

Livestock Office – Mail Merge

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Mail Merge Feature

A mail merge allows a set of data to be integrated into a document template, and a set of documents created. E.g. A mail merge that creates a document for each client to show and explain their overdue amount.

In Livestock Office there is a simple mail merge option that can either create the documents to print or email, or a file for using in an external mail merge.

A mail merge can be done from any file access list.

Select the appropriate file access list, E.g. Clients, Debtors or Creditors and click the report button (This is found at the bottom right).

N.B. You can do a Simple or Full Search to refine the client list. Some examples could be:

- where Client Group 3 Is CAL
- where Debtor Outstanding Is Not 0
- where Debtor YTD Sales Ranges From 1000

Click on the Mail Merge button to open the Mail Merge feature:

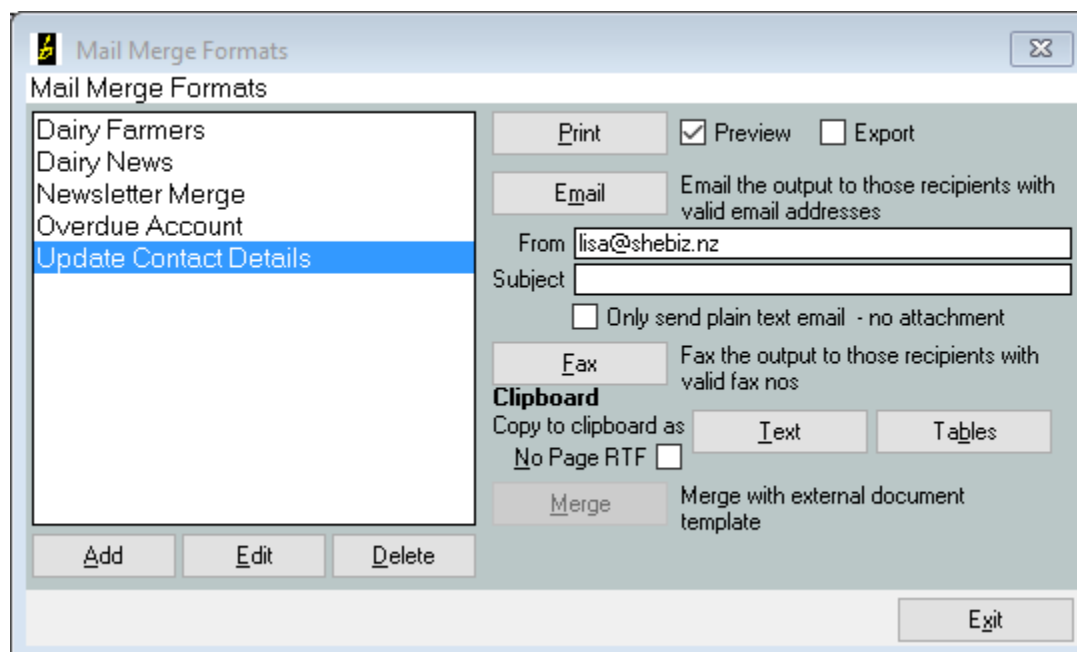


Figure 1: Mail Merge Formats

This shows a list of existing mail merge formats.

You can select a format and either run merge, edit or delete. You can print to printer or copy it to clipboard or if you have the mass communications module then you can email or fax.

To create a new mail merge, click **Add**.

