Oracle® Hospitality Suite8

Mailing User Manual

Release 8.9

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Preface

Audience

This user manual is intended for system users and system administrators.

Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL:

https://support.oracle.com/

When contacting Customer Support, please provide the following:

- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

Documentation

Oracle Hospitality product documentation is available on the Oracle Help Center at http://docs.oracle.com

Revision History

Date	Description of Change
July, 2005	• 8.5.0.0 - First Issue Small Business Edition
May, 2008	• 8.7 - Updated for Version 8.7
June, 2008	• 8.7.3.1 - Updated for Version 8.7.3.1
May, 2009	• 8.8 - Updates for Version 8.8
Sept, 2010	• 8.8 - Updates for Oracle 11gR1
Jan, 2012	• 8.9 - Updated for Version 8.9
Nov, 2012	• 8.9 - New cover page
July, 2015	• 8.9 – Oracle template applied

1 Mailing

Standard & Advanced Mailings

Fidelio Suite8 offers two types of mailings: Standard and Advanced.

The standard mailing allows users to enter values in a number of pre-defined fields from customer profiles, group/block and individual reservations, conference bookings, tasks and activities. The advanced mailing enable users to build queries based on pre-defined views, fields and values, with the possibility to create additional views at any time.

A translation tool ensures that the field descriptions can be translated into multiple languages.

Once a mailing query has been set up, it can be run at any time. All the matching records will be displayed and can be sorted as required. Users will have the ability to select records for processing; the selected records can then either be included or excluded in the mailing.

After a mailing query has been processed, users will be able to select from a field list the fields to use in their mailing merge. Fields that will be used for the mail merge such as company name, street, city, zip code etc. can be taken from a pre-defined view. This approach offers great flexibility as the view can be changed at any time and more fields can be added if necessary.

With the Mailing Option, you can:

- Create a standard mailing query using the mailing wizard
- Create an advanced mailing query
- Send out form letters and forms
- Create and print merge files, using Word or Excel
- Send mailings via email to selected profiles
- Send a mailing to in-house guests
- Print labels and envelopes
- Create tasks for all customer profiles included in the mailing

Overview

The creation of a mailing is a 4 step process:

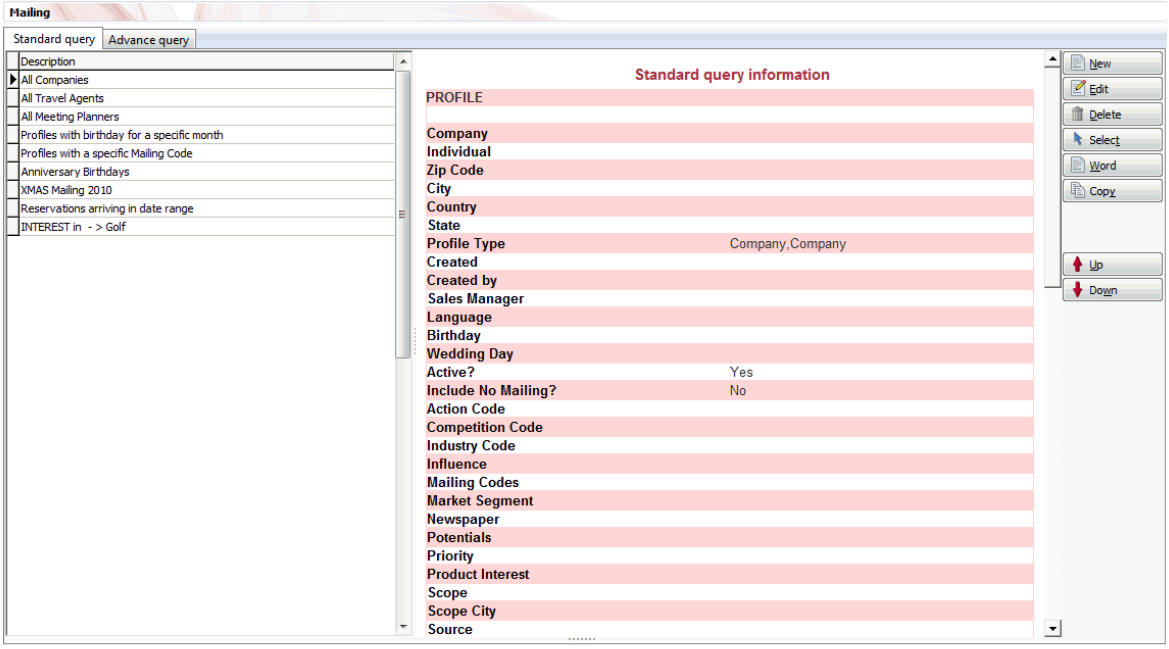
Create Mailing Query Using the standard or advanced option.		**Step 1:** Define the selection of the records based on query options such as all customers with the mailing code "Christmas Card".
↓		↓
Select the field list		**Step 2:** Via the field list the information that is used for the data merge is defined. Example: customer name, street, city, country, letter greeting, etc.
↓		↓
Select the profile criteria		**Step 3:** Define the profile criteria such as the linking options or checking if an address exists, etc.
↓		↓
Merge the data Create a new letter or use an existing one.		**Step 4:** Place the merge fields into the document and perform the data merge.

Creating a Standard Mailing

From the standard query screen you can edit an existing query or create a new query. You can also copy an existing query and then edit it to make any changes necessary. The list of available queries can be ordered as required by using the up and down arrow buttons. The description field is mandatory otherwise all fields as detailed below are optional.

To create a new standard mailing query:

1. Click the menu option CRM and select MAILING, the mailing dialog box is displayed.



Description
All Companies
All Travel Agents
All Meeting Planners
Profiles with birthday for a specific month
Profiles with a specific Mailing Code
Anniversary Birthdays
XMAS Mailing 2010
Reservations arriving in date range
INTEREST in - > Golf

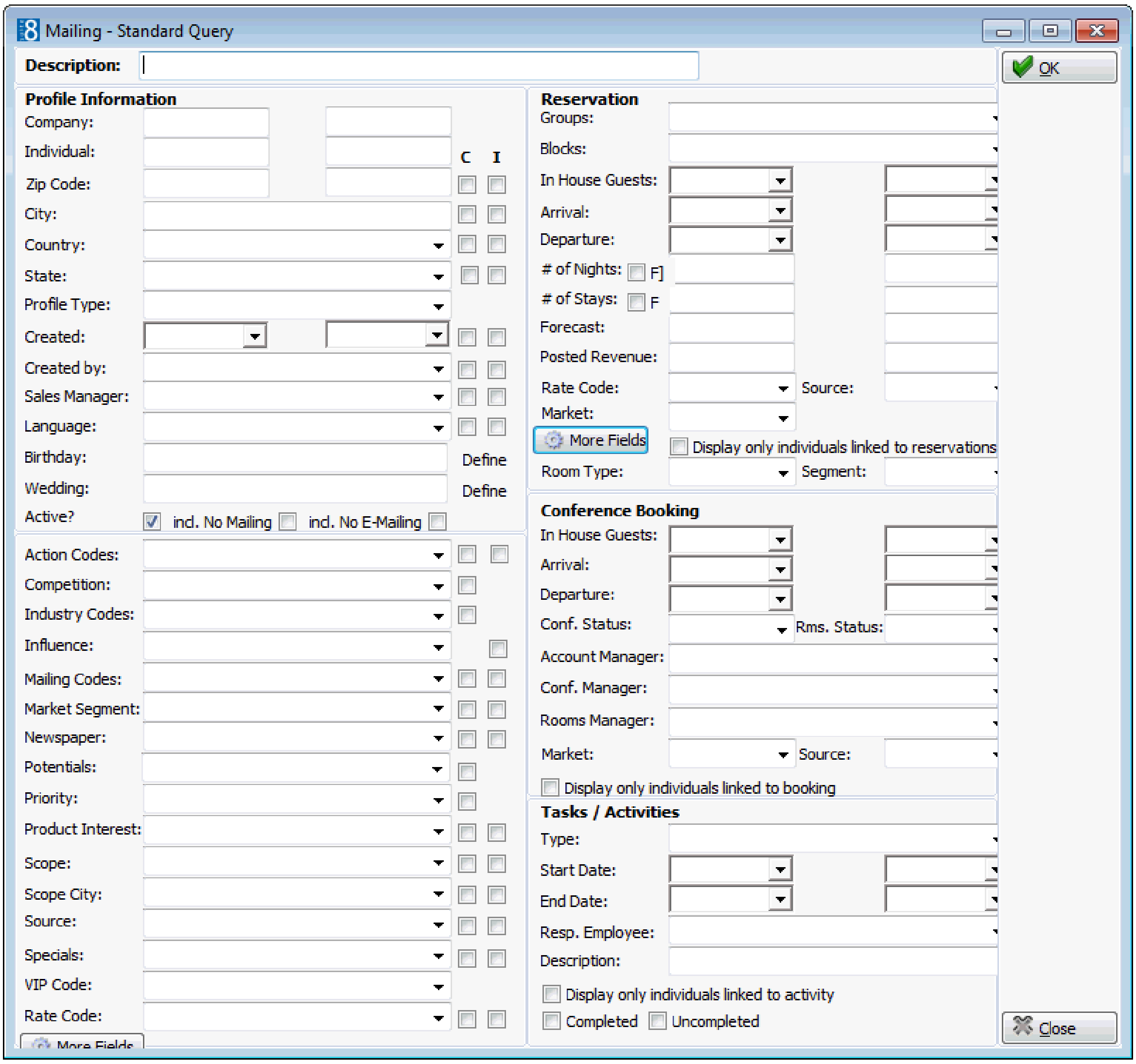
Standard query information

PROFILE	
Company	
Individual	
Zip Code	
City	
Country	
State	
Profile Type	Company,Company
Created	
Created by	
Sales Manager	
Language	
Birthday	
Wedding Day	
Active?	Yes
Include No Mailing?	No
Action Code	
Competition Code	
Industry Code	
Influence	
Mailing Codes	
Market Segment	
Newspaper	
Potentials	
Priority	
Product Interest	
Scope	
Scope City	
Source	

2. From the Mailing dialog box, select the tab STANDARD QUERY.
3. Click NEW, the standard query dialog box appears.

   The default selections are as follows:

   - To search for active profiles but not to include individuals whose profile is marked as 'No Mailing', however, this may be changed via the add/edit query definition dialog box.
   - All information that is entered is considered as an AND relation.
   - Values selected from the same drop down lists and the C + I flag are considered as OR.
   - The reservation status DEFINITE is taken as the default when running a query where reservations are included.


Mailing - Standard Query
Description:
OK
Profile Information
Company:
Individual:
C
I
Zip Code:
City:
Country:
State:
Profile Type:
Created:
Created by:
Sales Manager:
Language:
Birthday:
Define
Wedding:
Define
Active? ☑ incl. No Mailing ☐ incl. No E-Mailing ☐
Action Codes:
Competition:
Industry Codes:
Influence:
Mailing Codes:
Market Segment:
Newspaper:
Potentials:
Priority:
Product Interest:
Scope:
Scope City:
Source:
Specials:
VIP Code:
Rate Code:
More Fields
Reservation
Groups:
Blocks:
In House Guests:
Arrival:
Departure:
# of Nights: ☐ F]
# of Stays: ☐ F
Forecast:
Posted Revenue:
Rate Code:
Source:
Market:
More Fields
☐ Display only individuals linked to reservations
Room Type:
Segment:
Conference Booking
In House Guests:
Arrival:
Departure:
Conf. Status:
Rms. Status:
Account Manager:
Conf. Manager:
Rooms Manager:
Market:
Source:
☐ Display only individuals linked to booking
Tasks / Activities
Type:
Start Date:
End Date:
Resp. Employee:
Description:
☐ Display only individuals linked to activity
☐ Completed ☐ Uncompleted
Close

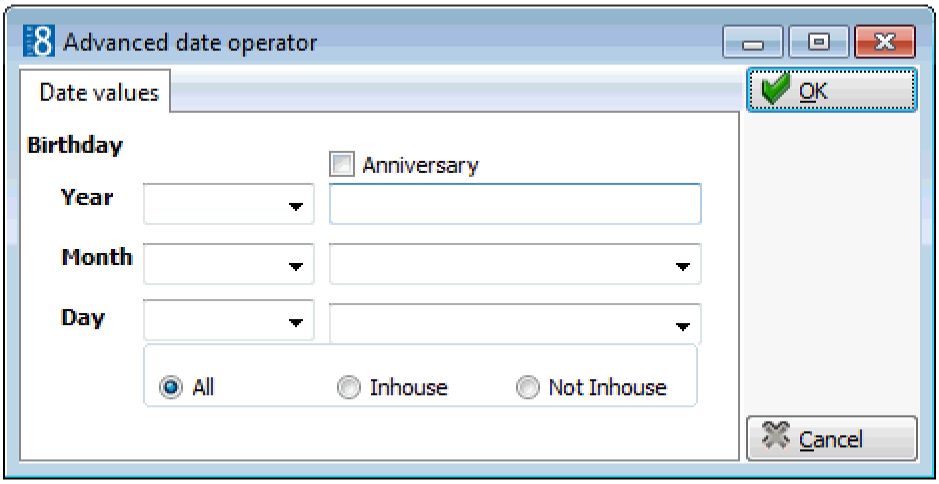
4. Enter a description for the mailing query.
5. Fill in the limiting criteria for your mailing list.
   - Profile Information Criteria
   - Profile Marketing Information Criteria
   - Reservation Criteria
   - Conference Booking Criteria
   - Tasks / Activities Criteria
6. Click OK to save the query.

Profile Information Criteria

This Field	Is to limit a mailing to
C	Select this checkbox to select if the criteria should be on the company profile level. Either company or individual must be selected if an entry is made in a field which has the C and I checkboxes.

I	Select this checkbox to select if the criteria should be on the individual profile level. Either company or individual must be selected if an entry is made in a field which has the C and I checkboxes.
Company: From-To	Companies whose names fall within the alphabetical range entered. Leaving the From and To fields blank means not to restrict the mailing to a certain range of the alphabet.
Individual: From-To	Individuals whose names fall within the alphabetical range entered. Leaving the From and To fields blank means not to restrict the mailing to a certain range of the alphabet.
ZIP Code: From-To	Certain regions. For example, if the range is 94700-94799, the mailing is limited to profiles from the San Francisco area.
City	Certain Cities. The mailing is limited to the city name entered.
Country	Individuals or companies from one or more particular countries. To restrict the mailing to individuals or companies from the USA and Canada, for instance, select USA and Canada from the drop-down list.
State	Certain States. The mailing is limited to the states selected.
Profile Type	Certain profile types. Select the profile types from the drop-down list.
Created From-To	The date the profile was created. Select a date from the calendar list box or enter a date range from / to.
Created by	Certain users. Select the users from the drop-down list.
Sales Manager	Search by responsible Sales Manager. Select the Sales Manager from the drop-down list.
Language	Certain Language codes. Select the language codes from the drop-down list.
Birthday	Click on DEFINE to enter the year, month and day of birth. Date fields can be further defined via the Advanced Date Operator dialog box, see the table below.
Wedding	Click on DEFINE to enter the wedding year, month and day. Date fields can be further defined via the Advanced Date Operator dialog box, see the table below.
Active	Select this checkbox if only active profiles should be included. The default is checked, i.e. include only active profiles.
include No mailing	Select this checkbox if you want to include those individuals who are marked as 'No Mailing'. The default is not selected, i.e. do not include individuals whose profile is marked as 'No Mailing'.
include No mailing	Select this checkbox if you want to include those individuals who are marked as 'No E-Mailing'. The default is not selected, i.e. do not include individuals whose profile is marked as 'No E-Mailing'.

Advanced Date Operator dialog box



This Option	Defines
Anniversary	Enables the definition of one or multiple years instead of entering a specific year. This could be used for anniversaries such as 50th or 60th birthdays. **Note:** This option is only available for the Birthday and Wedding Day fields.
Year	Defines the year for the date value. Multiple years may be entered separated by a comma.
Month	Defines the month for the date value. Multiple months may be entered separated by a comma.
Day	Defines the day for the date value. Multiple days may be entered separated by a comma.
All	Includes all individuals regardless of whether they are in-house or not. **Note:** This option is only available for the Birthday and Wedding Day fields.
In-house	Includes in-house guests. **Note:** This option is only available for the Birthday and Wedding Day fields.
Not In-house	Excludes in-house guests. **Note:** This option is only available for the Birthday and Wedding Day fields.

Profile Marketing Information Criteria

This Field	Is to limit a mailing to:
C	Select this checkbox to select if the criteria should be on the company profile level. Either company or individual must be selected if an entry is made in a field which has the C and I checkboxes.
I	Select this checkbox to select if the criteria should be on the individual profile level. Either company or individual must be selected if an entry is made in a field which has the C and I checkboxes.

Action codes	Certain action codes. Select the action codes from the drop-down list.
Competition	Certain competition codes. Select the competition codes from the drop-down list.
Industry codes	Certain industry codes. Select the industry codes from the drop-down list.
Influence	Certain influence, such as Booker, Contact or Negotiator. Select the influences from the drop-down list.
Mailing Codes	Certain mailing codes: Christmas mailing, summer mailing, new rates mailing, etc. Select the mailing codes from the drop-down list.
Market Segment	Certain market segments. Select the market segments from the drop-down list.
Newspaper	Certain newspaper preferences. Select the newspapers from the drop-down list
Potentials	Certain potential codes. Select the potential number of room nights/bookings from the drop-down list.
Priority	Certain priority codes. Select the priority codes from the drop-down list.
Product interest	Certain product interest codes. Select the product interest codes from the drop-down list.
Scope	Certain scopes such as National, International. Select the scopes from the drop-down list.
Scope City	Certain scope city codes. Select the scope city codes from the drop-down list.
Source	Certain source codes. Select the sources from the drop-down list.
Specials	Certain special codes. Select the special codes from the drop-down list.
VIP Code	Certain VIP codes. Select the VIP codes from the drop-down list.
Rate Code	Certain rate codes. Select the rate codes from the drop-down list.
More Fields	This option is only displayed if custom attributes have been defined. Click on the MORE FIELDS button to select from a list of user-defined attributes. **Note:** When this button is displayed in red it indicates that an attribute has been selected.

