

Use Case X-mas Card Labels

Version 2.4



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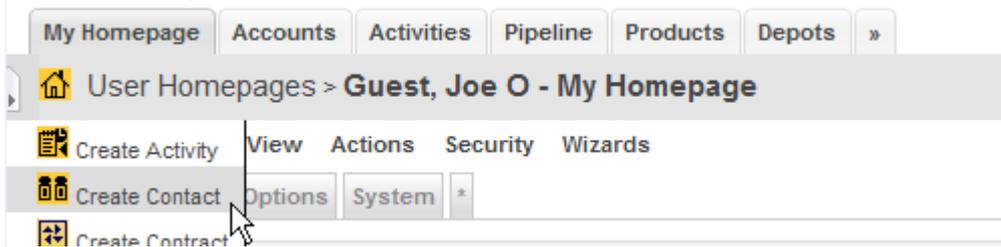
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1 Enter Contacts

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



- Enter contact data with address:

 A screenshot of the 'Accounts' form in the software. The form is titled 'Accounts' and has a menu bar with 'File', 'Edit', 'View', 'Actions', 'Security', 'Wizards', and 'Reports'. The form is divided into two main sections: 'Contact' and 'Addresses (Home / Business)'.

 The 'Contact' section contains the following fields:

- Salutation code: Mr. (dropdown)
- Salutation: (empty)
- First Name: Tom
- Middle Name: (empty)
- Last Name: Easy
- Alias name: (empty)
- Job Title: (empty)
- Job Role: (empty)
- Organization: ACME
- Department: (empty)
- Do not phone: (empty)
- Phone business: (empty)
- Phone mobile: (empty)
- Phone home: (empty)
- E-mail business: (empty)
- E-mail home: (empty)
- Birth Date: (empty)

 The 'Addresses (Home / Business)' section contains the following fields:

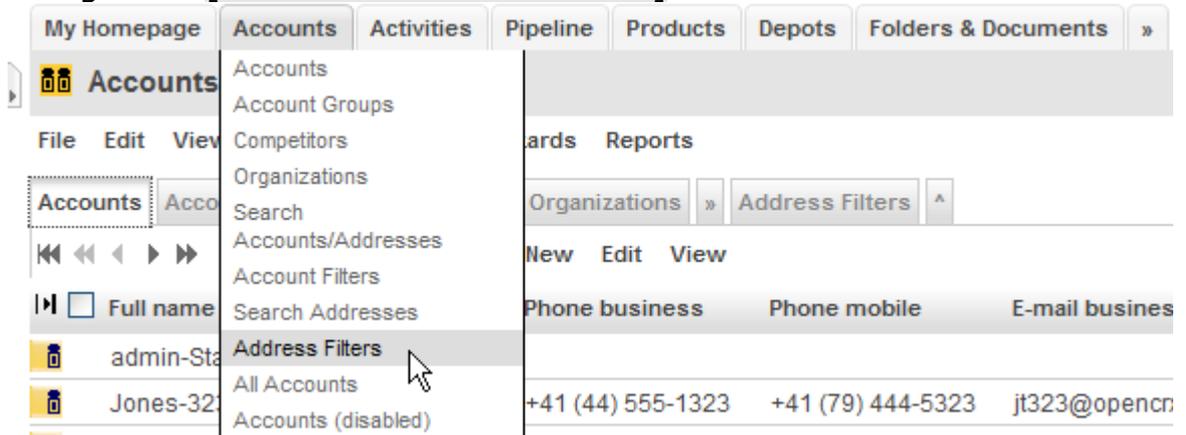
- Address line(s): Mr. Tom Easy
- Street / PO Box: 658 California Ave.
- City: Palo Alto
- ZIP/Postal code: CA 94306
- Country/Region: United States of Am (dropdown)
- Address line(s): (empty)
- Street / PO Box: (empty)
- City: (empty)
- ZIP/Postal code: (empty)
- Country/Region: (empty)

 At the bottom of the form, there are three buttons: 'Search', 'New Search', and 'Cancel'.

