

## Proposers for This Year – Table Function Disabled in CLMS2PC

Because we are only supporting Proposer Reports on CLMS2Web any proposer reports, letters, labels and queries based on this table function will no longer work. So for example you may have noticed that when you run the **Proposers of Elks This Year** shown below in **Fig.1**. You will get the following results in the print preview shown in Fig 2.

Fig. 1

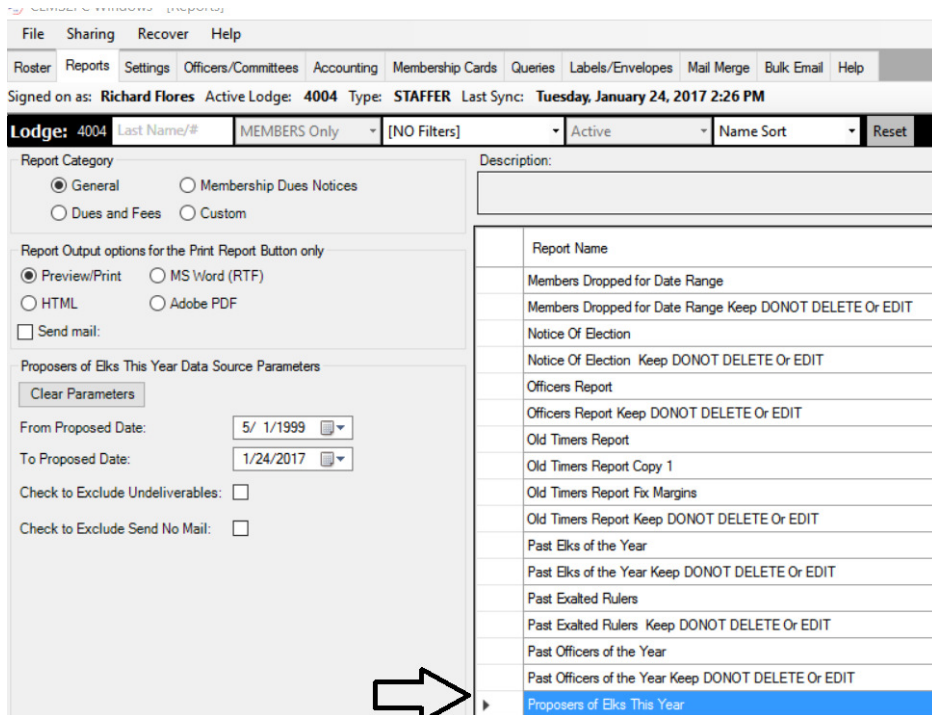
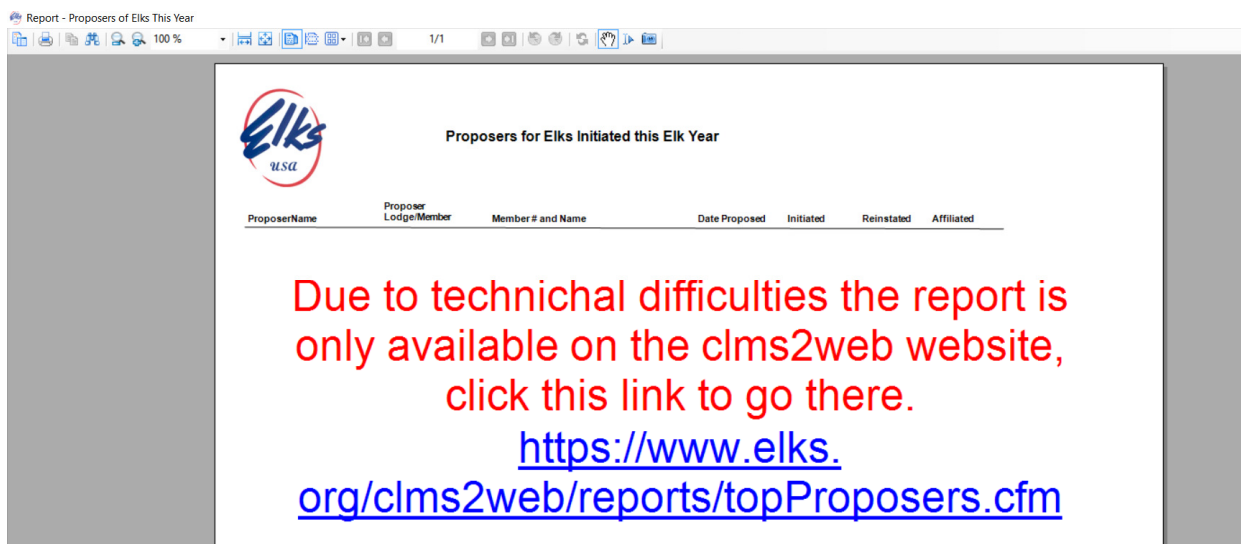


Fig. 2.



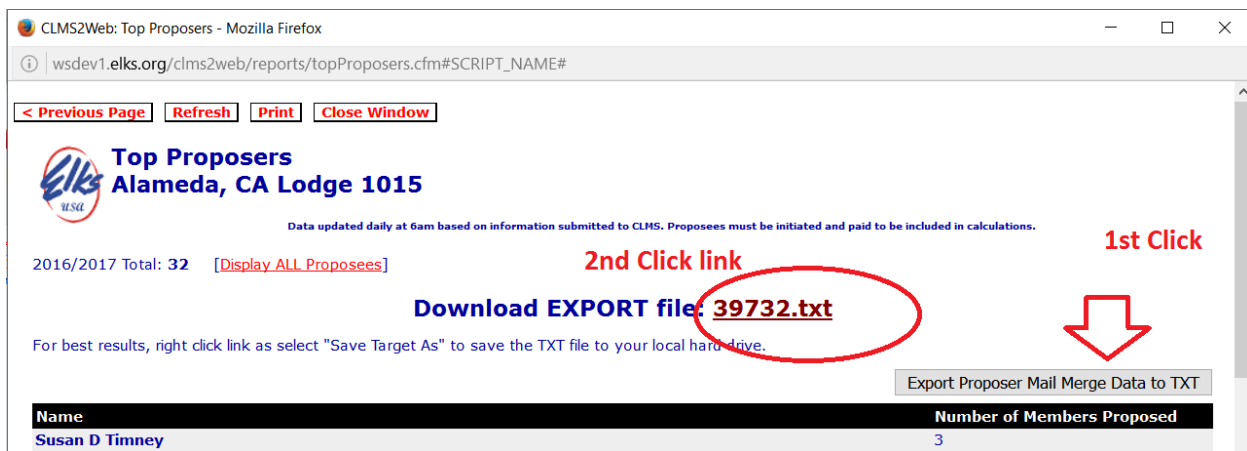
So this means that even if you copied and made changes to this report you will no longer get any results and you also will not see the preview telling to go to <https://www.elks.org/clms2web/reports/topProposers.cfm> form. This is

because the report, letter or whatever else you copied is not designed to present the print preview with the information show above.

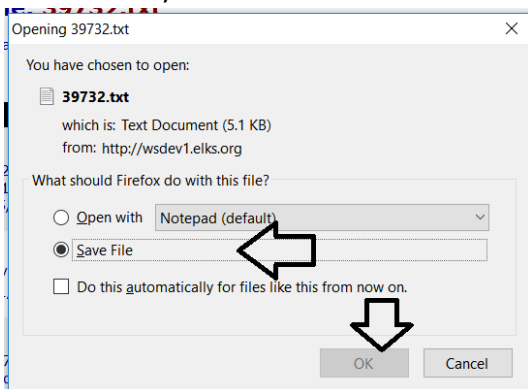
## Steps For Recreating a custom letter that uses the Proposers Table Function

Steps Creating the Export File.