Reservation Criteria

This Field	**Is to limit a mailing to**
Groups	Members of the specified groups. Select the group names from the drop-down list.
Blocks	Members of the specified blocks. Select the block names from the drop-down list.
In-house Guests: From-To	Guests who were in-house within the specified range of dates.

Arrival: From-To	Individuals or companies who arrived within the specified range of dates.
Departure: From-To	Individuals or companies who departed within the specified range of dates.
# of Nights: From-To F	Individuals or companies with a number of room nights within the specified range. Includes also those checked in today. Select the option F to include future reservations.
# of Stays: From-To F	Individuals or companies who stayed at the hotel within the specified range. Includes also those checked in today. Select the option F to include future reservations.
Forecast: From-To	Individuals or companies whose forecasted revenue is within the specified range.
Posted Revenue: From-To	Individuals or companies whose posted revenue is within the specified range.
Rate Code	Certain rate codes. Select the rate codes from the drop-down list.
Source	Certain source codes. Select the source codes from the drop-down list.
Market	Certain market segments. Select the market segments from the drop-down list.
More Fields	Certain reservation attributes. Click on the MORE FIELDS button to select from a list of user-defined reservation attributes. **Note:** When this button is displayed in red it indicates that an attribute has been selected.
Display only individuals linked to reservations	If a company meets the query criteria then all individuals linked to that company will be displayed. Select this checkbox if you want to display only individuals from the company that are linked to the reservation. The default is not checked, i.e. display all individuals regardless if they are linked to this reservation or not.

Conference Booking Criteria

This Field	**Is to limit a mailing to**
In house guests: From- To	Individuals or companies that are already in house until the specified departure date.
Arrival: From-To	Individuals or companies that arrived within the specified range of dates.
Departure: From-To	Individuals or companies that departed within the specified range of dates.
Conference Status	Certain conference status codes. Select the conference status codes from the drop-down list.
Room Status	Certain room status codes. Select the room status codes from the drop-down list

Account Manager	Certain account managers. Select the account managers from the drop-down list.
Conf. Manager	Certain conference managers. Select the conference managers from the drop-down list.
Rooms Manager	Certain room managers. Select the rooms managers from the drop-down list.
Market	Certain market segments. Select the market segments from the drop-down list.
Source	Certain source codes. Select the source codes from the drop-down list.
Display only individuals linked to booking	If a company meets the query criteria then all individuals linked to that company will be displayed. Select this checkbox if you want to display only individuals from the company that are linked to the booking. The default is not checked, i.e. display all individuals regardless if they are linked to this booking or not.

Tasks / Activities Criteria

This Field	**Is to limit a mailing to**
Type	Certain task/activity types. Select the task/activity types from the drop-down list.
Start Date: From-To	The task/activity start date is within the specified range of dates.
End Date: From-To	The task/activity end date is within the specified range of dates.
Resp. Employee	Certain responsible employees. Select the employees from the drop-down list.
Description	Tasks/Activities with this description.
Display only individuals linked to activity	If a company meets the query criteria then all individuals linked to that company will be displayed. Select this checkbox if you want to display only individuals from the company that are linked to the task/activity. The default is not checked, i.e. display all individuals regardless if they are linked to this task/activity.
Completed / Uncompleted	Select completed to include only completed tasks/activities. Select uncompleted to include only uncompleted tasks/activities.

Creating an Advanced Mailing Query

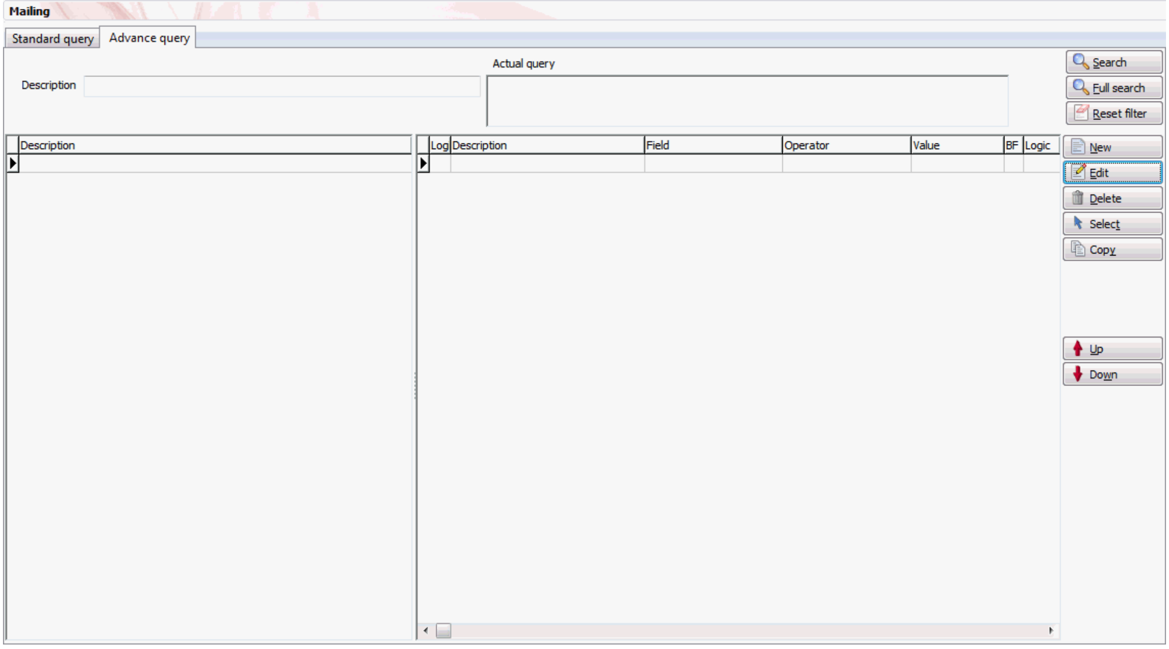
From the Advanced Query screen you can edit an existing query or create a new query. You can also copy an existing query and then edit it to make any changes necessary. The list of available queries can be ordered as required by using the up and down arrow buttons. The description field is mandatory otherwise all fields as detailed below are optional.

The default selections are as follows:

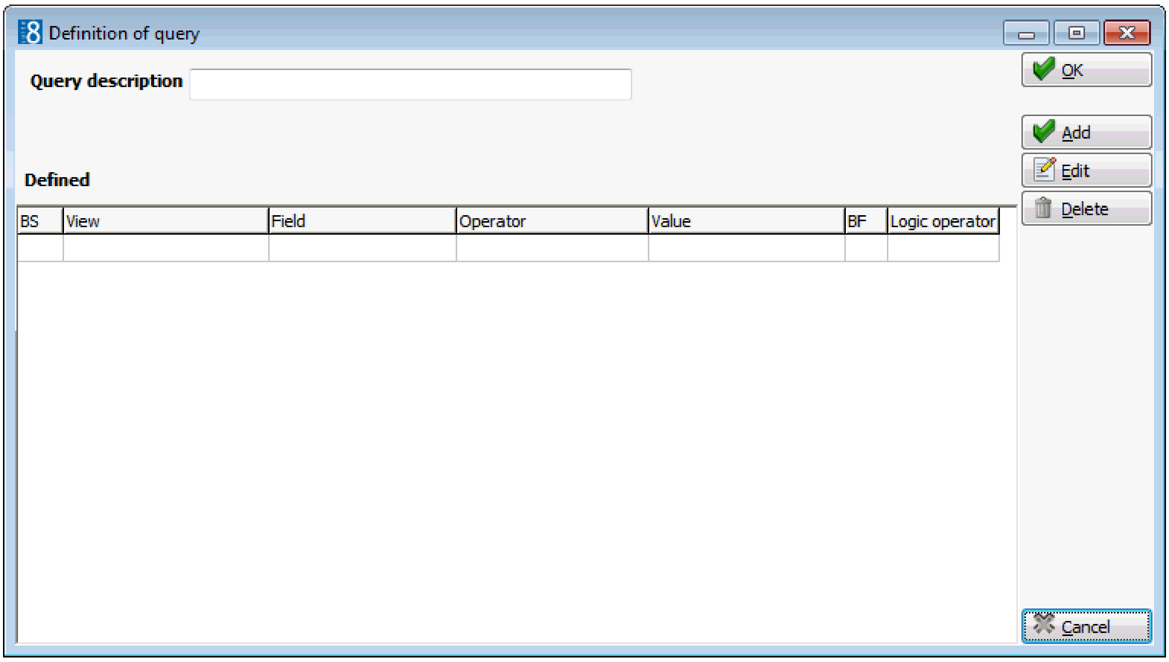
- To search for active profiles but not to include individuals whose profile is marked as 'No Mailing', however, this may be changed via the add/edit query definition dialog box.
- All information that is entered is considered as an AND relation.
- Values selected from the same drop down lists and the C + I flag are considered as OR.
- The reservation status DEFINITE is taken as the default when running a query where reservations are included.

To create a new advanced mailing query

1. Click the menu option CRM and select MAILING, the mailing dialog box is displayed.
2. From the Mailing dialog box, select the tab ADVANCED QUERY.

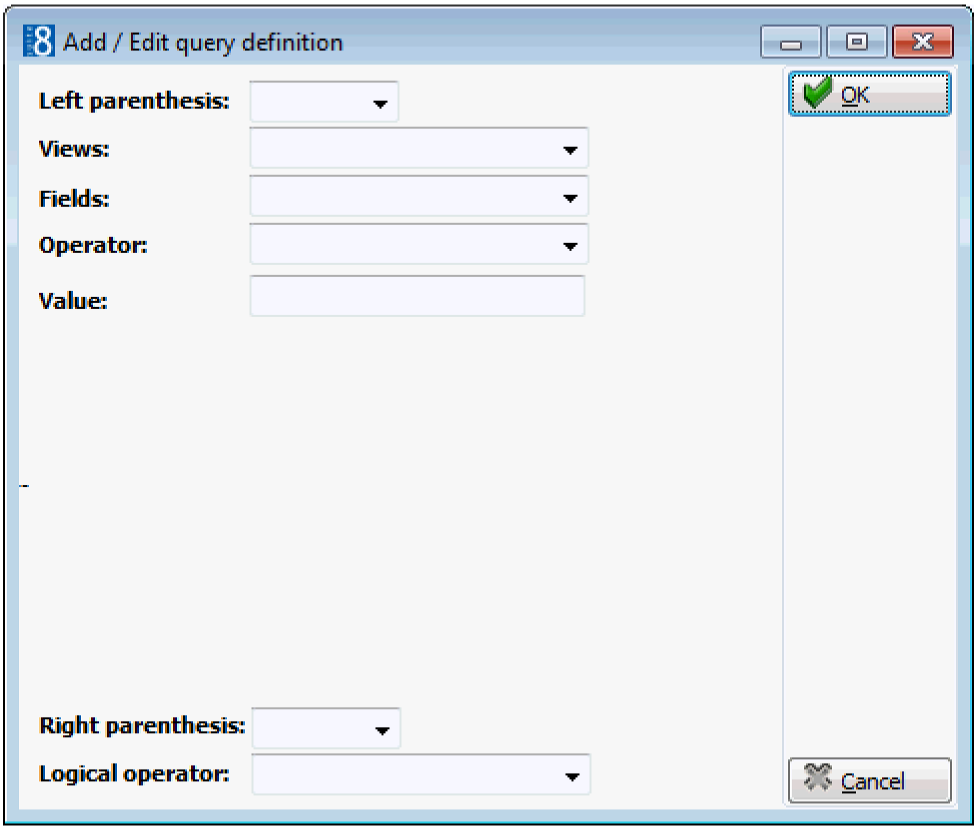

Mailing
Standard query
Advance query
Actual query
Description
Search
Full search
Reset filter
Description
Log
Description
Field
Operator
Value
BF
Logic
New
Edit
Delete
Select
Copy
Up
Down

3. Click NEW, the Definition of query dialog box appears.


Definition of query
Query description
OK
Add
Edit
Delete
Defined
BS
View
Field
Operator
Value
BF
Logic operator
Cancel

4. In the QUERY DESCRIPTION box enter a name for the query.

5. Click ADD to build the query, the Add/Edit query definition dialog box appears.



6. Complete the fields as detailed in the Add/Edit query definition and Mailing Operators tables below.
7. Date fields can be further defined via the Advanced Date Operator dialog box, see the table below.
8. Click OK.
9. Repeat from step 5 for each additional condition required.
10. Depending on the fields selected for the query additional options may be displayed when running a query for tasks & activities, conference bookings or reservations:
    - Display only individuals linked to tasks, activities, conference bookings or reservations. If a company meets the query criteria then all individuals linked to that company will be displayed. Select this checkbox if you want to display only individuals from the company that are linked to an activity, task, conference booking or reservation.
    - Future Nights - includes future nights in the query results. Only valid when running queries where reservations are included.
    - Future Stays - includes future stays in the query results. Only valid when running queries where reservations are included.
11. When all conditions have been entered click OK.

Note: The last defined condition must have no logical operator selected.

Add/Edit query definition dialog box

This option	Does this
Left parenthesis	Lets you select single or double left parenthesis if required. Usually required for complex queries such as (profiles with country=Germany and priority=A) OR (profile with country=Switzerland and priority=B).
Views	Lets you select the view the query should be based upon.
Fields	Lets you select specific fields for the query.
C	Select this checkbox to select if the criteria should be on the company profile level. Either company or individual must be selected if a field is selected which has the C and I checkboxes. **Note:** This checkbox is only displayed for certain query fields.
I	Select this checkbox to select if the criteria should be on the individual profile level. Either company or individual must be selected if a field is selected which has the C and I checkboxes. **Note:** This checkbox is only displayed for certain query fields.
Operator	Lets you select an operator such as, is exactly equal to, is less than, is an empty field, etc. See Operator table.
Value	Lets you select the valid options. The choices depend on the type of field selected: Option 1: Choice between 2 pre-defined values. Option 2: Choice from a list of pre-defined values such as country codes. Option 3: Entry of a free-format value, e.g. if the field selected is city then a valid value would be a city name such as Hamburg. Option 4: If the condition 'is an empty' field then the value field may be left blank.
Right Parenthesis	Lets you select single or double right parenthesis if required.
Logical Operator	Specifies the logical operator for the next connection. AND the first condition and the next condition must both be true. OR either the first or the second condition must be true. BLANK no logical operator selected.

Mailing Operators table

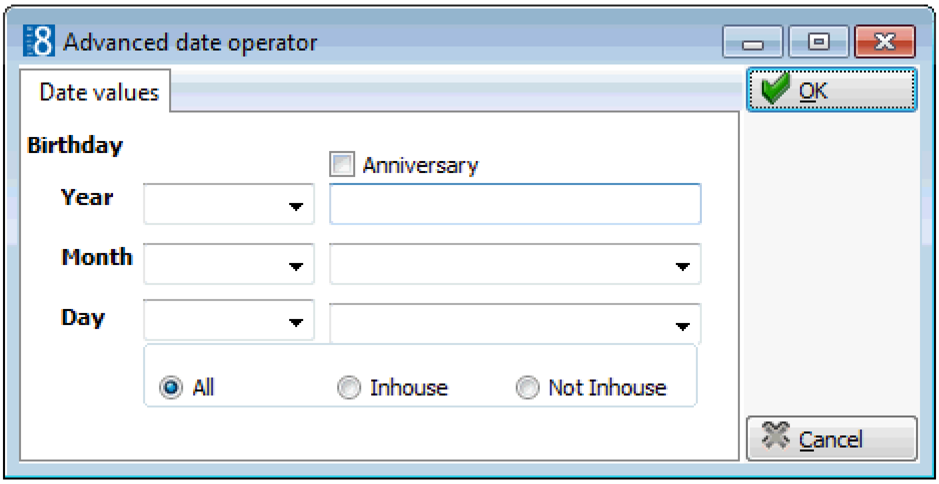
This Operator	May be used:	Example
is exactly equal to (Value is mandatory)	This operator may be used for fields where the entry is selected from a list box or for fields which contain free-format text.	Mailing Code is exactly equal to XMC will select only profiles that have the code XMC selected.

		Company Name 1 is exactly equal to Micros will select only profiles with the exact name Micros. Micros Fidelio will not be displayed as it is not the exact name.
is not exactly equal to (Value is mandatory)	This operator may be used for fields where the entry is selected from a list box or for fields which contain free-format text.	Mailing Code is not exactly equal to XMC will select only profiles that do **not** have the code XMC selected. Company Name 1 is not exactly equal to Micros will select only profiles that do **not** have the exact name Micros. Micros Fidelio will be displayed as it is not the exact name.
is an empty field (Value is not mandatory)	This operator may be used for fields where the entry is selected from a list box or for fields which contain free-format text.	Profile Mailing code is an empty field will select all profiles where no mailing code has been entered. Department is an empty field will select all profiles which have no value in the department field.
is not an empty field (Value is not mandatory)	This operator may be used for fields where the entry is selected from a list box or for fields which contain free-format text.	Profile Mailing code is not an empty field will select all profiles where at least one mailing code has been entered. Department is not an empty field will select all profiles which have some value in the department field.
is greater than (Value is mandatory)	This operator may be used for value or date fields. It should not be used for fields where the entry is selected from a list box.	Profile zip code is greater than 89000 will select all profiles with a zip code above 89000. Reservation Posted revenue is greater than 90,000 will select all reservations where the posted revenue is greater than 90,000.
is greater than or equal to (Value is mandatory)	This operator may be used for value or date fields. It should not be used for fields where the entry is selected from a list box.	Arrival date is greater than or equal to 01.06.2006 will select all reservations where the arrival date is either on or after June 1st 2006.

is less than (Value is mandatory)	This operator may be used for value or date fields. It should not be used for fields where the entry is selected from a list box.	Profile zip code is less than 89000 will select all profiles with a zip code below 89000.
is less than or equal to (Value is mandatory)	This operator may be used for value or date fields. It should not be used for fields where the entry is selected from a list box.	Arrival date is less than or equal to 01.06.2006 will select all reservations where the arrival date is either on or before June 1st 2006.
is like (Value is mandatory)	This operator is used to search fields where the entry in the field starts with the entered value. This operator may be used for fields which contain free-format text. It should not be used for fields where the entry is selected from a list box.	Company Name 1 is like Fidelio will select only profiles which begin with Fidelio, e.g. Micros Fidelio will not be displayed because the name does not start with Fidelio.
is not like (Value is mandatory)	This operator is used to search fields where the entry in the field does not start with the entered value. This operator may be used for fields which contain free-format text. It should not be used for fields where the entry is selected from a list box.	Company Name 1 is not like Fidelio will select profiles which do not begin with Fidelio, e.g. Fidelio Software will not be displayed because the name starts with Fidelio.
contains text (Value is mandatory)	This operator is used to search fields where the entered value is contained somewhere in the selected field. This operator may be used for fields which contain free-format text. It should not be used for fields where the entry is selected from a list box.	Company Name 1 contains text Fidelio will select all profiles where Fidelio is contained anywhere in the name, e.g. both Micros Fidelio and Fidelio Software will be selected.
not contain text (Value is mandatory)	This operator is used to search fields where the entered value is not contained anywhere in the selected field.	Company Name 1 does not contain text Fidelio will select all profiles where Fidelio is not contained anywhere in the name, e.g. Micros Fidelio and Fidelio Software would not be selected.

