CourtMail

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Instructions for creating a letter template in Word Perfect

The letter template is the document that you will use each day to merge your letters from the file lists you receive in your emails from CourtMail. The following instructions will help you set this up. You should only have to create this document one time. If these instructions do not seem compatible with the version of Word Perfect that you are using, click the Help tab at the top of your screen and look for topics dealing with Form Merge Records. You are always welcome to contact a CourtMail representative for assistance.

Step One: Before you can set up your letter template, you will need a data source so that the Word Perfect program can determine the content of the merge fields. Your data source will always be the chart that you create from the daily email files. You can use the test file or any of your daily emails from CourtMail to set up this template.

1. Open up the email that contains the attachment with your records file.
2. Save the attachment as a **text file** in a location that is easily accessible and close the email.
3. Open up Word Perfect.
4. At the top of the screen, you will see insert. Click this and choose spreadsheet/database and then import.
5. You will now see a box. In the data type box, select **ASCI II delimited text**. In the Import As box, select **Merge data file**. In the File Name box, click on the small folder to select the text file you created earlier from the email.
6. Now click ok and Word Perfect will open up the records. There should be the words end field in red out to the side of each field. This is a data file now.
7. Save this as filename.dat (you can call it whatever you would like to help you remember what it is and where you save it).
8. Close this record - you have created your data source!

Step Two: Now that you have your data source, you are ready to create your letter template.

1. Open Word Perfect or a new document in Word Perfect.
2. From the Tools option at the top of your screen, select "merge".
3. You should now have a box on your screen in which you should select "Form".
4. A new box will appear that says "Create Merge File". You can select either "new document window" or "active document window".
5. You will now get a box that says "create form file". Choose "Associate a data file" and click the little corner window of this box to select the data file that you created when you finished all of step one and click "ok".
6. Now at the top of your document you should see a new tool bar that has the option to "insert merge field". If you click on this option you will see a window appear with all of the merge fields in it to choose from. Basically, at this point, just type your letter and insert the merge fields by clicking on the field name you want and then clicking "insert" when your cursor is where you want the merge fields to appear. Below are the fields and the information they contain:

   <M1> = County, <M2> = Case number, <M3> = Salutation (Ms. Mr. Etc.), <M4> through <M7> = name, <M8> =street address or PO Box, <M9> =City, State, Zip, <M10>=offense date, <M11>=filing date, <M12>=trial date, and <M13> through <M15> are the offenses.

7. When you are finished, save this somewhere you will remember as "filename.frm". You are now finished setting up your letter template! Be sure to save a copy of your letter template in another location should you ever need a backup copy.

Instructions for Importing a TXT file into WordPerfect and Merging with a WordPerfect Letter

Save Txt file received in e-mail

1. Double click on e-mail attachment to open.
2. Click "file" then click "save as".
3. Key in new file name.
4. Select location to save file.
5. Save file as Text (.TXT) Document.
6. Click "save".
7. Close E-mail message.
8. Shrink E-mail.

Import TXT file into WordPerfect to Create a Data File

1. Open WordPerfect, click on "Insert" in Tool Bar.
2. From Drop Down Box - choose "Spreadsheet/DataBase".
3. From Drop Down Box - choose "Import".
4. In "Data Type" - choose "ASCII delimited text".
5. In "Import As" - choose "Merge Data File".
6. In "File Name" - click on the small folder to access location of the .txt file saved from the email.
7. Double click on the txt file, click "OK" and the file will open up as a database file.
8. Save this as "filename.dat".
9. Close this database.

Merge Letter in WordPerfect

1. Click "file", click "open".
2. Select letter template and open. The letter template will appear in the open window.
3. In toolbar section, click "tools"   .
4. Click "merge".
5. In the next window, click "merge".
6. In the "files to merge" section of the "Perform Merge" window.
   Confirm that the:
      "Form File" to be "Current Document".
      "Data File" to be the location of the database file you created.
      "Output File" is marked "New Document".
7. The letter is now set up to be merged. Click "OK".
8. Scroll down to the first letter to make sure the information has been merged into letter template.
9. Print letters, once merge has completed. Do **not** save changes to your letter template.