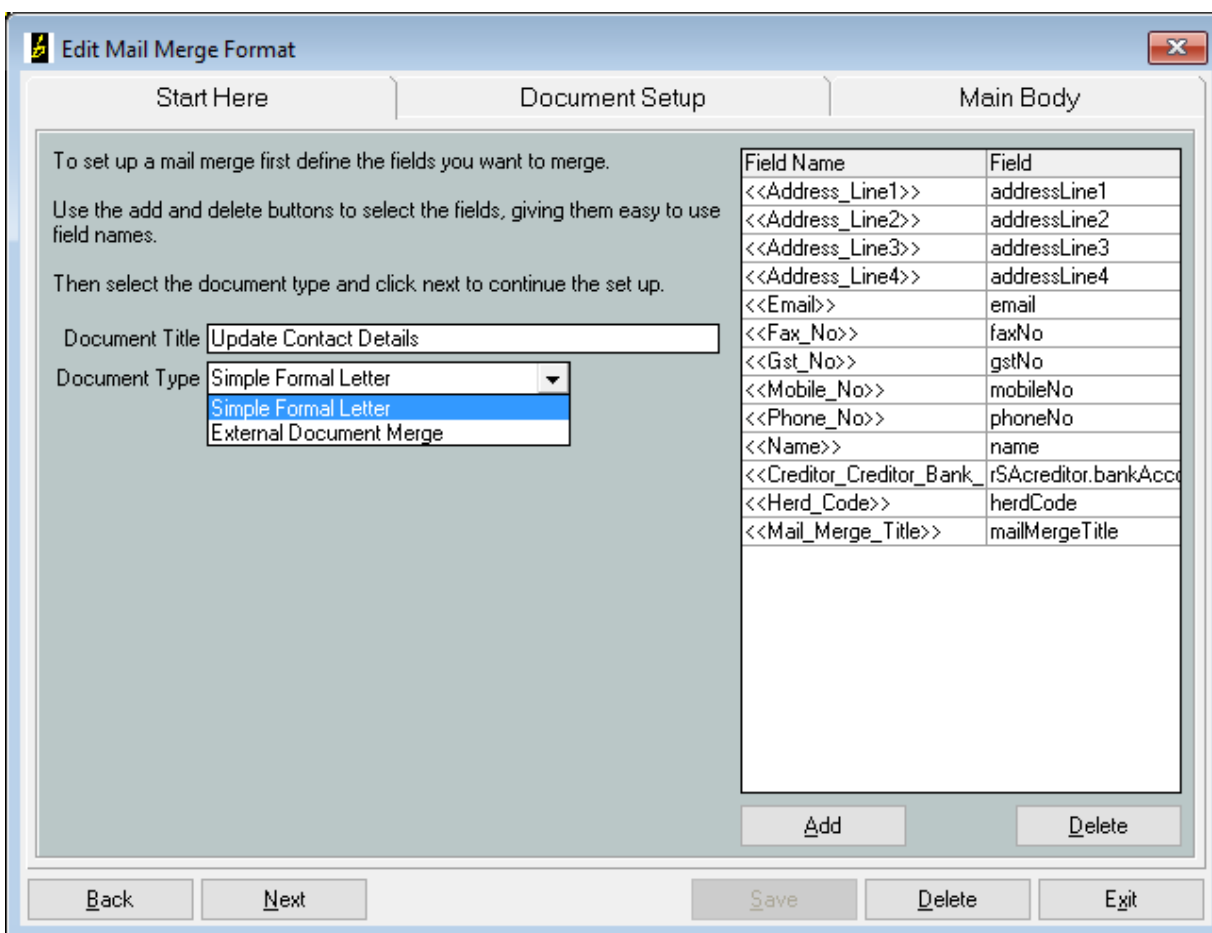


Figure 2: Mail Merge Setup 1

Field	Description
Document Title	Type a title for the mail merge, this appears on the list of mail merge formats.
Document Type	Select an option from the drop-down menu. <ul style="list-style-type: none"> Simple Formal Letter option - allows you to create the document in Livestock Office. External Document Merge - creates a data set that can be used in an external mail merge E.g. MS Word.
Add	Opens a list of the Livestock Office properties related to your search E.g. Client. Add the fields you wish to use in your document.
Delete	Removes the selected field.

Simple Formal Letter

Document Setup tab:

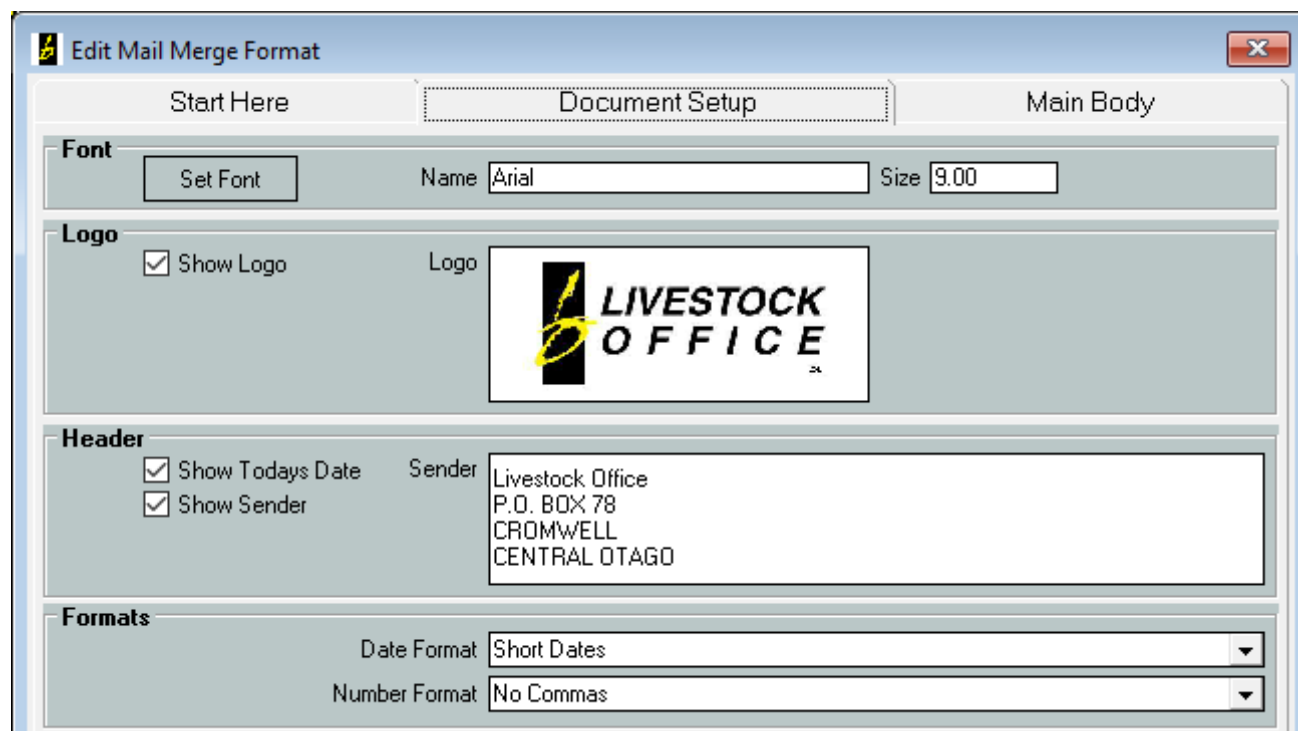
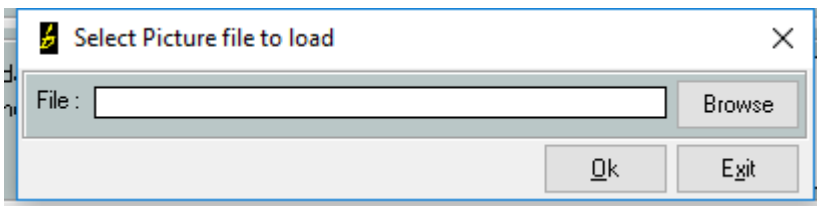
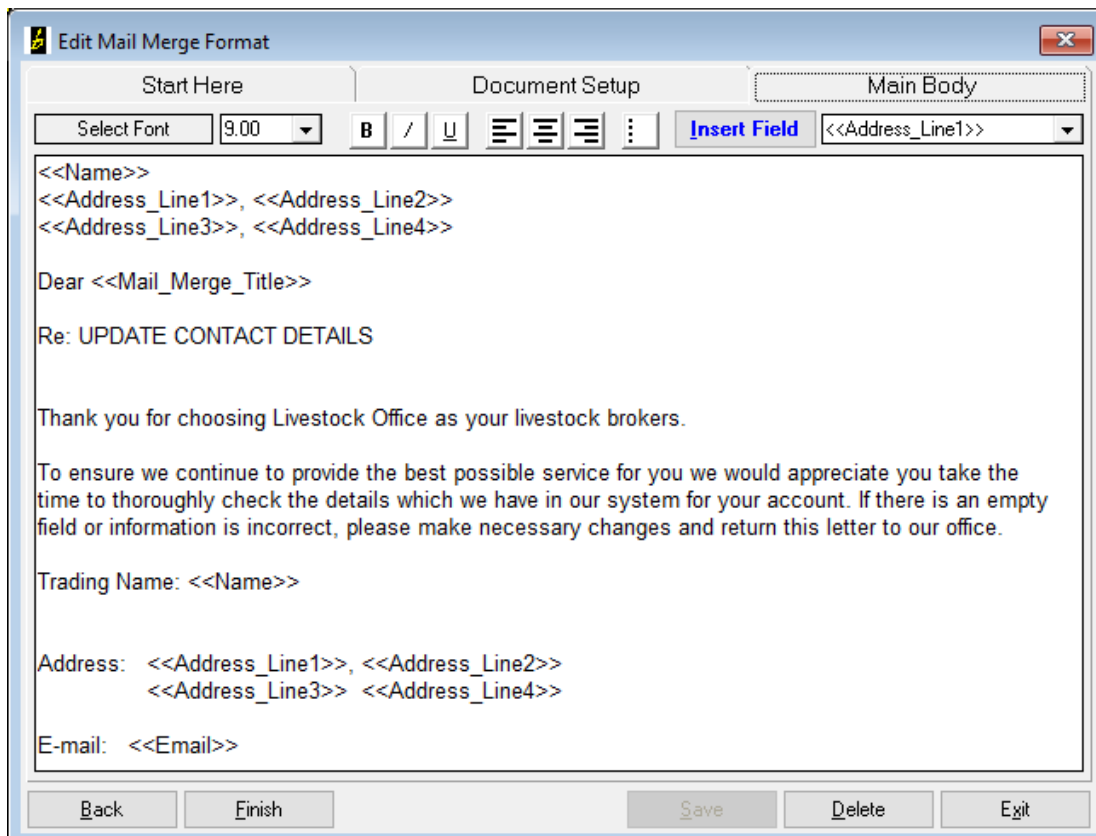


