TaiRox Productivity Tools User Guide

Summary - 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 eliminates the need to export 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 Sage 300, and is integrated with A/P vendors, A/R customers, I/C Items and US and Canadian Payroll Employees. All relevant 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, items or employees are selected using the exact mechanism used in reports. After selection, the selected items can be "cherry-picked" for mail merge.

Overview - Mail Merge

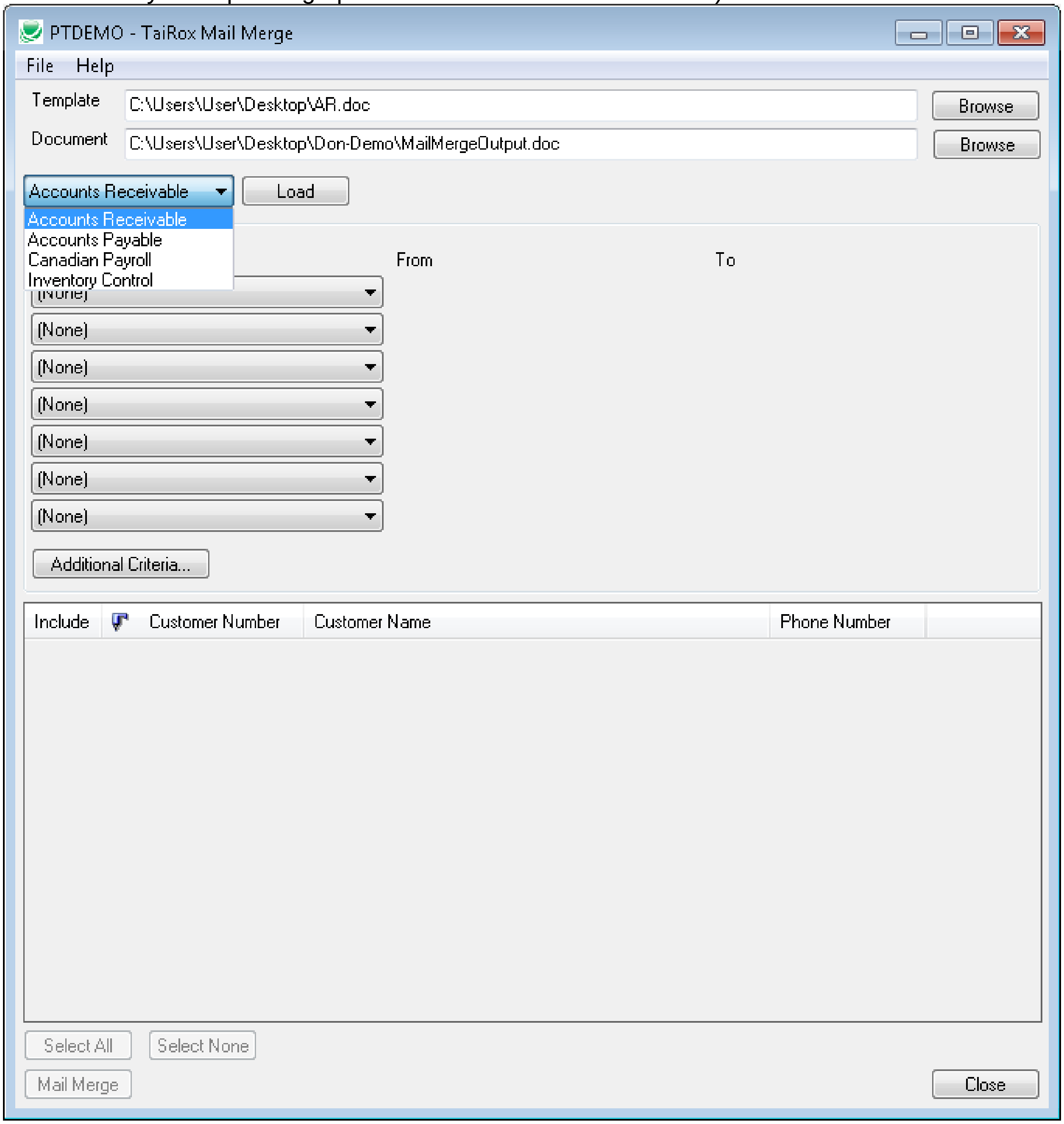
Mail Merge operates from within the desktop. A single screen provides access to A/P vendors, A/R customers, I/C items and US and Canadian Payroll employees. On that screen a drop-down list is presented prompting for the module the mail merge is to be performed on (A/R, A/P, I/C, US or Canadian Payroll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

Running Mail Merge

Once the TaiRox Productivity Tools are installed and activated, the Mail Merge icon will be shown from the TaiRox Productivity Tools menu on the Sage 300 desktop (and can be copied to other menu locations).

