TaiRox Mail Merge

TaiRox Mail Merge integrates Sage 300 with Microsoft Word's mail merge function. The integration presents a Sage 300 style interface from within the Sage 300 desktop.

Mail Merge is designed for the production of merge documents from Sage 300, and is integrated with A/P vendors, A/R customers, I/C items and US and Canadian Payroll employees. It eliminates the need to export data from Sage 300, manually manipulate that data, and define the resulting file as a Microsoft Word "data source".

All A/R, A/P, I/C, and PR merge data fields are displayed with field definitions to make it easy to prepare a "mail merge template" within Microsoft Word. Optional fields can also be added to mail merge documents.

Once you have created mail merge documents, you can select vendors, customers, items or employees using exactly the same mechanism used to select records in reports. After selecting ranges of data, you can "cherry-pick" the results for the mail merge.

Mail Merge lets you:

- Perform the mail merge operation from the Sage 300 desktop.
- Select a number of print options for the merge documents, such as data formatting and blank line suppression.
- Select ranges of vendors, customers, items or employees using ranges of up to seven fields.

TaiRox Mail Merge selects ranges with the same mechanisms used by core modules when printing reports.

- Specify the vendors, customers, items or employees by importing an Excel spreadsheet list.
- Specify additional criteria for record selection.
- "Cherry-pick" records for generating merge documents from the selected set of vendors, customers, items, or employees.
- Click the Mail Merge button to complete the document merge operation for all included records in one step.
- View a log of all document merges after processing.

Running Mail Merge

The Mail Merge icon appears in four locations under TaiRox Productivity Tools – in the Accounts Payable, Accounts Receivable, Inventory Control, and Payroll Tools folders on the Sage 300 desktop.



Note that Enterprise Productivity Tools appear <u>only</u> if you have an Enterprise license from TaiRox Software.

Sage 300 - Sample Company Lim	ted					Administrator		c	Sage 300 - Sample Company Limited Administrator X
Home									Home
Accounts Payable Tools Accounts Receivable Tools General Ledger Tools	Inventory Contr	trol Tools (Mail Merg	e)						TaiRox CRM and Collections TaiRox Productivity Tools Accounts Payable Tools Hierard to: Doo Thomson TaiRox VortNeBPEINC
Inventory Control Tools Multi-Company Tools Order Entry Tools	Dealer: TAIROX S CC: TAIROX S	SOFTWARE INC SOFTWARE INC							Accounts Receivable Tools Dealer: TAIROX SOTTWARE INC General Ledger Tools CC TAIROX SOTTWARE INC Investory Center Tools
Payroll Tools Purchase Order Tools Visual Process Flows	Extended Inventory Extend	ded Locations Extended Vendor Details	Extended Customer Details	Extended Location Details	Extended Manufacturers' items	Extended Item Pricing	Extended Reorder Quantities		Multi-Company Tools Order Entry Tools Payroll Tools Sync Timecards
A/P Transactions A/R Transactions B/K Reconciliation C/P Transactions	Extended I/C Stor Segment Codes	sck Reorder Mail Merge	Fix Item Valuation Errors	Delete Items	Delete BOMs	Kit Component Usage Inquiry	Remove Items from Price Lists		Purchase Order Tools ✓ Visual Process Flows A/P Transactions A/R Transactions
Saga For Help, press F1						Session D	ate: 2024-04-08	10	Sogo For Help, press F1

Select the appropriate Mail Merge icon from the Sage desktop to create merge documents using a selection of vendors, customers, inventory items or employees.

Choose the merge document template and output document for the merge

Users must first select a mail merge template (MS Word document) and an output document.

🗾 PTDEM	O - Mail Merge	-		×			
<u>F</u> ile <u>H</u> elp							
Template	C:\Sage300\XL61A\AddressUpdate-Location2.doc		Browse				
Document	C:\Sage300\XL61A\Vendor-UpdateLetter.docx		Browse				
Accounts Payable							

If you are sending letters to all vendors (for example), you can click the load button and then click the Mail Merge button to create merge documents in the "Document" file.

• Note that the program date choice (in the above screen, Accounts Payable) depends on the which Mail Merge icon you choose.

