify existing letters.

Any letter or document generated within the system can be sent to individual employees, groups of employees or to everybody who has a record on the database.

- [Mail Merging](#)
- [Editing an existing mail merge letter template](#)
- [Creating a new mail merge letter](#)
- [Print mail merge letters](#)
- [Tracking Correspondence History](#)
- [Attaching letters to an employees file](#)
- [Creating Labels](#)
- [Changing the description or location of a letter template](#)
- [E-Merging](#)
- [Adding your own standard letters to WBS](#)
- Deleting letters



#### Note:

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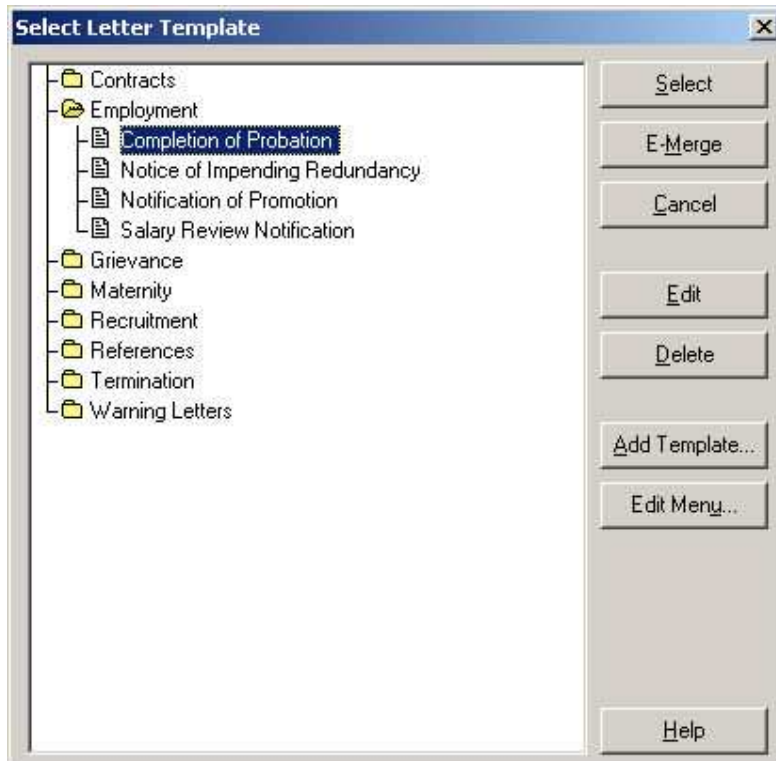
##### **What is a Letter Template?**

A template determines the basic structure for a letter. The template contains standard paragraphs that can be edited to suit the user's needs

## Mail Merge Letters

Follow the steps below to merge a letter template with an employees record:

1. Click on **Write** (menu bar)
2. Click on **Mail Merge Letters**
3. The **Select Letter Template** dialog box appears: -



4. Double click on a folder name (e.g. Employment)
5. A list of available letter templates appears
6. Highlight the letter template you wish to merge and click on **Select**
7. The following dialog box appears: -



8. Select current employee, all employees or group
9. Click on **OK**
10. Wait a few moments for WBS to open MS Word and merge the relevant details
11. Click on **File** and **Save As** and save the letter to a convenient location

## Edit Letter Template

WBS comes with over 30 standard employment letter templates. These standard letters may be edited to suit your individual requirements

1. Click on **Write** (menu bar)
2. Click on **Mail Merge Letters**
3. Double click on the relevant folder (e.g. Termination)
4. Select the relevant letter
5. Click on the **Edit** button
6. Microsoft Word will open the letter template for editing
7. Make any necessary modifications
8. Click on **File** and **Save**
9. **Exit** Microsoft Word

