



## Setting Up Word Merges

**Word Merges are documents that are based on Microsoft Word templates, and are used to create letters or documents from Chintaro to Clients.**

The process for creating a new template for Word Merges has 2 steps:

1. Create a new Word Merge template in Microsoft Word, then
2. Add the new Word Merge template to Chintaro

### **Step 1: Create the New Word Merge template in Microsoft Word**

1. Open your Chintaro/Data/Templates folder, stored on your PC or network drive (EG S/Chintaro/Data/Templates)

NOTE: Ensure you have the file extensions for file types turned on. To turn file extensions on, click the View tab> Options> View. Untick the box. You will now be able to see the file extensions of all files Microsoft Word Templates will be either .dot or .dotx files.

2. Copy an existing template in your Chintaro/Data/Templates folder. If this is the first new template that you are creating, copy one of the existing supplied files:

- Arrears Letter copy Arrears.dot
- Client Letter copy Client.dot
- Maintenance (Work Order) Template copy TradeEmail.dot
- Tenancy Word Letter copy Tenancy.dot
- Waiting List Letter copy WaitList.dot

NOTE: You can start with a blank Template if you want, however copying an existing template will generally save time when adding appropriate fields.

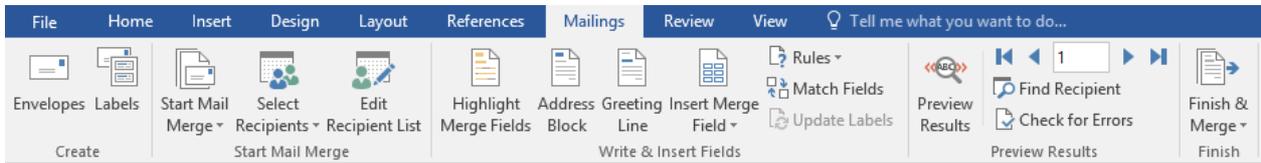
3. Paste the copied template in to the same Templates folder, and re-name the template relevant to the type of letter you are going to write (EG ClientApplication.dot)

**4. Open the template by right clicking and selecting open.** Do not double click the template to open, or it will open as a Word Document and not a template. You must right click and select Open to open the document as a template.

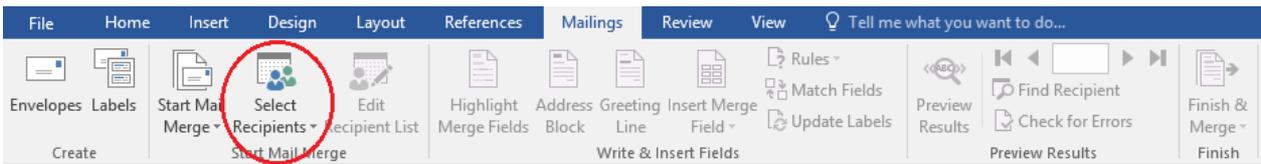
5. You will get a warning message: 'Opening this document will run the following Sequel Command'. Click yes to this warning which will retain the link to the .txt files that links the Chintaro data to the template.



6. The Mail Merge icons in the Mailings tab of Word will be enabled:



7. If the Mail Merge icons are disabled, you will need to enable Select Recipients:



8. Select Use An Existing List.

9. You will be asked to find the Data file that the information from Chintaro will come from. These data files are text files and are held in the same folder as the Templates (see above for the location of this folder in your environment).

10. You will need to select the appropriate file for the type of Template you are creating. The table below shows which file you should choose:

<b>Arrears.txt</b> for Arrears Templates
<b>Maint.txt</b> for Maintenance Work Order Templates
<b>WordMergeClient.txt</b> for Client Templates (Used on the Client screen)
<b>WordMergeTenancy.txt</b> for Tenancy Templates (Used on the Tenancy screen)
<b>WordMergeTxn.txt</b> for Invoice or Receipt Templates
<b>WordMergeWait.txt</b> for Waiting List Templates (Used on the Waiting List screen)

11. Once you have linked the recipient file successfully, all icons on the Mailings Tab will now be enabled. Compose your letter and add data fields. Data fields can be added by clicking the Insert Merge Fields icon and inserting the appropriate fields at the cursor.

12. When you are happy with the document, you must save it and close the document before continuing to the next step.



## 2. Adding the New Word Merge Template to Chintaro

The second step in the process is to tell Chintaro about the new template.