Selecting vendors, customers, inventory items or employees

Choose data ranges for creating merge documents:

Vendor Range		
Select Vendors By	From	То
Vendor Number -	Q	ZZZZZZZZZZZ Q
(None)		
(None) Status Status Stat Date Group Code Account Set Currency Code Terms AC# Accounts Payable Contact Type Discount Grace Period Due Date Grace Period		
Note Vendor's Purchasing Representative	ame	Phone Number
UPS Zone Vendor Class		

- You can use up to seven fields to specify ranges of vendors, customers, inventory items, or employees for the merge.
 - Vendors vendor number, status, start date (to send to new vendors), group code, account set, currency code, terms – or any of the optional fields used for vendor records (as shown in the dropdown above).
 - Customers customer number, status, on hold, account type, national account, group code, start date (to send to new customers), account set, currency code, billing cycle, terms, territory code, salesperson1 – or any of the optional fields used for customer records (as shown in the dropdown above).

- items by item number, item category, or account set or any of the optional fields used for item records.
- Canadian Payroll employees by employee list, employee number, employment status, birth date, hire date, termination date, position, part-time, pay frequency, cheque language, workers compensation code, overtime schedule, shift differential schedule, supervisor, last review date, date of last raise, or work classification code.
- US Payroll employees by employee list, employee number, employment status, birth date, hire date, termination date, position, part-time, pay frequency, check language, workers compensation code, overtime schedule, shift differential schedule, supervisor, last review date, date of last raise, or work classification code.

For instructions on importing a list of mail merge recipients using the **File > Import** menu choice, see <u>Importing a List of Mail Merge Recipients</u>.

Choose additional criteria:

		Additional Cr	iteria			
I	Inc	🔍 Set Crit	eria - Vendors			
	Γ	Column	State/Prov.	✓ <u>A</u> dd <u>D</u> elete)	
I		Field	State/Prov.			
I		Criteria	= BC			
I		Or		-		

- Click Additional Criteria to further restrict the records retrieved for the mail merge. In this case, we are only going to use vendors in BC.
- Click OK to save.

Load the list of selected records and choose which ones to use:

• Click the Load button to display the selected list of records.



o Go back and adjust the ranges or additional criteria if necessary.

Importing a List of Mail Merge Recipients

Important: If you are importing a mail merge recipient list, you must first select a mail merge template (MS Word document) and an output document. See <u>Choose a merge template and output document</u>.

• Choose File > Import from the Mail Merge menu.

SAMLTD - Ma	il Merge	-		×
Customize	age300\XL61A\Documentation\UP.doc		Browse	
Import	ont\Desktop\Employees.docx		Browse	
Close	Load			

• Select the list of mail merge recipients that you want to process.

S Open					×
Computer + Loca	I Disk (C:) > Sage300 > XL61A > Docume	entation 🕨		Search Documentation	Q
Organize 💌 New folder					
📕 TX66A	Name	Date modified	Туре	Size	A
TX67A	🍌 ENG	11/18/2020 12:45	File folder		
I UDEEA	BillsOfMaterial.xlsx	11/12/2020 1:24 PM	Microsoft Excel W	9 KB	
	Customers.xlsx	11/12/2020 1:24 PM	Microsoft Excel W	10 KB	
	Employees.xlsx	11/12/2020 1:24 PM	Microsoft Excel W	10 KB	=
UT73A	items.xlsx	11/12/2020 1:24 PM	Microsoft Excel W	10 KB	-
1/3C	ItemSubstitutes.xlsx	11/12/2020 1:24 PM	Microsoft Excel W	10 KB	
UX66A	Orders.xlsx	11/18/2020 1:00 PM	Microsoft Excel W	9 KB	

Note that you the list type will depend on which version you Mail Merge you are running – for example, you will import a list of customer numbers if you run Mail Merge from the Accounts Receivable Productivity Tools folder.

 The program will import the list and load all relevant recipients into the grid – setting all recipients to "Include" – and display a message stating the number of recipients that were successfully loaded, and the number of recipients that could not be imported.

Include	🖸 Cus	tomer Number	Customer Name	Phone Nu	umber	Salesperson C
Yes	1100		Bargain Mart - San Diego	(408) 451	-8981	BB, KW
Yes	1200		Mr. Papald Plack	(212) 555	0274	BB, DS
Yes	1210	🚺 Message		×	341	DA
Yes	1400				799	RB
		- Message -				
		Description \Customers Merge User	4 Customers imported from 'C:\Sage300\XL61A\Documentatio xlsx'. 1 Customers could not be imported. Please see the Mail Guide for more details	n 🔺		

All valid records will be loaded into the grid at the bottom of the screen. You can then confirm which items you want to merge.

In the above screen, one of the customer numbers was invalid, so the program could not import a record.

Choosing Recipients from the Grid

 Use the Select All and Select None buttons below the grid to set all records to Yes for Include or No to exclude.