## Changing Letter Template Title & Location

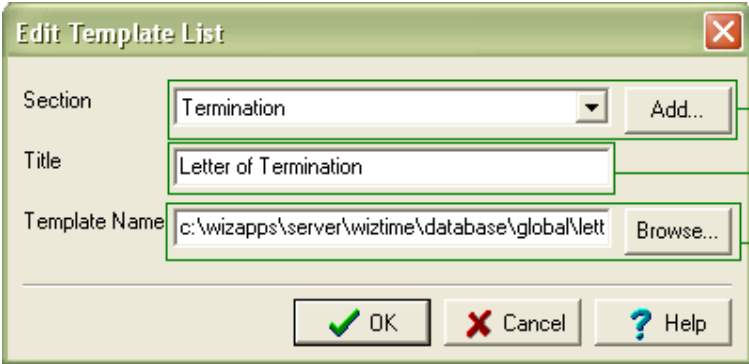
1. Click on **Write** (menu bar)
2. Click on **Mail Merge Letters**
3. Double click on the relevant folder (e.g. Warning Letters)
4. Select the relevant letter template
5. Click on the **Edit Menu** button

To change the **LOCATION** of a template

- Click on the drop down arrow to the right of the **Section** field
- Select the new folder location for the template (e.g. Termination)
- Click on **OK**
- Click on Close when finished

To change the **TITLE** of a letter template

- Click on the **Title** field
- Delete the existing title and type in a new description
- Click on **OK**
- Click on **Close** when finished



Select a new folder to store the letter template from the Section drop down list. Alternatively, click on Add to create a new folder

Key in a new letter template description in the Title text box

The Template Name text box holds the location, on the server, where the letter template is located. It is recommended that only an advanced user of the system change this if required.

## Adding Existing Standard Letters

This option may be used to add your own company's standard letters to WBS or restore a previously deleted standard file.

1. Click on **Write** (menu bar)
2. Click on **Mail Merge Letters**
3. Click on **Add Template**
4. Select a folder from the **Section** drop down list (this is the folder where the letter template will be located)
5. Key in a description for the letter in the **Title** text box
6. Click on the **Browse** button to locate the letter template (letter templates should have a \*.dot extension)
7. Click on **OK**



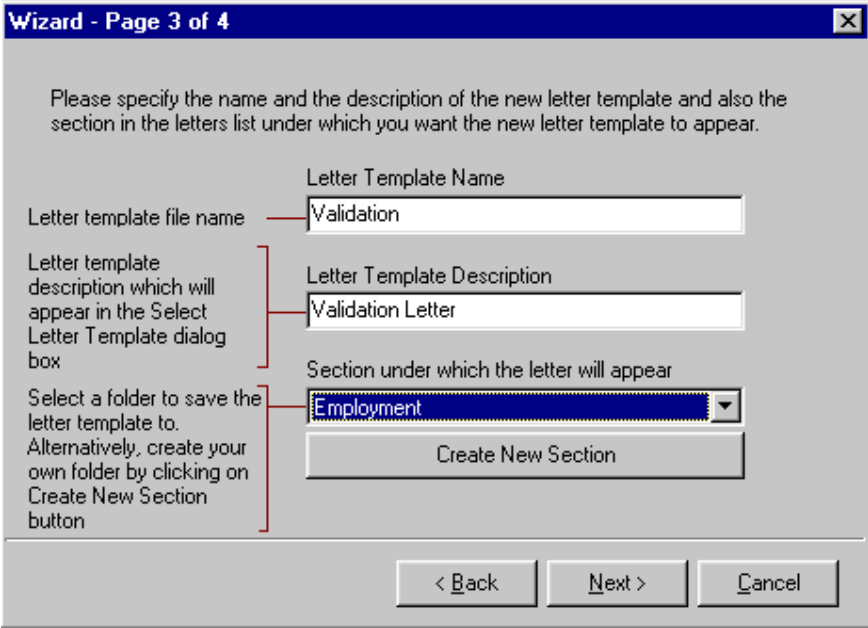
### Note:

If you are adding you own standard letters to WBS, ensure that they are save to a network drive (so that all users may have access to the letter).

If you are restoring a previously deleted standard letter, navigate to \\server\wizapps\wiztime\database\global\letters. All WBS standard letters are stored in this folder.