Figure 3: Document Setup

Field	Description
Font	Click Set Font to select the font options.
Logo	<p>Tick the Show logo box to print a logo at the top right of the merge document. Double click in the logo box, a Select picture file to load window will appear:</p>  <p>Click browse to select the required logo file.</p>
Header	Select what to include in the header, and type in the sender address.
Formats	Select date and number formats from the drop-down selections

Main Body tab:

This is where you type your letter.



Edit Mail Merge Format

Start Here | Document Setup | **Main Body**

Select Font | 9.00 | B | / | U | [List Icon] | [List Icon] | [List Icon] | [List Icon] | **Insert Field** | <<Address_Line1>>

<<Name>>
 <<Address_Line1>>, <<Address_Line2>>
 <<Address_Line3>>, <<Address_Line4>>
 Dear <<Mail_Merge_Title>>
 Re: UPDATE CONTACT DETAILS
 Thank you for choosing Livestock Office as your livestock brokers.
 To ensure we continue to provide the best possible service for you we would appreciate you take the time to thoroughly check the details which we have in our system for your account. If there is an empty field or information is incorrect, please make necessary changes and return this letter to our office.
 Trading Name: <<Name>>
 Address: <<Address_Line1>>, <<Address_Line2>>
 <<Address_Line3>> <<Address_Line4>>
 E-mail: <<Email>>

Back | Finish | Save | Delete | Exit

Figure 4: Main Body

Field	Description
Select Font	Click this button to select font (as for Document Setup Tab) There are also some additional font/layout options on the other buttons.
Insert Field	Position the cursor in the document where you want to the field to be. Select the field you want from the drop-down box and click Insert Field
Finish	When your letter is finished, click Finish to return to Mail Merge Formats window
Back	Returns to the Document Setup window
Save	Saves the letter
Delete	Deletes the current letter.
Exit	Returns to Mail Merge Formats window

Merge:

From the **Mail Merge Formats** screen select the letter.

Letters will be produced for each record on the original file access list.

