PULLING SIGNATURE INFORMATION INTO FORMLETTERS FROM A SINGLE REFERENCE FILE

Setup Instructions

Note: These instructions reference TAM fields but they work equally well in Vision and Epic. Just make sure you use the appropriate datafields and choose a location for the reference file(s) that is accessible to all users.

How it works:
- There are two WORD fields in the letter template.

  o The first is the {SET *variablename <TAM datafield>* } field, which assigns a value to a variable name we choose. So in the CSR letter, we have the following:
    {SET CSRCODE <CUST.INS.CSRCODE> }
    This creates a variable – CSRCODE – and gives it the value of the CSR code on the client when we run the letter. So if the CSR code is GB, the variable CSRCODE will now have the value GB.

    - Why do we need to do this? Because we are going to go out and read a second document (see the next item), and we cannot have TAM datafields in this second document – they won't get converted by the TAM/Word macro. So we need to create a Word variable (CSRCODE in this example), which will be read in the second document.

    - In the Producer letter, which includes the signature, we have two SET commands because we need both the Producer code (assigned to variable PRDCR) and the Producer name (assigned to variable PRDNAME).

    - The second is the {INCLUDETEXT *"filename and path"* } field, which tells Word to include the contents of the file specified in the letter at the point where the command is. Some important things to note about the filename and path:

    - The entire entry must be enclosed in double quotes " ".

    - There must be two \ (backslashes) between the items in the path, not single backslashes as we are used to. So in the example file the field reads
      { INCLUDETEXT "L:\\DOC\\Cformlet\\ZXTNSNS.RTF" }
      I have put the quotes and backslashes in a larger font to emphasize them in the line above.

    - The path can be to any file location accessible to your workstations, and can even be a URL rather than a drive and folder reference. (Obviously it must be where the actual file resides.) In the example I have created these files through Document Setup in TAM, so they are in the CFORMLET folder, but it is not

necessary for them to be created there. If you pointing to a URL rather than a drive & folder, the address starts with four backslashes, and all other backslashes are doubled – like this: {INCLUDETEXT \\\\servername\\etc }

- The reference file contains a string of IF statements that read the variable name and puts the appropriate information, based on the value of the variable, into the letter. There is nothing unusual about these IF statements except that they read the value of the variable (for instance CSRCODE) to do the comparison. So in the CSR reference file, the IF statement begins:
  {IF {REF CSRCODE } = *"GB" "*GB info goes here*" ""* }
  { REF *variablename* } is another Word field that reads the value of the variablename.

  o Be sure to not have any extraneous text or characters (including line returns) in this reference file. ***Everything*** in that file will be dumped into the letter (as long as it passes the test in the IF statement).

You can set up a file that works the same way but also pulls in the actual signature image. Because we want the Producer name below the signature but above the rest of the information, incorporate it into the reference file, using the {SET PRDNAME } field in the letter and the {REF PRDNAME } field in the reference file.