	This operator may be used for fields which contain free-format text. It should not be used for fields where the entry is selected from a list box.	
advanced date operator	This operator enables the user to search for a date value, year only, month only, day and month or day, month and year. On the fields Birthday and Wedding Day the option Anniversary is available and additional options are displayed to include or exclude in-house guests.	Birthday advanced date operator month March will select all profiles where a birthday date has been entered for the month of March. Conference Booking advanced date operator year equals 2007 will select all profiles with a conference booking in 2007. On the field Birthday, activating the Anniversary check box, entering 50, 60 in the Year field and the required month in the Month field will select all profiles that have a 50th or 60th birthday in the specified month.

Advanced Date Operator dialog box

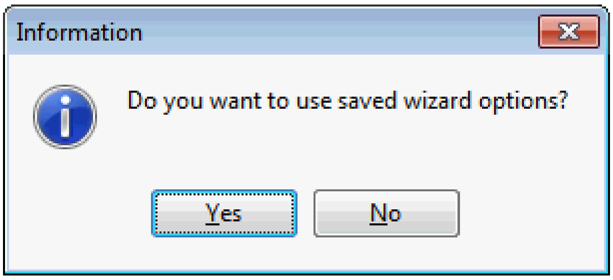


This Option	Defines
Anniversary	Enables the definition of one or multiple years instead of entering a specific year. This could be used for anniversaries such as 50th or 60th birthdays. **Note:** This option is only available for the Birthday and Wedding Day fields.
Year	Defines the year for the date value. Multiple years may be entered separated by a comma.

Month	Defines the month for the date value. Multiple months may be entered separated by a comma.
Day	Defines the day for the date value. Multiple days may be entered separated by a comma.
All	Includes all individuals regardless of whether they are in-house or not. **Note:** This option is only available for the Birthday and Wedding Day fields.
In-house	Includes in-house guests. **Note:** This option is only available for the Birthday and Wedding Day fields.
Not In-house	Excludes in-house guests. **Note:** This option is only available for the Birthday and Wedding Day fields.

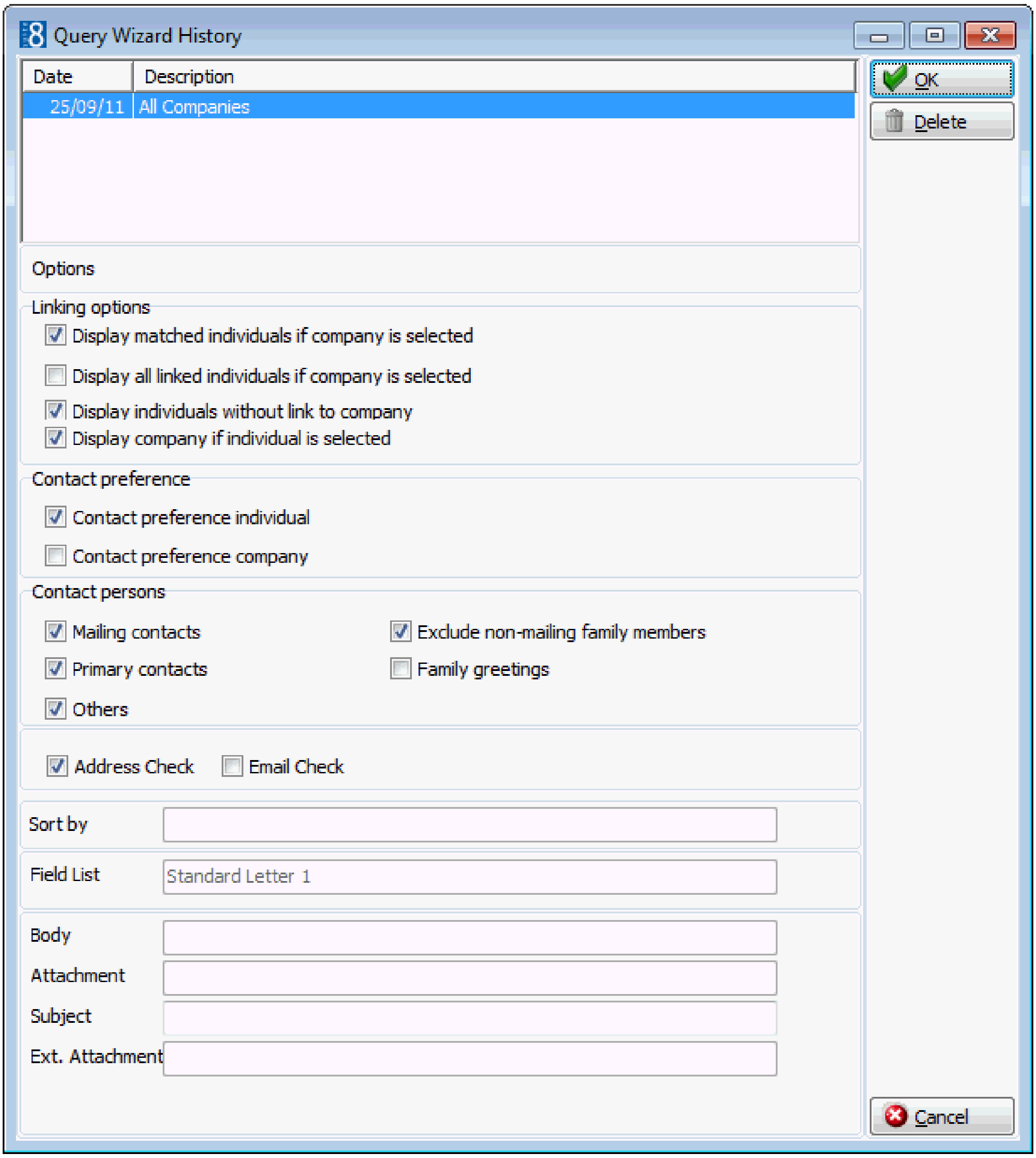
Running a Standard or Advanced Mailing Query

1. From the Mailing dialog box, select either the STANDARD QUERY or ADVANCED QUERY tab.
2. Highlight the query to be run.
3. Click the SELECT button; if there are saved wizard settings then you are prompted to use the saved wizard options.



Do you want to use saved wizard options?

4. Click YES to view the saved wizard options or NO to display a new query wizard dialog box.
5. If YES is selected then the Query Wizard History dialog box is displayed.



Query Wizard History

Date	Description
25/09/11	All Companies

Options

Linking options

☑ Display matched individuals if company is selected

☐ Display all linked individuals if company is selected

☑ Display individuals without link to company

☑ Display company if individual is selected

Contact preference

☑ Contact preference individual

☐ Contact preference company

Contact persons

☑ Mailing contacts

☑ Primary contacts

☑ Others

☑ Exclude non-mailing family members

☐ Family greetings

☑ Address Check ☐ Email Check

Sort by

Field List: Standard Letter 1

Body

Attachment

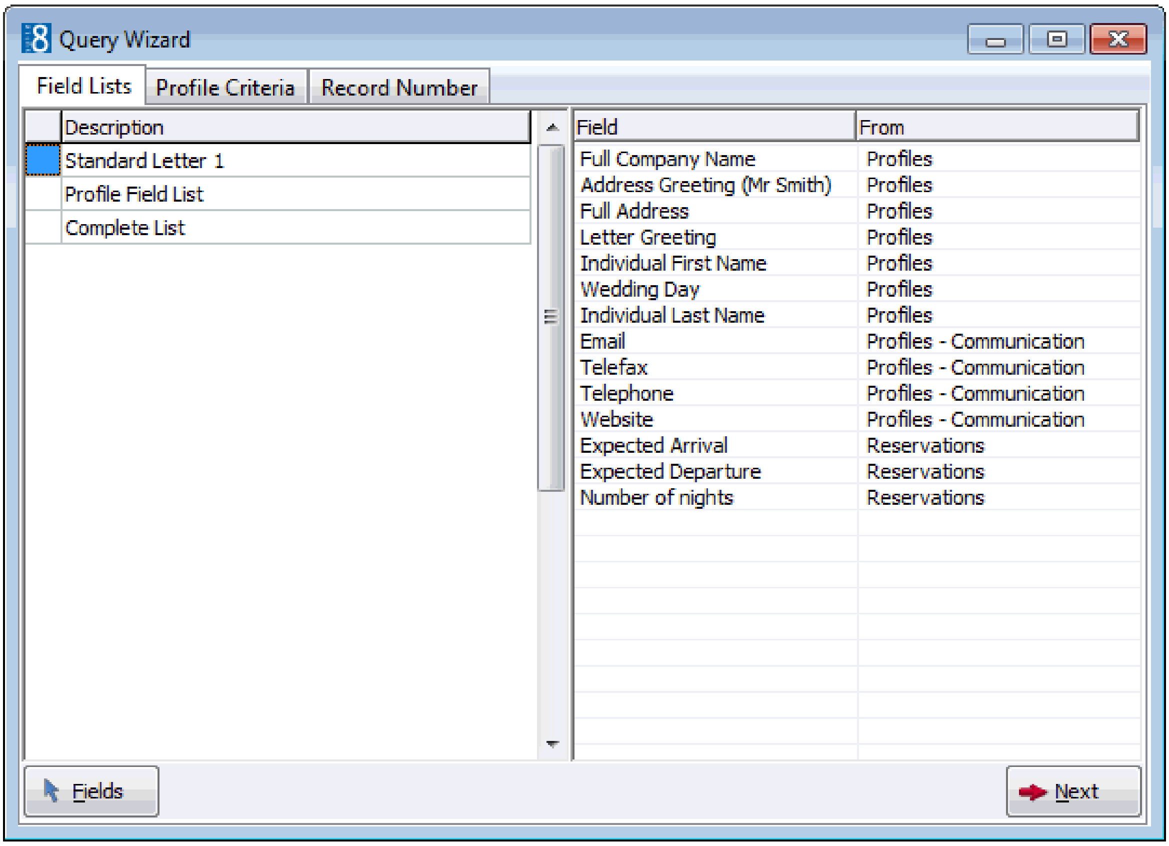
Subject

Ext. Attachment

Note: Query Wizards which are no longer required may be deleted via the Query Wizard History dialog box by selecting the wizard and clicking the DELETE button.

6. Select the query wizard required and click OK, the mailing results screen is displayed.
7. If No is selected then the Query wizard dialog box is displayed.

   Any pre-defined field lists are displayed; these are the lists of fields that are used for the mailing query results.

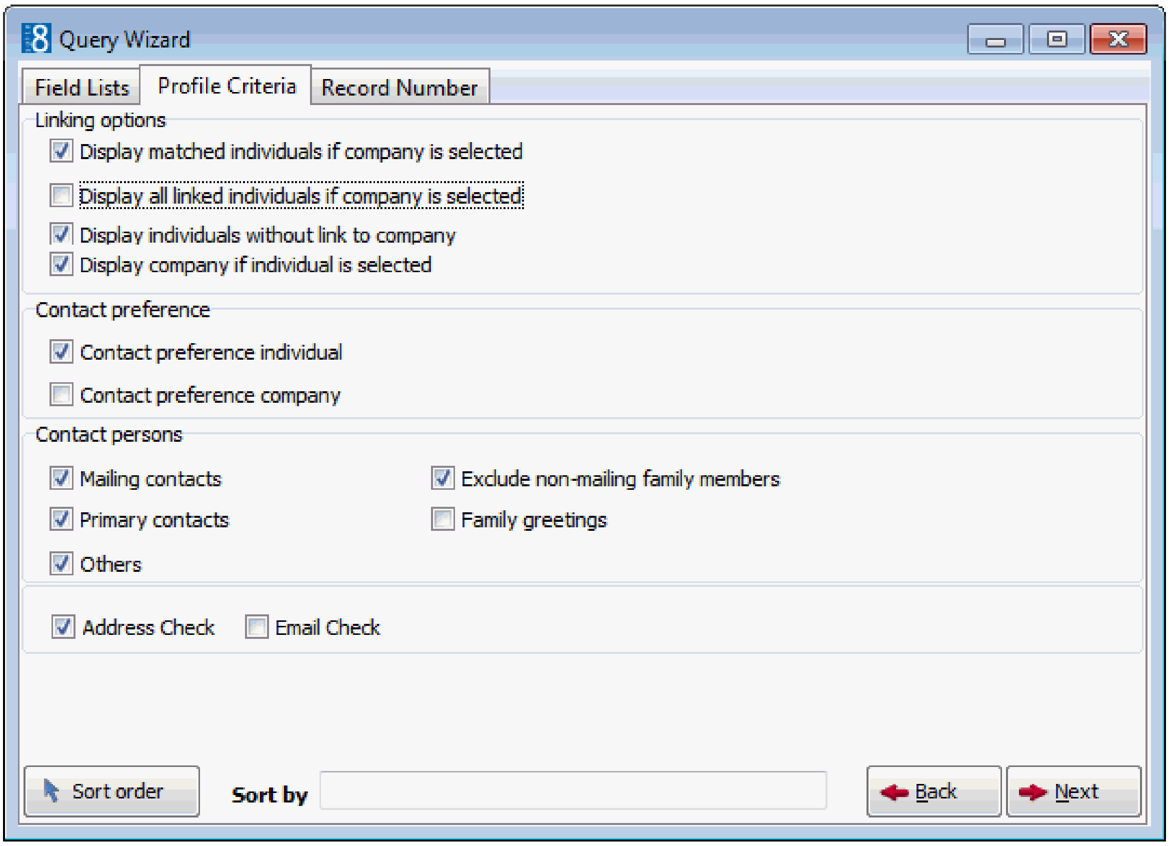

Query Wizard
Field Lists
Profile Criteria
Record Number
Fields
Next

Description
Standard Letter 1
Profile Field List
Complete List

Field	From
Full Company Name	Profiles
Address Greeting (Mr Smith)	Profiles
Full Address	Profiles
Letter Greeting	Profiles
Individual First Name	Profiles
Wedding Day	Profiles
Individual Last Name	Profiles
Email	Profiles - Communication
Telefax	Profiles - Communication
Telephone	Profiles - Communication
Website	Profiles - Communication
Expected Arrival	Reservations
Expected Departure	Reservations
Number of nights	Reservations

8. Click the FIELDS button to edit an existing field list or build a new one, see CONFIGURATION → SETUP → MISCELLANEOUS → MAILING for more details.

9. Select a FIELD LIST and click NEXT to display the profile criteria dialog box. The first field list will be taken by default if no other field list is selected.


