



# Mail Merge User Guide

## **Important Notice**

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## Summary

TaiRox Mail Merge integrates Sage ERP Accpac with Microsoft Word's mail merge function. The integration presents an Accpac-style interface from within the Accpac desktop. Mail Merge eliminates the need to export Accpac data, manually manipulate that data, and to define the resulting file as a Microsoft Word "data source".

Mail Merge is designed for the production of merge documents from Accpac, and is integrated with A/P vendors, A/R customers and US and Canadian Payroll Employees. All relevant Accpac fields are presented with definitions to ease the preparation of a "mail merge template" within Microsoft Word. Optional fields defined for the modules are also available for selection into a mail merge document.

Vendors, customers, or employees are selected using the exact mechanism used in Accpac's reports. After selection, the selected items can be "cherry-picked" for mail merge. The cherry-picking mechanism can be adapted for reports by TaiRox programmers. Contact TaiRox for more details.

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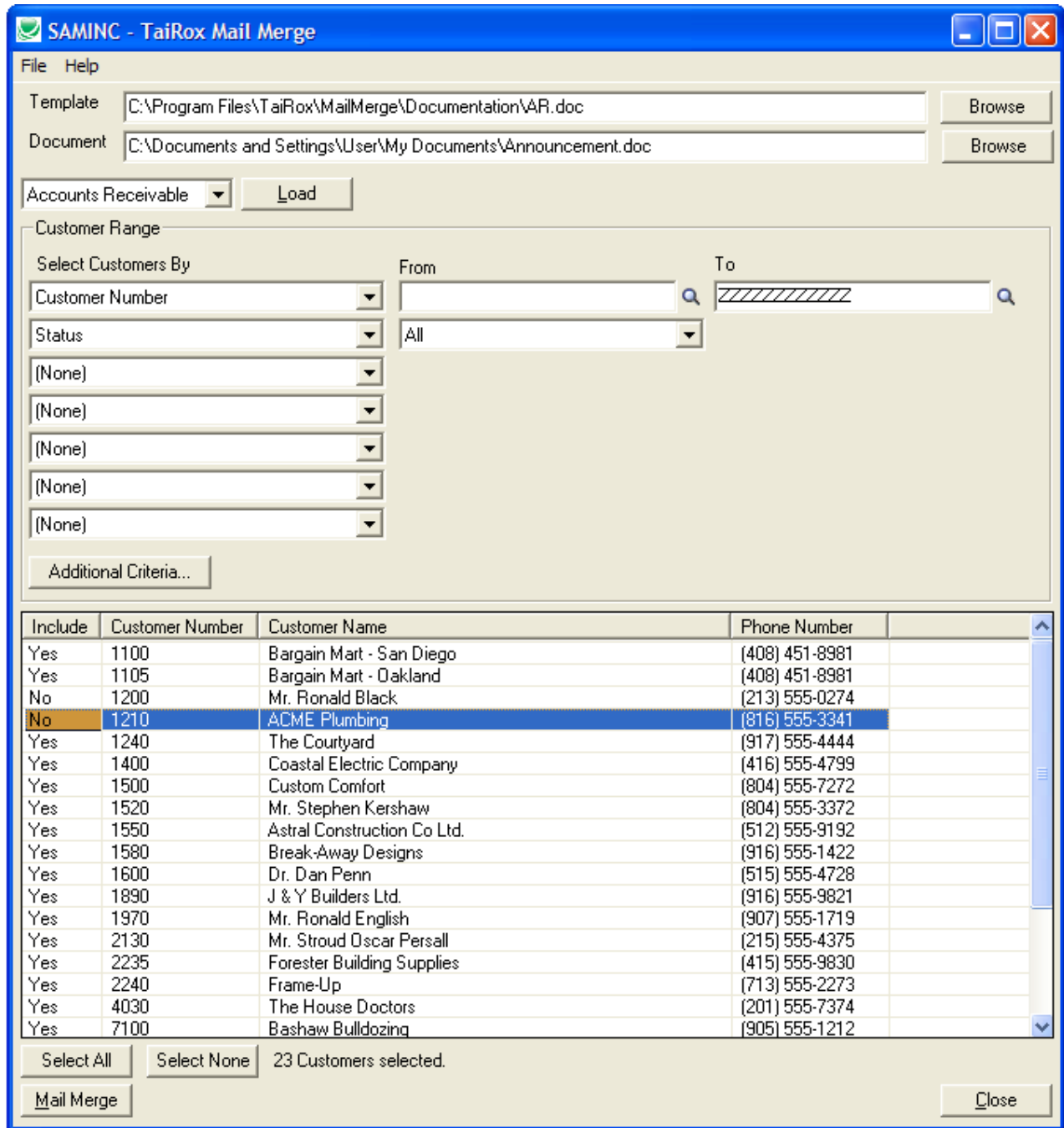
## Overview