• Double-click in the Include column to "cherry-pick" from the records:

Include	🖸 Vendor Number	Vendor Name	Phone Number	*
No	1200	Chloride Systems	(816) 555-3341	
Yes	1350	Excide Industrial Batteries	(713) 555-4799	
Yes	1400	Coastal Heating of Ottawa	(613) 555-1254	=
No V3	1450	Intercontinental Electronics	(512) 555-9192	

 Click the Vendor Number or Customer Number column in A/P or A/R Mail Merge heading to drill down on the selected record to confirm the details:

Include	🖪 Vendor Number	Vendor Name	Phone Number
No	1200	Chloride Systems	(816) 555-3341
Yes	1350	Excide Industrial Batteries	(713) 555-4799
Yes	1400	Coastal Heating of Ottawa	(613) 555-1254
No V3	1450	Intercontinental Electronics	(512) 555-9192

Click the Mail Merge button to run the mail merge:

Click the Mail Merge button at the bottom of the screen. If the target document does not exist, the program will display a message and create the document for you when you proceed.

When the merge operation is complete, the program asks if you want to open Microsoft word to print the merge document.



Additional Mail Merge settings

To display additional settings for mail merges, select **File > Settings** from the Mail Merge menu.

PTDEMO - Mail	Merge	-		×
C <u>u</u> stomize	0\XL61A\APVENtest.doc		Browse	
Close	0\XL61A\target.docx		Browse	
Settings				
Reset Defaults	From To			
(None)	• •			

The settings form appears as follows:

💌 PTDEMO - Mail Merge Settings	—
✓ Format Field Values	
Perform Mail Merge with Word Maximized	
Highlight Merge Fields	
Suppress Blank Lines	
Pause Mail Merge on Error	
Save	Cancel

Format Field Values: This setting determines whether or not to use the field presentation information defined for the Sage 300 field, or whether to use the raw data value.

For example, field ARCUS_SWACT (Customer Status) has 2 presentation values, Inactive, and Active, which represent the raw integer values of 0 and 1 respectively.

If you select this setting, the program will insert a merge value of "Inactive" for inactive customers; if you do not select it, the program will insert a "0" into your document.

Perform Mail Merge with Word Maximized: This setting determines whether Microsoft Word is run in the background or it is launched in the foreground (letting you view the mail merge operation).

Highlight Merge Fields: You can use this setting to help proof your merged documents.

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 – which will cause 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 problems while running the mail merge.

Creating Merge Templates for Mail Merges

Sample mail merge templates in \Sage300\XLxxx\Documentation

TaiRox Productivity Tools includes the following sample mail merge documents for A/P, A/R, I/C, US Payroll and Canadian Payroll which contain commonly used merge fields. The I/C sample is an item label. You can use these documents as a starting point for creating your own templates.

AP.Doc: Includes the following fields -- «APVEN_VENDORID», «APVEN_VENDNAME», «APVEN_AMTBALDUET», «APVEN_SWACTV», and «APVENO_VENDORCLASS».

AR.Doc: Includes the following fields -- «ARCUS_IDCUST», «ARCUS_NAMECUST», «ARCUS_AMTLASTSTT», «ARCUS_SWACTV», and «ARCUSO_UPSZONE».

CP.Doc: Includes the following fields -- «CPEMPL_EMPLOYEE», «CPEMPL_FULLNAME», «CPEMPL_MINWAGE», and «CPEMPL_STATUS».

IC.Doc: Includes the following fields and also shows you how to create a label page with multiple labels – «ICITEM_FMTITEMNO» and «ICITEM_DESC».

UP.Doc: Includes the following fields -- «UPEMPL_EMPLOYEE», «UPEMPL_FULLNAME», «UPEMPL_MINWAGE», and «UPEMPL_STATUS».

Displaying available merge fields

To view a list of mail merge fields, select Help > Mail Merge Fields from the TaiRox Mail Merge menu. The program will display a list of mail merge fields along with the corresponding mail merge format that you can copy and paste into your mail merge templates.

🗾 P1	🛃 PTDEMO - Mail Merge				×
File	<u>H</u> elp				
Templa	User Guide			Browse	
Docun	Mail Merge Fields			Browse	
Accou	License Information	✓ Load			
Vendo Select (None	TaiRox Home Page <u>A</u> bout	From To			

Mail Merge contains field names with extended descriptions to make it easier to create mail merge templates. For example, the following Accounts Payable fields will appear if you select "Mail Merge Fields" from the Mail Merge menu in the TaiRox Productivity Tool > Accounts Payable Tools folder.