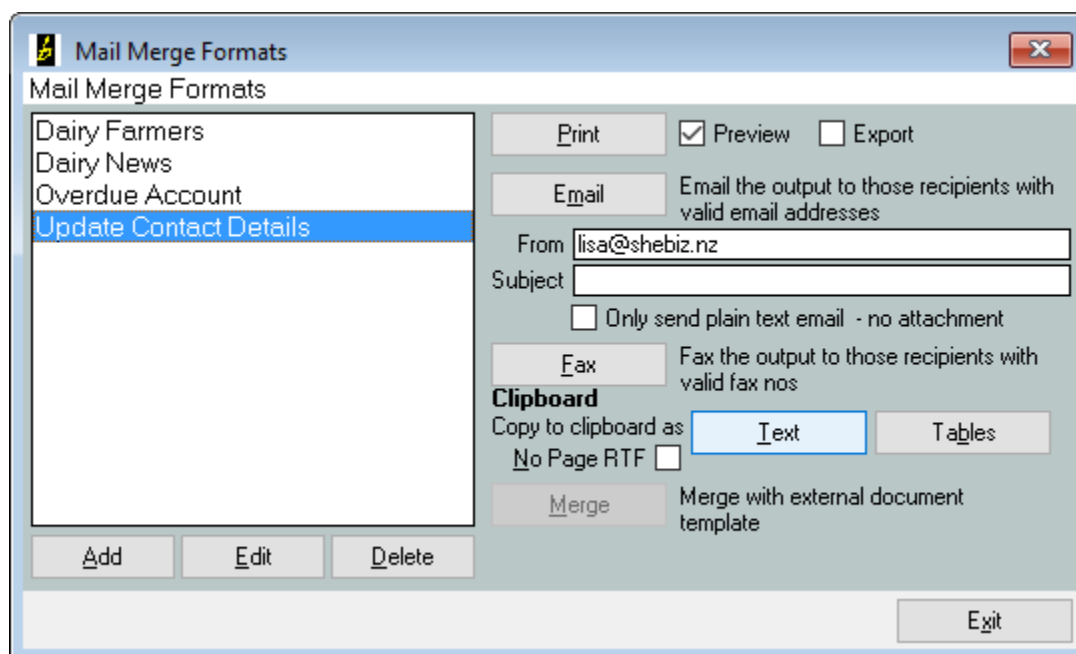
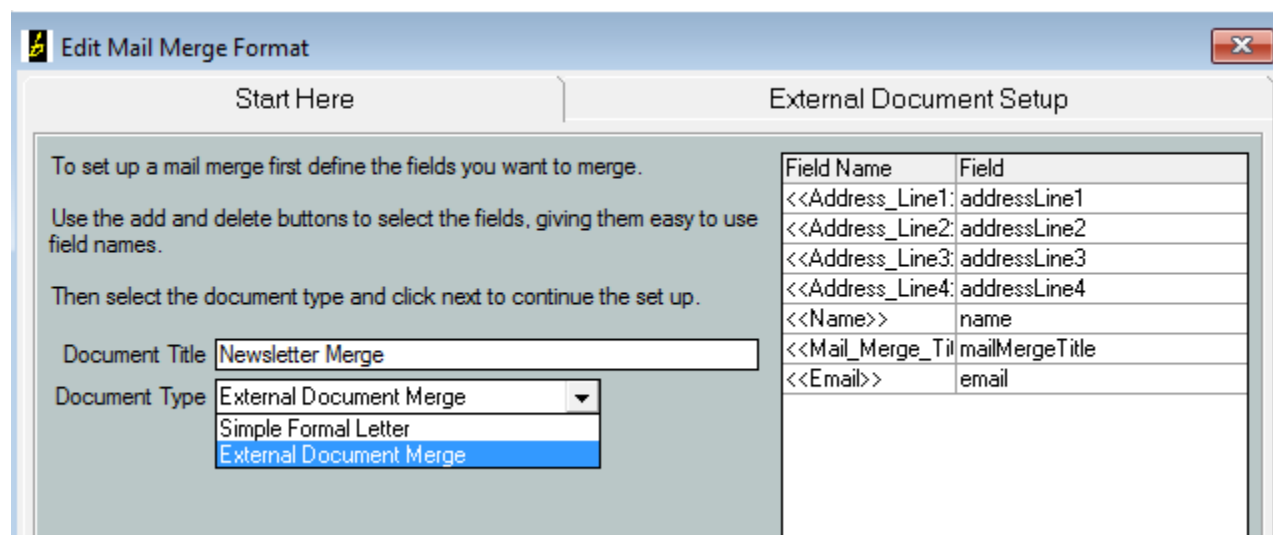