Running Mail Merge (continued)

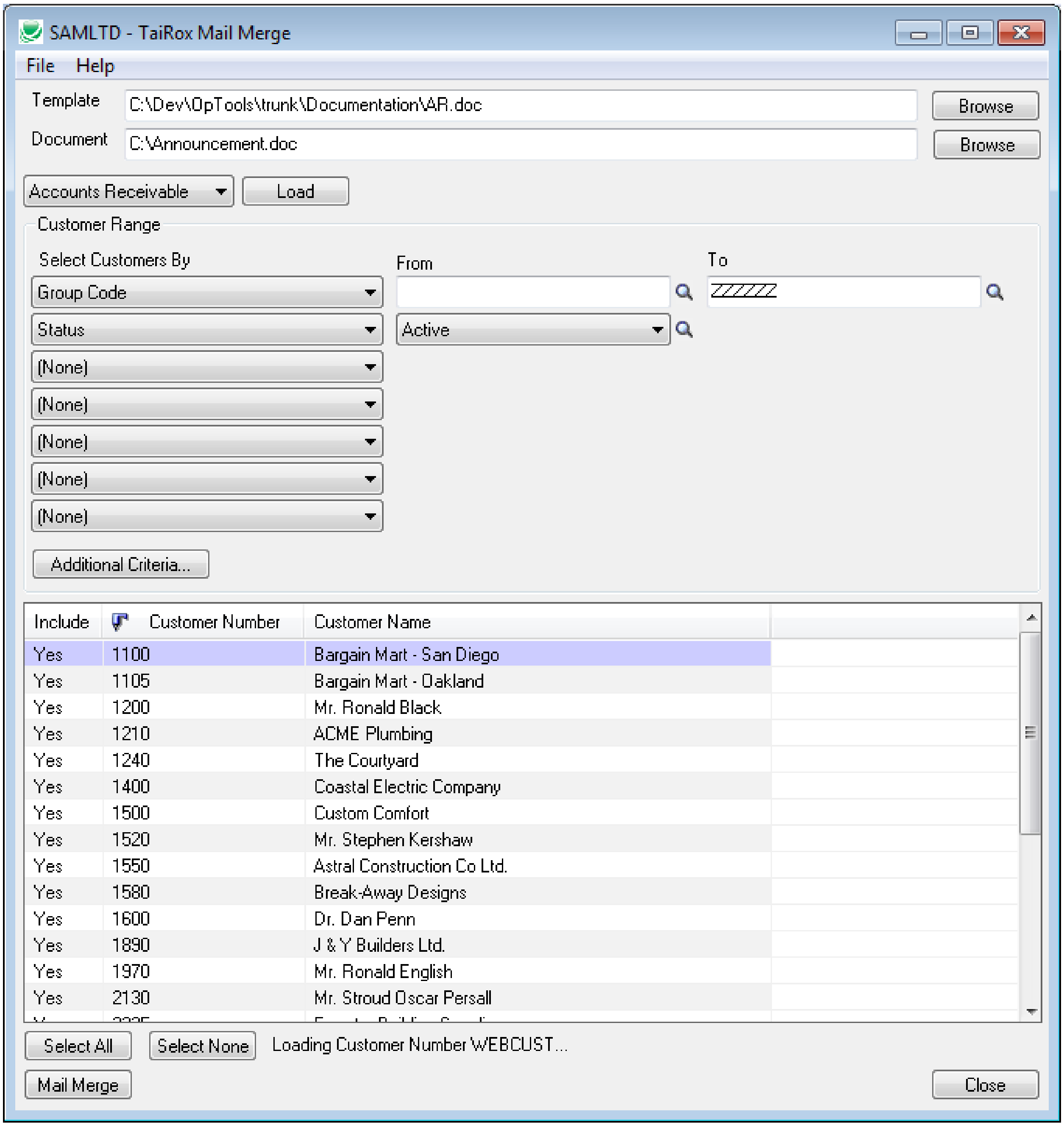
Select the Sage 300 module that the mail merge is to be performed on (A/R, A/P, I/C, US or Canadian Payroll depending upon what is installed and activated).



Running Mail Merge (continued)

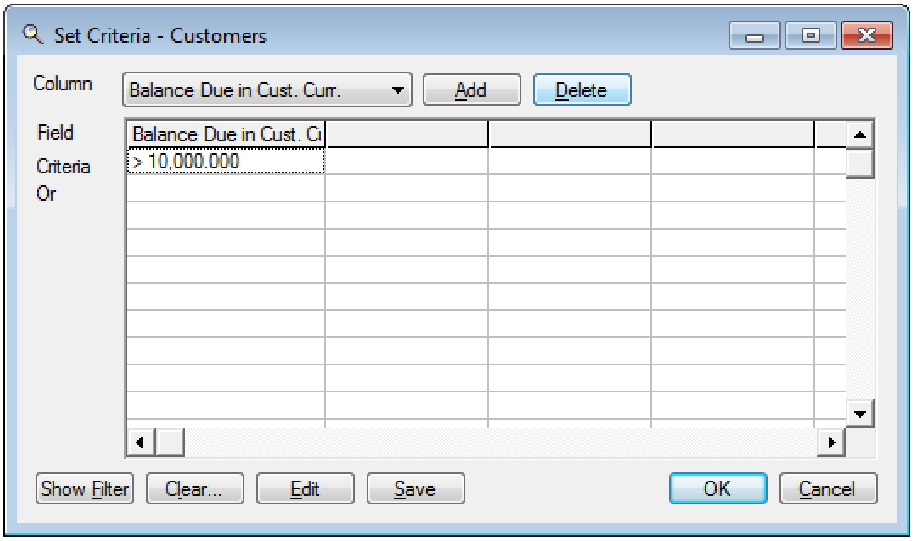
When a module is selected, an is presented (each module has a slightly different interface) to select the items appropriate for that module (vendors, customers, items or employees). Extending the Sage 300 interface, a scrolling list of items is displayed and the items can be included or excluded on an individual basis.