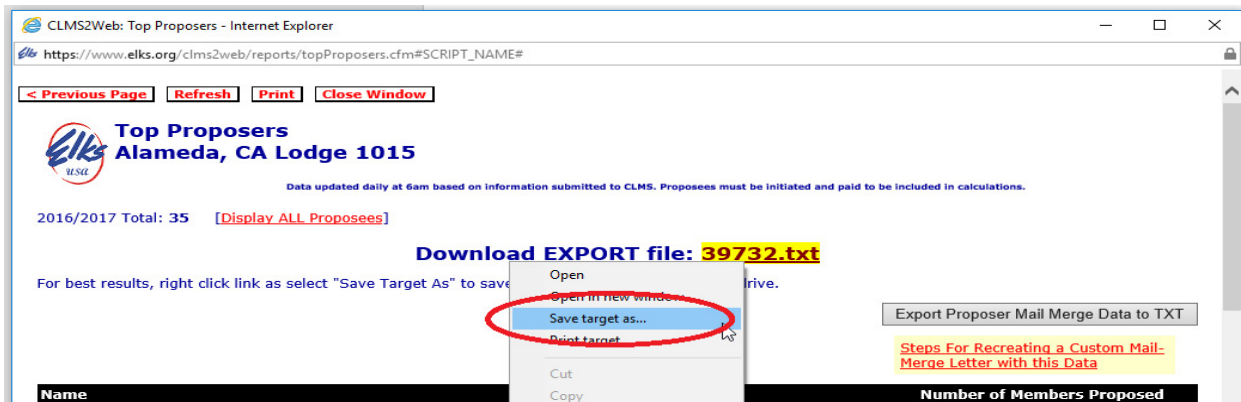
1. 1st Using the link below  
<https://www.elks.org/clms2web/reports/topProposers.cfm>
2. Once the Top Proposers Report is displayed on the screen click the button **“Export Proposer Mail Merge Data to TXT”** button near the upper right hand corner of the screen. This will in turn provide you with a **“Download EXPORT file:”** link. Click the numbered link with the extension of **“TXT”**



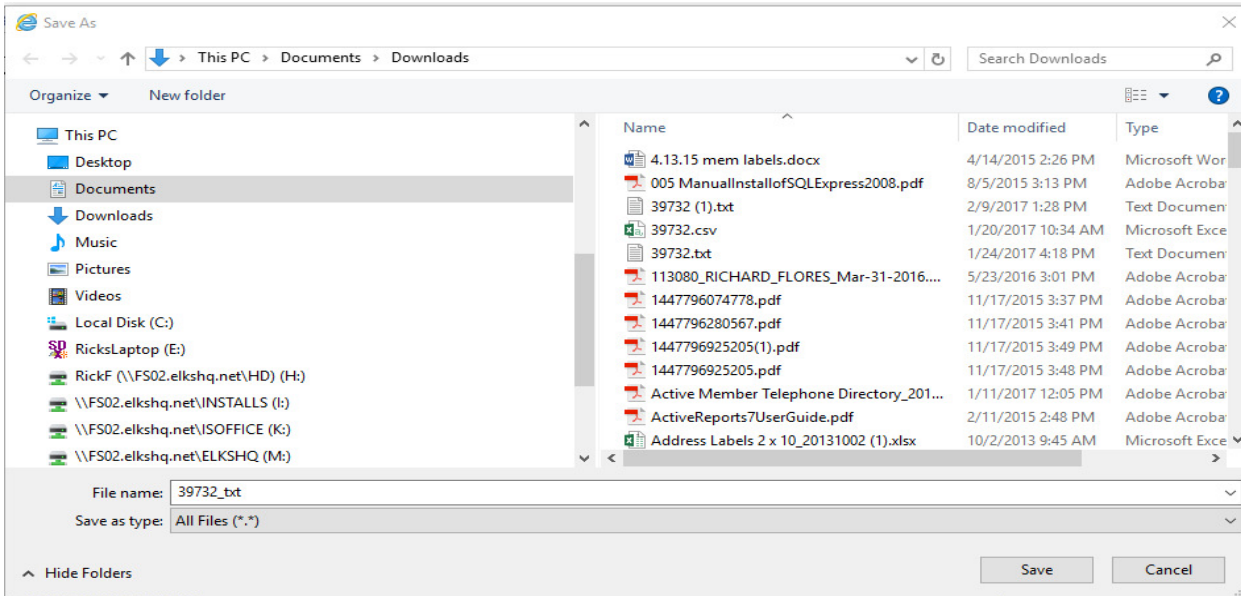
3. Depending on what browser you are using and your personal settings you should be presented with a download or opening dialog. Click the Save option then click the ok button.
  - a. Here is what you would see in **Mozilla Firefox**



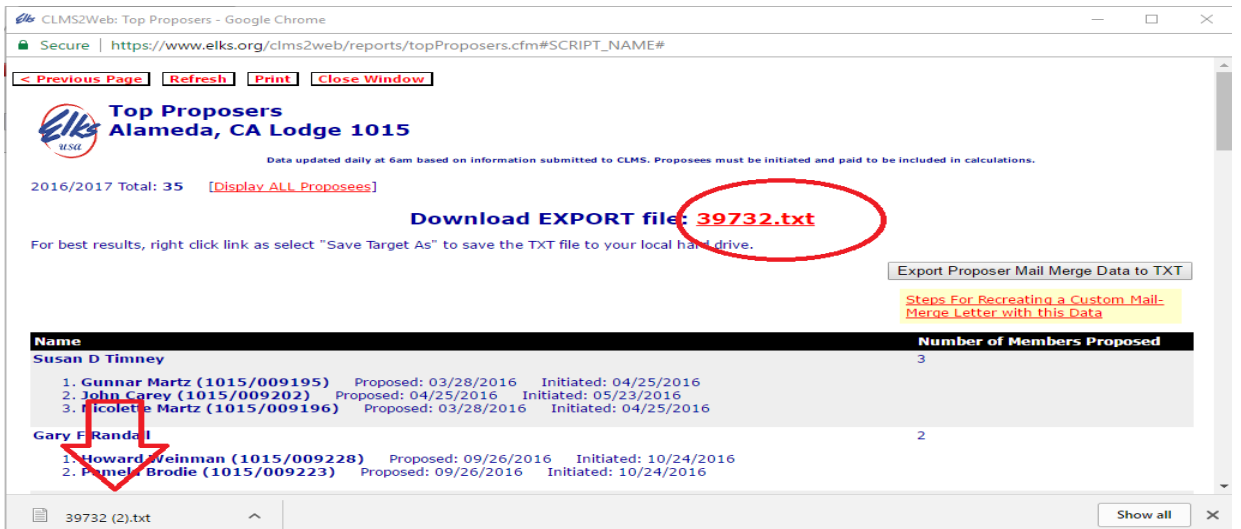
- b. Using **Internet Explorer** the best approach to downloading this file is to right click on the link that is created after you click the **“Export Proposer Mail Merge Data to TXT”** button. Then select the **Save target as...** option.



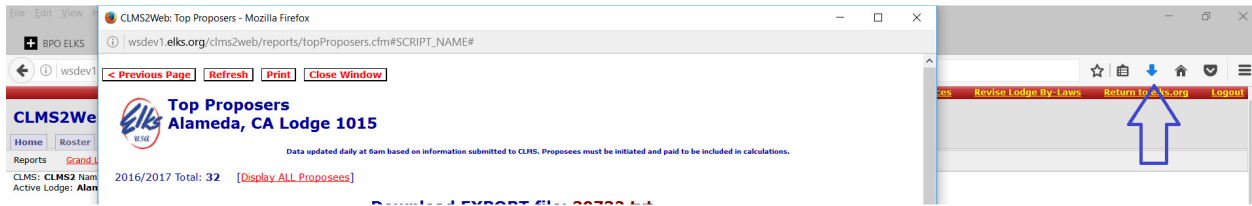
From there you will get the standard Save file dialog and can save it wherever you like.



