

Use Case X-mas Card Labels

Version 2.4



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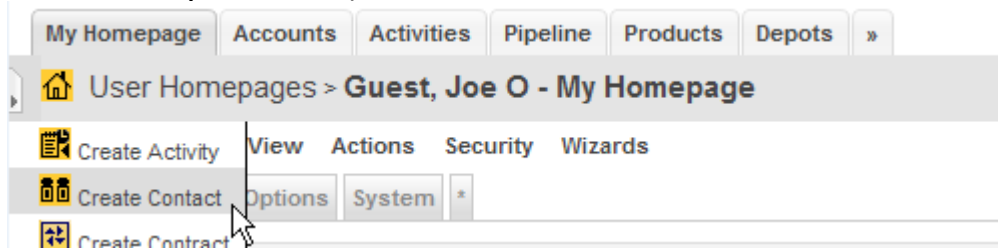
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1 Enter Contacts

- From the fly-in menu, start the wizard **Create Contact**:



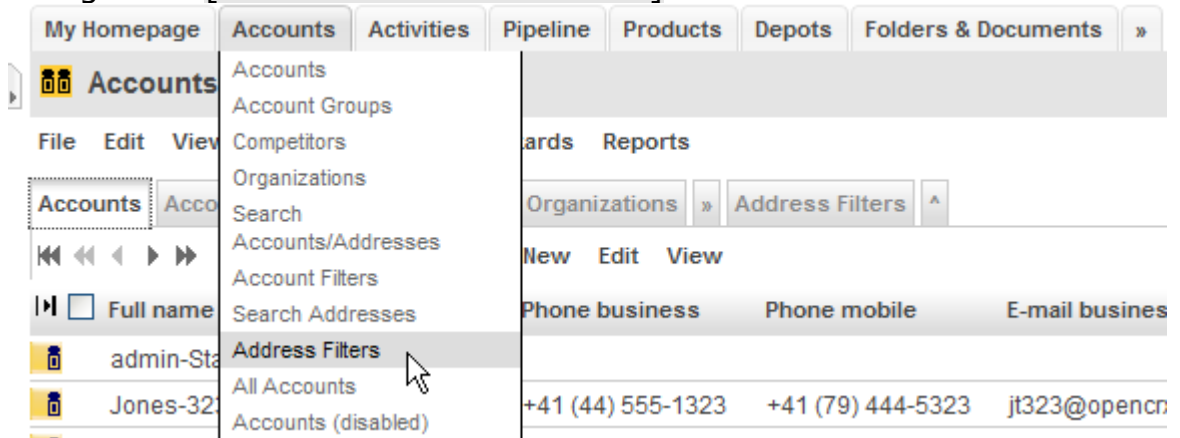
- Enter contact data with address:

 A screenshot of the 'Accounts' form. The top navigation bar is the same as the previous image. Below the breadcrumb trail is a menu bar: 'File', 'Edit', 'View', 'Actions', 'Security', 'Wizards', 'Reports'. The form is divided into two main sections. The top section is titled 'Contact' and contains fields for: 'Salutation code' (dropdown with 'Mr.' selected), 'Salutation' (text), 'First Name' (text with 'Tom'), 'Middle Name' (text), 'Last Name' (text with 'Easy'), 'Alias name' (text), 'Job Title' (text), 'Job Role' (text), 'Organization' (text with 'ACME'), 'Department' (text), 'Do not phone' (checkbox), 'Phone business' (text), 'Phone mobile' (text), 'Phone home' (text), 'E-mail business' (text), 'E-mail home' (text), and 'Birth Date' (text). The bottom section is titled 'Addresses (Home / Business)' and contains fields for: 'Address line(s)' (text with 'Mr. Tom Easy'), 'Street / PO Box' (text with '658 California Ave.'), 'City' (text with 'Palo Alto'), 'ZIP/Postal code' (text with 'CA 94306'), and 'Country/Region' (dropdown with 'United States of Am' selected). At the bottom of the form are three buttons: 'Search', 'New Search', and 'Cancel'.

