Sage CRM

Sage CRM 2016 R1
Mail Merge Datasheet

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1. Introduction

We designed the Mail Merge feature in response to customer feedback about the difficulties of creating mail merge templates using Microsoft Word's native mail merge feature. Our aim was to remove that complexity and enable you to create simple mail merge templates from within Sage CRM. However, the new mail merge process and the move to the Cloud environment have highlighted a number of areas that are causing some confusion. The purpose of this document is to alleviate some of that confusion.

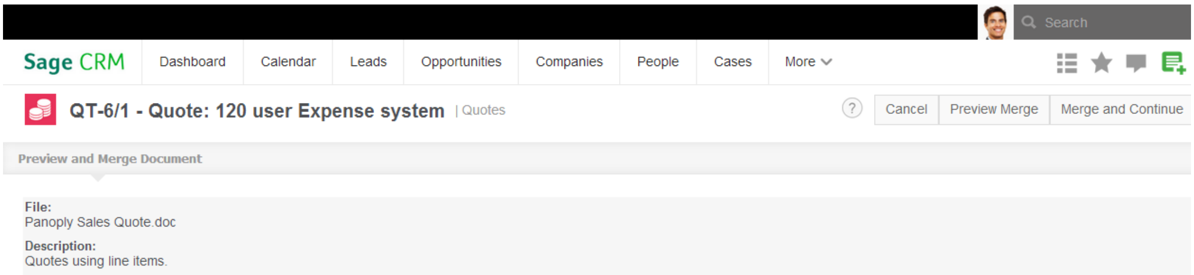
2. Important things to know

- Mail merge is a server-side process. You don't need Microsoft Word on your client machine in order to perform a mail merge. However, you require Microsoft Word or another program that opens .docx files to view and print merged documents.
- A number of sample templates are included in a standard install. To check the templates in your install, go to **<My Profile> | Administration | Email And Documents | Document Templates**.
- Mail merge templates contain Sage CRM merge fields, which are placeholders for information from the Sage CRM database that are inserted during a merge. For example, the merge field `<<comp_name>>` is replaced by an actual Company name when the merge between the template and the database data is executed.
- The merge fields that are available to you depend on the context you're in, so you need to make sure that you start the merge in the correct context. For example, if you want to include merge fields from the opportunity table, you need to start the merge process from within the context of an opportunity.
- You should only enter merge fields from one primary entity when creating a new template in Microsoft Word. For example, when creating a template for use with Case records, you can enter Case, Person, Company, Address, and User merge fields but not Quote merge fields.
- Mail merge templates are available to you only in the context with which they are associated. For example, only case templates are available in the case context. If you attempt to use a template outside of its context - for example a quotation mail merge template in the case context - none of the merge fields will convert successfully.
- You can create new Microsoft Word templates and upload them for your users to work with.
- You can continue to work with existing Microsoft Word templates (except those that contain nested items. However, you can't edit them during a mail merge in Sage CRM.
- The Edit Attachment option is available in the final step of a mail merge if you're working in IE and merging with an MS Word document template. This allows you to edit a merged document after the merge has completed. To enable this option, set **<My Profile> | Administration | Email and Documents | Documents & Reports Configuration | Allow ActiveX Document Drop** to **Yes**.

- If you have existing Word templates that you want to edit during the merge process, these templates must be converted to HTML.
- Old Quote or Order Word templates must be reconfigured. Any template that merges child items must include `TableStart` and `TableEnd` tags. For example, if you’re creating a Quote template, include a `TableStart:Quotes` tag at the beginning of the template and a `TableEnd:Quotes` tag at the end. You must wrap any child items to be merged with `TableStart:QuoteItems` and `TableEnd:QuoteItems` tags. For more information refer to the in-product documentation.
- You can create new templates using Sage CRM's rich text editor. Any new template you create is saved in HTML format. You can add images to these templates, but any images must be uploaded to the server first.