Mail Merge operates from within Accpac, using Accpac's look-and-feel. A single screen provides access to A/P vendors, A/R customers and US and Canadian Payroll employees. On that screen a drop-down list is presented prompting for the Accpac module the mail merge is to be performed on (A/R, A/P, US or Canadian Payroll depending upon what is installed and activated).

The screenshot shows the 'SAMINC - TaiRox Mail Merge' application window. The interface includes a menu bar with 'File' and 'Help'. There are two text input fields: 'Template' (with path C:\Dev\MailMerge\Documentation\VAR.doc) and 'Document' (with path C:\Documents and Settings\User\My Documents\Announcement.doc), each with a 'Browse' button. A dropdown menu is open, showing 'Accounts Receivable', 'Accounts Payable', and 'US Payroll'. Below the dropdown is a 'Load' button. The main area contains a table with columns 'From' and 'To'. There are seven rows, each with a '(None)' dropdown. Below the table is an 'Additional Criteria...' button. At the bottom, there is a table with columns 'Include', 'Customer Number', 'Customer Name', and 'Phone Number'. Below this table are buttons for 'Select All', 'Select None', 'Mail Merge', and 'Close'.

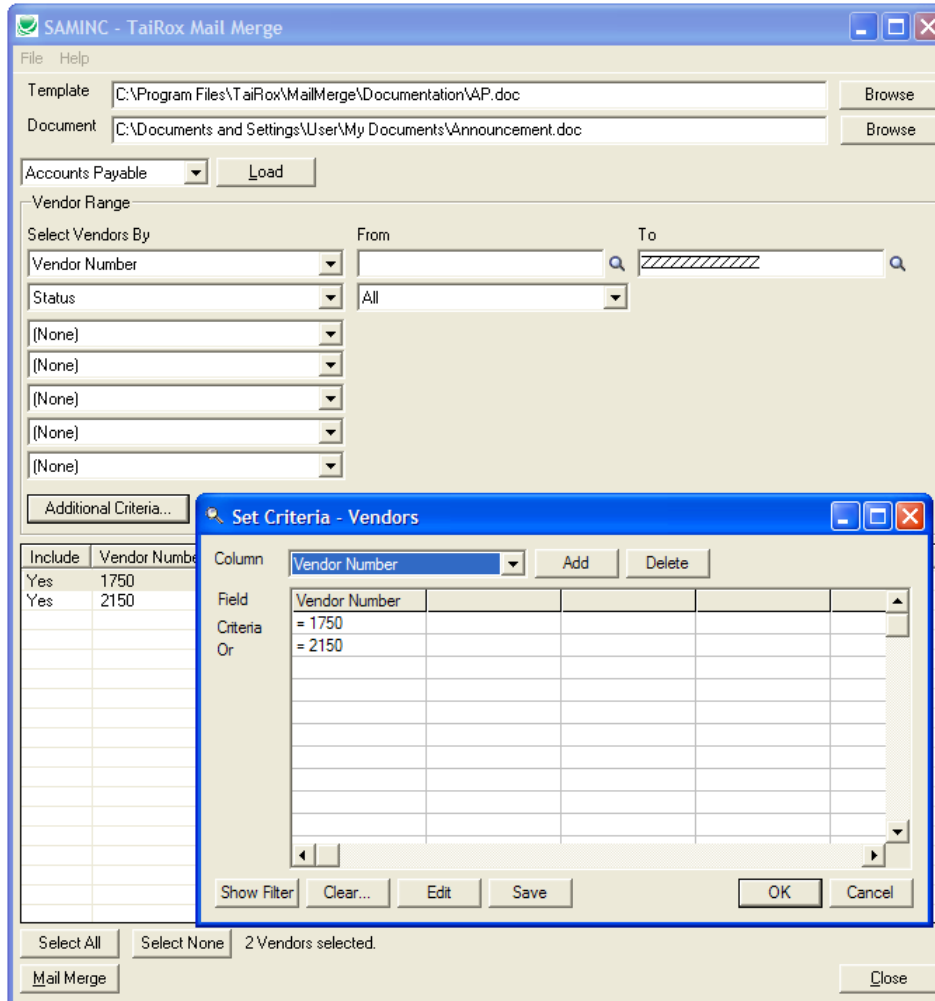
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When a module is selected, an interface exactly like Accpac's is presented (each module has a slightly different interface) to select the items appropriate for that module (vendors, customers or employees). Extending Accpac's interface, a scrolling list of items is displayed and the items can be included or excluded on an individual basis.



