Merging data from webCRM with Word documents

Office/Word 2003 / 2007 / 2010 are supported.
(documents type .doc and .docx)

Important notice for Microsoft Office 2007

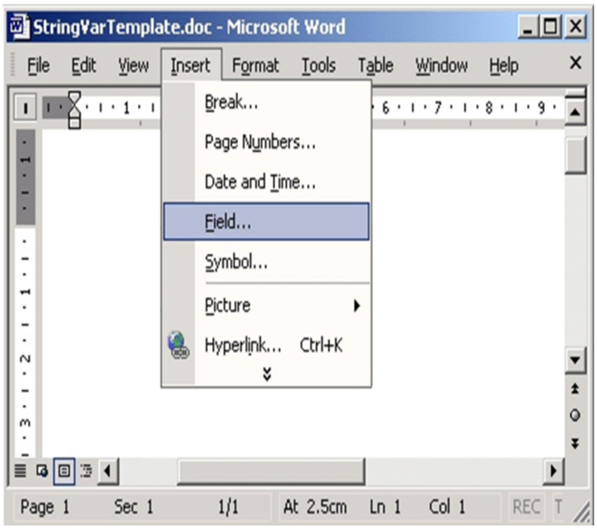
To insert a new merge field click the "Insert tap" and then the "Fast" icon (Danish: hurtigdele) and select "Field" and follow instructions as below.

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.

Note: If you wish to merge data from several records, you don't use the webCRM Word merge function. Instead you create an overview and download the data list to your PC and perform any merging on your PC using the downloaded list as data source.
The available merge fields available are listed below. You may also include merge fields not listed below. Doing so will cause the system to prompt you for data values for these merge fields during the merge process.

Important: Merge field names may only include letters and numbers and the under-score character. Using other characters (including space, and national characters such as æ,ø,å,ä,ö,ü) causes the merge function to fail.

To use Word Merge, first create one or more template in Microsoft Word:



1. Open an existing document or create a new document and enter the text you want.

2. From the Insert menu, select Field.

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: <<Field Name>>.

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" from the Utility menu. 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 sections for the data type in question (i.e. Organisation, Person, Activity, Meeting, Opportunity or Delivery).

In webCRM from the Utility menu: "Documents / Word merge templates", you can click the "List all merge fields" to get a complete list of all possible merge fields.

Example
You can download, modify and upload this example to your webCRM system
http://www.webcrm.com/webdoc/mergeExample.doc