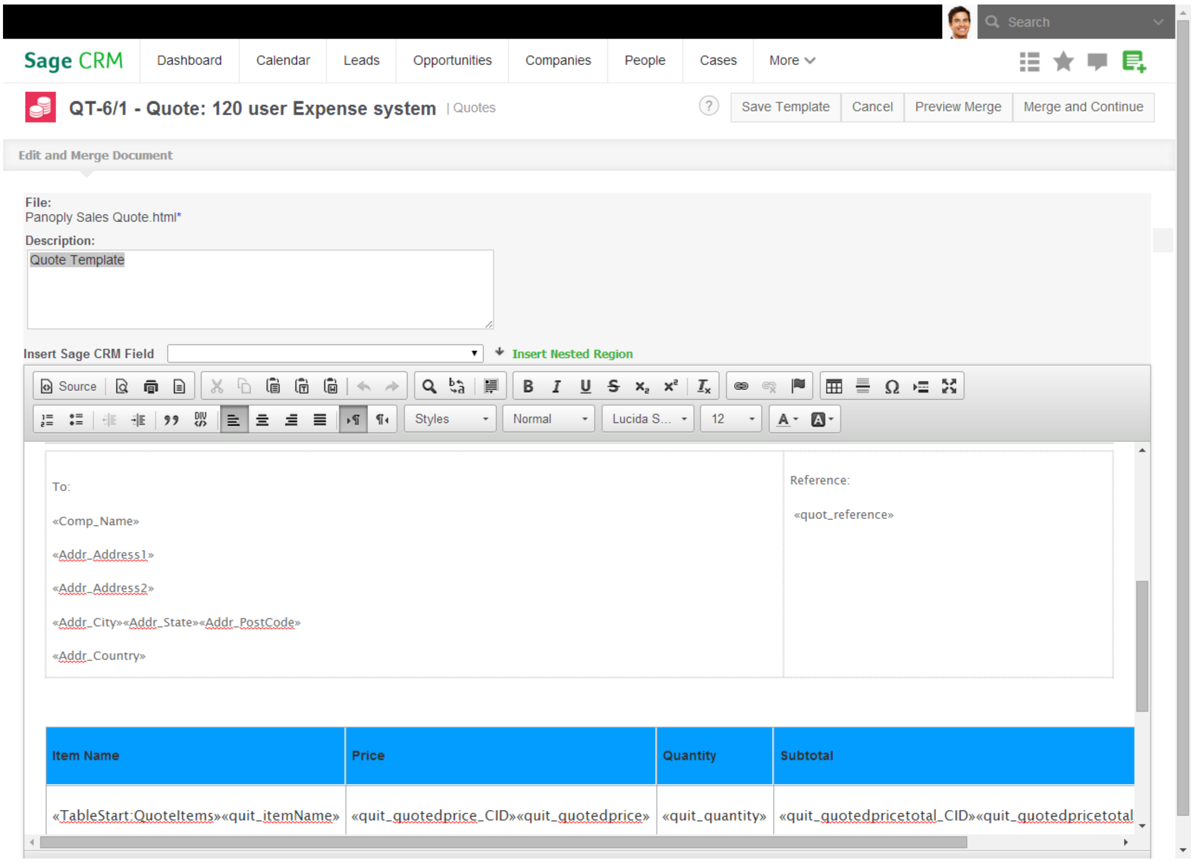
3. Performing a merge with an existing Word template

You can continue to work with existing Microsoft Word templates, if they don't contain nested (child) items. For Word documents including nested items, see Converting a Quote Template. If you're working with existing Word templates, you can't edit them during a mail merge in Sage CRM. When you kick off the mail merge process with a Word template, the template is read-only until the merge has completed.



Mail merge process using a Word template

This is different to performing a mail merge using a mail merge template, during which the template is immediately available to edit in the rich text editor.



Mail merge process using an HTML template

If you want to edit your existing Word templates during a mail merge in Sage CRM, you can convert them to HTML. The process is outlined in this blog.