1. To set up Word Merges in Chintaro, from the System Maintenance Sub-Menu, click Set Up Word Merges. The Set Up Word Merges screen will open

Setup Word Merges							Arrears	Tenancy	Client	Waiting List	Property	Tradesperson	EXIT
You can add as many Word Templates to Chintaro so that you can generate Word Merges using Chintaro data in your letters and documents.													
<b>Tenancy Word Merges</b>													
Templates set up here will be available from the Tenancy Screen and the Bulk Tenancy Word Merge Menu option.													
Site ID	ID	Letter Name	Template Name	Active	Directory								
1	7	Another Tenancy Blank	Tenancy02.dot	<input checked="" type="checkbox"/>	<input type="checkbox"/>								
1	6	CENTREPAY FORM 2011	CENTREPAY FORM 2011.dot	<input checked="" type="checkbox"/>	<input type="checkbox"/>								
1	4	Centrepay Update	TenancyCpsayForm.dot	<input checked="" type="checkbox"/>	<input type="checkbox"/>								
1	8	Rooming House Residency Agreement	VWMTRoomingHouseResidencyAgreemen	<input checked="" type="checkbox"/>	<input type="checkbox"/>								
1	3	Tenancy Blank	Tenancy01.dotx	<input checked="" type="checkbox"/>	<input type="checkbox"/>								
1	10	VWMT Notice Residents Rooming House	VWMTNoticeResidentsRoomingHouse.dot	<input checked="" type="checkbox"/>	<input type="checkbox"/>								
*	1	(New)		<input checked="" type="checkbox"/>	<input type="checkbox"/>								

2. This screen will open to the Tenancy Word Merge tab. Click on the appropriate tab at the top of the screen:

- For Arrears Templates, click **Arrears** tab
- For Tenancy Templates, remain on the Tenancy Word Merges screen
- For Client Templates, click **Client** tab
- For Property Templates, click **Property** tab
- For Waiting List Templates, click **Waiting List** tab
- For Tradesperson Templates, click **Tradesperson** tab

3. To add the template, click the curser in to the box next to New in the line that has the asterisks and type the title of title of the letter you created. This is the name that you will see in the Word Merge pop up:

Setup Word Merges							Arrears	Tenancy	Client	Waiting List	Property	Tradesperson	EXIT
You can add as many Word Templates to Chintaro so that you can generate Word Merges using Chintaro data in your letters and documents.													
<b>Client Word Merges</b>													
Templates set up here will be available from the Client Screen and the Bulk Client Word Merge Menu option.													
Site ID	ID	Letter Name	Template Name	Directory?	Active								
1	1	Client Blank	ClientDemo.dot	<input type="checkbox"/>	<input checked="" type="checkbox"/>								
1	3	Christmas Letter	ClientChristmas.dot	<input type="checkbox"/>	<input checked="" type="checkbox"/>								
1	2	Centrepay Update	ClientCentrepay.dot	<input type="checkbox"/>	<input checked="" type="checkbox"/>								
1	7	Application Received		<input type="checkbox"/>	<input checked="" type="checkbox"/>								
*	1	(New)		<input type="checkbox"/>	<input checked="" type="checkbox"/>								

4. In the box next to the letter name you will enter the exact template name including the file extension. If you drop the list down, you will see the template you created in the list. Select the relevant template:

Client Word Merges						
Templates set up here will be available from the Client Screen and the Bulk Client Word Merge Menu option.						
Site ID	ID	Letter Name	Template Name	Directory?	Active	
1	1	Client Blank	ClientDemo.dot	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
1	3	Christmas Letter	ClientChristmas.dot	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
1	2	Centrepay Update	ClientCentrepay.dot	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
1	7	Application Received		<input type="checkbox"/>	<input checked="" type="checkbox"/>	
*	1	(New)		<input type="checkbox"/>	<input checked="" type="checkbox"/>	

Arrears.dot  
 ArrearsRepayment.dot  
 Blah Blah Blah.dotx  
 breach.dot  
 CentreLink Authorisation.dot  
 Centrepay Deduction.dot  
 Client.dot  
**ClientApplication.dot**  
 ClientCentrepay.dot  
 ClientChristmas.dot  
 ClientDemo.dot  
 FirstArrears.dot  
 Inspection Letter.dotx  
 Intention To Vacate.dotx  
 Labels7159.dot  
 Lease Renewal.dotx

5. Ensure the Active box is ticked. You will now be able to use your Word Merge template.