## New Letter Template

1. Click on **Write** (menu bar)
2. Click on **New Template**
3. A welcome wizard appears, click on **Next**
4. Key in a **Letter Name** (this will be the file name of the MS Word template)
5. Key in a **Letter Template Description** (this description will appear in the Letter Templates dialog box)
6. Select a folder to save the letter template into from the Section under which the letter will appear drop down list



Wizard - Page 3 of 4

Please specify the name and the description of the new letter template and also the section in the letters list under which you want the new letter template to appear.

Letter template file name: Letter Template Name  
Validation

Letter template description which will appear in the Select Letter Template dialog box: Letter Template Description  
Validation Letter

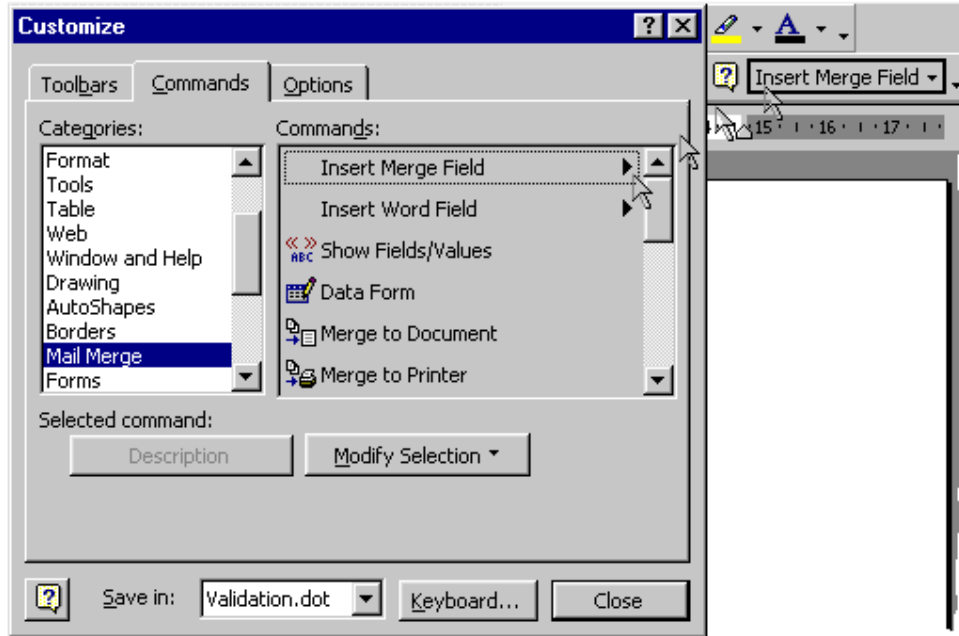
Select a folder to save the letter template to. Alternatively, create your own folder by clicking on Create New Section button: Section under which the letter will appear  
Employment

Create New Section

< Back    Next >    Cancel

7. Click on **Next**
8. Wait a few moments while MS Word opens a blank document
9. Ensure that the **Mail Merge Toolbar** is available. Specifically, ensure that you can see the **Insert Merge Field** button. If you cannot see this button, follow the steps below
  - Click on **View** (menu bar)
  - Select **Toolbars**
  - Click on **Customise**
  - Under **Categories**, select **Mail Merge**

- Under **Commands**, select **Insert Merge field**
- Drag this button onto the mail merge or other toolbar



- Click on **Close**

10. Use the **Insert Merge field** button to add WBS database fields into the letter
11. Click on **File** and **Save** when finished (see example below).



**Note:**

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The fields which you may enter are from the Master Details table only

To display the merged data correctly, make sure to type space and punctuation between the merge fields, outside the merged field characters (<< >>). To place a merge field on a new line, press ENTER.

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**Sample:**

Merge Field	After data is merged
<<Title>> <<Forenames>> <<Surname>>	Mr. Paul Martin
<<Address_1>>	12 Brewery Lane
<<Address_2>>	Kenworth
<<Address_3>>	Knocksville
<<Address_4>>	Cork



**Note:**

**What is a merge field?**

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A variable that contains data extracted from WBS. Merge fields direct MS Word where to insert specific information. For example the variable <<Surname>> may insert the data 'Murphy', etc.