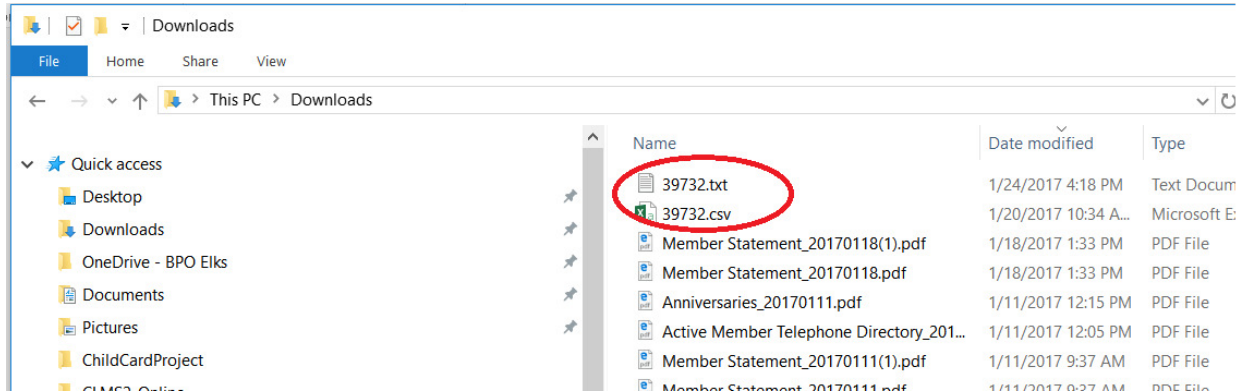
- c. From the Chrome browser after you click the link then look in the lower left hand portion of the browser you will see the downloaded file. You can click on that to open it or right click on the file to open the containing folder.



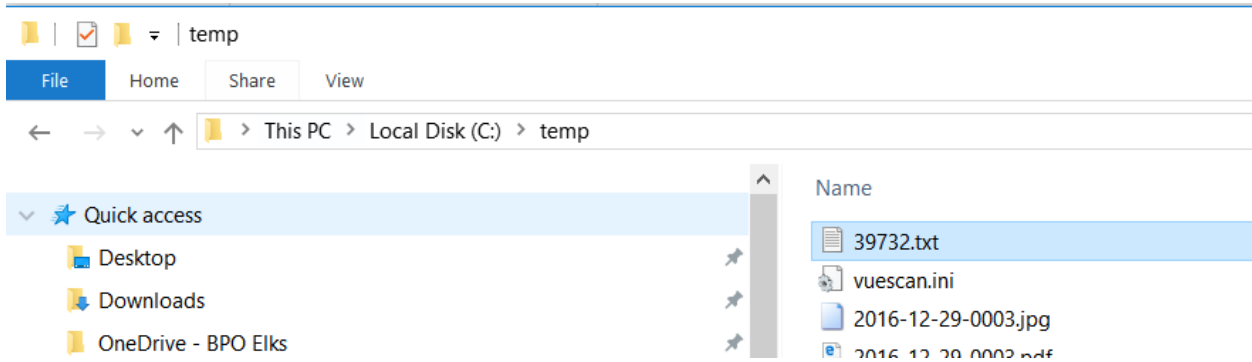
4. **Firefox** – example continued Click on the download arrow or go to your downloads folder



5. Make note of this file location or you can copy it to a location that might be easier to find later. As you can see in the snapshot below the file was downloaded to my downloads folder under the same name that was referenced in the link on the page in this example it's **39732.txt**



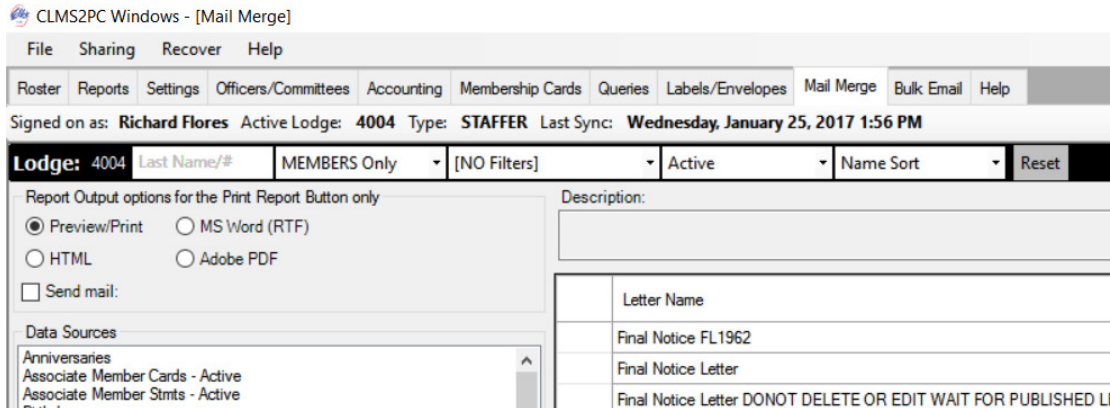
6. For these instructions I will copy it to my c: temp folder



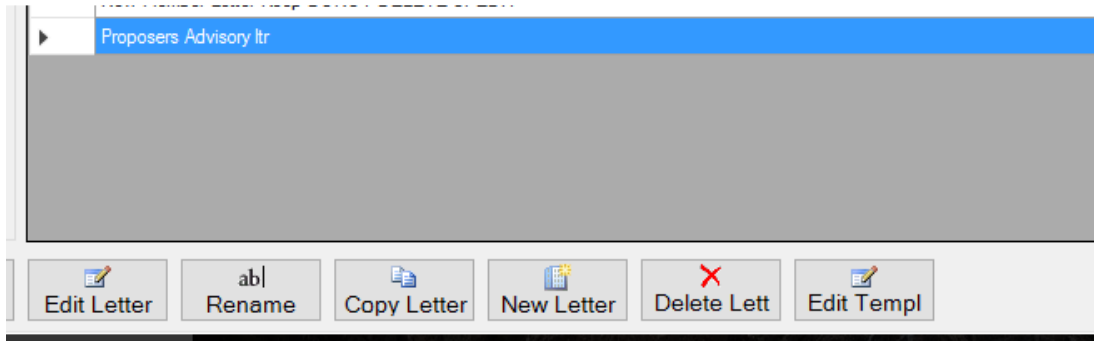
7. Just a few words about the file format the file created and downloaded is in a Tab delimited format, which means the fields are spaced out by tabs. This is a very commonly used format used for mail merge in Microsoft Word as well as other word processing software from a variety of Office suites.