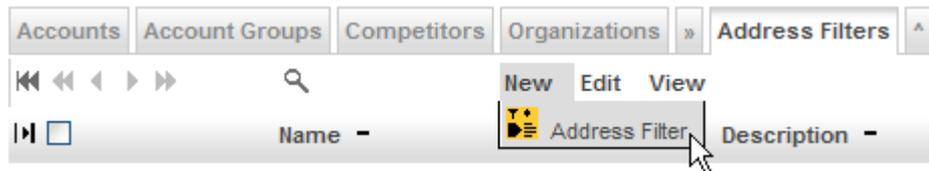
- click the [Search] button to check for duplicates
- if no duplicates are found, click the [Create New] button; otherwise, select one of the duplicates, update data, and then click [Apply Changes]

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:

Untitled - Address Filter

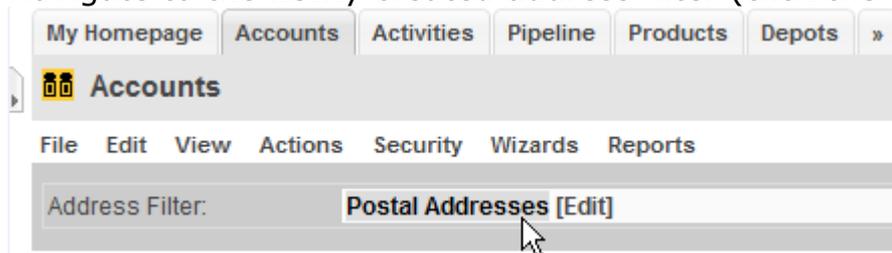
General System *

Name: Postal Addresses

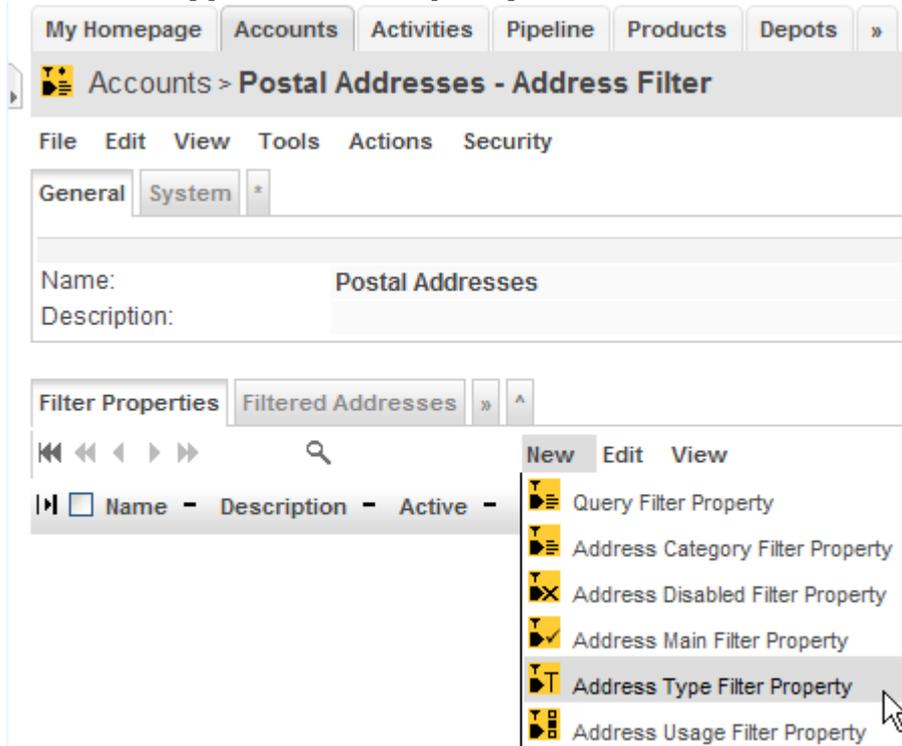
Description:

Save Cancel

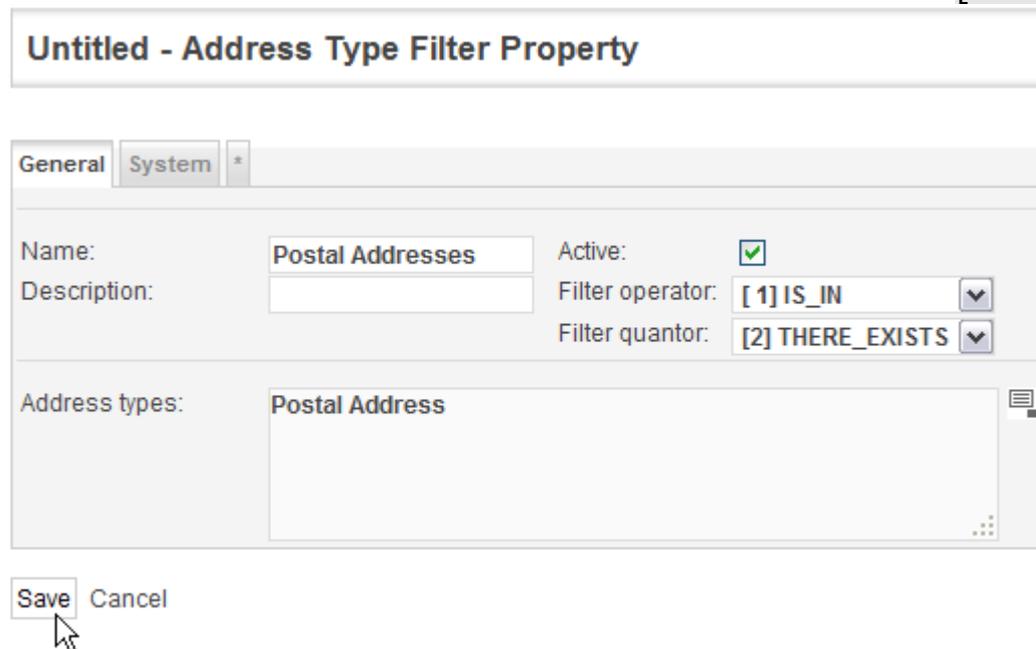
- Navigate to the newly created address filter (click the operation result):



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

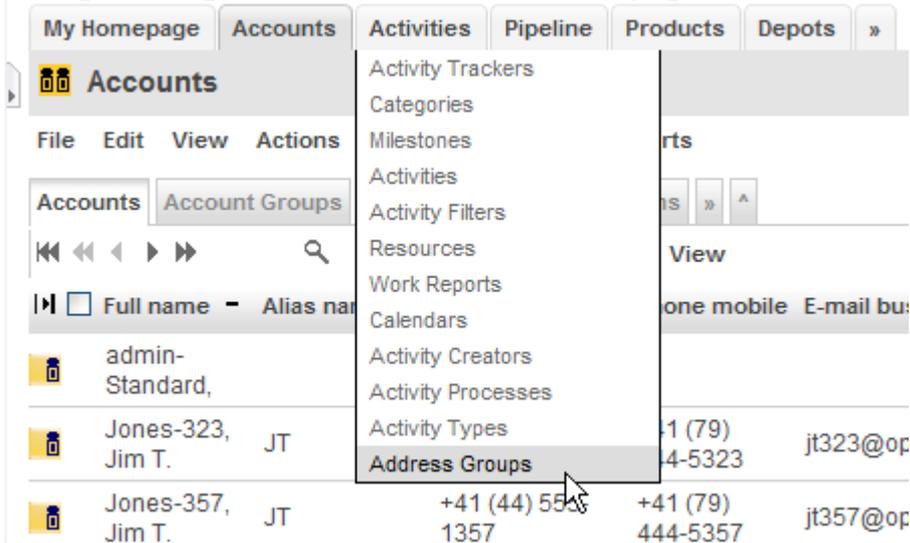


- Define the filter as shown below and then click the button [Save]:

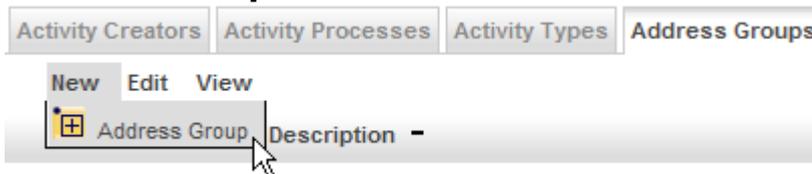


3 Create Address Group

- 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

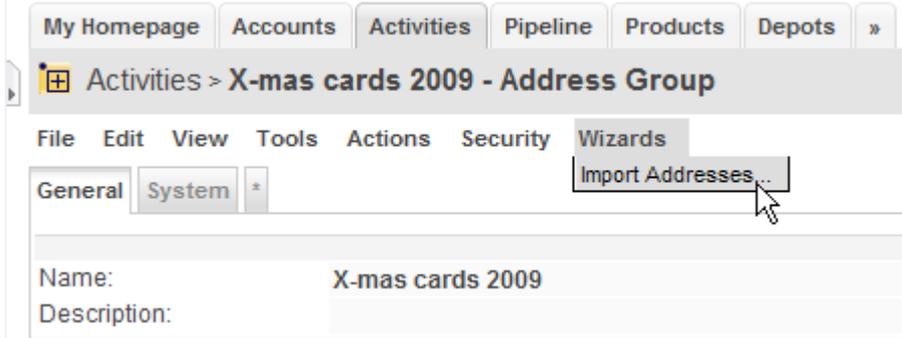
Description:

Save Cancel

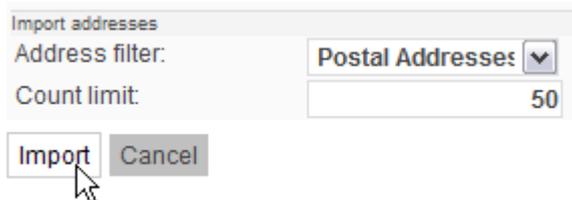
- Navigate to the newly created address group (click the operation result):



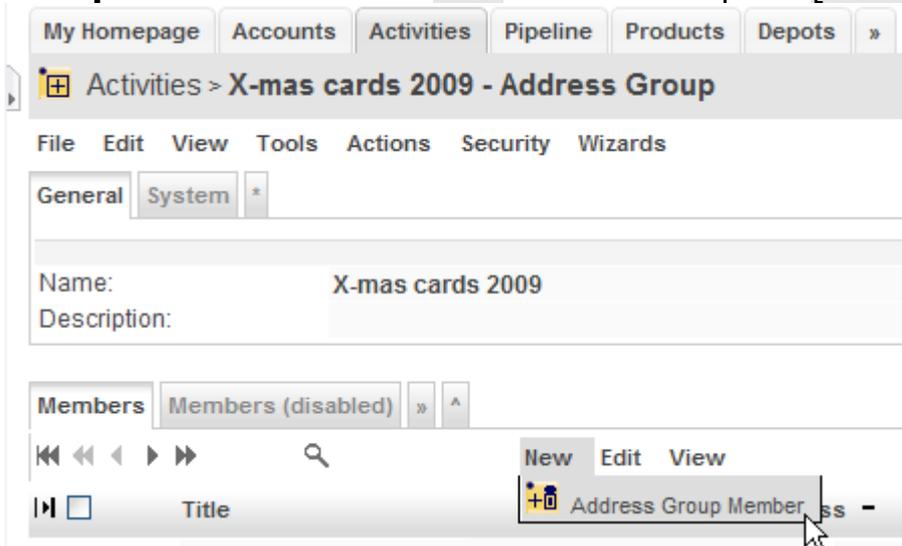
- Start the wizard **Import Addresses**:



- 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:



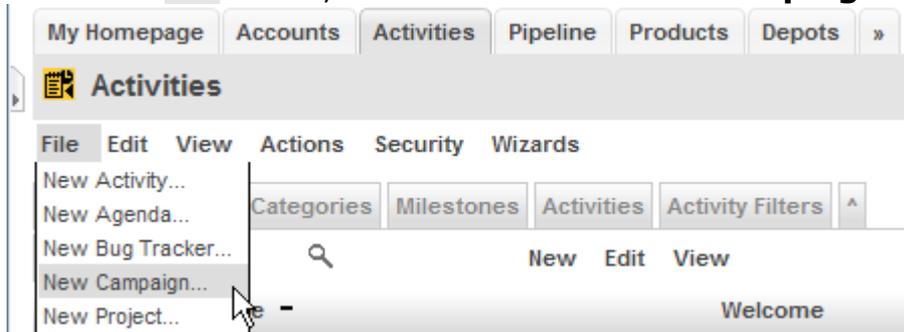
- Alternatively, you can add addresses manually with the entry **Address Group Member** from the New menu in the pane [Members]:



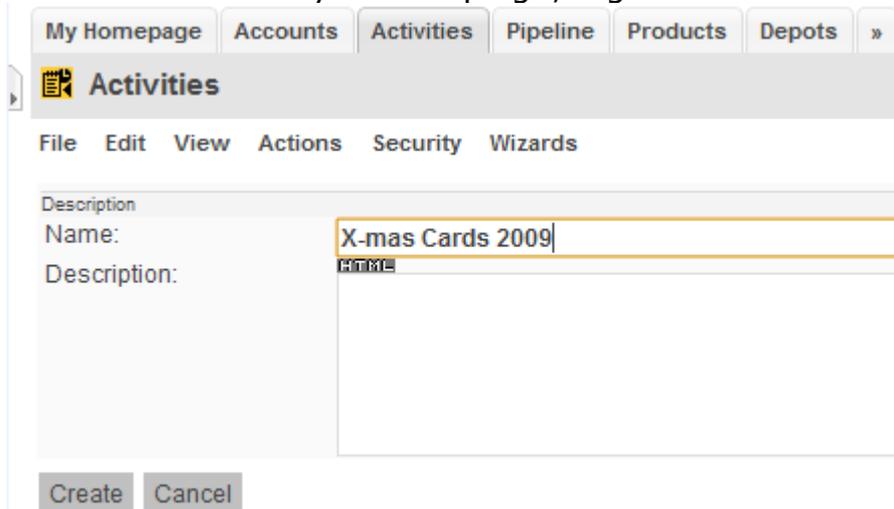
- To remove addresses you can either delete the respective address group member or disable it; if you disable an address group member you can also provide a reason for disabling it, e.g. "move abroad – new address unknown".