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**Example:**

The Letter Template:



«Title» «Forenames» «Surname»  
«Address\_Line\_1»  
«Address\_Line\_2»  
«Address\_Line\_3»  
«Address\_Line\_4»

Dear «Known\_As»

It is with sincere regret that we accept your resignation, effective as of «Date\_of\_Leaving». Your work in our «Division» division, and more particularly, in the «Department» was valued and appreciated by all.

Of course, your «Leave\_Remaining» days of Leave entitlement will be paid in full.

We hope that whatsoever you undertake in the future will be blessed with success.

Should you ever wish to return to Ireland, be assured that your position at «Cmp\_Company\_Name» will be there for you.

Yours truly

«My\_Forenames» «My\_Surname»  
«My\_Job\_Title»  
«Cmp\_Company\_Name»

Letter, after the data merge

**Dr. Patrick Ryan**  
**14 Donnybrook**  
**Bishopscourt**  
**Cork**

Dear **Paddy**

It is with sincere regret that we accept your resignation, effective as of **01/03/2005**. Your work in our **Administration** division, and more particularly, in the **Finance** department was valued and appreciated by all.

Of course, your **11** days of Leave entitlement will be paid in full.

We hope that whatsoever you undertake in the future will be blessed with success.

Should you ever wish to return to Ireland, be assured that your position at **ABC Ltd** will be there for you.

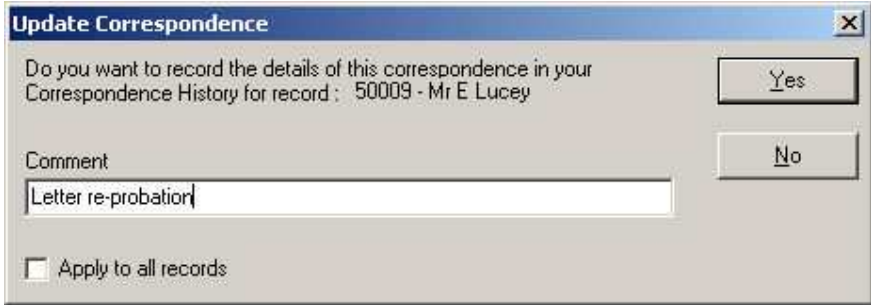
Yours truly

**Mary Black**  
**HR Manager**  
**ABC Ltd**



## Printing Mail Merge Letters

1. Mail merge a letter for an individual employee, all employees or a group of employees.
2. It is advisable to save the letter before printing
3. Click on **File**
4. Click on **Print**
5. Click on **OK** (if you are happy with the printer settings)
6. Just before the letter is sent to the printer, WBS presents you with the following screen:-



7. Key in an appropriate **comment**
8. Click on **Apply to all records** (if you are merging details for more than one employee)
9. Click on **Yes**.
10. Close MS Word and open Wiztec Business Suite
11. Open the Employment Outlook bar and click on Correspondence
12. Listed below is the letter of correspondence which was sent to this employee (Mr. E Lucey).



 **Note:**

The correspondence history screen outlines the date a particular letter was sent to an employee, however it does not contain the actual attached letter. This must be done as an additional step.

## Correspondence History



### Topic Headings

- [Purpose](#)
- [Location](#)
- [Example of Use](#)

### Purpose

The Correspondence History screen allows you to track any letters which were sent to an employee. Correspondence records are automatically created by Microsoft Word when mail merged letters are printed.

It is possible to enter as many correspondence history records as is required.