## Steps Recreating your Mail Merge Document in Word.

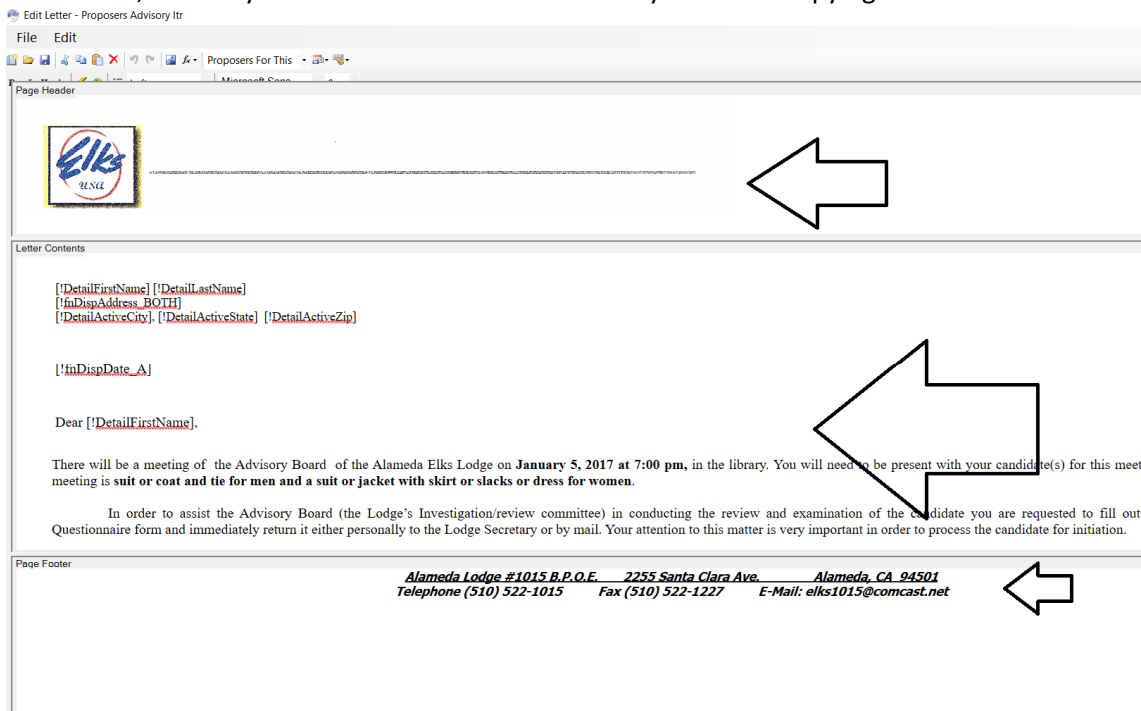
1. Login to CLMS2PC on the Mail Merge Tab locate the letter you want to edit.



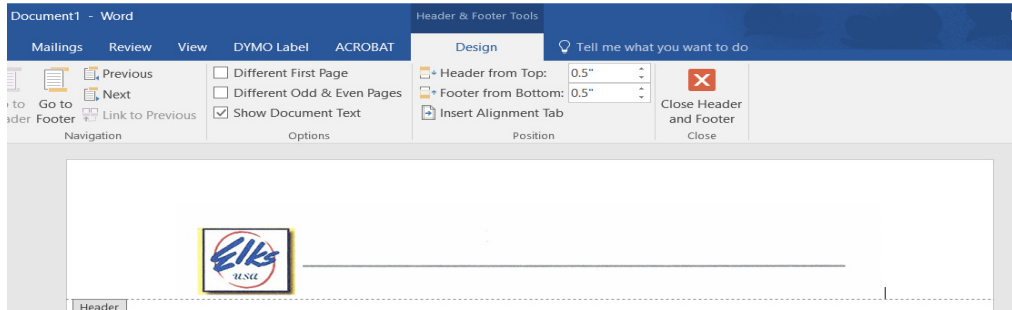
2. Select that letter you want to copy and click the **Edit Letter** button



3. Once in the Editor you need to select each element of the letter you want to reproduce in the Word Mail Merge. Keep in mind that this could work differently in different Word Processing applications and on different letters. Consider this to be a general overview of how to do this. Open a word document. In this document, you have the header, the body and the footer of the letter that you will be copying.



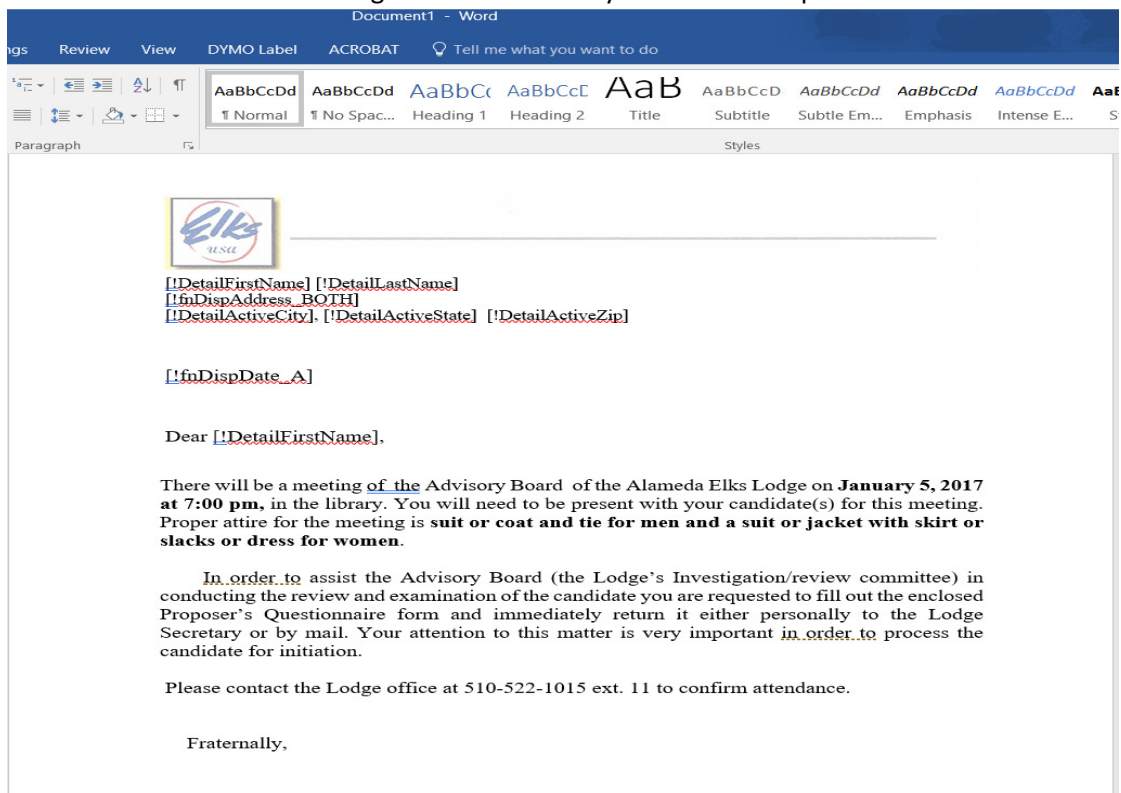
4. You can select each part then hit ctrl + c key to copy and then ctrl + v to paste once in the word document.
  - a. So, for the header copy select the graphic in the header of the clms2pc designer, once that is highlighted type **Ctrl + C** to copy the graphics or text. Now open a blank word document double click near the top of the page. This will put you in the header section of the word document. Now type **Ctrl + V** to paste into the header. What you copied should now appear in the header of the Word document.



- b. Then you want to select the Letter Contents from the CLMS2PC Letter Designer by selecting the text then Ctrl + C



- c. Return to the word document go to the letter body and Ctrl + V to paste into the document.



- d. Now the footer Ctrl + C after selecting the text you want to paste.

Deanie Donato  
Lodge Secretary

Candidate: [!ProposedDetailFirstName] [!ProposedDetailLastName]

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Page Footer

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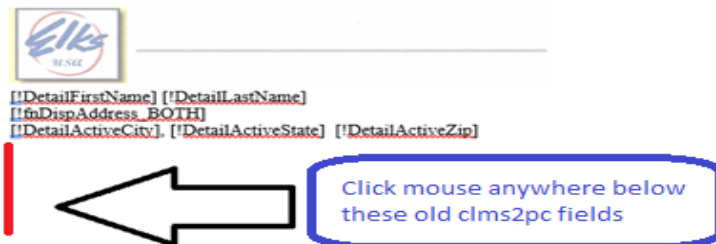
- e. You can close the editor in **CLMS2PC** since it's no longer needed.  
f. At this point save the Word Document in MS Word so that you can proceed with the mail merge setup.