4. Converting a Quote template

Old templates that contain nested (child) items, such as those for Quotes or Orders, no longer work and need to be converted using some special rules.

To display nested items in a Quote (or Order) template, a specific structure is required. If you want to include a table with nested (child) item merge fields, you need to insert start and end tags for both the main table (Quotes) and the child table (Quote Items). You must also include a `TableStart` and `TableEnd` tag in the same template section, table row or table cell.

For example, if you want a row of quote item data to display, the first column in that row must include a `TableStart:QuoteItems` tag, and the final column must include a `TableEnd:QuoteItems` tag.

Any mail merge fields included in the document must be genuine mail merge fields:

1. Go to **Insert** | **Quick Parts** | **Field,** then select **MergeField** from the **Field Names** drop-down list in the **Please Choose A Field** panel.
2. Enter the name of the CRM merge field (for example, `comp_name`) in **Field Name** in the **Field Properties** panel.

In addition, any column, section, or page breaks must be removed.

Here's a basic example:

«TableStart:Orders»

«orde_createddate»
Reference: «orde_reference»

To:
«pers_firstname»«pers_lastname»
«comp_name»
«addr_address1»
«addr_address2»
«addr_address3»

Please find enclosed the requested quote. Please call me with any questions you may have.

Item Name	Price	Quantity	Subtotal
«TableStart:OrderItems»«orit_itemName»	«OrIt_quotedprice_CID» «OrIt_quotedprice»	«OrIt_quantity»	«OrIt_quotedpricetotal_CID»«OrIt_quotedpricetotal» «TableEnd:OrderItems»
		Total Cost:	**«Orde_grossamt_CID» «Orde_grossamt»**

«TableEnd:Orders»

For more information on creating new templates in Microsoft Word and creating new Quote or Order templates, please refer to the following Help files:

- Creating a Quote or Order template
- Creating a new template in Microsoft Word

5. Creating a Microsoft Word label template

You can use Microsoft Word to create a label template. Please note, when creating label templates you must:

- Insert Sage CRM merge fields manually.
- Wrap the template in `TableStart:Labels` and `TableEnd:Labels` tags.
- Ensure the template contains a minimum of two label placeholders, the second of which must contain a **Next** field.

To create a label template in Microsoft Word:

1. Create a new blank document and insert a one row table. Insert a column for each label you want to print onto. Size the cells to the dimensions of the label you are using, and align the margins to the labels.
2. Insert a `TableStart:Labels` tag in the top left cell. To do this, select **Quick Parts** from the **Text** part of the **Insert** tab, then select **Field**.
3. Select **MergeField** from **Field Names** in the **Please Choose A Field** panel.
4. Type *TableStart:Labels* in **Field Name** in the **Field Properties** panel.
5. Use the same method to insert any Sage CRM merge fields you want to include after the `TableStart:Labels` tag. Type the name of the Sage CRM merge field in **Field Name**.
6. In each subsequent cell, insert a Next field. To do this, open the **Field** dialog box and select **Next** from **Field Names**. Copy the Sage CRM merge fields from the label placeholder you created earlier.

   Note: To see the Next field, the **Show Field Codes Instead Of Their Values** option must be selected in **Word Advanced Options**. Alternatively, press ALT+F9.
7. Insert a `TableEnd:Labels` tag after the Sage CRM merge fields you entered in the rightmost cell.