### Location

1. Click on **Employee** (menu bar)
2. Click on **Tracking**
3. Click on **Correspondence History**

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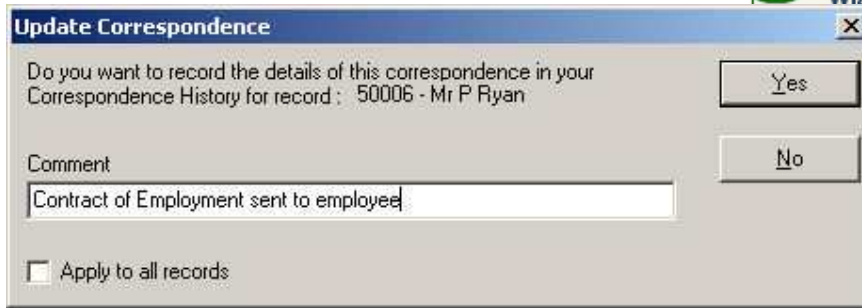
alternatively

This screen is not visible on the Outlook bar as part of the default installation of WBS. However, it is possible to add this screen using the Toolbar Management screen. Follow the instructions below to add the Correspondence screen to your user profile.

- Click on **Preferences** (menu bar)
- Select **Toolbar Management**
- Select **Employment** (left hand side of the dialog box)
- Under **Components**, check the **Correspondence** check box
- Under **Components**, highlight **Correspondence**
- Click on the **Change Toolbar** button (right hand side of the dialog box)
- Select **WizHR** from the **Please Choose a Menu Bar** drop down list
- Click on **OK**
- Click on **Close**

### Example of Use

1. Click on **Write** (menu bar)
2. Click on **Mail Merge Letters**
3. Double click on a folder (e.g. Contracts)
4. Double click on a letter (e.g. Staff Terms and Conditions)
5. Under **Print Letter for**, select **Current Employee**
6. Click on **OK**
7. Wait a few moments for the letter to merge with the employees details
8. Click on **File** (MS Word menu bar)
9. Click on **Print**
10. Click on **OK**
11. A dialog box similar to below will appear:-



**Update Correspondence** [X]

Do you want to record the details of this correspondence in your Correspondence History for record : 50006 - Mr P Ryan

Yes

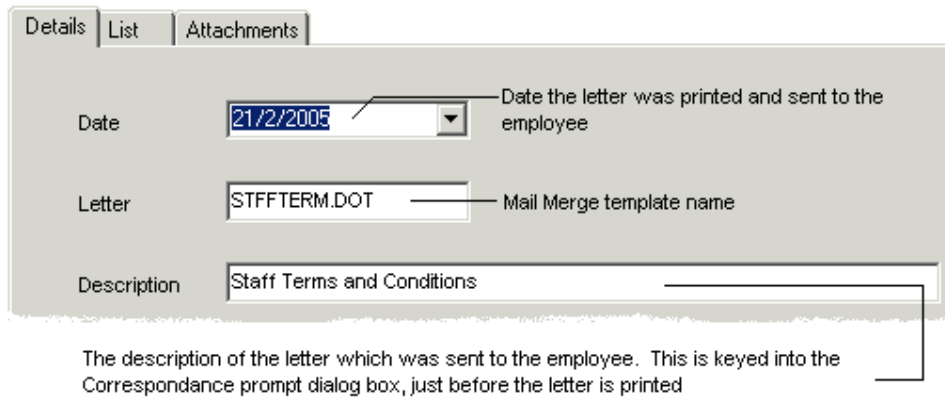
Comment

Contract of Employment sent to employee

No

Apply to all records

12. Key in a comment and click on **Yes**
13. When you click on **Yes**, the mail merge letter/contract will print
14. The letter will be tracked in the correspondence history screen, similar to below:-



Details | List | Attachments

Date: 21/2/2005 — Date the letter was printed and sent to the employee

Letter: STFFTERM.DOT — Mail Merge template name

Description: Staff Terms and Conditions

The description of the letter which was sent to the employee. This is keyed into the Correspondence prompt dialog box, just before the letter is printed

## Attached Documents



### Topic Headings

- [Purpose](#)
- [Location](#) of the Employee Attached Documents screen
- [Adding](#) an attached document to an employees file
- [Opening](#) an existing attached document
- [Emailing](#) an attached document
- [Scanning](#) an attached document

## Purpose

The Attached Documents screen allows you to attach external documents to an employees file. Attached documents may be MS Word documents, Adobe Reader documents, Images, Spreadsheets.