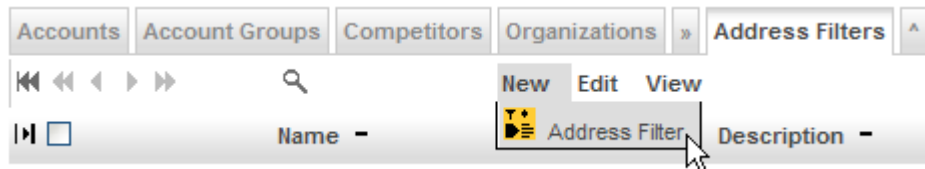
- click the [Search] button to check for duplicates
- if no duplicates are found, click the [Create New] button; otherwise, select one of the duplicates, update data, and then click [Apply Changes]

2 Create Address Filter

- Navigate to [Accounts > Address Filters]:



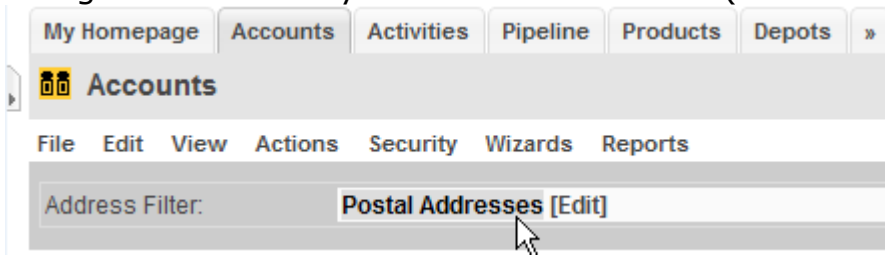
- From the **New** menu in the pane [Address Filters], select the entry **Address Filter**:



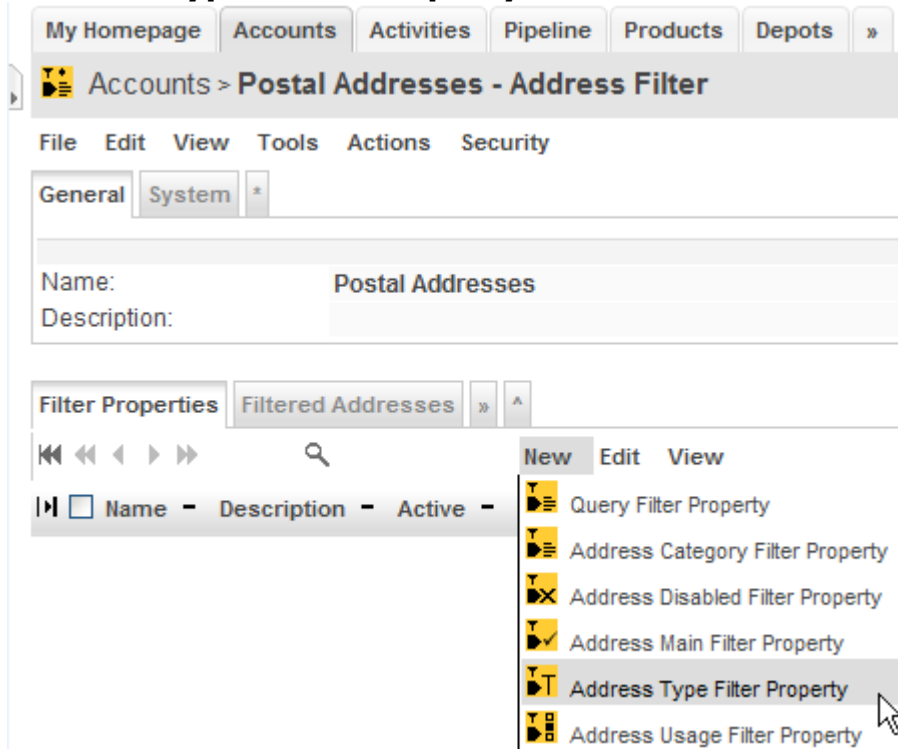
- Enter the name of the address filter, e.g. Postal Addresses, and then click the [Save] button:

 A screenshot of a form titled 'Untitled - Address Filter'. The form has two tabs: 'General' and 'System'. Under the 'General' tab, there are two input fields: 'Name:' and 'Description:'. The 'Name:' field contains the text 'Postal Addresses'. Below the form, there are two buttons: 'Save' and 'Cancel'.