PTDEMO - Mail Merge	🖉 PTDEMO - Mail Merge 💼 🔳 💌				
Accounts Payable					
Name	Description	Format			
APVEN_VENDORID	Vendor Number	* MERGEFORMAT			
APVEN_SHORTNAME	Short Name	* MERGEFORMAT			
APVEN_IDGRP	Group Code	* MERGEFORMAT			
APVEN_SWACTV	Status	* MERGEFORMAT			
	List Presentation with 2 items in the list:				
	0 - Inactive				
	1 - Active				
APVEN_DATEINAC	Inactive Date	* MERGEFORMAT			
APVEN_DATELASTMN	Date Last Maintained	* MERGEFORMAT			
APVEN SWHOLD	Op Hold	* MERGEFORMAT			
		Close			

Using Microsoft Word to create a merge template

You use Microsoft Word to create merge template documents.

To add merge fields to a document in MS Word:

- Open the merge document.
- Position the cursor where you want to insert a merge field and choose Insert > Quick Parts > Field or Insert > Field (if that choice is available) or choose Insert > Field. Note that your version of Office may be slightly different than shown below.

File Home	Inse	rt Design Layout References	Mailings Review View	r Hel	p Acrobat 🔎					ि्र, Share	
Cover Page ~ Blank Page H Page Break	Table	Pictures SmartArt Online Pictures Image: Chart Shapes * Screenshot *	Store Wikipedia	Online Video	 Link Bookmark Cross-reference 	Comment	Header - Footer - Page Number -	A Text Box *	Quick Parts - Z Signature Line - T Equation - AutoText bol - bol - bol - bol -	Field Bookmark	
Pages	Tables	Illustrations	Add-ins	Media	Links	Comments	Header & Footer		Field bols	Fields Bookmarks	-04
									Building Blocks Organizer Save Selection to Quick Part Gallery		

• Choose "MergeField" as the type of field that you are inserting, and then specify the merge field name that you are inserting.

Field			?	\times
Please doose a field <u>Categories:</u> (cat) Eidd names: GreetingLine A rhyperlink rhyperlink ridde-Brother moduleFont index a refo Link Link Link Link Link Mergende Mergen	Field properties Field same, Field same, Format; Format; Uppercase Lopercase Format; Field same Fie	Field options Text to be inserted justore: Text to be inserted justore: Mapped field Vegrical formatting		
NoteRef		Preserve formatting during up	dates	
Description: Insert a mail merge field Fjeld Codes		ОК	Cano	el

You can copy the name directly from the list in the mail merge help by double-clicking the field name, and pressing CTRL+C.

芝 PTDEMO - Mail Merge		
Accounts Payable		
Name	Description	Format
	1 - On Hold	
APVEN_DATESTART	Start Date	* MERGEFORMAT
APVEN IDPPNT	Participant ID	* MERGEFORMAT
APVEN_VENDNAME	Vendor Name	* MERGEFORMAT
APVEN_TEXTSTRE1	Address Line 1	* MERGEFORMAT
APVEN_TEXTSTRE2	Address Line 2	* MERGEFORMAT
APVEN_TEXTSTRE3	Address Line 3	* MERGEFORMAT
APVEN_TEXTSTRE4	Address Line 4	* MERGEFORMAT
APVEN_NAMECITY	City	* MERGEFORMAT
APVEN CODESTTE	State /Prov	* MERGEFORMAT
		Close

File Format for an Importing Mail Merge Lists

Mail Merge lets you import lists of recipients. Note that the list type will depend on where you are running Mail Merge.

For example, you will import a list of customer numbers if you run Mail Merge from the Accounts Receivable Productivity Tools folder.

Customer List

The Excel Spreadsheet customer list for Mail Merge is a single column with "IDCUST" as the column heading in the first row.

		Α	
1	IDCUST		
2	1100		
3	1200		

Notes:

• All other columns are ignored. This means that you can add descriptions and notes to your spreadsheet without affecting the file import.

Vendor List

The Excel Spreadsheet vendor list for Mail Merge is a single column with "VENDORID" as the column heading in the first row.

	Α
1	VENDORID
2	1200

Employee List

The Excel Spreadsheet employee list for Mail Merge is a single column with "EMPLOYEE" as the column heading in the first row.

	А	
1	EMPLOYEE	
2	100020	

Item List

The Excel Spreadsheet item list for Mail Merge is a single column with "ITEMNO" as the column heading in the first row.

	Α	
1	ITEMNO	
2	A11030	
3	A11050	