## Mail Merge Setup

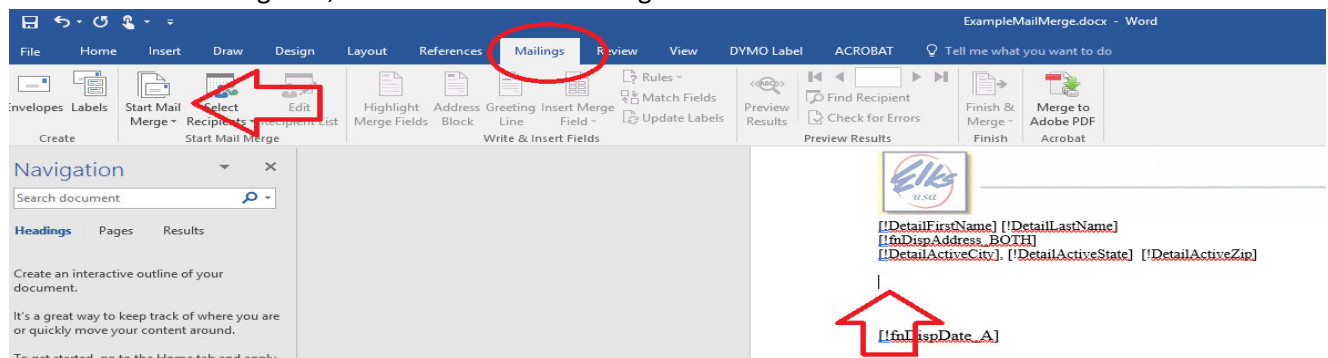
Keep in mind that in this example we are going to simply insert the fields we want into the mail merge. We will not be demonstrating MS Word editing or other features of the Word application except for those specifically relating to creating and importing data into your letter. Please refer to Microsoft Office help system or research on your own via the internet on how to edit and enhance your word documents. If you are using some other product to perform mail merge you can use this as a guide but the manner in which your product adds fields and performs mail merges can be quite different.

Follow the steps below to setup and perform your mail merge.

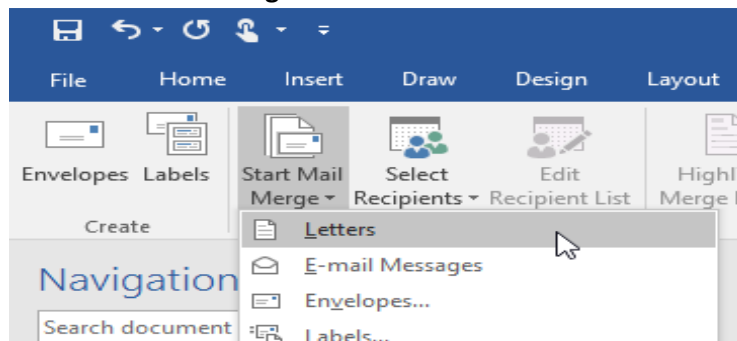
1. From the Word document position your mouse by clicking directly under the fields you wish to import, these are the fields enclosed in [!FieldName] the brackets. Eventually we will get rid of these but for now it will help as a guide for fields you will be inserting shortly.



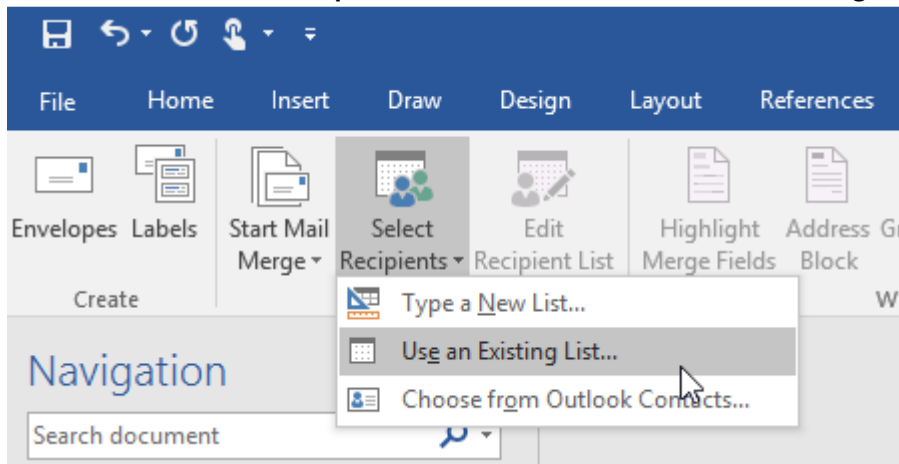
2. Now from the Mailings tab, select the Start Mail Merge button



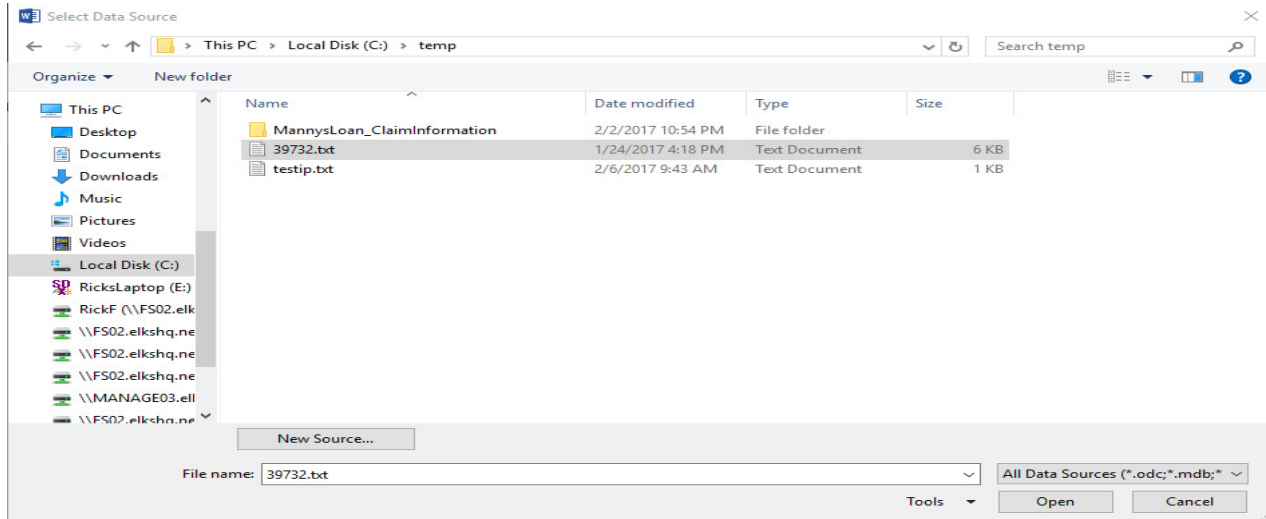
3. Select **Start Mail Merge** button then select **Letters** from the dropdown



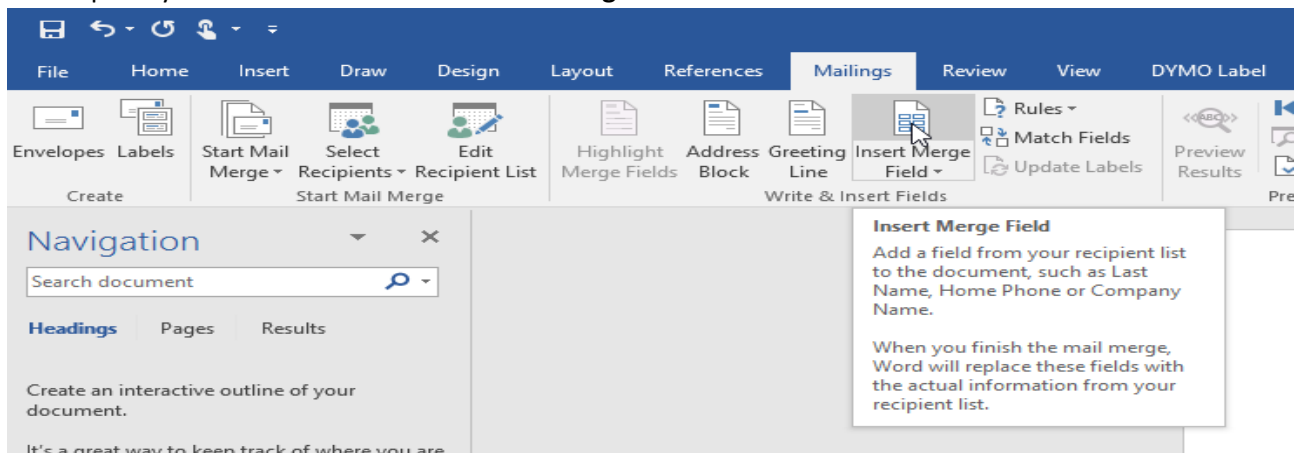
4. Now select the **“Select Recipients”** button and choose the **“Use Existing List”** item from the dropdown.