4 Create Campaign

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



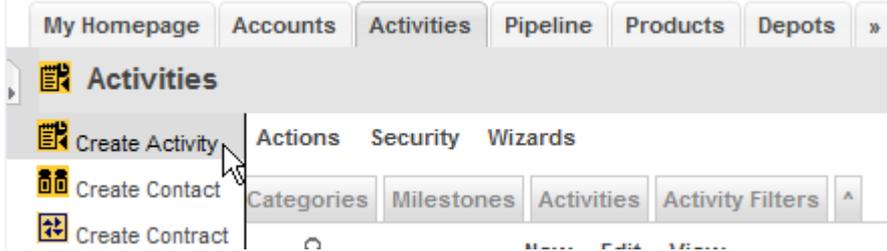
- Enter the name of your campaign, e.g. X-mas cards 2009:



- Click the button [Create]

5 Create Mailing Activity

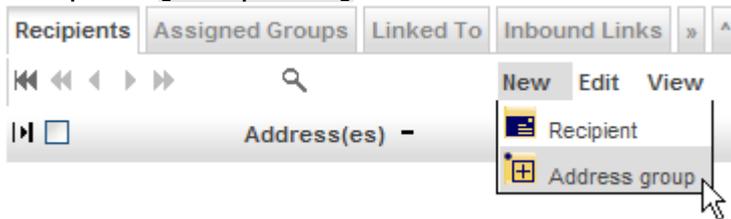
- From the fly-in menu, start the wizard **Create Activity**:



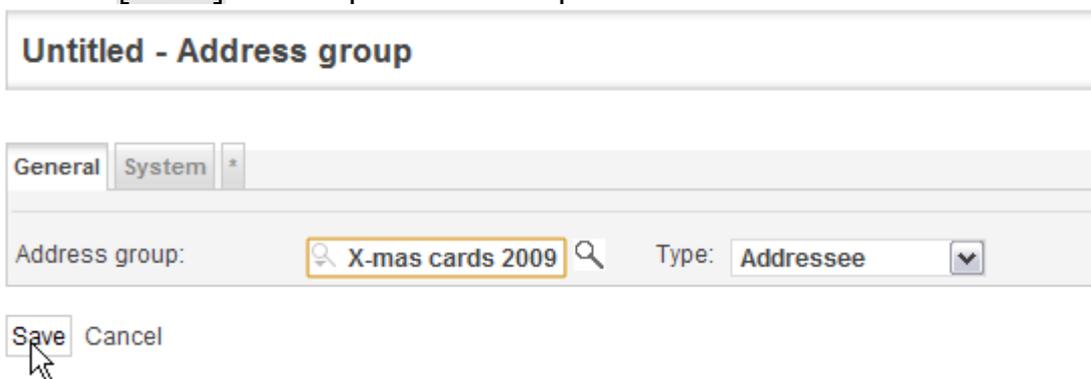
- Populate the form as shown below and then click the button **[Create]**:

- 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]:

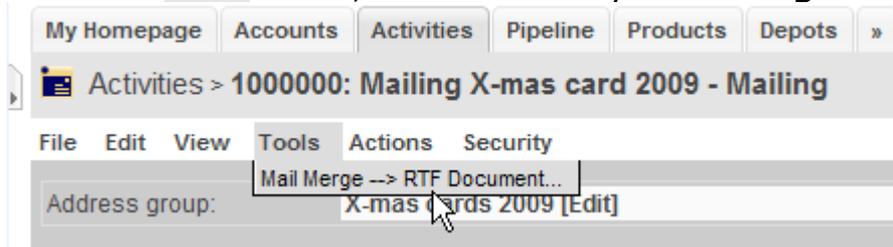


- Select the address group **X-mas cards 2009** with the auto-completer and set the recipient type to **Addressee** as shown below. Click the button [Save] to complete this step.



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.):