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.

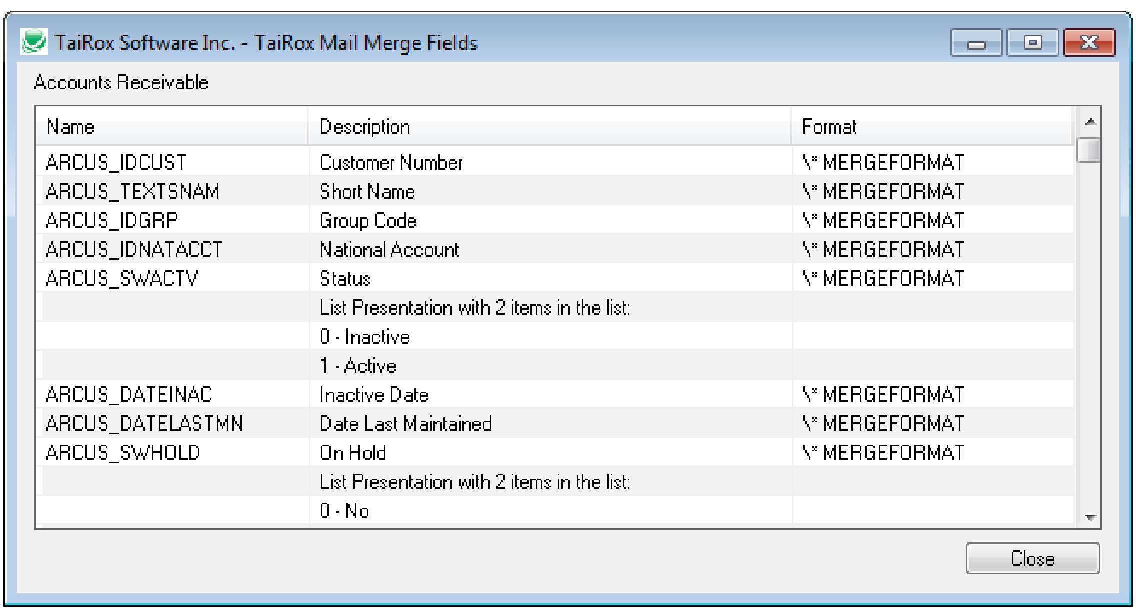


Running Mail Merge (continued)

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.

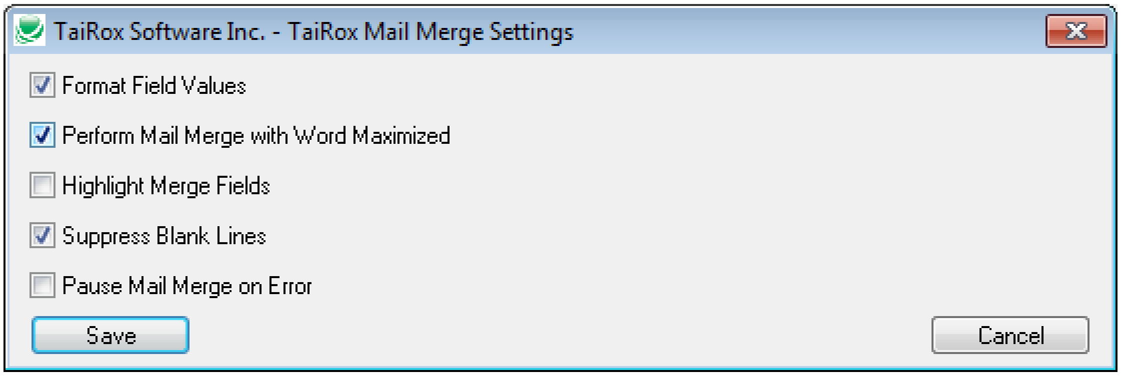


Mail Merge contains field names with extended descriptions so as to ease the creation of a mail merge template. Microsoft Word is used to create the template and users must know how to insert mail merge fields into a word document. Installed with Mail Merge are sample templates for A/P, A/R, I/C, US and Canadian Payroll which contain commonly used merge fields. In the case of I/C, a label form is used for illustration. 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** … 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.



Running Mail Merge (continued)

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…



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 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.