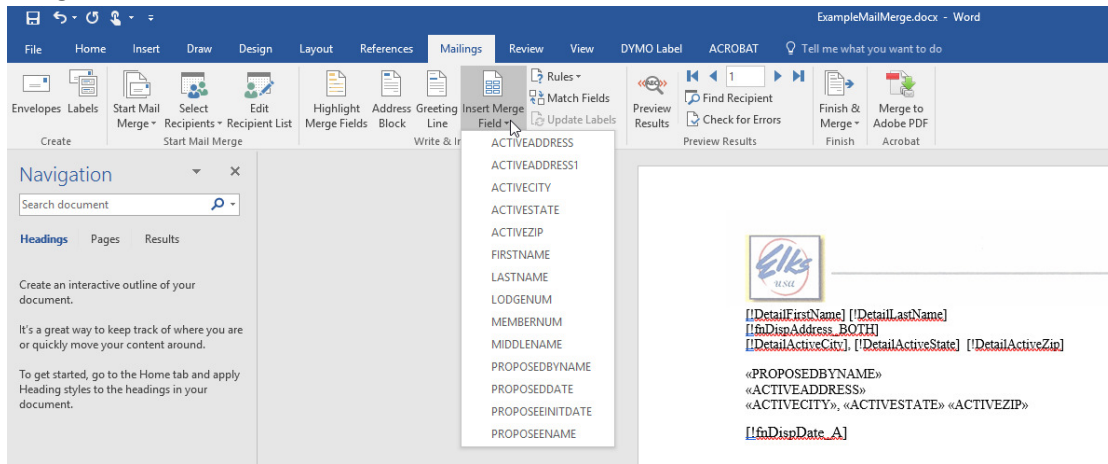
5. You will have navigate to the location of the tab delimited either the downloads folder or as we did in the **“C:\temp folder”**, your location may be different. Review the below Steps Creating the Export Filed Steps 4, 5 and 6.



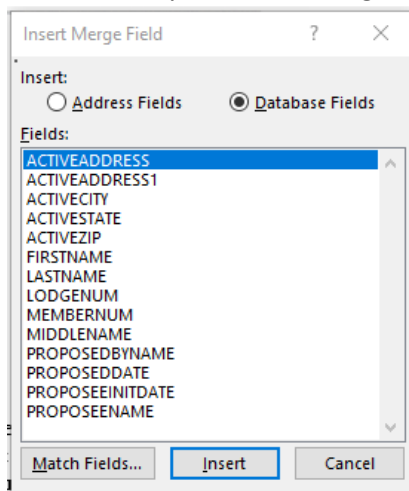
6. At this point you will want to click the **“Insert Merge Field”** button.



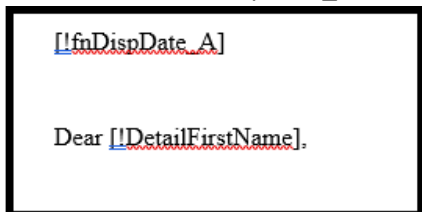
- Since you have a data source attached and you click near the bottom of the button on the dark down arrow a list of fields will appear that you can choose from. Insert each field you want. You can also add a comma, space and line as you add them. Or you can add all the fields first then move them around to where you want. Make sure though that you keep the fields enclosed in the “<< field >>” as they were inserted. Make sure you insert both the ACTIVEADDRESS AND ACTIVEADDRESS1 otherwise you may be missing apartment numbers on your final merge.



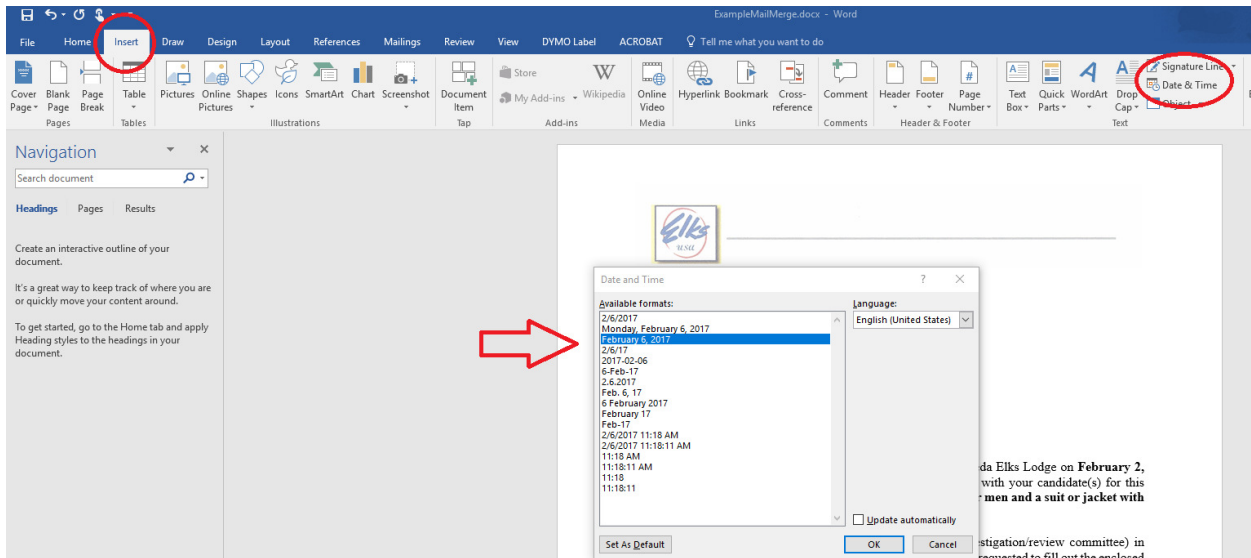
- If you clicked directly on the “**Insert Merge Field**” button instead of the bottom near the back down arrow the field dialog will look like the popup below and not the drop down. Both steps 7 and 8 accomplish the same thing so don’t worry about it looking one way or the other. Mentioning it here to eliminate any possible confusion.



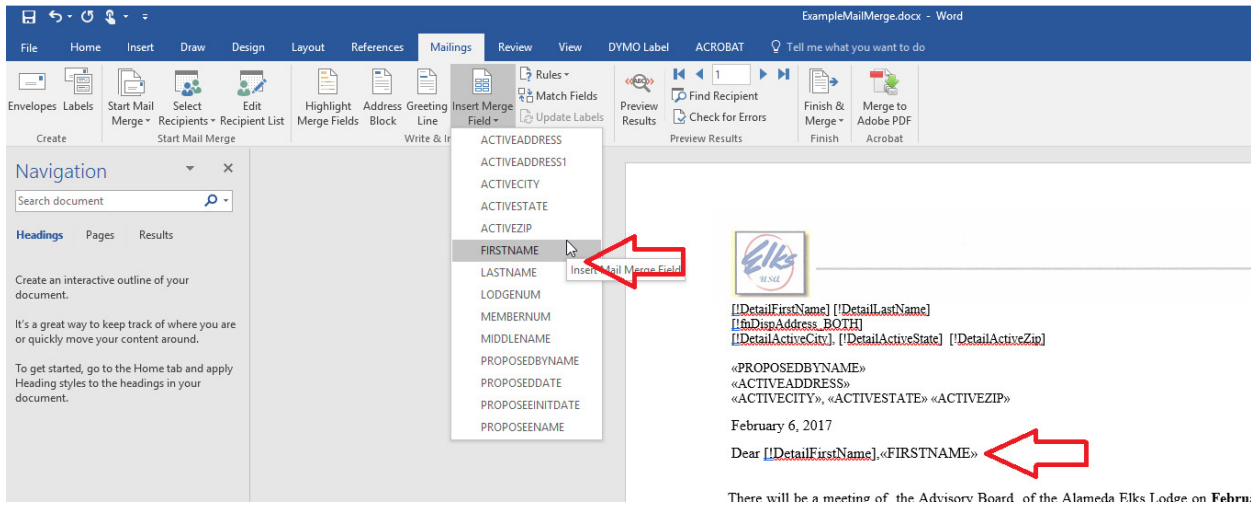
- The date field [!fnDispDate\_A] can simply be replaced with the current date.