Query Wizard
Field Lists
Profile Criteria
Record Number
Sort order
Back
Next

Linking options

☑ Display matched individuals if company is selected
☐ Display all linked individuals if company is selected
☑ Display individuals without link to company
☑ Display company if individual is selected

Contact preference

☑ Contact preference individual
☐ Contact preference company

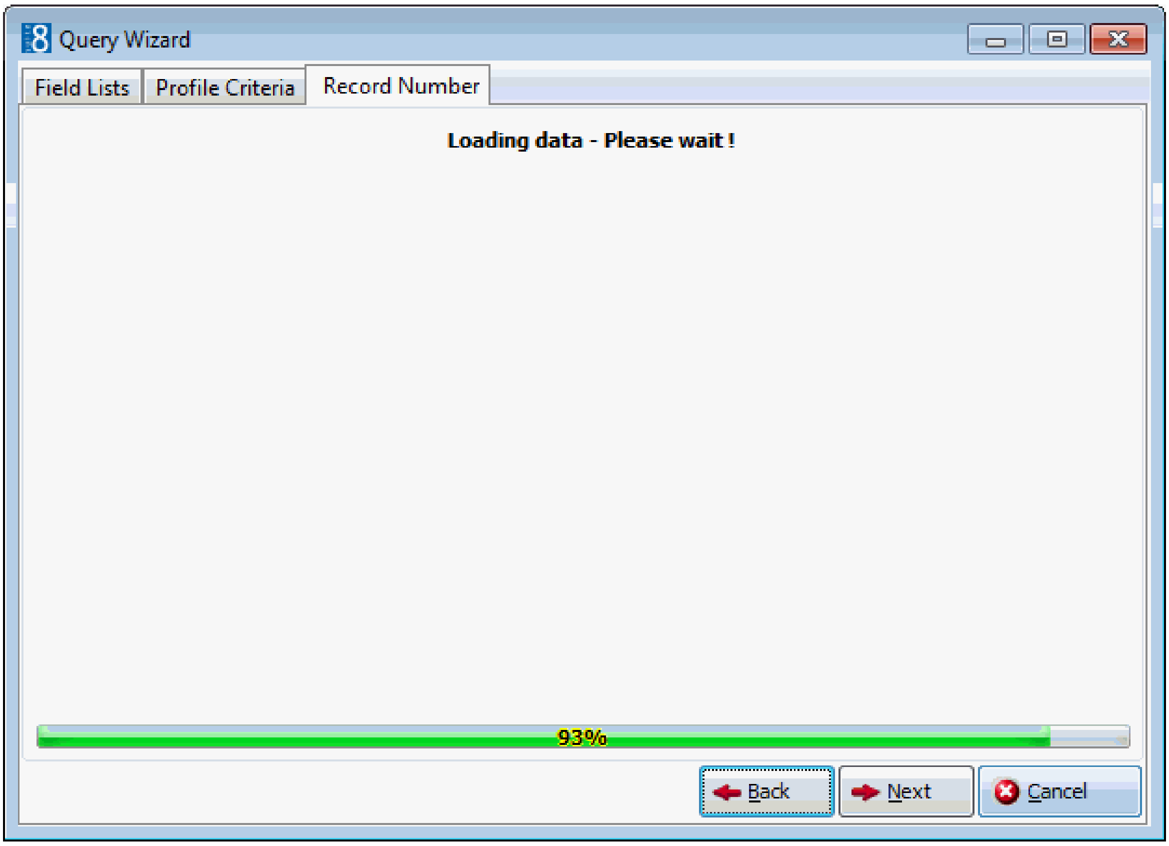
Contact persons

☑ Mailing contacts
☑ Primary contacts
☑ Others
☑ Exclude non-mailing family members
☐ Family greetings

☑ Address Check
☐ Email Check

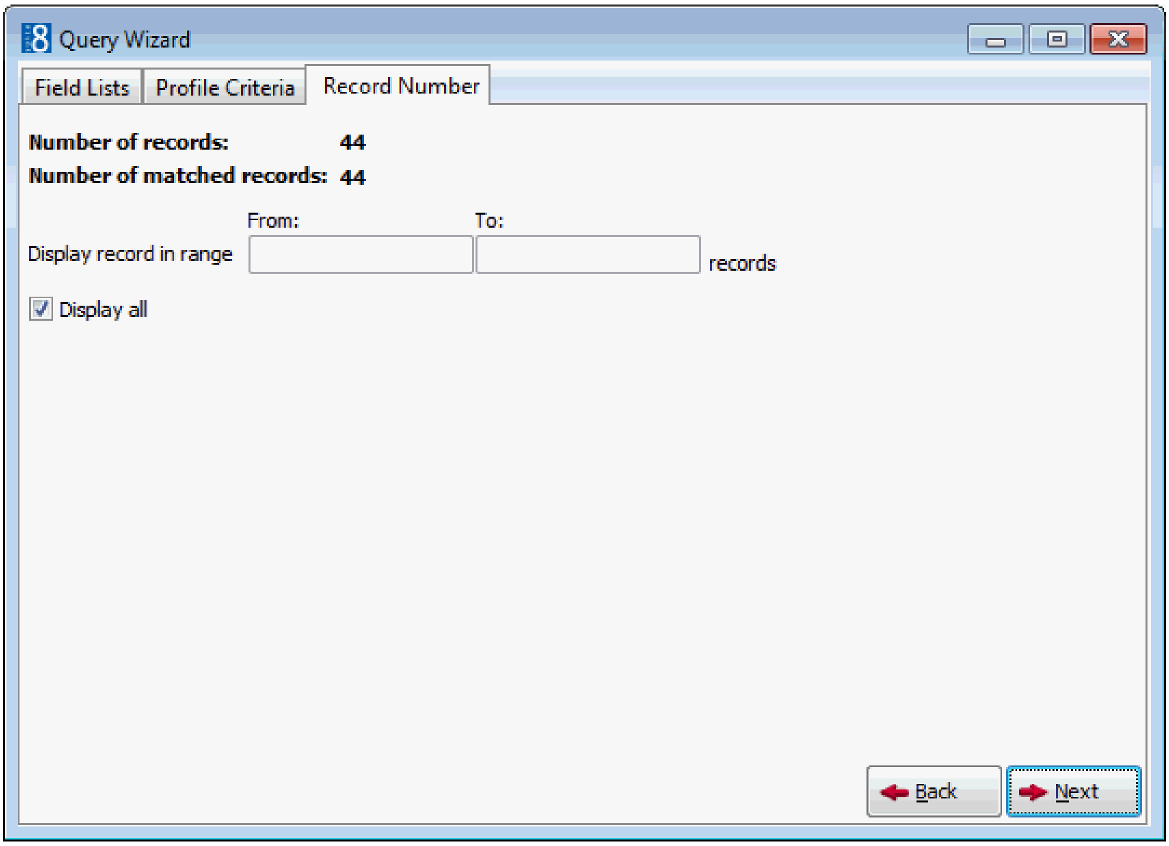
Sort by

10. Mark the mailing option check boxes as required, the check boxes are explained in the table below.
11. Click NEXT, the query is run and a progress bar displays the status of the query, in addition the various stages of the query are displayed on top - Loading Data, Gathering Profiles, Validate Profiles and Links, Validate Family Members and Validate Address and Communications.


Loading data - Please wait !

12. When the query finishes the query wizard displays the number of records found and the number of records matched.
    - Number of records shows all selected records.
    - Number of matched records shows the number of profiles that match the query.

The number of records and the number of matched records could be different; for example, running a query for individuals with a certain action code, the mailing result will show both the number of individuals and the number of linked company profiles.

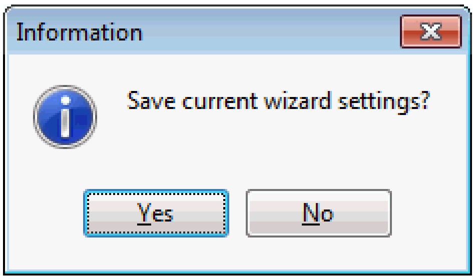

Query Wizard
Field Lists
Profile Criteria
Record Number
Back
Next

Number of records: 44
Number of matched records: 44

Display record in range From: To: records

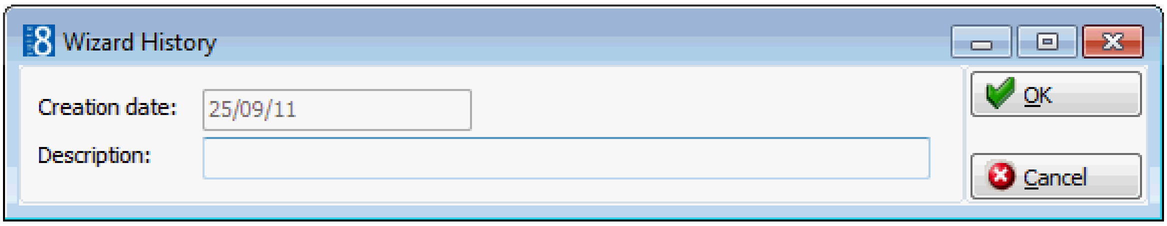
☑ Display all

13. If a large number of records are found, a record range can be entered. To enter a range of records remove the check mark from the DISPLAY ALL checkbox field and complete the FROM and TO fields.
14. Click NEXT; you are prompted to 'Save current wizard settings?' Click YES to save the current wizard settings or NO not to save the wizard settings.


Information
Yes
No

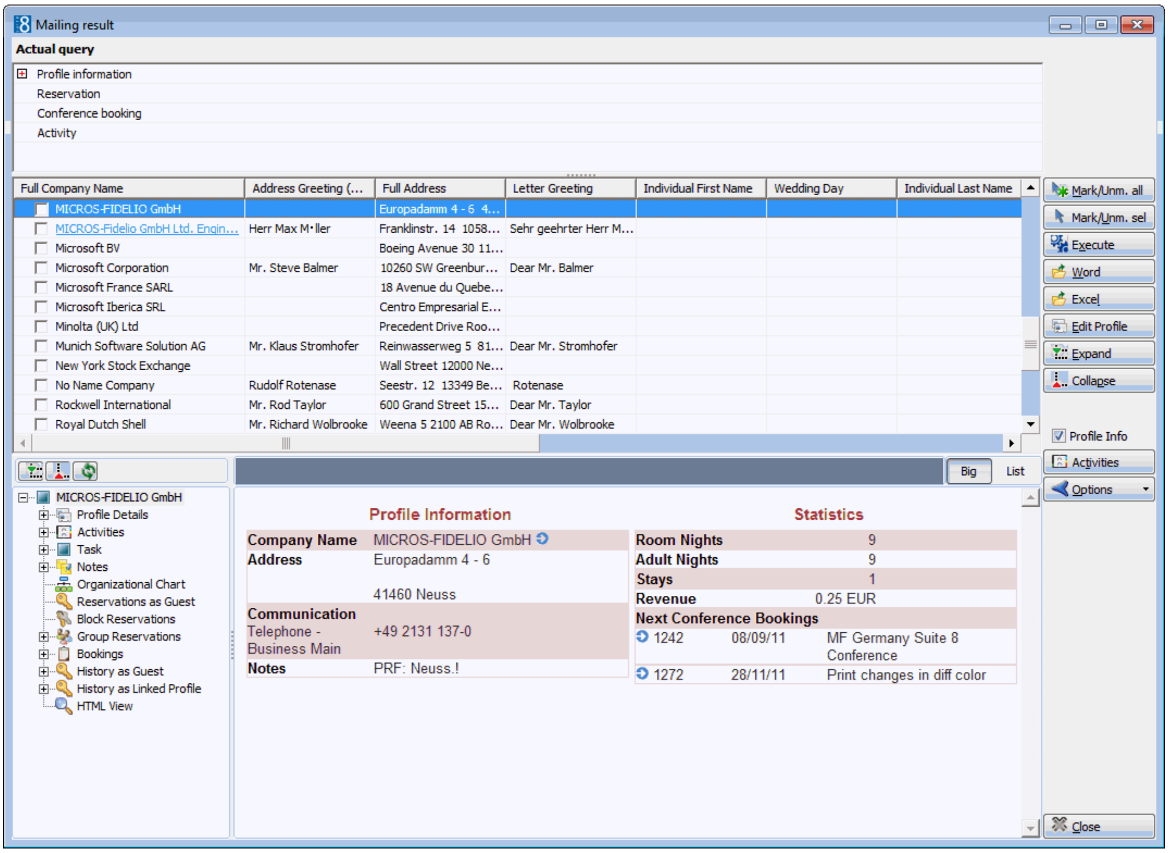
Save current wizard settings?

15. If you selected to save the wizard settings then the Wizard History dialog box is displayed.


Wizard History
OK
Cancel

Creation date: 25/09/11
Description:

16. Enter a DESCRIPTION for the wizard settings; the CREATION DATE is completed automatically with the current date. The Wizard History saves only the settings, so that the next time a query is run from the Wizard History all current records matching the query will be displayed.
17. Click OK, the mailing result screen appears.


Mailing result
Actual query
Profile information
Reservation
Conference booking
Activity
Mark/Unm. all
Mark/Unm. sel
Execute
Word
Excel
Edit Profile
Expand
Collapse
☑ Profile Info
Activities
Options
Big
List
Close
MICROS-FIDELIO GmbH
Profile Details
Activities
Task
Notes
Organizational Chart
Reservations as Guest
Block Reservations
Group Reservations
Bookings
History as Guest
History as Linked Profile
HTML View

Full Company Name	Address Greeting (…	Full Address	Letter Greeting	Individual First Name	Wedding Day	Individual Last Name
☐ MICROS-FIDELIO GmbH		Europadamm 4 - 6 4…				
☐ MICROS-Fidelio GmbH Ltd. Engin…	Herr Max M·ller	Franklinstr. 14 1058…	Sehr geehrter Herr M…			
☐ Microsoft BV		Boeing Avenue 30 11…				
☐ Microsoft Corporation	Mr. Steve Balmer	10260 SW Greenbur…	Dear Mr. Balmer			
☐ Microsoft France SARL		18 Avenue du Quebe…				
☐ Microsoft Iberica SRL		Centro Empresarial E…				
☐ Minolta (UK) Ltd		Precedent Drive Roo…				
☐ Munich Software Solution AG	Mr. Klaus Stromhofer	Reinwasserweg 5 81…	Dear Mr. Stromhofer			
☐ New York Stock Exchange		Wall Street 12000 Ne…				
☐ No Name Company	Rudolf Rotenase	Seestr. 12 13349 Be…	Rotenase			
☐ Rockwell International	Mr. Rod Taylor	600 Grand Street 15…	Dear Mr. Taylor			
☐ Royal Dutch Shell	Mr. Richard Wolbrooke	Weena 5 2100 AB Ro…	Dear Mr. Wolbrooke			

Profile Information

Company Name	MICROS-FIDELIO GmbH
Address	Europadamm 4 - 6 41460 Neuss
Communication	
Telephone - Business Main	+49 2131 137-0
Notes	PRF: Neuss.!

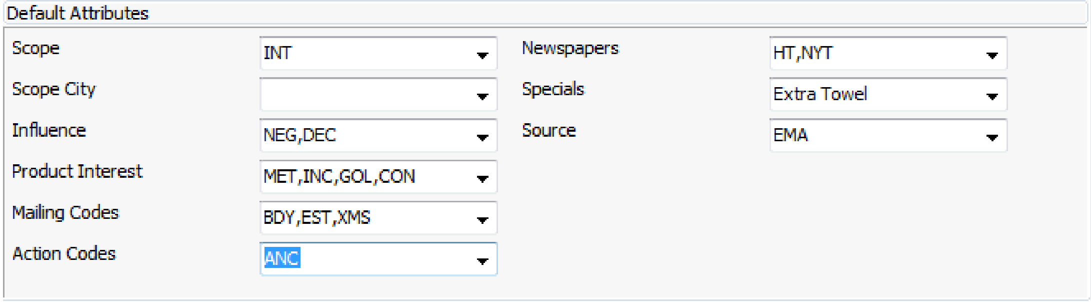
Statistics

Room Nights	9	
Adult Nights	9	
Stays	1	
Revenue	0.25 EUR	
Next Conference Bookings		
1242	08/09/11	MF Germany Suite 8 Conference
1272	28/11/11	Print changes in diff color

The upper window of the screen shows the options that were used in the query.

In the query results the values of the selected attribute categories will be displayed regardless if they have been used in the query or not, for example.

A guest has the following attributes defined:

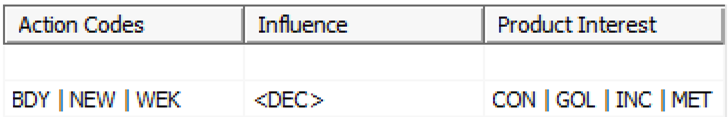

Default Attributes

Scope	INT	Newspapers	HT,NYT
Scope City		Specials	Extra Towel
Influence	NEG,DEC	Source	EMA
Product Interest	MET,INC,GOL,CON		
Mailing Codes	BDY,EST,XMS		
Action Codes	ANC		

The mailing query is setup to include the attribute code INFLUENCE equal to Decision Maker (DEC).

The field list includes the fields INFLUENCE, ACTION CODES and PRODUCT INTEREST.

In the mailing result the values of all three attribute categories are displayed in the result, however as the query included specifically the attribute value DECISION MAKER then this is displayed in brackets <DEC> indicating that it is part of the actual query.



Action Codes	Influence	Product Interest
BDY | NEW | WEK	<DEC>	CON | GOL | INC | MET

- Records can be selected by selecting the check-box in front of the name or via the options MARK/UNM ALL or MARK/UNM SEL on the right hand side of the screen.

- The selected mailing result can be exported to Word or Excel or sent via email by clicking the relevant button.
- Profile details may be viewed and edited via the EDIT PROFILE button. The button is not accessible if more than one profile is marked. If a profile is edited and changed so that it no longer meets the query criteria then a warning will be displayed, however the profile remains in the mailing result list. The profile can either be de-selected or the mailing query run again.
- If the profile criteria 'Display all linked individuals if company is selected' was selected then the buttons EXPAND and COLLAPSE can be used to expand or to collapse all linked individuals of all companies. By default these are not expanded. Clicking the ⊞ and ⊟ signs next to the company name expands and collapses the linked individual of the selected company.
- The profile HTML and tree may be viewed via the PROFILE INFO button. The button is not accessible if more than one profile is marked.

Profile Criteria dialog box

Select this checkbox	**To do this**
Linking Options	
Display matched individuals if company is selected	If this option is selected individuals that are linked to a company and match the query will be shown in the result set.
Display all linked individuals if company is selected	If this option is selected individuals that are linked to a company will be shown in the result set. Example: If the query used was city=Hamburg and the company address is in Hamburg, but the address of the linked individual is not city=Hamburg, the linked individual will be shown as well.
Display individuals without link to company	If this option is selected individuals without a link to a company will be shown. Example: An individual without any company link with city=Hamburg will be displayed in the result set.
Display company if individual is selected	If this option is selected, the company that is linked to the individual will be displayed regardless of it meeting the query requirements. Example: Individual with city=Hamburg is linked to a company which has a city=Berlin. Due to the mailing query, the individual will be selected and if the option is selected the company will also be shown in the result set.
Contact Preference	This option defines which address preference should displayed and used in the mailing. **Note:** Only one or the other can be selected.
Contact Preference Individual	If this option is selected, the address entered on the individual level will be displayed in the result set.
Contact Preference Company	If this option is selected, the address entered on the company level will be displayed in the result set.
Contact Persons	

Mailing Contacts	If this option is selected all individuals defined as mailing contacts will be selected
Primary Contacts	If this option is selected all individuals defined as primary contacts will be selected.
Other	If this option is selected all individuals other than mailing or primary will be selected
Exclude non-mailing family members	If this option is selected all family members which are not defined as family mailing contact will be excluded from the mailing. **Note:** This option is only available if the option 'Enable Family Wizard' is activated in Setup → Configuration → Global Settings → Profile Tab.
Family greetings	If this option is selected then the family address/letter greetings defined on the Family Wizard tab of the profile will be used in the mailing and not the individual address/letter greetings. **Note:** This option is only available if the option 'Enable Family Wizard' is activated in Setup → Configuration → Global Settings → Profile Tab.
Address Check	If this option is selected then only those profiles which match the query conditions and have an address (zip code and city) will be displayed in the query results.
Email Check	If this option is selected then only those profiles which match the query conditions and have an email address will be displayed in the query results.
Sort By	Users can define a sort order for each query by selecting it from the sort orders list, for example, users can define a sort order by country and then within the country by zip code and within the zip code in alphabetical order. Sort By 1. Click on the Sort order button to display a list of defined sort criteria. 2. Choose the criteria required by selecting the checkboxes in the order required. 3. To change the sort order double-click on the column Sort Order and adjust the sort order number. 4. Right-click on the Order Type column to select whether the criteria should be sorted in ascending or descending order.