Attachments may include Contracts of Employment, Correspondence Letters, Appraisal Forms, Interview Forms, etc.

There is no limitation on the type of file which you may attach to an employees file. There is no limitation on the number of files which you may attach.

## Location

1. Click on **Main Details** (*Outlook bar*)
2. Click on **Attached Documents**

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alternatively

1. Click on **Employee** (*Menu bar*)
2. Click on **Personnel**
3. Click on **Attached Documents**

## Adding Attachments

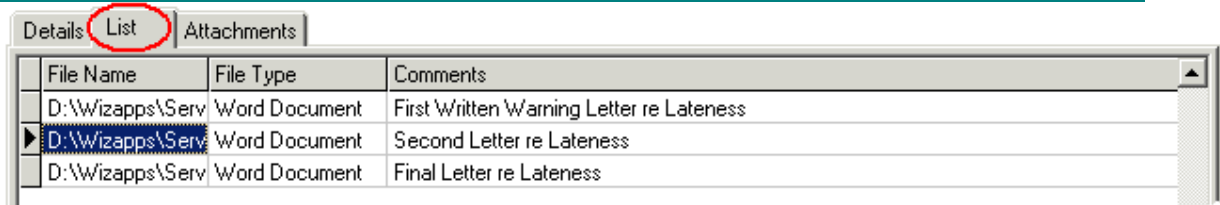
1. Click on the **Add** button (*sub screen toolbar*)
2. Click on the pick list button to the right hand side of **File Name** field
3. The open dialog box appears
4. Navigate to the location where the file is saved (*e.g. My Documents*)
5. Highlight the document and click on **Open**



6. Click on the pick list button to the right of **File Type**
7. Select a file type from the list provided (in this case, Word Document)
8. Click into the **Comments** text box and key in any additional comments regarding this document
9. Click in the check box to the right of **Copy File to Central Wiztec folder**. (*This ensures that the file is available to all users for viewing and also provides you with a backup of the file in the event that the original file is deleted*)
10. Click on **Save** (*sub screen toolbar*)

## Opening an Attached Document

1. Navigate to the correct employee (*using the employee navigation toolbar*)
2. Click on the **List** tab (*to view all files which have been attached to this employees record*)
3. Highlight the attached document you wish to open



4. Click on the **Open** button (*sub screen toolbar*)
5. Wait a few moments while Wiztec Business Suite opens the file
6. When you exit the application (*e.g. MS Word or MS Excel, WBS will be open*)

## Emailing an Attached Document

1. Navigate to the correct employee (*using the employee navigation toolbar*)
2. Click on the **List** tab (*to view all files which have been attached to this employees record*)
3. Highlight the attached document you wish to email
4. Click on the **Email** button (*sub screen toolbar*)
5. The email application will open (*the email application must be IMAPI compliant e.g. Microsoft Outlook*)

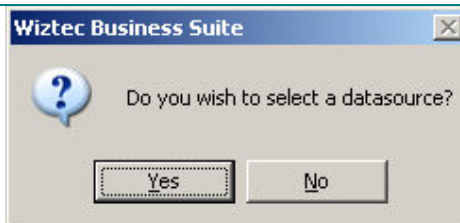


6. The file will be automatically attached to the email
7. Key in the email address, subject line, body of the message and send

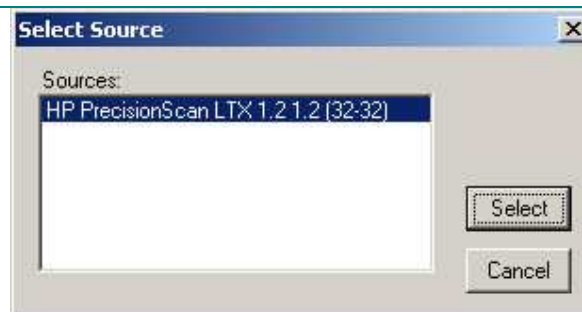
## Scanning an Attached Document

Ensure that you have a scanner attached to your PC before completing the following steps:-