Figure 5: Mail Merge

Field	Description
Print Preview Export	Prints the merged letters. Tick to preview the letters. Tick to export the letters as a single document containing all the letters.
Email From Subject Plain Text	Emails the letters to recipients who have valid email addresses. The From Address. Defaults to the email for the current user. Enter an email subject. Tick this option to send the letter in the body of the email rather than an attachment. N.B. The logo and text formatting will be lost using this option.
Fax	Fax the letters to recipients with a valid fax number
Clipboard No Page RTF Text Tables	Copies the letters to the clipboard to be pasted into another application If ticked the rich text output will not be paged) Paste the mail merge output onto the clipboard for use in a word processor or spreadsheet)

External Document Merge

When creating a new Mail Merge Format select **External Document Merge** and add the merge fields as normal:



Edit Mail Merge Format

Start Here | External Document Setup

To set up a mail merge first define the fields you want to merge.

Use the add and delete buttons to select the fields, giving them easy to use field names.

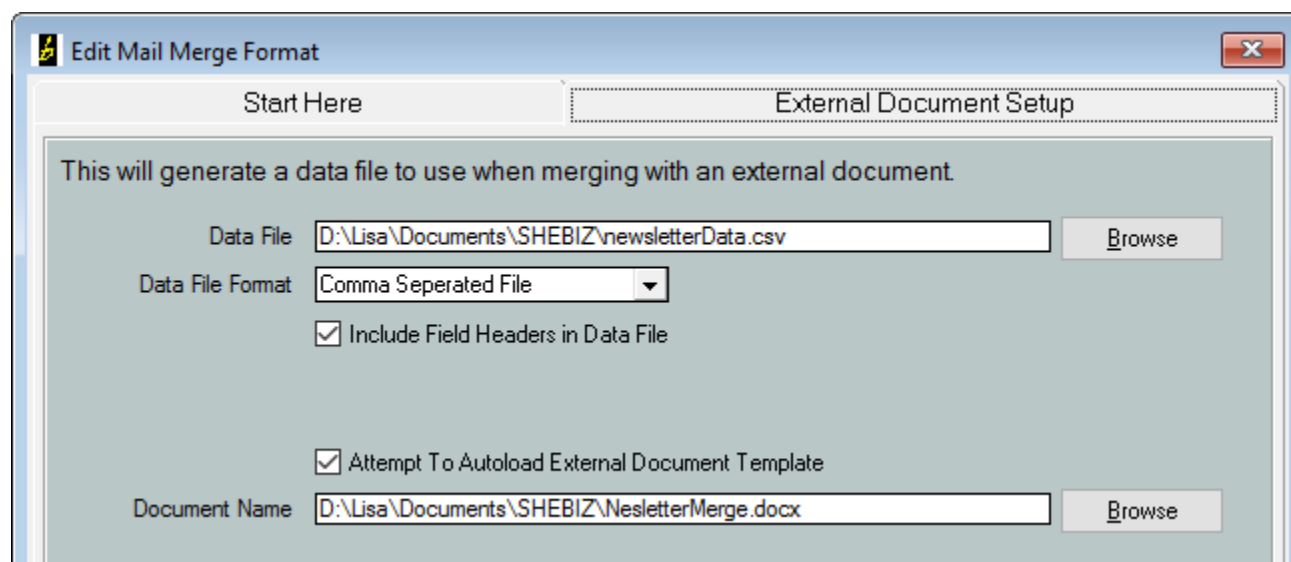
Then select the document type and click next to continue the set up.

Document Title:

Document Type:

Field Name	Field
<<Address_Line1>>	addressLine1
<<Address_Line2>>	addressLine2
<<Address_Line3>>	addressLine3
<<Address_Line4>>	addressLine4
<<Name>>	name
<<Mail_Merge_Title>>	mailMergeTitle
<<Email>>	email

Figure 6: External Document Merge



Edit Mail Merge Format

Start Here | External Document Setup

This will generate a data file to use when merging with an external document.

Data File:

Data File Format:

☒ Include Field Headers in Data File

☒ Attempt To Autoload External Document Template

Document Name:

Figure 7: External Merge

On the **External Document Setup** tab set up the export file.
This saves a .csv or .tsv file that can be used to import into an external mail merge.
Click **Browse** to select a directory to save the data file.