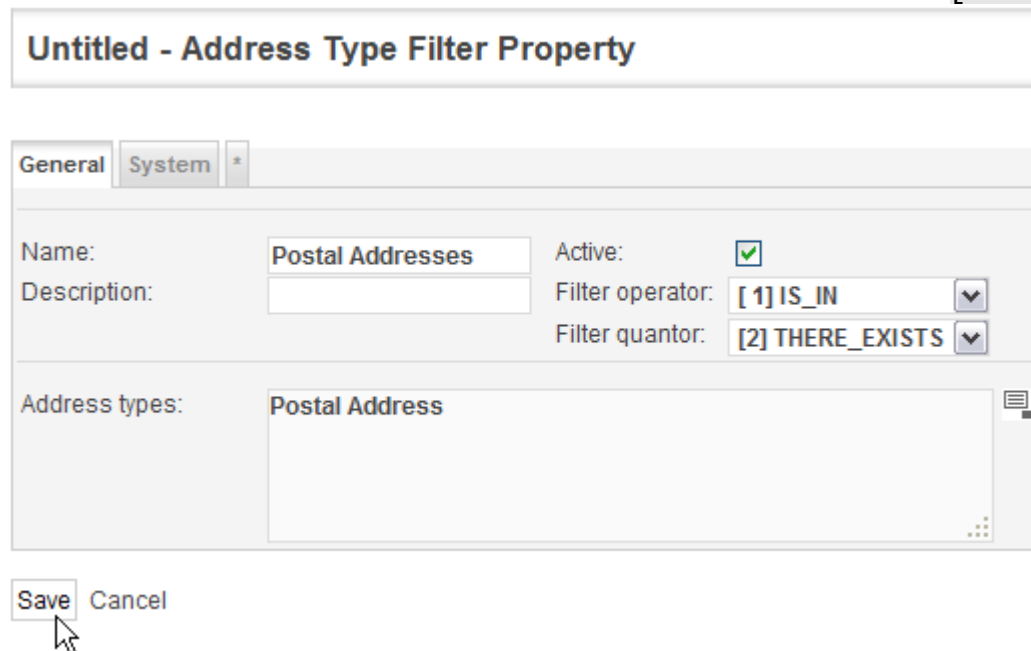
- Navigate to the newly created address filter (click the operation result):



- From the **New** menu in the pane **[Filter Properties]**, select the entry **Address Type Filter Property**:

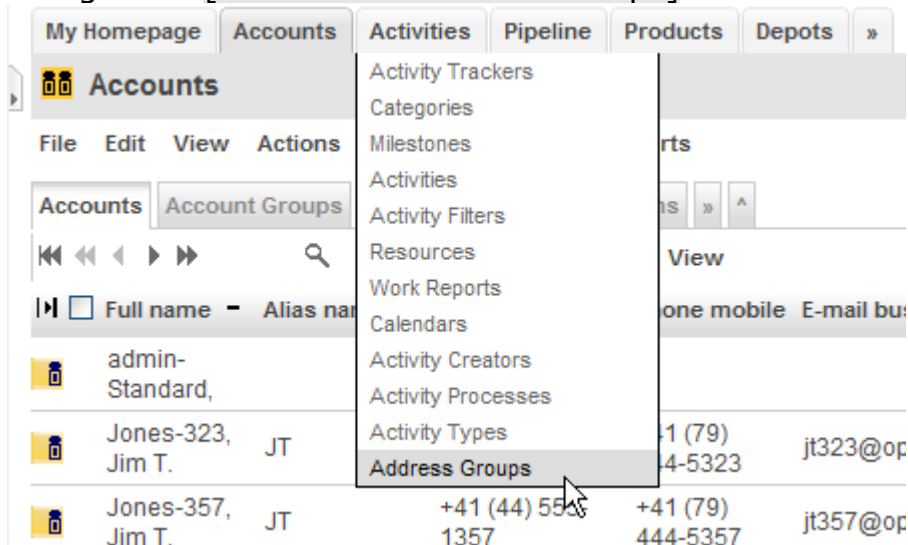


- Define the filter as shown below and then click the button **[Save]**:

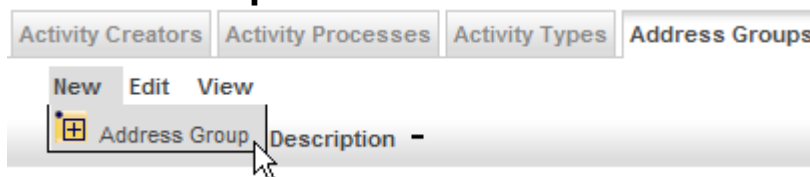


3 Create Address Group

- Navigate to [Activities > Address Groups]:



- From the **New** menu in the pane [Address Group], select the entry **Address Group**:



- Enter the name of the address group, e.g. X-mas cards 2009, and then click the [Save] button:

Untitled - Address Group

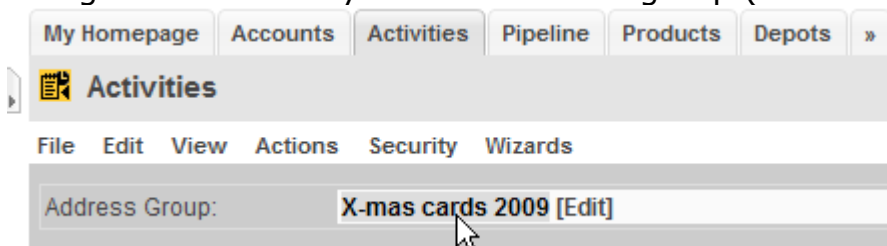
General System *

Name: X-mas cards 2009

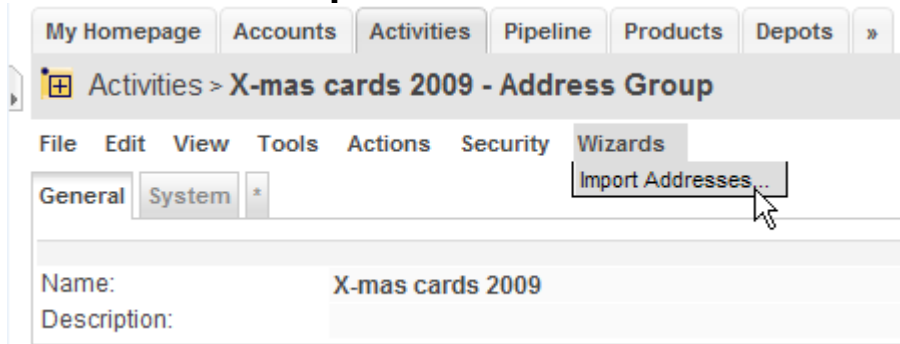
Description:

Save Cancel

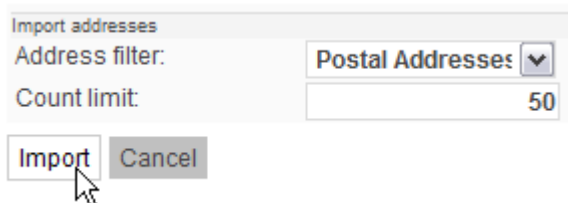
- Navigate to the newly created address group (click the operation result):