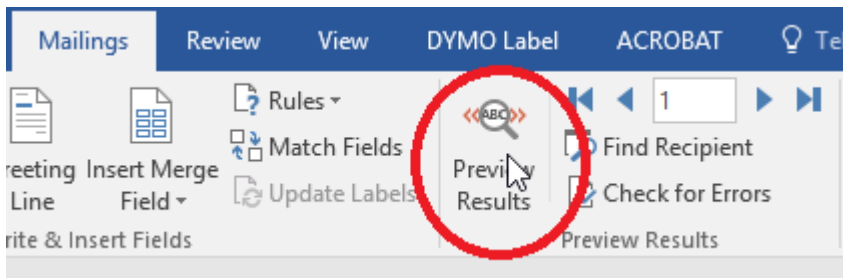
To do this highlight the [!fnDispDate\_A] now from the “**Insert Tab**” select the “**Date & Time**” button and select the date format from the list provided in word. See next page.



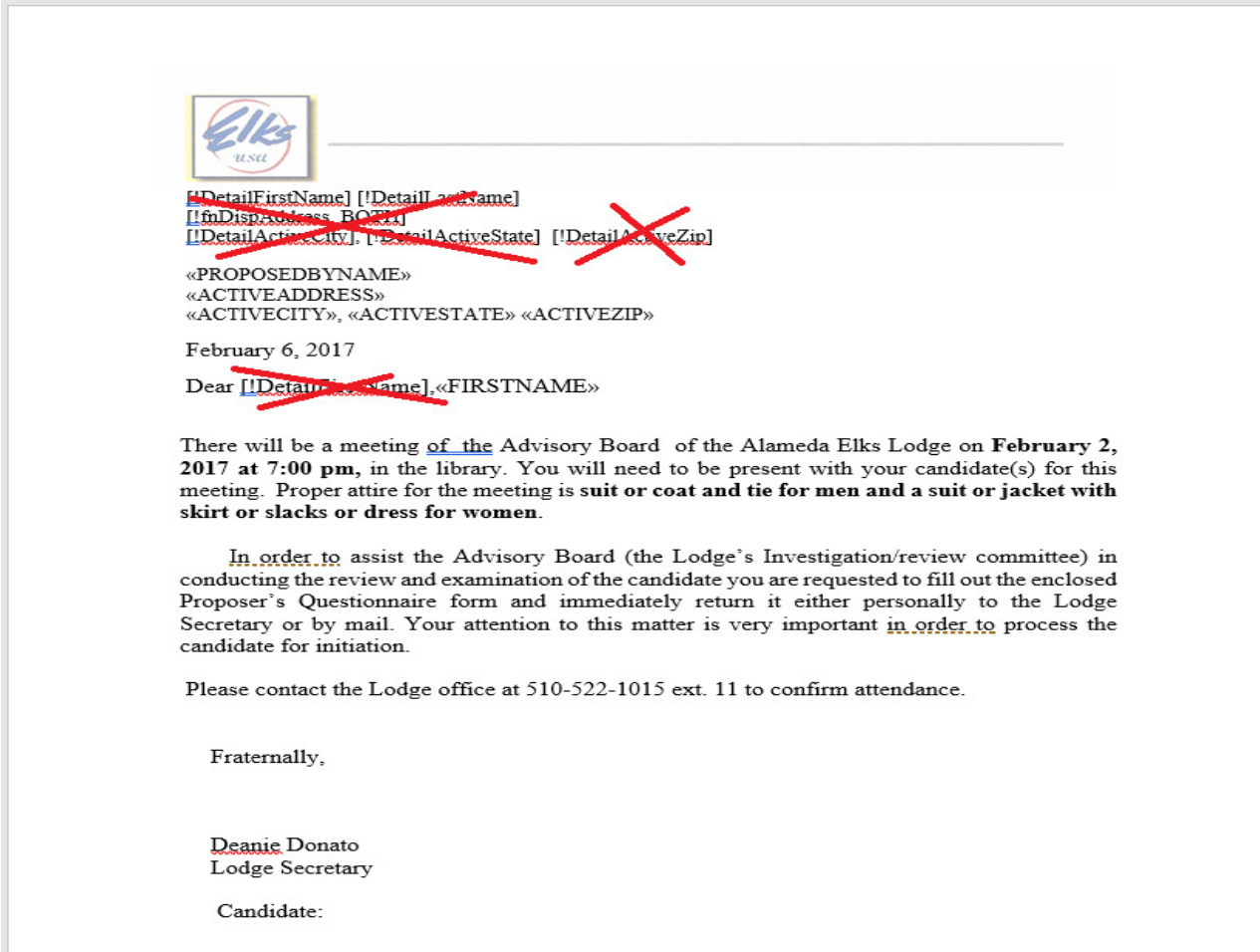
10. Repeat steps 7 for any other fields you want to insert.



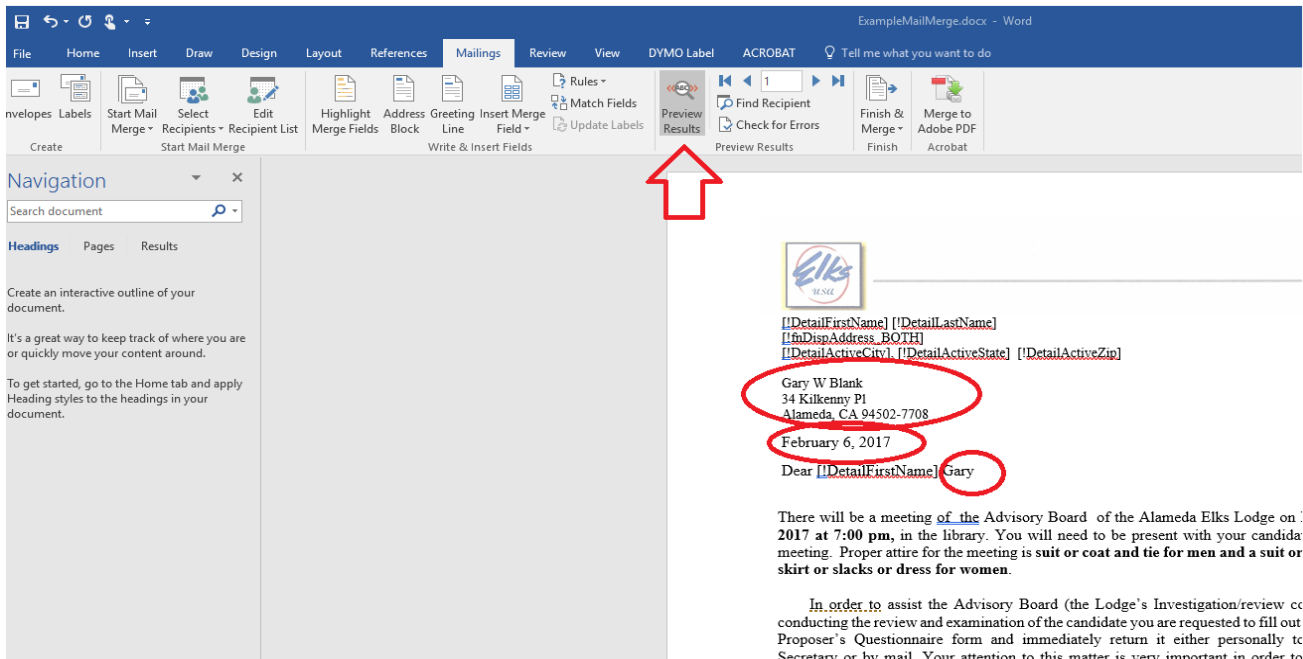
11. Once you are done inserting fields it would be a good time to see how it looks. Click the “Preview Results” button to see how it looks, to go back to edit mode simply click this button again to return to edit mode and make more changes if needed.