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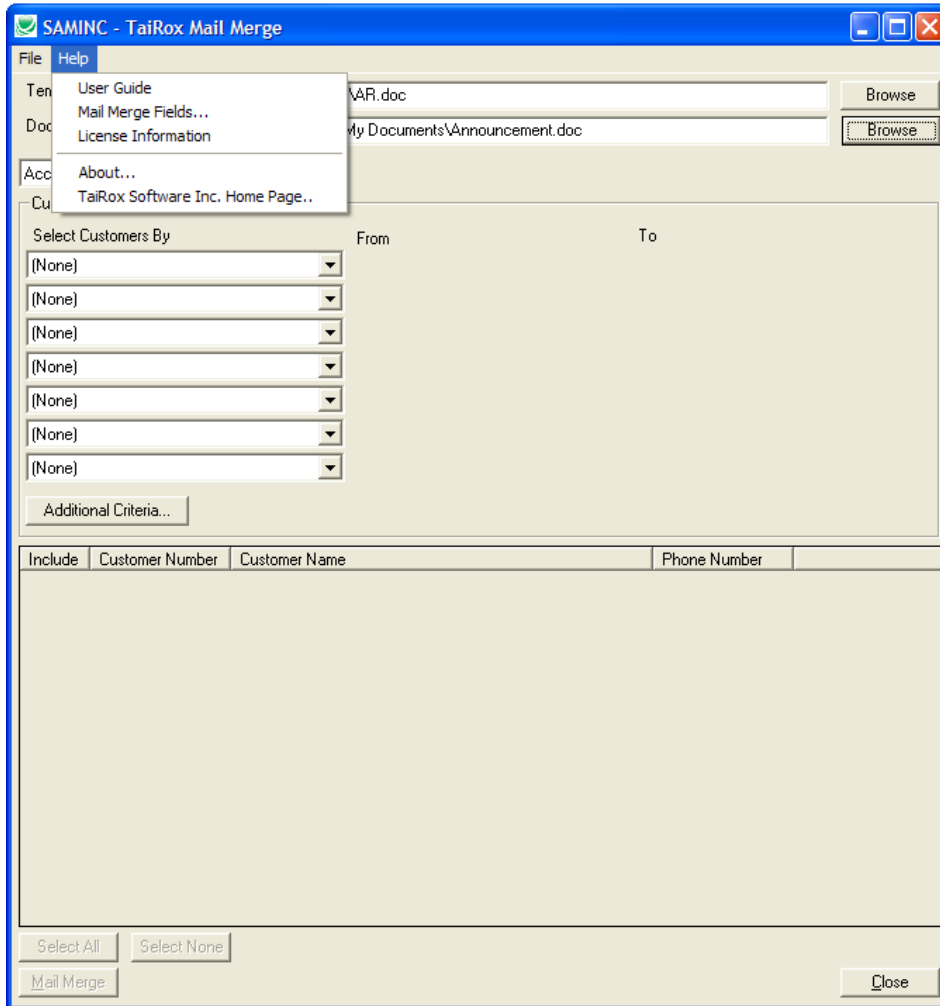
If the item selection ranges is not sufficient to select records from you can press the “Additional Criteria...” button where you can enter additional criteria to select items by. To set the criteria add and set the columns appropriately and then press the **Save** button followed by the **OK** button. To clear the additional criteria press the **Clear** button, followed by the **Save** button, and then **OK** button.