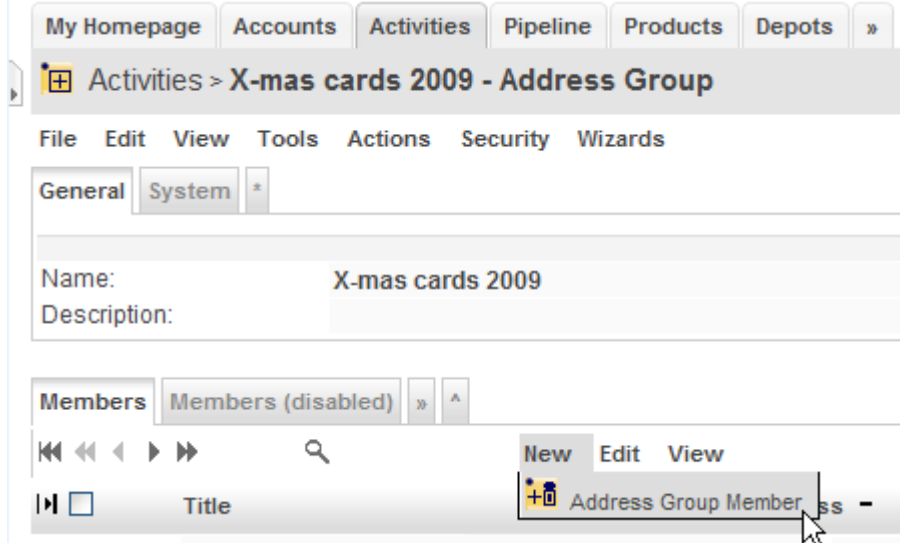
- Start the wizard **Import Addresses**:



- Select the desired address filter from the drop down, e.g. **Postal Addresses**, and enter the number of addresses you want to import. Click the button [Import] to add the filtered addresses to your address group:



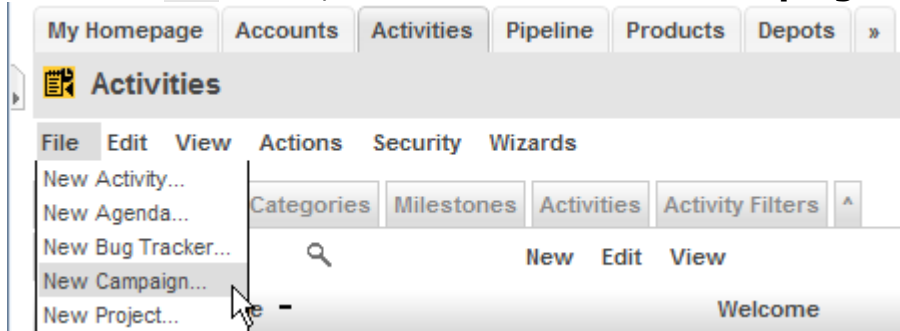
- Alternatively, you can add addresses manually with the entry **Address Group Member** from the **New** menu in the pane [Members]:



- To remove addresses you can either delete the respective address group member or disable it; if you disable an address group member you can also provide a reason for disabling it, e.g. "move abroad – new address unknown".

4 Create Campaign

- Navigate to [Activities]
- From the File menu, start the wizard **New Campaign:**



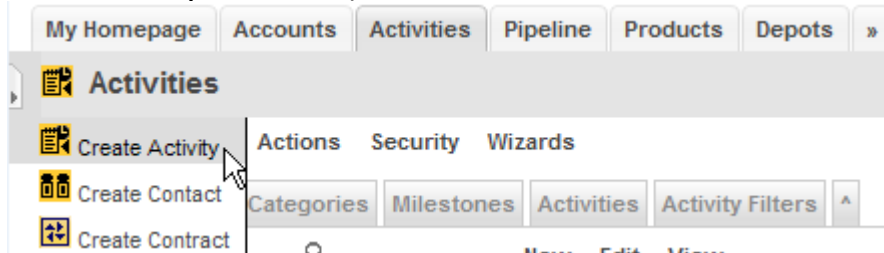
- Enter the name of your campaign, e.g. X-mas cards 2009:

A screenshot of the 'New Campaign' wizard form. The form has a header with the same navigation tabs as the previous screenshot. Below the header, there is a 'Description' label, followed by a 'Name:' label with a text input field containing 'X-mas Cards 2009'. Below the 'Name' field is a 'Description:' label with a larger text area. At the bottom of the form, there are two buttons: 'Create' and 'Cancel'.

