klopotek.

Mail Merge Manager

Create your mail merge letter and email templates with placeholders in the simplest way – by simply 'writing' them

Our admin tool Mail Merge Manager is a central element of all STREAM apps using template-based document and email creation features. Design numerous data merge activities and use them whenever necessary:

The powerful merging functionality of the app supports creating and integrating multiple data tables to be used in one document, which is essential for the different communication processes triggered by the various STREAM apps (e.g. an author letter with a list of titles, a supplier order with multiple order lines and complex production specification, etc.).

Letters & emails: write, edit, merge

Mail Merge Manager provides a 'Mail Merge Engine' and an interactive component: a rich html editor for defining MS Word® document (for letters) and email templates (and the relat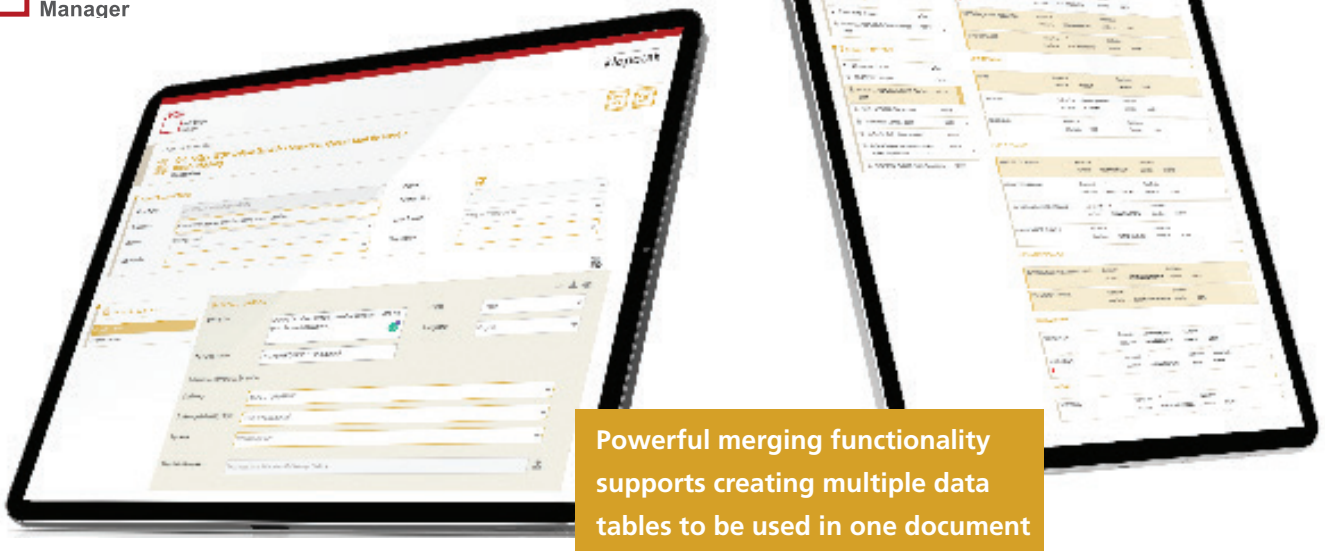ed data sources), so working on these is very much like working on texts. Docx and PDF files and emails can then be created and merged with information from your selected database.

Stationaries for letters

With Mail Merge Manager, you can store and manage multiple stationaries for your letters. A stationary can directly be merged into the document you're creating as a background – together with the data that

WEB
Mail Merge Manager

Powerful merging functionality supports creating multiple data tables to be used in one document

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KEY FEATURES AND BENEFITS

- An admin app: a central element of various STREAM apps for different business processes using template-based document and email creation features (e.g. Contact Tracker, Contact Manager, Ticketing, Citation Manager, Title Life Cycle Manager)

- Creating mail merge (a) letter and (b) email templates resembles the process of 'writing' using placeholders

- Powerful merging functionality supports creating multiple data tables to be used in one document

- Rich html editor for defining MS Word® document (for letters) and email templates

- Multiple stationaries for writing / printing business letters

- Option to integrate pictures for defining email templates with placeholders

- Multiple attachments can be added to an email template

- 'Mail Merge Engine' for retrieving the correct data from the database and creating a final document

- No restrictions for data sources to be used (SQL statements)

has been retrieved. In addition to this, uploaded scanned signatures can automatically be merged into the document. This makes it easy to create new business letters using the correct stationary.

For printing, there is no need to provide the correct stationary in the paper tray, as the document itself already incorporates the correct one.

Placeholders for emails

Mail Merge Manager also supports integrating pictures for defining email templates with placeholders. The subject line – as well as the recipients (to, cC, bCC) – can also be placeholders for your data.

Handling attachments included

Multiple attachments can be added to an email template: these can include/ show attachments and support including a pre-generated pdf document as an attachment when being sent out. This can directly be done using the app, in the right language, as each template is automatically linked to the correspondence language it should be used for.

The Mail Merge Engine

Based on the document templates with placeholders that have been uploaded and the defined data sources, the Mail Merge Engine retrieves the correct data from the

database and creates a final document with the data merged into the document. It also automatically determines the appropriate template depending on the correspondence language of the main recipient.

Defining & managing data sources

The basis for creating merged documents are data sources. To define these, you simply upload SQL statements to the system. There are no restrictions for the data sources you want to work with: an SQL statement can retrieve data from the entire data model.

Determines the appropriate template depending on the correspondence language of the main recipient automatically

Store and manage multiple stationaries for your letters