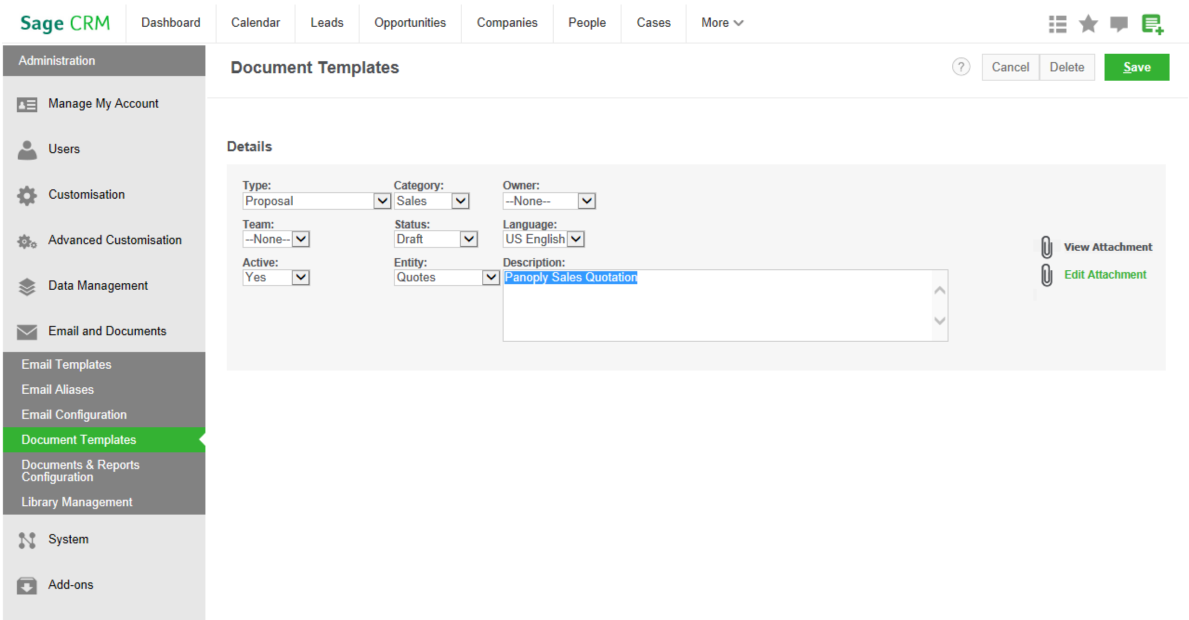
«TableStart:Labels» ***«pers_salutation» «pers_firstname» «pers_lastname»*** ***«comp_name»*** ***«comp_emailaddress»***	*{NEXT}* ***«pers_salutation» «pers_firstname» «pers_lastname»*** ***«comp_name»*** ***«comp_emailaddress»*** «TableEnd:Labels»

Sample label template

8. Save and upload the template. You can save it in .docx format.
9. To test the merge document, navigate to a customer record.
10. In the **Documents** tab, select **Start Mail Merge**. Click the hyperlink of your new template, preview the merge, and check that the customer data is merged.

6. Editing an existing Microsoft Word Mail Merge template in Sage CRM

As a Sage CRM Administrator, you can edit existing Microsoft Word mail merge templates in **<My Profile> | Administration | Email and Documents | Document Templates**. To do this, must be working in IE and have installed the ActiveX plug-in.



Edit Attachment button available when document Status is set to Draft

1. Click the document's hyperlink, select **Draft** from **Status**, and click **Save**. When you click the document's hyperlink again, an **Edit Attachment** button is available in the **Details** panel.
2. Click **Edit Attachment**. The document opens in Microsoft Word, or whatever program you use to open .docx files.
3. If your edits include adding new merge fields, you must add them. Go to **Insert | Quick Parts | Field** and select **MergeField** from **Field Names**. Enter the merge field name in **Field Name**.
4. Remove any column, section, or line breaks.
5. Save the document and close it.
6. Click **Save** on the **Document Details** screen in Sage CRM. If you perform a mail merge with the newly updated document, the changes you have made are reflected in any resulting merged output.

You can follow the same process for HTML, provided the template's status is set to Draft and the default program you use to open .htm and .html files is set to a text editor program such as Notepad. We recommend that only people with HTML experience edit HTML templates using this method. Incorrect changes to the HTML code can cause templates to not work properly.

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