12. You will want to delete the old fields from clms2pc those are the fields enclosed by brackets “[!FieldName]” since these have been replaced with the fields from the tab delimited file.

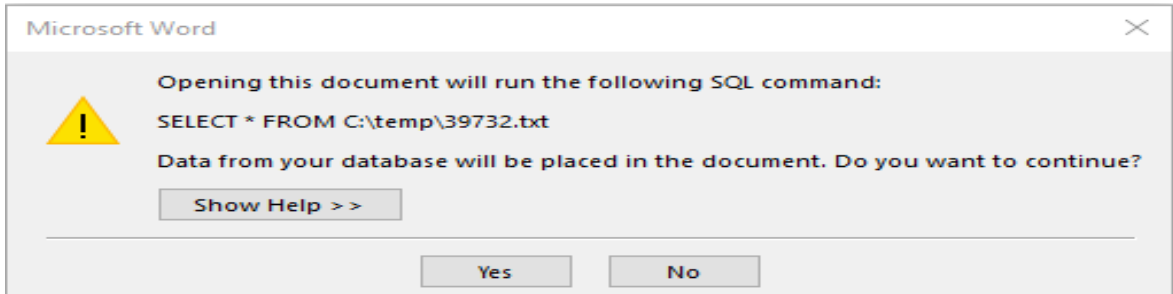


13. Now that you have cleaned up your mail merge document go ahead and save.

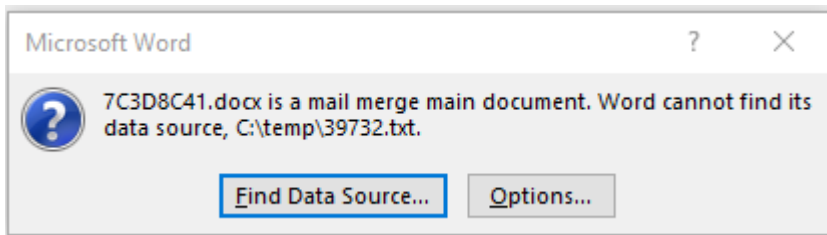


14. Depending on your computer and how office is installed you may have to re-attach the data source every time you perform a mail merge. You would have to do this anyways since the download file is always called something else. So below I will show you the worst case scenario for connecting to a new source with this file or another. Go ahead and open the mail merge document you created.

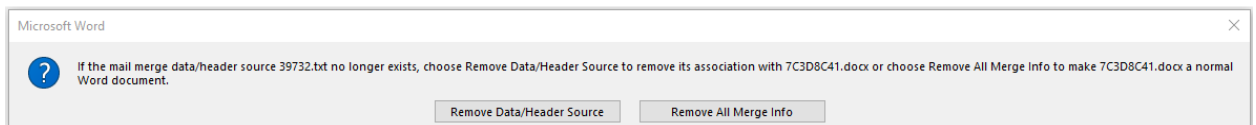
- a. You will be prompted informing you that you about to import data into your document. Click the “Yes” button.



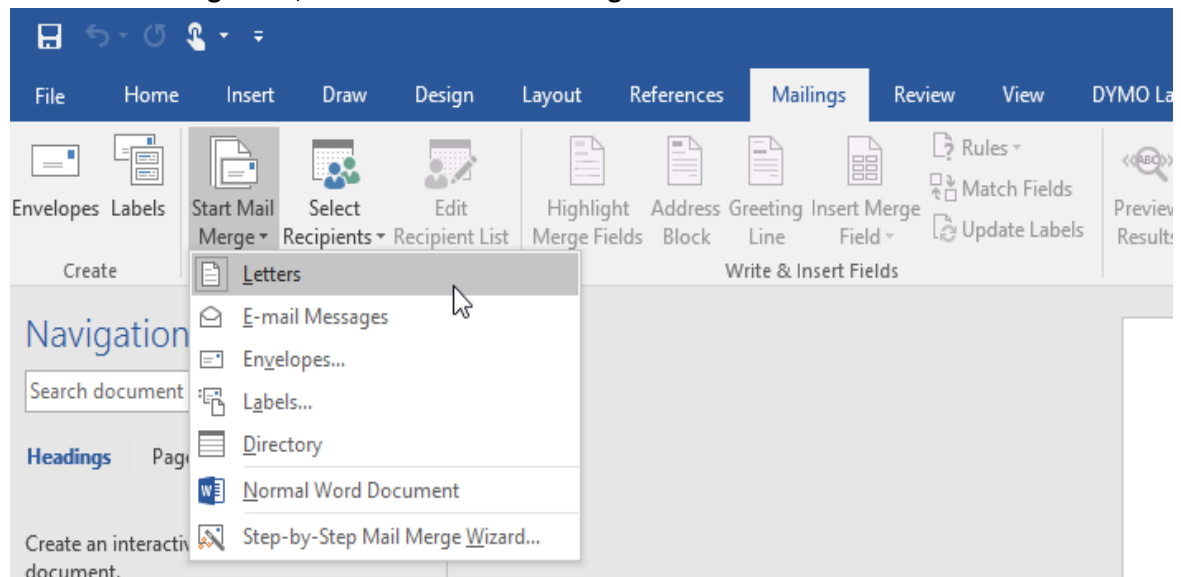
- b. Since you probably downloaded a new file and it would have a different name you will have to re-attach. So click the Options button.



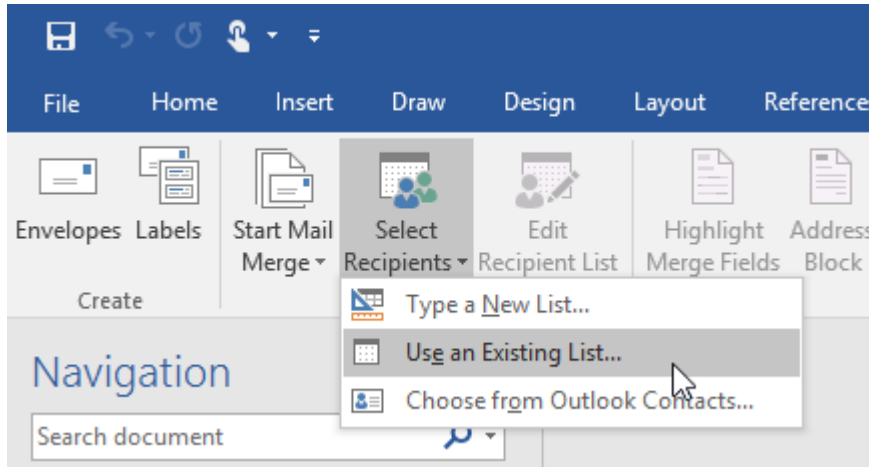
- c. Click the “Remove Data/Header Source” button. Do not click the “Remove All Merge Info”.



- d. Since you already inserted the fields you wanted previously all you need to do is the following.
  - i. Click the “Mailings” Tab, Click the “Start Mail Merge” button select “Letters” from the list.



- e. Click the Select Recipients button and choose the Use an Existing List... option.



- f. Locate your data source
- g. Import like you did prior.
- h. If you want to save these letters, I recommend that you do a **“Save As”** to another file name. The only time you want to save the actual merge document is when your changing the data source to different file. It’s always a good idea to create a copy of your document when creating a mail merge document too that way you have something to go back to if needed.