Users must then select a mail merge template (MS Word document) and an output document location. Mail Merge will then call Microsoft Word to perform the mail merge operation, producing an output file of merged documents.

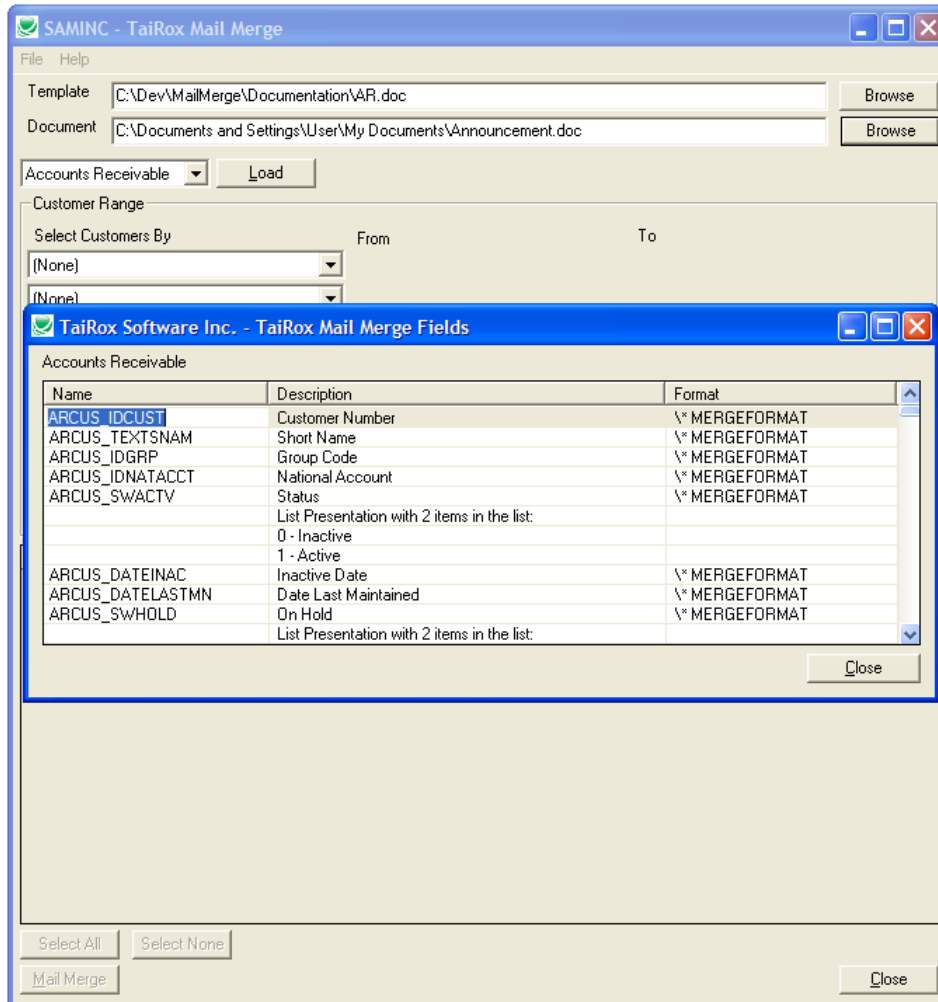
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Mail Merge contains field names with extended descriptions so as to ease the creation of a mail merge template. Microsoft Word is used to create the template and users must know how to insert mail merge fields into a word document. Installed with Mail Merge are sample templates for A/P, A/R, US and Canadian Payroll which contain commonly used merge fields. These documents can be used to start creating a template. To access the list of mail merge field names select **Help** from the application menu, and then select **Mail Merge Fields...**