Attempt To Autoload External Document will try to open the external mail merge file, a Microsoft Word document, and import the data.

Steps to create an External Document Merge:

1. Create the Document and add the merge fields required.
2. Set the **Data File** in the setup.
3. **Save** and **Exit** back to the Mail Merge Formats screen.
4. Ensure the correct letter is selected and click the **Merge** button to generate the data file.
5. Set up the external document.
If using Microsoft Word
 - a. **Mailings > Select Recipients > Use an Existing List**
 - b. Browse to and **Open** the data file
 - c. Create the letter/document inserting Merge Fields where appropriate
 - d. Save the document
 - e. **Finish & Merge**
6. Return to Livestock Office and open the Mail Merge Formats, select the appropriate letter and choose **Edit**.
 - a. On the **External Document Setup** tab add a tick to **Attempt to Autoload External Document Template**
 - b. Browse to and **Open** the Word document saved in the previous step
 - c. **Save**

Run an existing External Document Merge:

1. Open the appropriate File Access List E.g. Client, and perform a **Search** to restrict the list to those you wish to include in the mail merge
2. Click the **Report** button then choose **Mail Merge**
3. Select the appropriate letter and click **Merge**. MS Word will open with the current data merged:

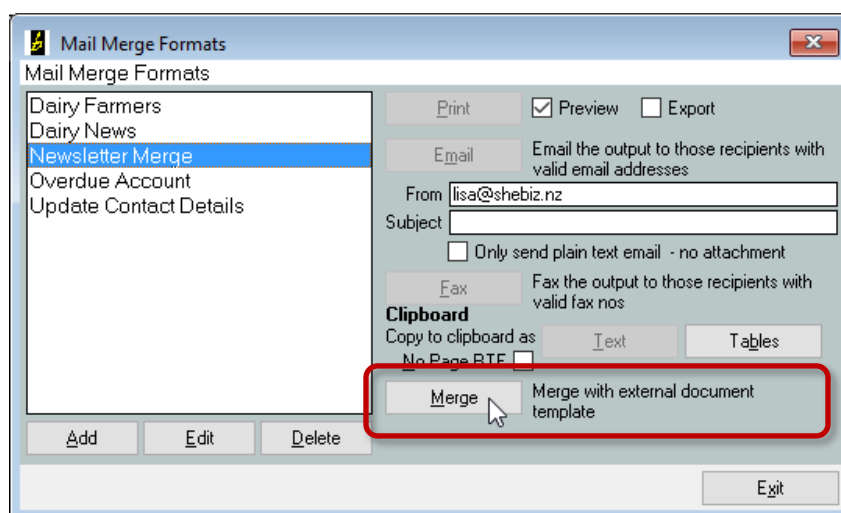


Figure 8: Run External Document Merge

Print a Single Mail Merge

Open the record, such as a client, and hit the **F9** key to open the **Mail Merge** feature.

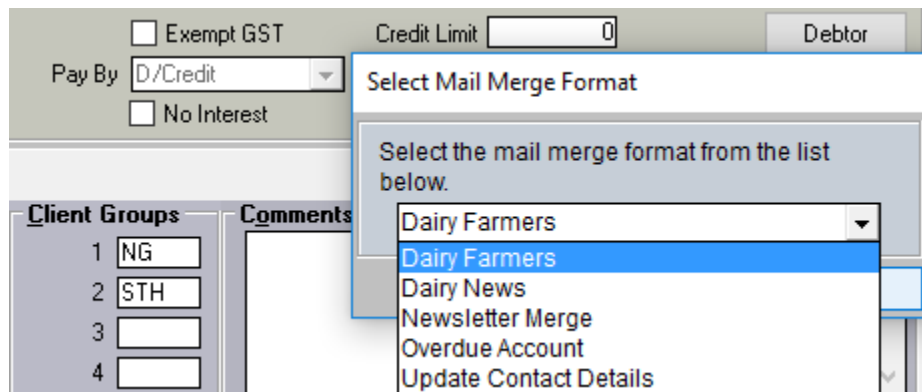


Figure 9: Single Mail Merge from Client

Select the desired letter and click OK.
The merged document will preview allowing you to print it.