- Click the button [Create]

5 Create Mailing Activity

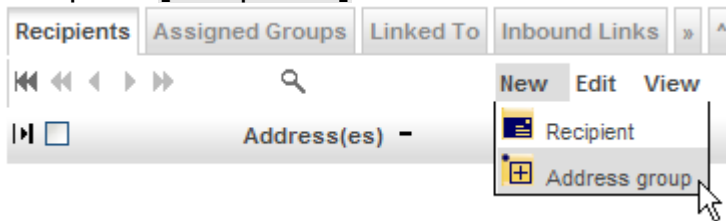
- From the fly-in menu, start the wizard **Create Activity**:



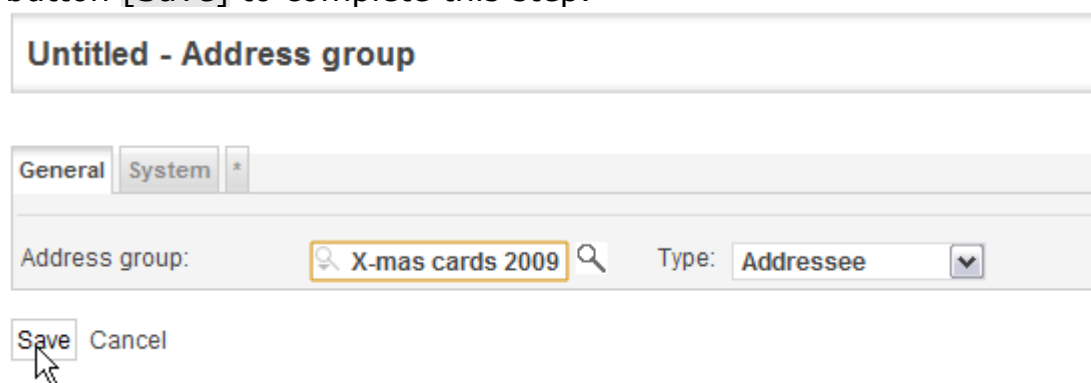
- Populate the form as shown below and then click the button [Create]:

- Once the mailing activity has been created, you will be forwarded to it:

- Next, we add the previously created address group as a recipient to this mailing activity. Select the entry **Address Group** from the **New** menu in the pane [Recipients]:

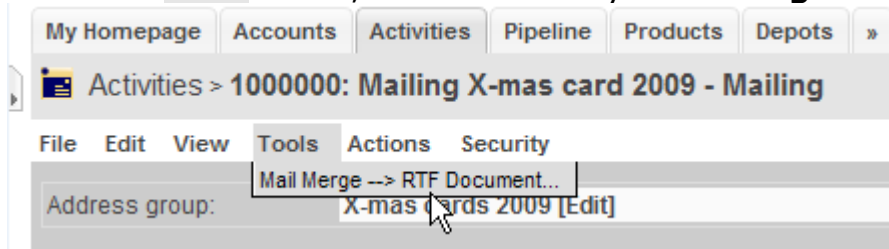


- Select the address group **X-mas cards 2009** with the auto-completer and set the recipient type to **Addressee** as shown below. Click the button [Save] to complete this step.



6 Create X-mas card labels with Mail Merge Wizard

- From the **Tools** menu, select the entry **Mail Merge --> RTF Document**:



- Select the desired template from the drop down and then click the button [OK] to start the mail merge process:



- Download the (zipped) RTF document and then open it with any word processor that can read RTF files (OpenOffice Writer, MS Word, etc.):