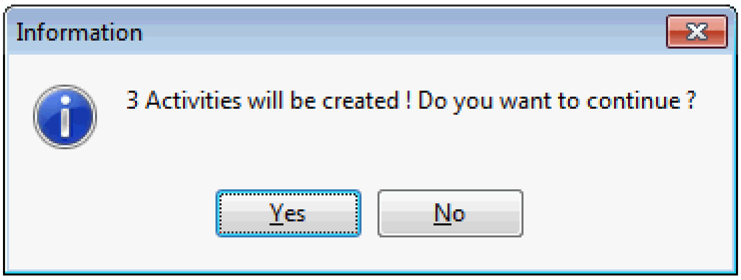
The order of the fields that display the results is defined via the option List of Fields under Configuration → Setup → Miscellaneous → Mailing.

Creation of Activities

At the same time as running a mailing, activities can be created for those that were included in the mailing.

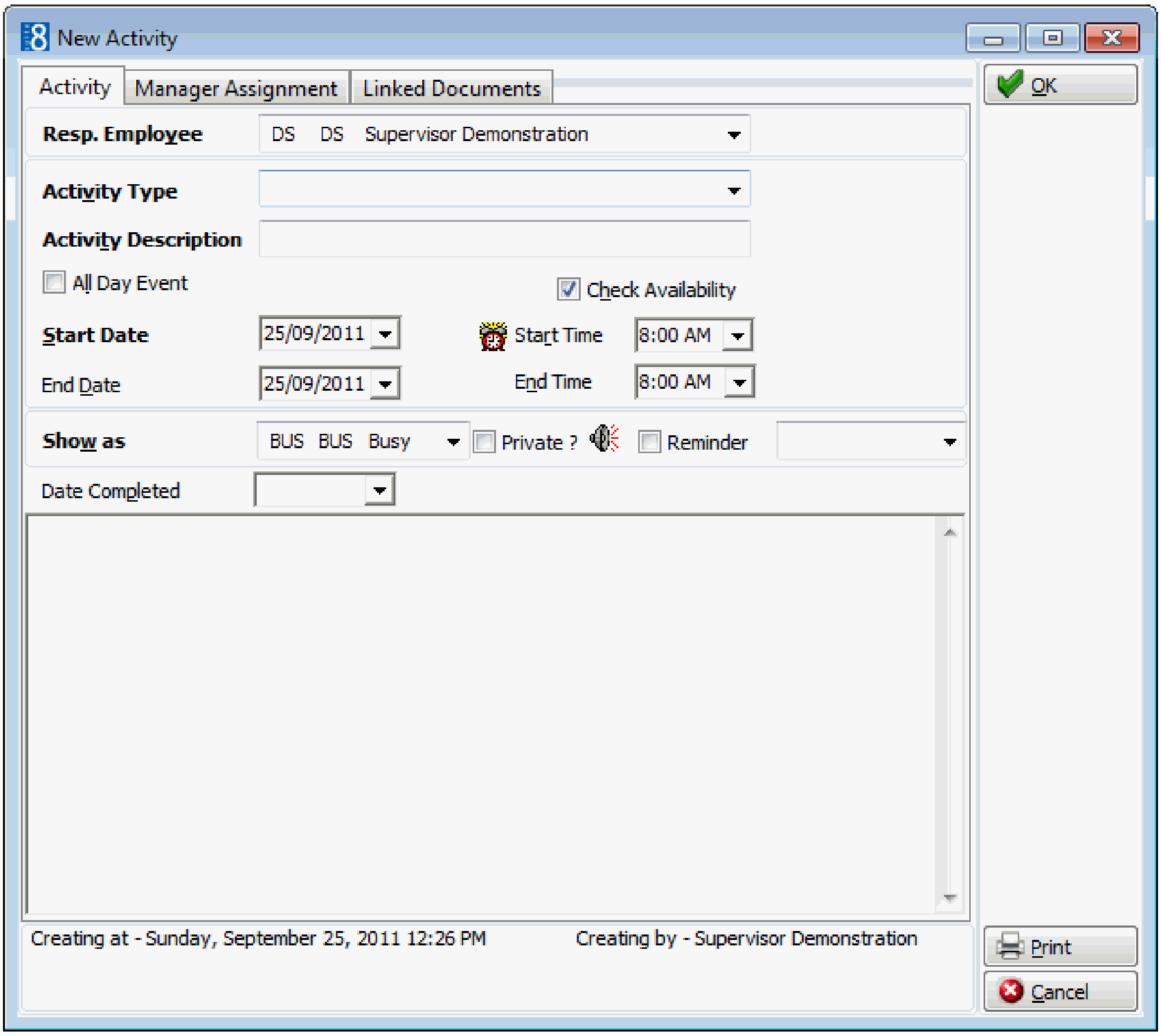
1. Run a mailing as detailed in 'Running a Standard or Advanced Mailing Query'.
2. Select the records for which activities are to be created.

3. On the mailing results screen select ACTIVITIES, a message is displayed indicating how many activities will be created.



3 Activities will be created ! Do you want to continue ?

4. Click YES; the New Activity dialog box is displayed.



Resp. Employee DS DS Supervisor Demonstration

Activity Type

Activity Description

☐ All Day Event

☑ Check Availability

Start Date 25/09/2011

Start Time 8:00 AM

End Date 25/09/2011

End Time 8:00 AM

Show as BUS BUS Busy

☐ Private ?

☐ Reminder

Date Completed

Creating at - Sunday, September 25, 2011 12:26 PM

Creating by - Supervisor Demonstration

5. Complete the information as detailed in the table below.
6. Click OK to create the activities.

> **Tip:** Make sure the field DATE COMPLETED is filled in otherwise many unfinished activities may be created.

7. Continue with the mailing merge, create for example a follow-up activity or click CLOSE on the mailing result screen.

Activity Edit dialog box

Fill in this field	With this information
Resp. Employee	Employee for whom this activity belongs.
Activity Type	Type of Activity.
Activity Description	Free format field to further define the purpose of the activity or to give a description of activity. By default the field is completed with the activity type as defined in the previous field.
All Day Event	Checking this field will mark the activity as an all day event. An activity marked as an all day event is displayed at the top of the column under the date field and not on the grid itself.
Check Availability	Select this checkbox to check availability when an activity is entered. If this option is active then each time an activity is entered for the resp. employee for that day and time, the availability message is displayed.
Start Date	The starting date of the activity.
Start Time	The starting time of the activity. The default starting time is defined in the Global Settings → Profile 1 tab.
End Date	The ending date of the activity.
End Time	The ending time of the activity. The default ending time is defined in the Global Settings → Profile 1 tab.
Show As	Selecting an entry from this list box shows whether the activity is taking place out of the office, if the Sales Manager is busy or free, etc.
Private	Checking this field will mark the activity as private. **Note:** Functionality not yet implemented.
Reminder	A reminder can be set, ranging from 5 minutes to one month. Users then have the option to choose to 'Dismiss' or 'Snooze' the activity. The reminder is sent to the responsible manager and any assigned managers.
Date Completed	Date the activity was completed - select from calendar.
	Free format field to add any additional notes or information. The day, date, time and name of the logged in user can be added to the text of the note by pressing F7.

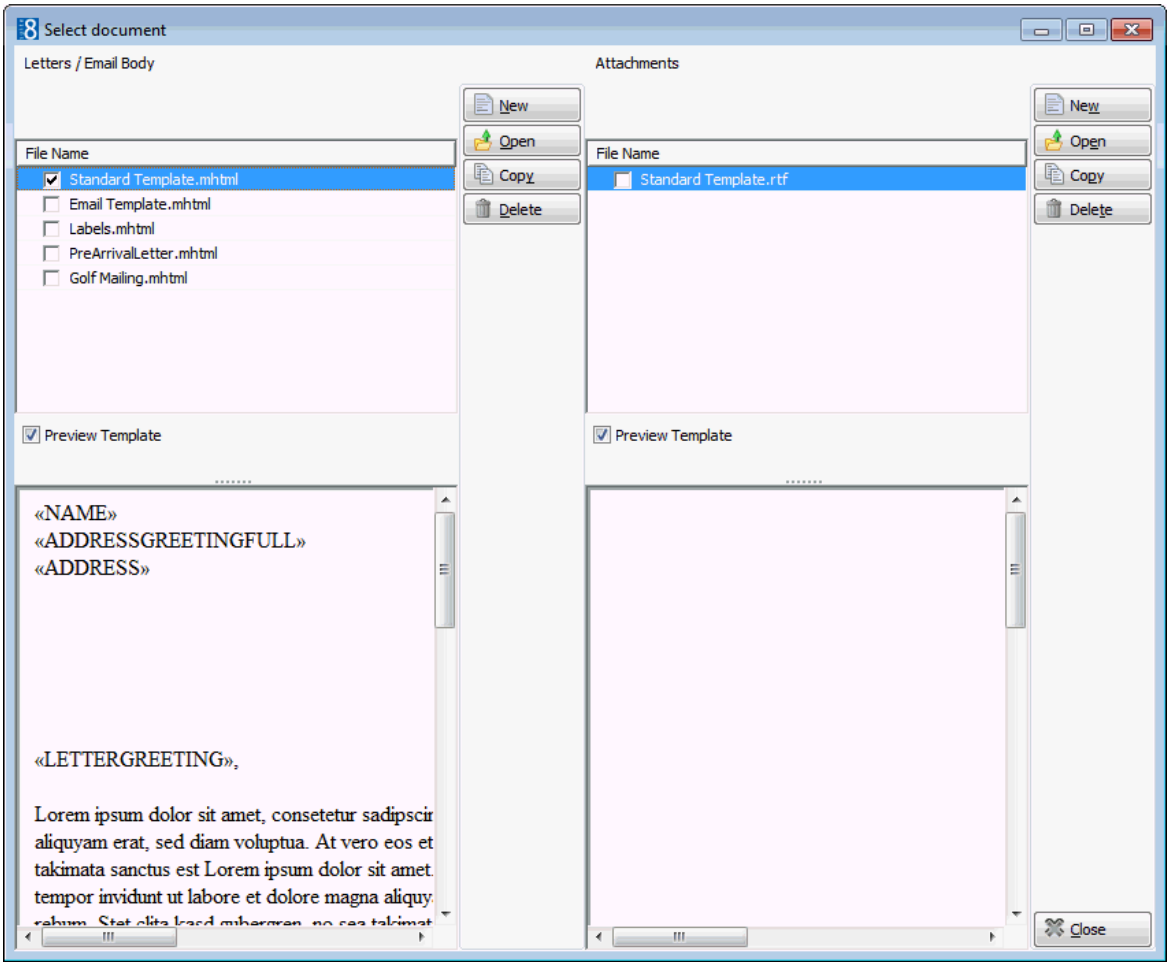
Note: It is also possible to create activities for the future, for example, to make follow up calls. The field DATE COMPLETED should not be filled in this case.

Merging to Word

Selecting an existing document template:

1. Follow the steps for running a mailing as detailed in 'Running a Standard or Advanced Mailing Query'.
2. Mark the records to be included in the merge.

3. Click WORD, the Select document screen is displayed.


Select document
Letters / Email Body
Attachments
New
Open
Copy
Delete
New
Open
Copy
Delete
File Name
File Name
Preview Template
Preview Template
Close

☑ Standard Template.mhtml
☐ Email Template.mhtml
☐ Labels.mhtml
☐ PreArrivalLetter.mhtml
☐ Golf Mailing.mhtml

☐ Standard Template.rtf

☑ Preview Template

☑ Preview Template

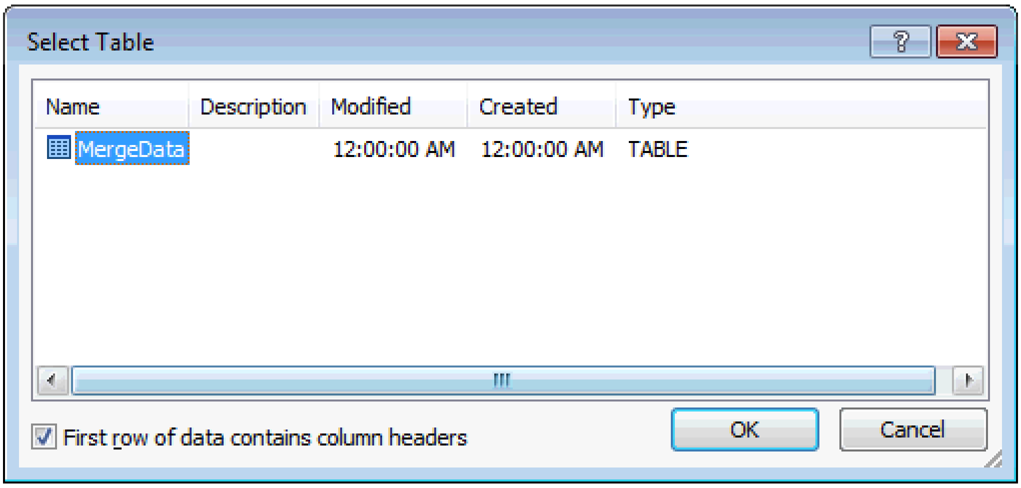
«NAME»
«ADDRESSGREETINGFULL»
«ADDRESS»

«LETTERGREETING»,

Lorem ipsum dolor sit amet, consetetur sadipscir
aliquyam erat, sed diam voluptua. At vero eos et
takimata sanctus est Lorem ipsum dolor sit amet.
tempor invidunt ut labore et dolore magna aliquy

Note: When the information is exported to e.g. Word, the file datasource.html is created automatically; this file is required to perform the mail merge and is stored in the path defined under Setup → Configuration → Global Settings → Workstation Defaults tab → Local Log Directory. During the merge to Word Fidelio requires that the first record in the datasource.html file be empty, this record is suppressed by default and in Word the mailing merge records start at number 2.

4. Select the required document template.
5. As the PREVIEW check box is selected by default then the document template is displayed in the preview window. The header and footer are not displayed in preview mode.
6. Click OPEN, MS Word opens the letter with the merge fields and automatically displays the mail merge toolbar.
7. If you are using Windows XP or Word2003 then the Select Table dialog box is displayed, click OK to close it.



Name	Description	Modified	Created	Type
MergeData		12:00:00 AM	12:00:00 AM	TABLE

☑ First row of data contains column headers

8. Select the «ABC» button to view the merged data, move from record to record via the arrows ⏮ ◀ 1 ▶ ⏭.

Note: The merged records start with record 2; record 1 is an empty record and is suppressed by default.

9. Make any changes required to the letter and then click the FINISH & MERGE icon, the merged results will then appear in a new document.
10. Print the merged letters.
11. To save the merged letters document click SAVE from the file menu in Word.
12. Allocate a name and select a location to save the document.

Note: The following words and special characters may not be used in the file name when saving the document: CON, PRN, AUX , CLOCK$, NULCOM0, COM1..9, LPT0..9 and special characters: |, \, ?, *, <,", :, >, /

13. Click CLOSE, the Suite8 Select documents screen is displayed and you are prompted to save the document in the database.
14. Select NO, as you do not want to save the merged letter file in the Suite8 database, MS Word is closed automatically.
15. Click CLOSE to close the Select document screen.
16. Click CLOSE to close the Mailing Results screen, the main mailing is screen is displayed.

Note: A dummy line is created in the datasource.html on top of the merge values passed to Microsoft. This is required due to Word interpreting the field zip code as a number if sorted by zip code and zip codes with letters were then displayed as 0. With this change zip codes are considered as a string value, the empty record is suppressed by default and the mailing record no. starts with 2 in Word.

Merging to Excel

1. Follow the steps for running a mailing as detailed in 'Running a Standard or Advanced Mailing Query'.

2. Mark the records to be included in the merge.
3. Click EXCEL, MS Excel opens a worksheet showing the results of the merge. The columns listed are as defined in the selected field list.
4. To save the merged results click SAVE from the file menu in Excel.
5. Allocate a name and select a location to save the worksheet.
6. To close the worksheet, click CLOSE from the Excel file menu.
7. To close MS Excel click EXIT from the Excel file menu, the mailing results screen is displayed.

Creation of email mailings

Suite8 uses an internal mailing client, therefore all hotels, even if they do not have their own email system such as MS Outlook, will be able to use this feature.
To use this feature the following files are needed:

- IPWORKS5.DLL (needs to be in the same directory as the MFMAIL.DLL)
- MFMAIL.DLL
- RegisterEDlls.bat (that registers the MFMAIL.DLL)

Under Setup → Configuration → Global Settings → Generic tab, enter the email address of the property in the field HOTEL EMAIL. This email address will be used as the sender of emails.