1. Open the **Attached Documents** screen
2. Use the Employee Navigation toolbar to navigate to the relevant employee
3. Click on the **Scan** button (*sub screen toolbar*)
4. The following message box appears:

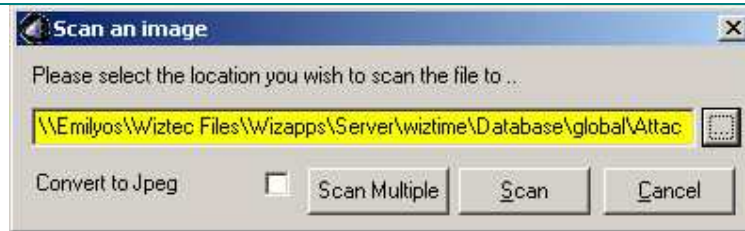


5. Click on **Yes**
6. The following dialog box appears:-

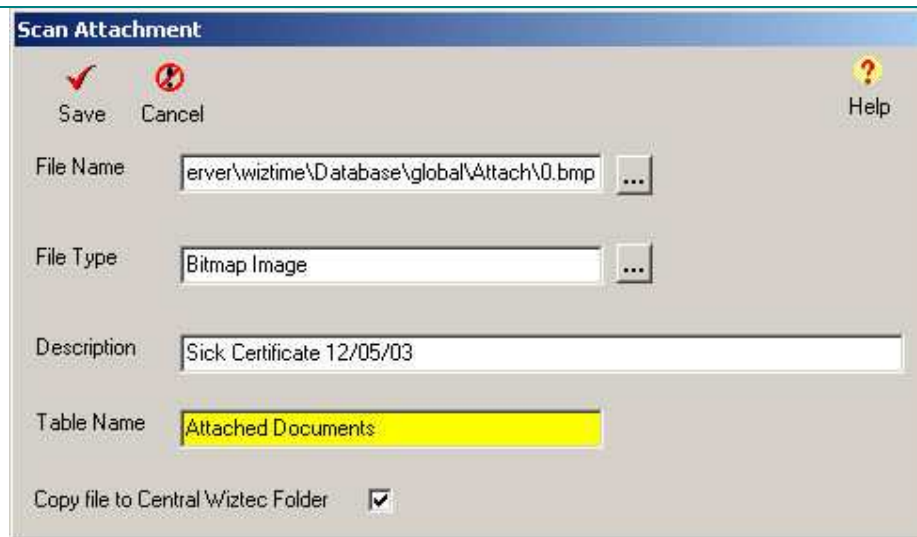


7. A list of scanners will appear in this dialog box (*if the list is blank, check that your scanner is correctly installed*)
8. Highlight the scanner name (*in the case above a HP scanner*)
9. Click on **Select**

10. The following dialog box appears:-



11. WBS will automatically save the attached document to  
 \\servername\Wizapps\WizTime\Database\Global\Attach\
12. If you want to change the location, click on the pick list button to the right hand side of the file location
13. Click on the **Scan** button
14. Wait a few moments for the document to scan
15. The following dialog box appears:-



16. Select a **File Type** from the pick list (*in the case above, Bitmap Image*)
17. Key in a **description**
18. Select **Copy file to Central Wiztec folder**
19. Click on **Save**



**Note:**

Some of the WizHR screens, also have an attachments tab (*to the left of the list tab*); this tab works in a similar way. The Attached Documents screen is a central holding ground for all/any documents you may wish to attach to an employees file.

The Attachments tab, in individual screens, should only contain documents which are relevant to that screen (*e.g. First Written Warning could be attached to the Disciplinary Screen*). However, this is not necessary, all documents may be linked via the Attached Documents screen.



**Note:**

If you want to attach a document, such as a company procedural document, which does not relate to any specific screen, use the Company Attached Documents Screen.