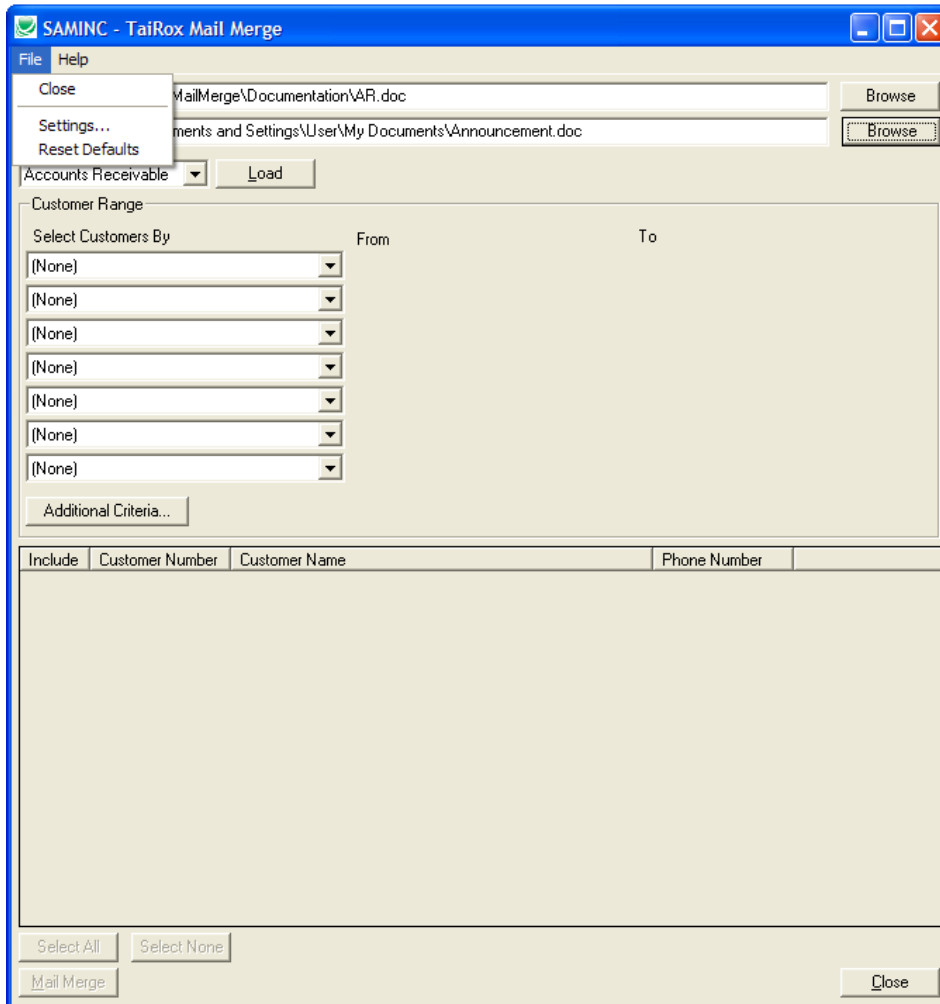
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A list of mail merge fields is displayed as well as the corresponding mail merge format that you can copy and paste from into your mail merge template.