There are 2 ways of sending an email mailing:

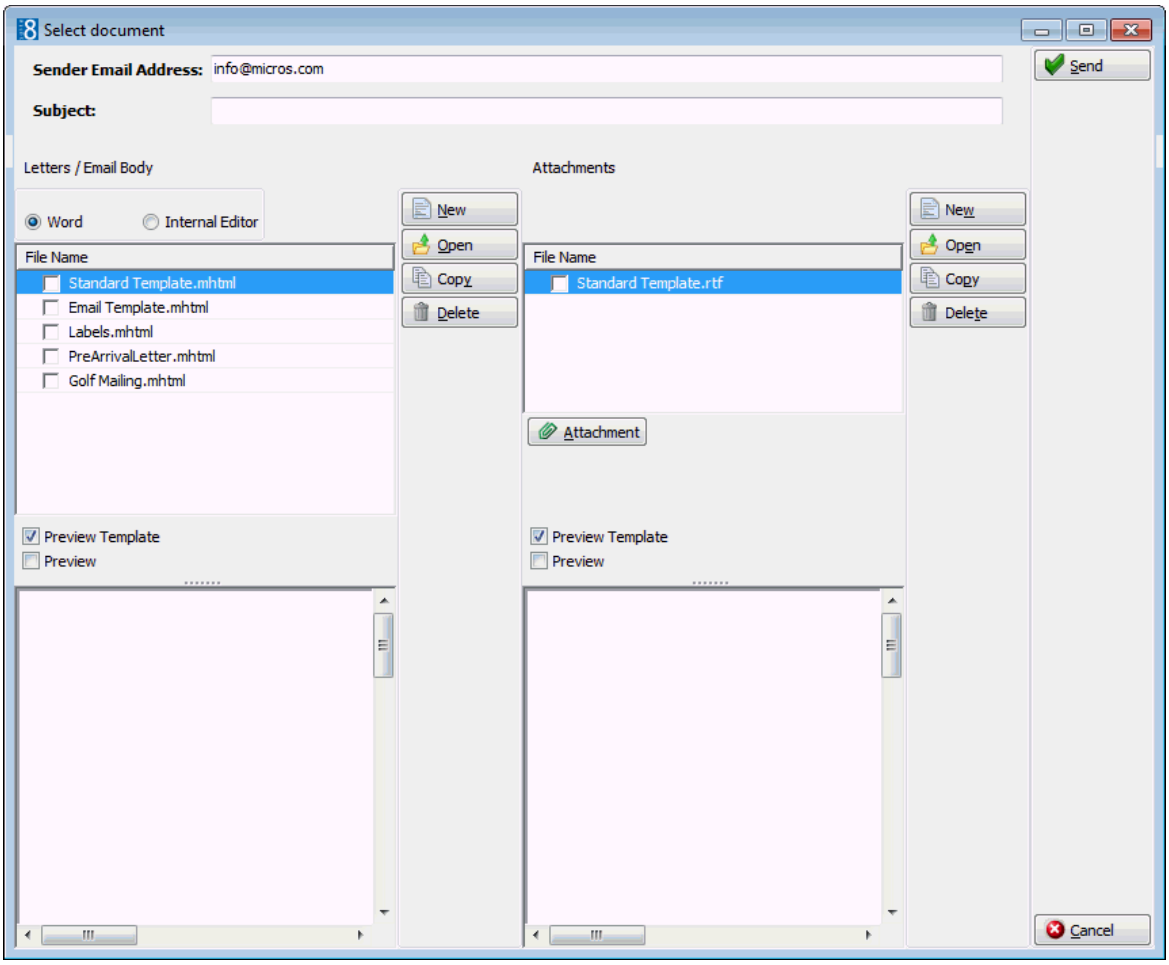
- As body text - the text is then displayed directly when the email is opened.
- As an attachment – attachments are sent as a PDF files. An email mailing sent as an attachment can also use merge functionality and will be merged according to the email address, for example, a letter greeting can be used and will be displayed correctly for each email.

Documents can be attached to the body of the email as follows:

- Selecting the required file via the Attachment button Attachment - any type of file can be attached and it will be sent as is.
- Selecting a document from the ATTACHMENTS column - these documents are sent as PDF files and can use merge functionality.

How to create an email mailing

1. Follow the steps for running a mailing as detailed in 'Running a Standard or Advanced Mailing Query'.
2. Mark the records to be included in the merge.
3. Click the EMAIL button, the select document dialog box is displayed.



Sender Email Address: info@micros.com

Subject:

● Word ○ Internal Editor

File Name
☐ Standard Template.mhtml
☐ Email Template.mhtml
☐ Labels.mhtml
☐ PreArrivalLetter.mhtml
☐ Golf Mailing.mhtml

☑ Preview Template
☐ Preview

File Name
☐ Standard Template.rtf

☑ Preview Template
☐ Preview

4. The senders email address is taken from the global settings.
5. In the SUBJECT box enter the subject of the email.
6. Select the template to be used from the list displayed in the LETTERS / EMAIL BODY column or the ATTACHMENTS column.

   The PREVIEW TEMPLATE check box is selected by default, so the selected template is automatically displayed in the lower window.
7. Select the PREVIEW check box to preview the merged results of the email. Click the left and right buttons ◄ ► to page forwards and backwards through the merged records.
8. To attach a document to the body email there are two possibilities:
   - Selecting the required file via the Attachment button Attachment - any type of file can be attached and it will be sent as is.
   - Selecting a document from the ATTACHMENTS column - these documents are sent as PDF files and can use merge functionality.
9. To remove an attachment right-click on the attachment name and select DELETE ATTACHMENT, to remove an attachment document just de-select it.
10. Click SEND to activate sending, an 'Are you sure' message is displayed, click YES to continue with the sending of the emails or NO to cancel.

    The message: ‘Please wait while emails are being sent’ will display. Depending on the number of emails being sent this can take some time.

    The status of the emails can be checked under Miscellaneous → Logs → Email Log.

Note: The following Word Versions work with email mailings.

Word 2002, Word 2003 + XP: all released Features.

Word 2000: Picture & Logos are not getting sent.

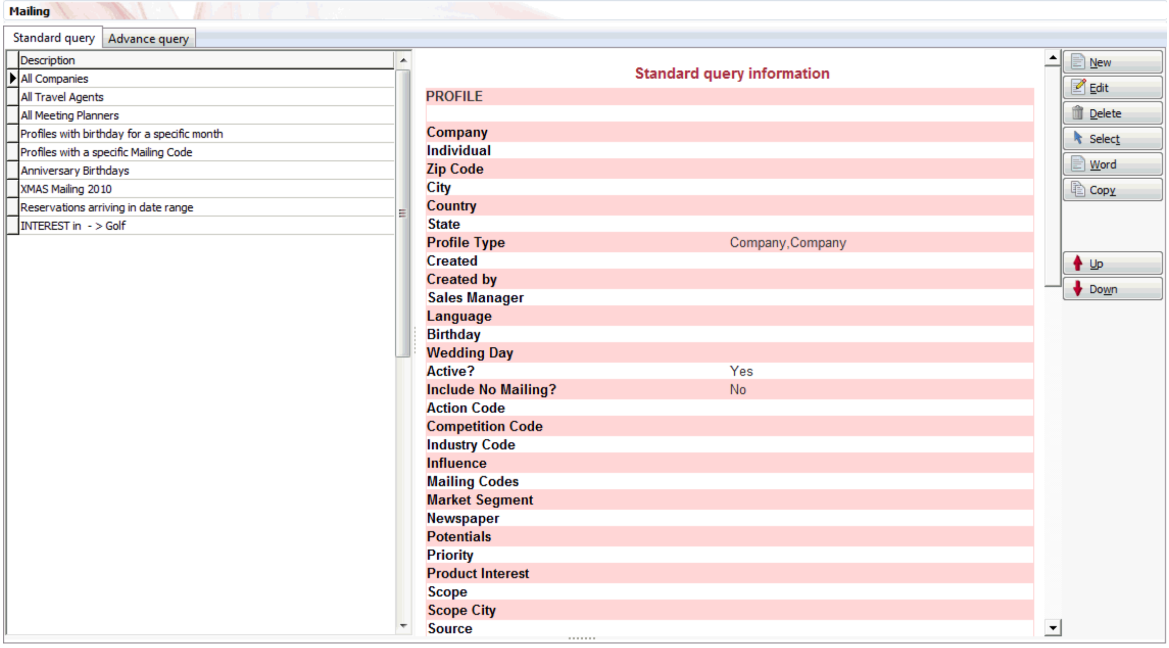
Creation of Documents and Attachments

Templates and attachment documents may be created and stored for future use. The easiest and quickest way to do this is from the main mailing screen. From here you can directly access the document and attachment options. The exception to this would be if you need additional fields in which case you would have to create the query accordingly and then access the document templates option from the mailing results screen.

A mailing query needs to be run at least once in order to create the file datasource.html. When the WORD button is pressed the data and field list from the last executed mailing are used. If the data of an actual mailing should be used then the required mailing query needs to be run.

Create a new Document

1. Click the menu option CRM and select MAILING, the mailing dialog box is displayed.



Description
All Companies
All Travel Agents
All Meeting Planners
Profiles with birthday for a specific month
Profiles with a specific Mailing Code
Anniversary Birthdays
XMAS Mailing 2010
Reservations arriving in date range
INTEREST in - > Golf

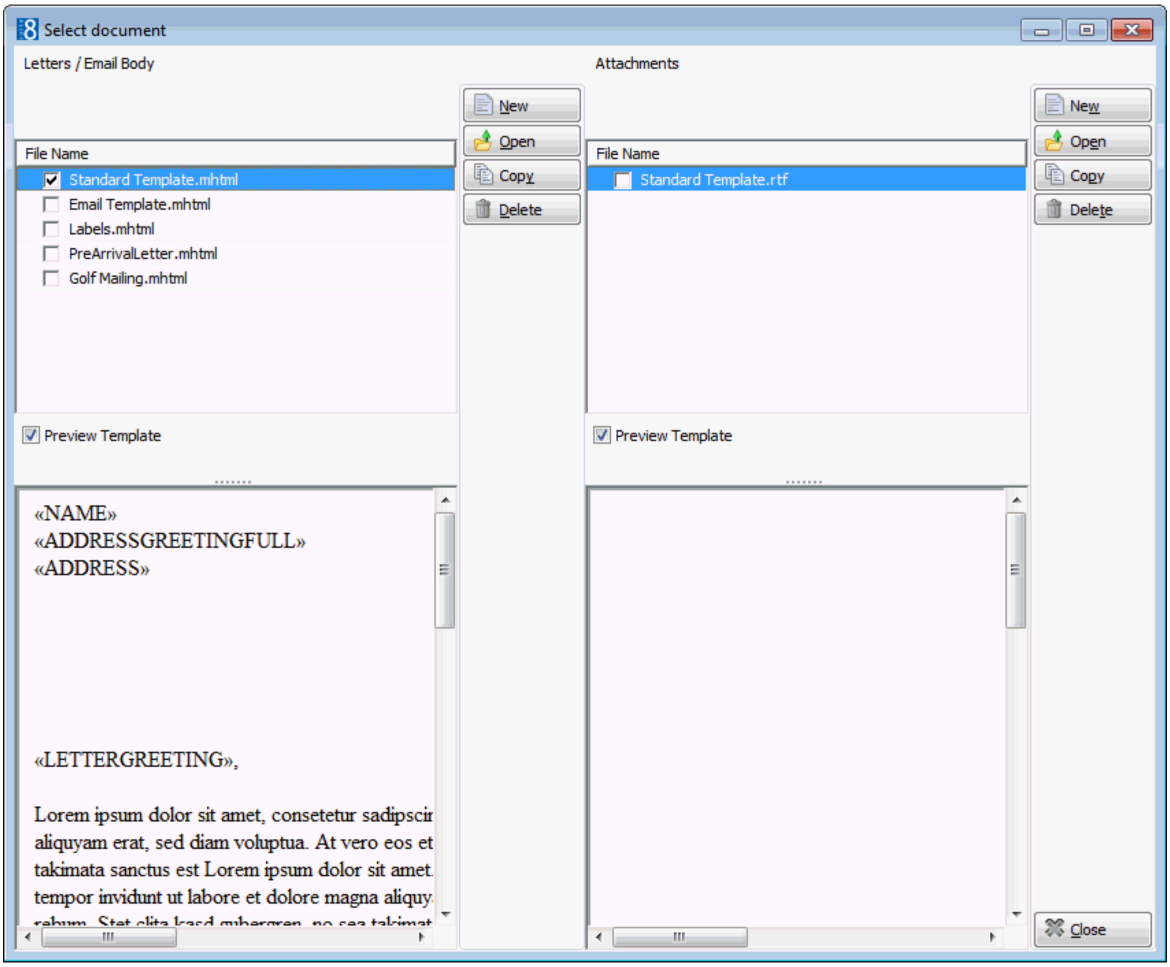
Standard query information

PROFILE	
Company	
Individual	
Zip Code	
City	
Country	
State	
Profile Type	Company,Company
Created	
Created by	
Sales Manager	
Language	
Birthday	
Wedding Day	
Active?	Yes
Include No Mailing?	No
Action Code	
Competition Code	
Industry Code	
Influence	
Mailing Codes	
Market Segment	
Newspaper	
Potentials	
Priority	
Product Interest	
Scope	
Scope City	
Source	

2. From the Mailing dialog box, click the WORD button, the Select document dialog box is displayed.

   or

   Follow the steps for running a mailing as detailed in 'Running a Standard or Advanced Mailing Query' until the Mailing result screen is displayed and the profiles selected, then click the WORD button to display the Select document dialog box.


Select document
Letters / Email Body
Attachments
New
Open
Copy
Delete
File Name
☑ Standard Template.mhtml
☐ Email Template.mhtml
☐ Labels.mhtml
☐ PreArrivalLetter.mhtml
☐ Golf Mailing.mhtml
☐ Standard Template.rtf
☑ Preview Template
Close

«NAME»
«ADDRESSGREETINGFULL»
«ADDRESS»

«LETTERGREETING»,

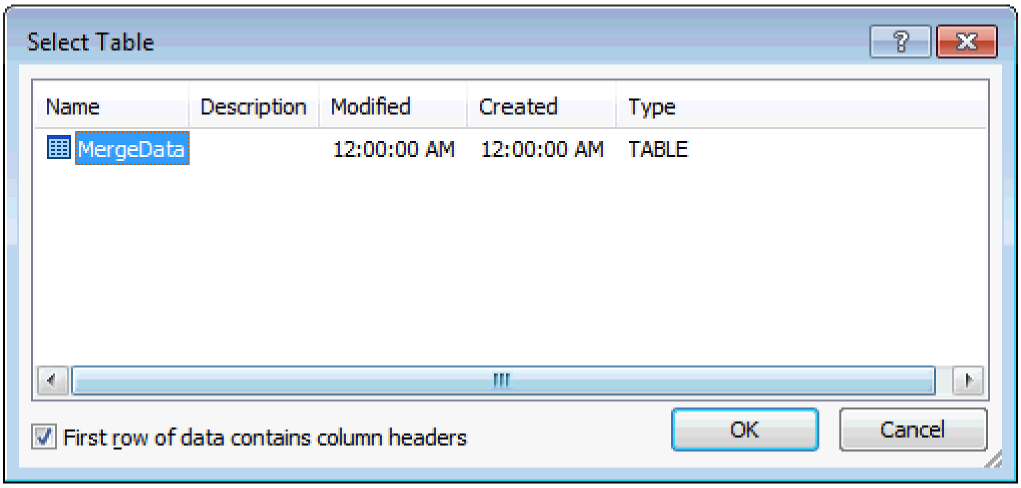
Lorem ipsum dolor sit amet, consetetur sadipscir
aliquyam erat, sed diam voluptua. At vero eos et
takimata sanctus est Lorem ipsum dolor sit amet.
tempor invidunt ut labore et dolore magna aliquy
rebum. Stet clita kasd gubergren, no sea takimat

3. To create a new Letter/Email body document click NEW next to the LETTER / EMAIL BODY column, to create a new attachment click NEW, next to the ATTACHMENTS column, MS Word opens a blank word document.

   Body documents are used for general letters and email mailings where the text should be displayed directly when the email is opened. Attachment document are used when the mailing is sent as a document attached to the email and not as text in the body of the email.

4. Depending on your Word settings the mail merge toolbar may be displayed automatically, if not, then on the Word View menu, point to TOOLBARS and then click CUSTOMIZE.

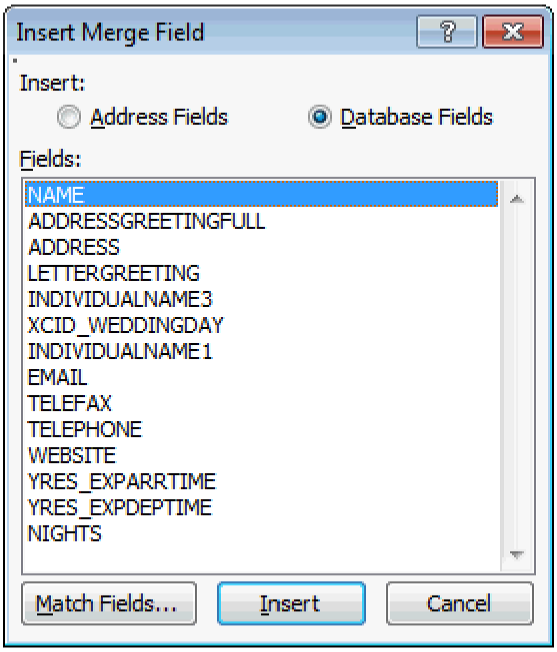
5. If you are using Windows XP or Word2003 then the Select Table dialog box is displayed, click OK to close it.



Name	Description	Modified	Created	Type
MergeData		12:00:00 AM	12:00:00 AM	TABLE

☑ First row of data contains column headers

6. Select the Insert Merge Fields button to display the Insert Merge Field dialog box.



Insert:
○ Address Fields ● Database Fields

Fields:

NAME
ADDRESSGREETINGFULL
ADDRESS
LETTERGREETING
INDIVIDUALNAME3
XCID_WEDDINGDAY
INDIVIDUALNAME1
EMAIL
TELEFAX
TELEPHONE
WEBSITE
YRES_EXPARRTIME
YRES_EXPDEPTIME
NIGHTS

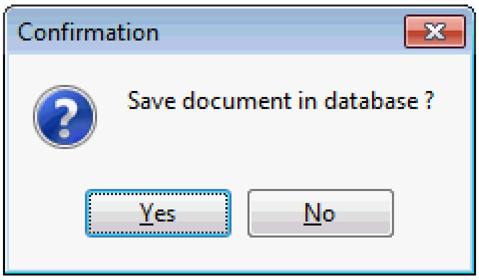
7. Select the merge field required and click Insert, repeat for each field required and click Close to close the dialog box.