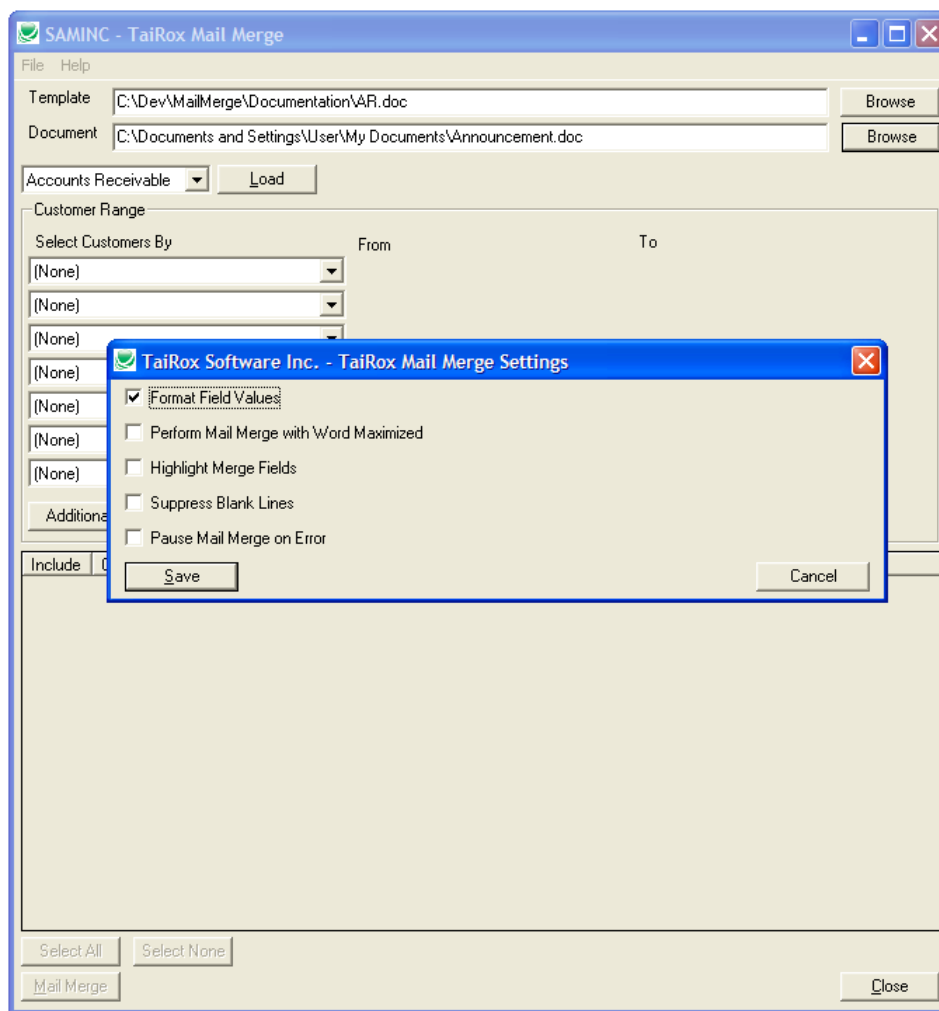


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There are additional settings that control the operation of TaiRox Mail Merge and its interaction with Microsoft Word. To change settings select the File menu choice followed by Settings...



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**Format Field Values:** This setting determines whether or not to use the field presentation information defined for the Accpac field, or whether to use the raw data value. For example the field ARCUS\_SWACT or Customer Status field has 2 presentation values Inactive, and Active, which represent the raw integer values of 0 and 1 respectively. Checking or not checking this setting determines whether a merge value of Inactive or 0 is used to merge into your document.

**Perform Mail Merge with Word Maximized:** This setting determines whether Microsoft Word is run in the background, or is launched in the foreground and you can view the mail merge operation.

**Highlight Merge Fields:** To aid in the proofing of your merged documents you can use this setting to highlight the merge fields.

**Suppress Blank Lines:** By default, Microsoft Word suppresses blank lines in a mail merge when the result of a MERGEFIELD is blank. However, when you perform a conditional mail merge, the result of a conditional field may be blank. This causes an extra blank line. You can use this setting to determine whether to suppress blank lines or not.

**Pause Mail Merge on Error:** You can use this setting to pause the mail merge process and display a troubleshooting error should you encounter difficulty running TaiRox Mail Merge.