8. Click the View Merged Data button to check the output.

9. Click the View Merged Data button a second time to display the merge fields again.

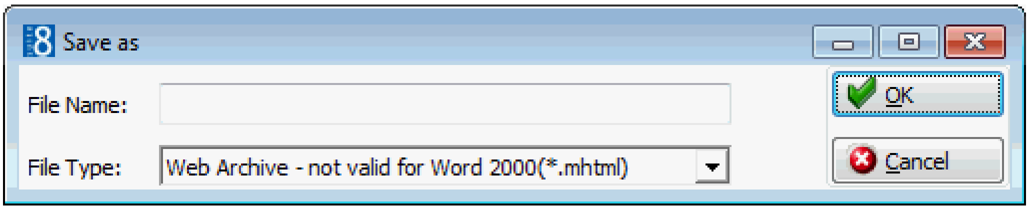
> **Note:** The document should be saved when the merge fields are displayed and not when the merged data is displayed; otherwise the merge data will be displayed when viewing the template preview.

10. Complete the document and then click Close or Exit from the file menu. Word is closed, the Suite8 Select document screen is displayed and you are prompted to save the document in the database.


Confirmation

Save document in database ?

11. Click YES and enter a file name.


Save as

File Name:

File Type: Web Archive - not valid for Word 2000(*.mhtml)

At this point an Attachment document is saved as an rtf file and a Letter / Email Body document is saved as either an mhtml (Default) or an html file. The file is stored in the path defined in MAILING DOCUMENTS under Setup → Configuration → Global Settings → Workstation 5 tab. In addition for Body documents containing a header and or footer a directory containing a filelist.xml file and a header.html file are also created.

Note: The file type *.mhtml is not valid for Word 2000.

12. The new body or attachment document is now listed in the Select document screen.
13. To view the document template mark the PREVIEW check box.
14. Click CLOSE to close the Select document screen, the main mailing screen is displayed.

Note: If a document has been stored into the database and is deleted from the hard drive, it can be edited from within Suite8 and saved again.

There are 2 possibilities for saving a body template document

- HTML - is faster and is recommended for documents with no embedded image logos. Text can be formatted but logos, headers & footers cannot be used.
- MHTML - web archive document where the images are compressed in the document, logos, headers & footers can be used. The file type *.mhtml is not valid for Word 2000.

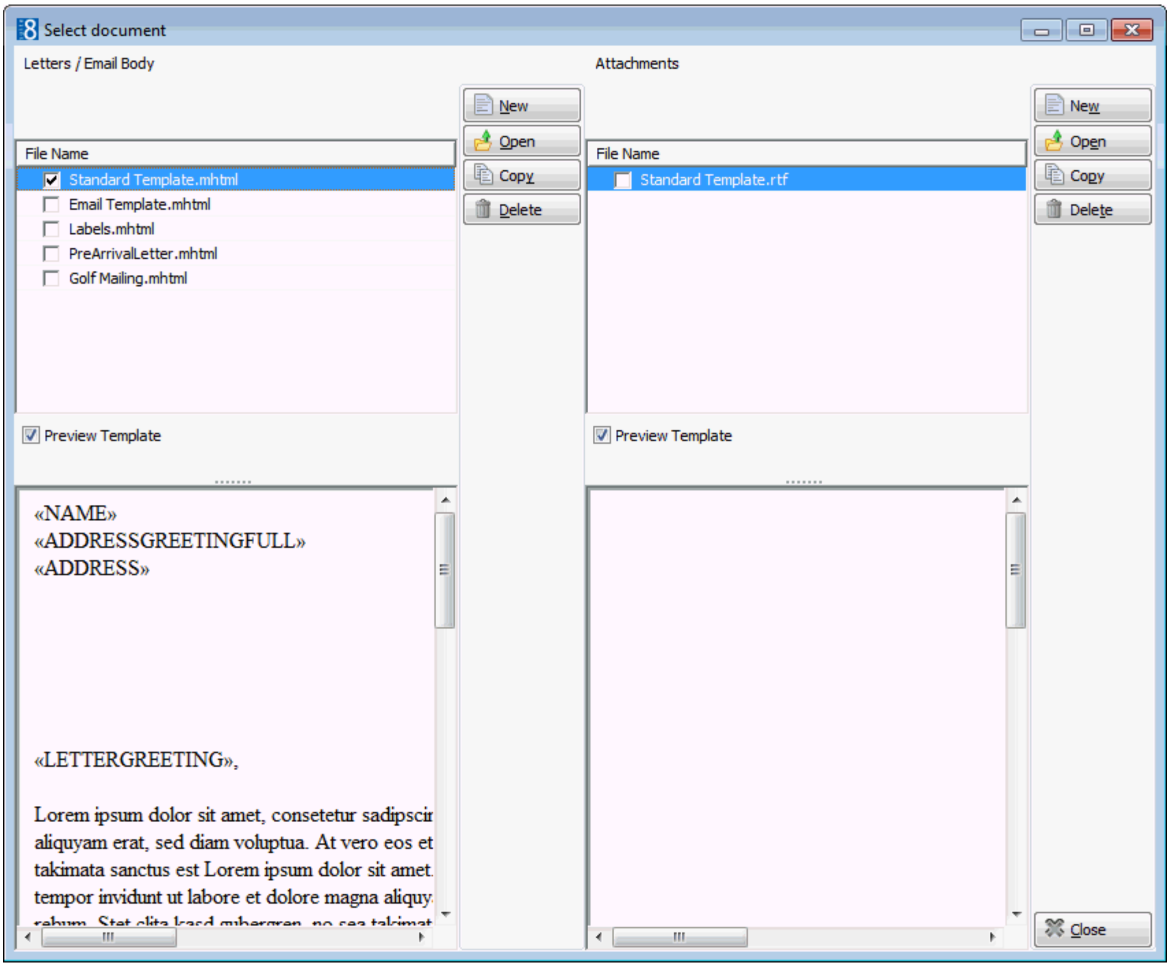
Note: It is not possible to save a document with a header/ footer as *.html - a warning will appear and word is opened again to save the document using the appropriate file extension.

Attachment documents can be saved as:

- RTF - which has the images encoded in the document, this is converted to *.PDF when sending emails. Attachment files that contain tables which have been drawn in tables are not displayed correctly when sent.

How to copy a Document

1. Click the menu option CRM and select MAILING, the mailing dialog box is displayed.
2. From the Mailing dialog box, click the WORD button, the Select document dialog box is displayed.

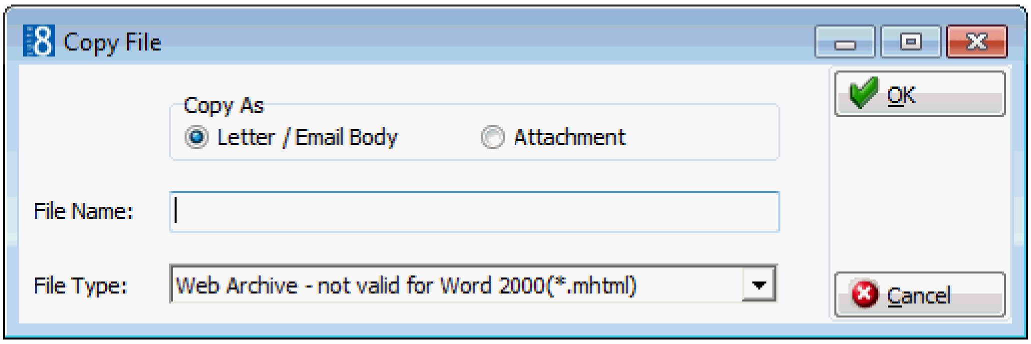

Select document
Letters / Email Body
Attachments
New
Open
Copy
Delete
File Name
☑ Standard Template.mhtml
☐ Email Template.mhtml
☐ Labels.mhtml
☐ PreArrivalLetter.mhtml
☐ Golf Mailing.mhtml
☐ Standard Template.rtf
☑ Preview Template
Close

«NAME»
«ADDRESSGREETINGFULL»
«ADDRESS»

«LETTERGREETING»,

Lorem ipsum dolor sit amet, consetetur sadipscir
aliquyam erat, sed diam voluptua. At vero eos et
takimata sanctus est Lorem ipsum dolor sit amet.
tempor invidunt ut labore et dolore magna aliquy

3. Select the document to be copied from the list displayed in the LETTERS / EMAIL BODY or the ATTACHMENTS column.
4. Click COPY, the Copy Document dialog box is displayed.


Copy File
OK
Cancel
Attachment

Copy As: ● Letter / Email Body ○ Attachment

File Name:

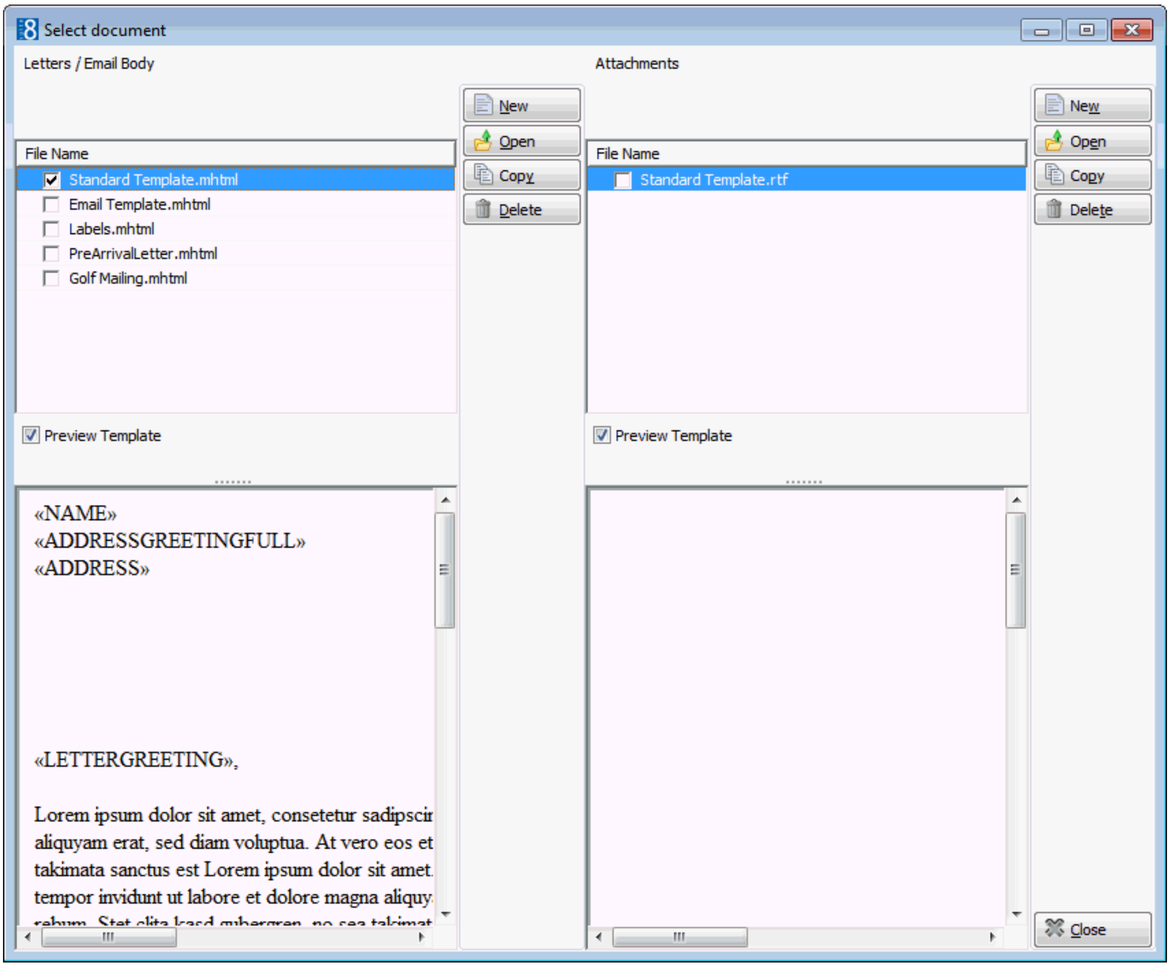
File Type: Web Archive - not valid for Word 2000(*.mhtml)

5. In the DOCUMENT NAME box enter a name for the copied document.

6. Select whether the new document should be copied as a Letter / Email Body document or an Attachment.
7. Click OK, the copied document is displayed in the list of documents.
8. Click Open to edit the document.
9. If you are using Windows XP or Word2003 then the Select Table dialog box is displayed, click OK to close it.
10. Make the required changes to the copied document.
11. Click Close, Word is closed, the Suite8 Select document screen is displayed and you are prompted to save the document in the database.
12. Click Yes and enter a file name.
13. The new body or attachment document is now listed in the Select document screen.
14. To view the document template mark the Preview check box.
15. Click Close to close the Select document screen, the main mailing screen is displayed.

How to edit a Document

1. Click the menu option CRM and select Mailing, the mailing dialog box is displayed.
2. From the Mailing dialog box, click the Word button, the Select document dialog box is displayed.


Select document
Letters / Email Body
Attachments
New
Open
Copy
Delete
File Name
☑ Standard Template.mhtml
☐ Email Template.mhtml
☐ Labels.mhtml
☐ PreArrivalLetter.mhtml
☐ Golf Mailing.mhtml
☐ Standard Template.rtf
☑ Preview Template
☑ Preview Template
Close

«NAME»
«ADDRESSGREETINGFULL»
«ADDRESS»

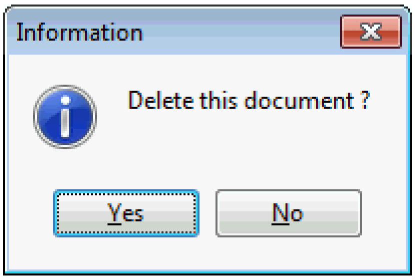
«LETTERGREETING»,

Lorem ipsum dolor sit amet, consetetur sadipscir
aliquyam erat, sed diam voluptua. At vero eos et
takimata sanctus est Lorem ipsum dolor sit amet.
tempor invidunt ut labore et dolore magna aliquy

3. Select the document to be edited from the list displayed in the Letters / Email Body or the Attachments column.
4. Click Open to edit the document.
5. If you are using Windows XP or Word2003 then the Select Table dialog box is displayed, click OK to close it.
6. Make the required changes to the document.
7. Click Close, Word is closed, the Suite8 Select document screen is displayed and you are prompted to save the document in the database.
8. Click Yes and enter the same file name.
9. To view the document template mark the Preview check box.
10. Click Close to close the Select document screen, the main mailing screen is displayed.

How to delete a document

1. Click the menu option CRM and select Mailing, the mailing dialog box is displayed.
2. From the Mailing dialog box, click the Word button, the Select document dialog box is displayed.
3. Select the document to be deleted from the list displayed in the Letters / Email Body or the Attachments column.
4. Click Delete, a confirmation message is displayed.



Delete this document ?

5. Click Yes to delete the document.

> **Note:** The document is deleted from the Suite8 database but remains on the hard drive.

Letter Merge with a new or existing data file

Using MS Word, mailing letters can be produced using a merged data file that contains all the required information. Either an existing letter template or a new letter template may be used.

Merge a letter with a new or existing data file

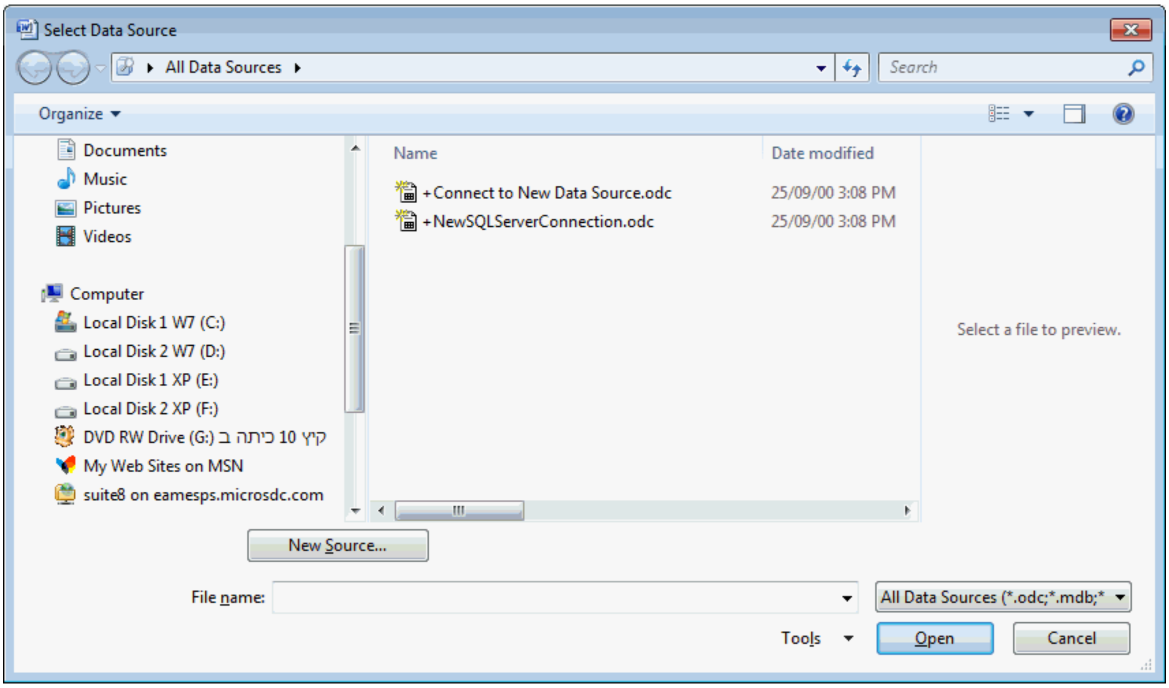
1. Click the menu option CRM and select Mailing, the mailing dialog box is displayed.
2. From the Mailing dialog box, click the Word button, the Select document dialog box is displayed.

   or

   Follow the steps for running a mailing as detailed in 'Running a Standard or Advanced Mailing Query' until the Mailing result screen is displayed and then click the Word button to display the Select document dialog box.
3. To create a new body document click New next to the Letter / Email Body column, to create a new attachment click New, next to the Attachments column, MS Word opens a blank word document.

4. In MS WORD open the letter that you want to use for the mailing.

5. On the mail merge toolbar click the SELECT RECIPIENTS button and select USE EXISTING LIST to display the Select Data Source dialog box.


Select Data Source
All Data Sources
Search
Organize
Documents
Music
Pictures
Videos
Computer
Local Disk 1 W7 (C:)
Local Disk 2 W7 (D:)
Local Disk 1 XP (E:)
Local Disk 2 XP (F:)
DVD RW Drive (G:) קיץ 10 כיתה ב
My Web Sites on MSN
suite8 on eamesps.microsdc.com
Select a file to preview.
New Source...
File name:
All Data Sources (*.odc;*.mdb;*
Tools
Open
Cancel

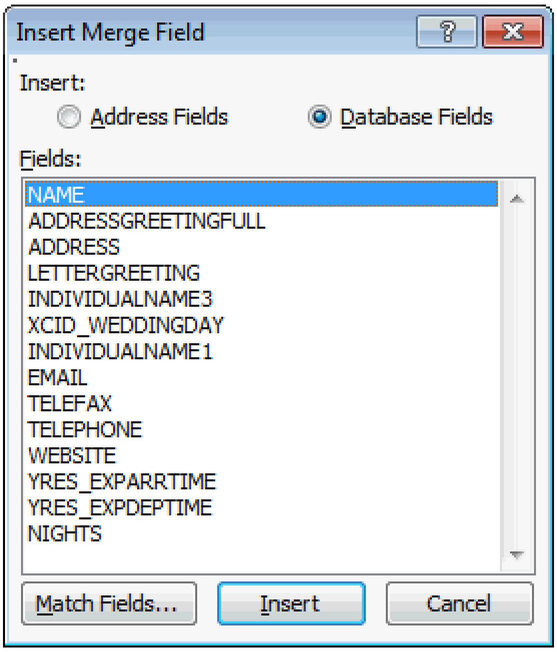
Name	Date modified
+Connect to New Data Source.odc	25/09/00 3:08 PM
+NewSQLServerConnection.odc	25/09/00 3:08 PM

6. Locate the datasource.html file and click OPEN.

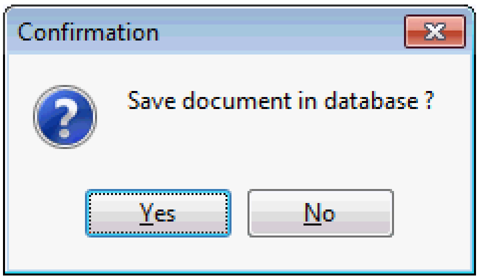
The datasource.html file is generated by Fidelio Suite8 when running a mailing query and is located in the directory defined in LOCAL LOG DIRECTORY under Setup → Configuration → Global Settings → Miscellaneous → Workstation Defaults 5 tab.

Note: The directory C:\Documents and Settings\My Documents\ My Data Sources is opened by default, requiring the users to search for the datasource.html each time. To avoid this, a shortcut to the datasource.html can be created in the directory 'My Data Sources'. Users can then select the shortcut to locate the datasource.html. This shortcut has to be created manually on each workstation where it's needed. If the path in global settings is changed then the shortcut has to be changed accordingly.

7. Select the INSERT MERGE FIELDS button to display the Insert Merge Field dialog box.

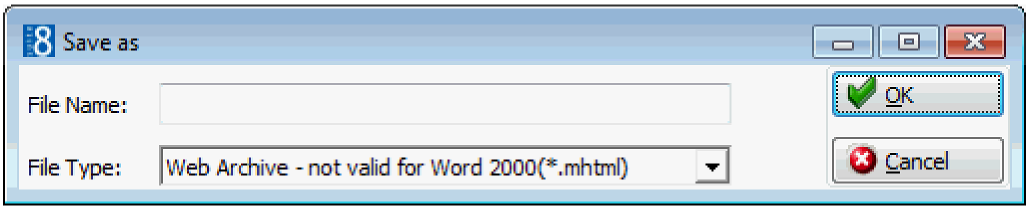

Insert Merge Field
Insert:
○ Address Fields
● Database Fields
Fields:
NAME
ADDRESSGREETINGFULL
ADDRESS
LETTERGREETING
INDIVIDUALNAME3
XCID_WEDDINGDAY
INDIVIDUALNAME1
EMAIL
TELEFAX
TELEPHONE
WEBSITE
YRES_EXPARRTIME
YRES_EXPDEPTIME
NIGHTS
Match Fields...
Insert
Cancel

8. Select the merge field required and click Insert, repeat for each field required; click Close to close the dialog box.
9. Complete the document and then either merge the data directly or click Close or Exit from the file menu. Word is closed, the Suite8 Select document screen is displayed and you are prompted to save the document in the database.


Confirmation
Yes
No

Save document in database ?

10. Click Yes and enter a file name.


Save as
OK
Cancel

File Name:

File Type: Web Archive - not valid for Word 2000(*.mhtml)

At this point an Attachment document is saved as an rtf file and a Body document is saved as either an mhtml (Default) or an html file. The file is stored in the path defined in Mailing Documents under Setup → Configuration → Global Settings → Workstation 5 tab. In addition for Body documents containing a header and or footer a directory containing a filelist.xml file and a header.html file are also created.

Note: The file type *.mhtml is not valid for Word 2000.

11. The new body or attachment document is now listed in the Select document screen.
12. To view the document template mark the Preview check box.

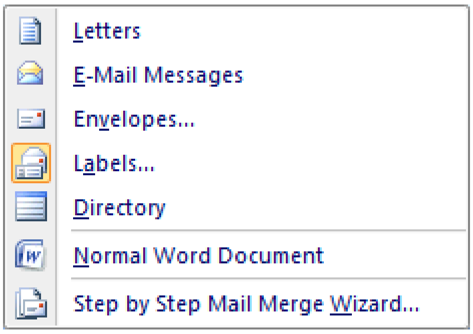
13. Click Close to close the Select document screen, the main mailing screen is displayed.

Create Envelopes and Labels using Windows XP or Word2003

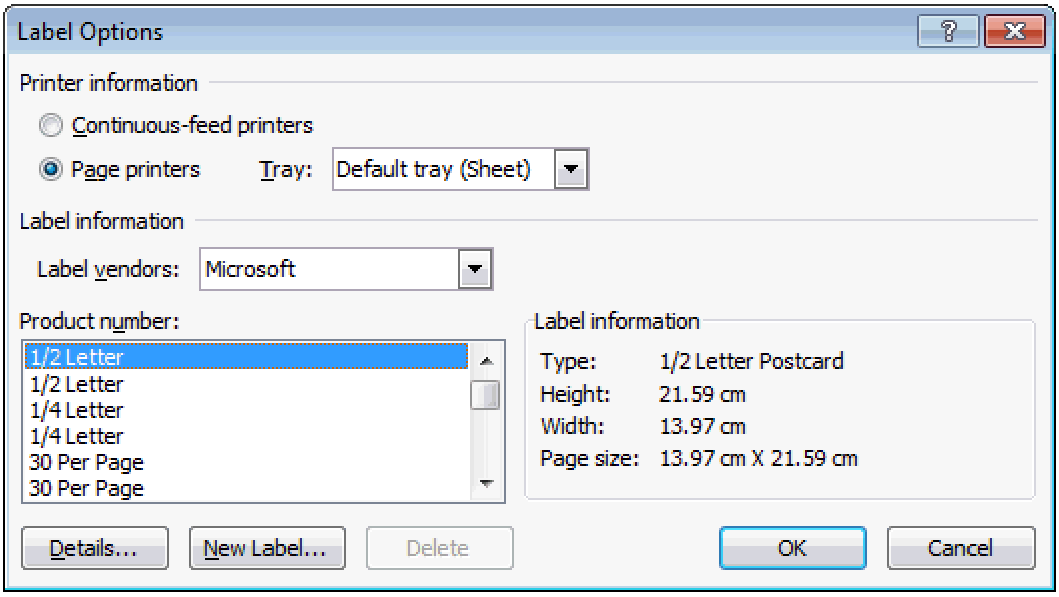
1. Click the menu option CRM and select Mailing, the mailing dialog box is displayed.
2. From the Mailing dialog box, click the Word button, the Select document dialog box is displayed.

   or

   Follow the steps for running a mailing as detailed in 'Running a Standard or Advanced Mailing Query' until the Mailing result screen is displayed and then click the Word button to display the Select document dialog box.
3. To create a new body document click New next to the Letter / Email Body column, to create a new attachment click New, next to the Attachments column, MS Word opens a blank word document.
4. On the mail merge toolbar select the Start Mail Merge button to display the Main Document Type dialog box.


Letters
E-Mail Messages
Envelopes...
Labels...
Directory
Normal Word Document
Step by Step Mail Merge Wizard...

5. Select Labels and click OK, the Label Options dialog box is displayed.


Label Options
?
X
Details...
New Label...
Delete
OK
Cancel

Printer information

○ Continuous-feed printers

● Page printers Tray: Default tray (Sheet)

Label information

Label vendors: Microsoft

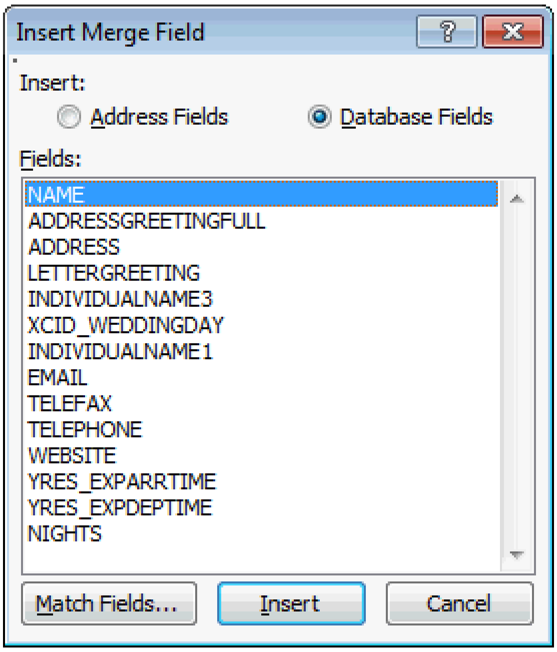
Product number:

1/2 Letter
1/2 Letter
1/4 Letter
1/4 Letter
30 Per Page
30 Per Page

Label information

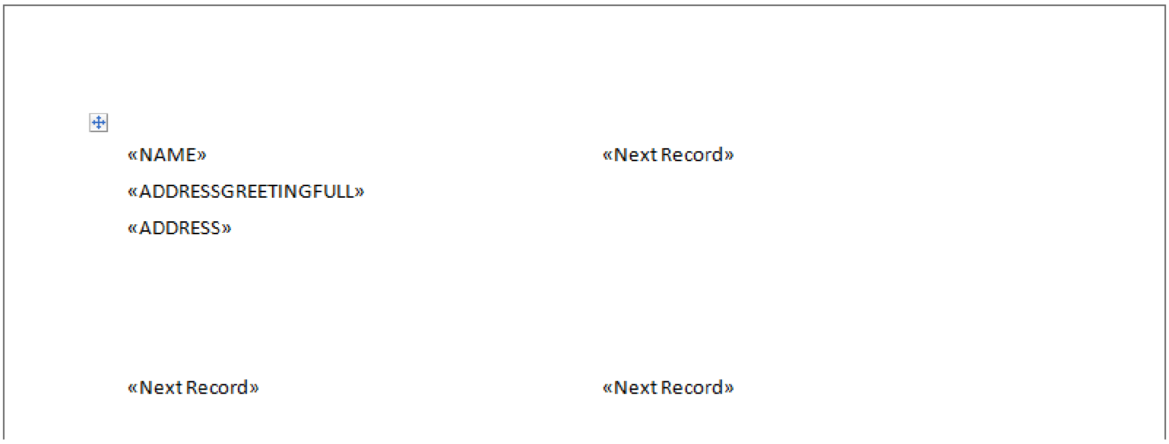
Type:	1/2 Letter Postcard
Height:	21.59 cm
Width:	13.97 cm
Page size:	13.97 cm X 21.59 cm

6. Select the label type required and click OK, the label template screen is displayed.
7. Select the Insert Merge Fields button to display the Insert Merge Field dialog box.


Insert Merge Field
?
Fields:
NAME
ADDRESSGREETINGFULL
ADDRESS
LETTERGREETING
INDIVIDUALNAME3
XCID_WEDDINGDAY
INDIVIDUALNAME1
EMAIL
TELEFAX
TELEPHONE
WEBSITE
YRES_EXPARRTIME
YRES_EXPDEPTIME
NIGHTS
Match Fields...
Insert
Cancel

Insert:
○ Address Fields ● Database Fields

8. Select the merge field required and click INSERT, repeat for each field required and click CLOSE to close the dialog box.



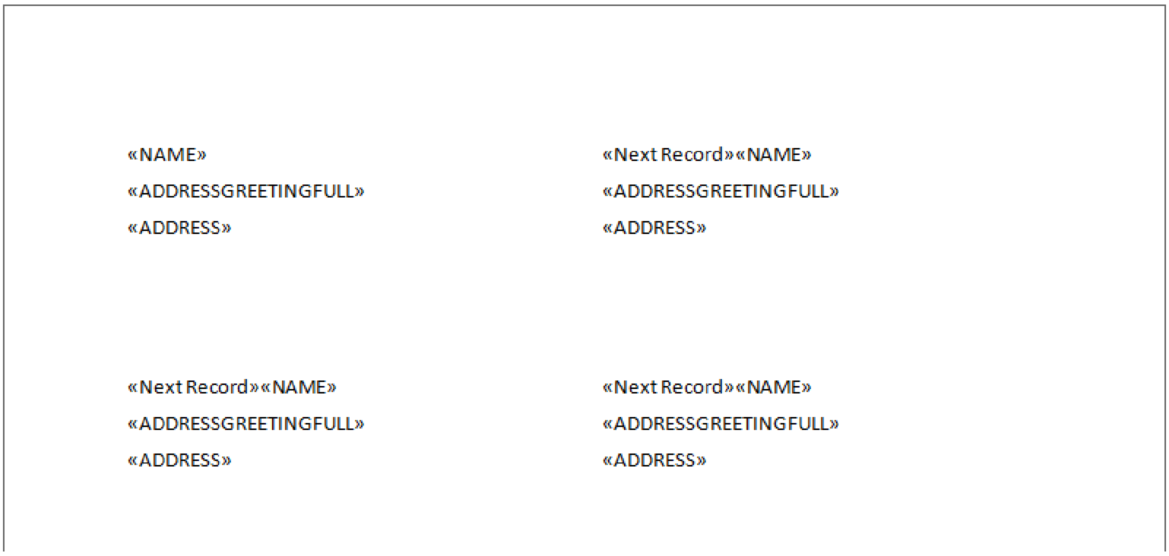
«NAME»
«ADDRESSGREETINGFULL»
«ADDRESS»

«Next Record»

«Next Record»

«Next Record»

9. Click the Update Labels button, all the labels are updated with the merge fields.



«NAME»
«ADDRESSGREETINGFULL»
«ADDRESS»

«Next Record»«NAME»
«ADDRESSGREETINGFULL»
«ADDRESS»

«Next Record»«NAME»
«ADDRESSGREETINGFULL»
«ADDRESS»

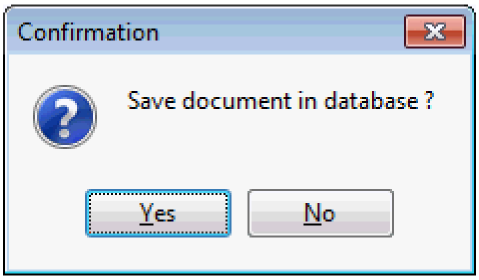
«Next Record»«NAME»
«ADDRESSGREETINGFULL»
«ADDRESS»

10. Click the View Merged Data button to check the output.

11. Click the View Merged Data button a second time to display the merge fields again.

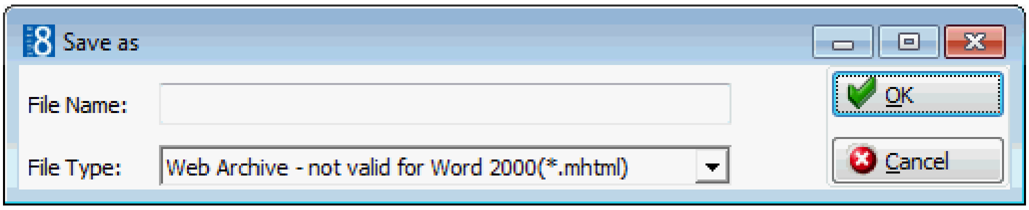
> **Note:** The document should be saved when the merge fields are displayed and not when the merged data is displayed; otherwise the merge data will be displayed when viewing the template preview.

12. Click Close or Exit from the file menu. Word is closed, the Suite8 Select document screen is displayed and you are prompted to save the label template in the database.



Save document in database ?

13. Click Yes and enter a file name.



File Name:

File Type: Web Archive - not valid for Word 2000(*.mhtml)

14. The label template is now listed in the Select document screen.

15. Click Close to close the Select document screen, the main mailing screen is displayed.

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