

MYOB Accountants Enterprise

Mail Merge to Word

Version 5.4.29 and above





Copyright 2010 MYOB Technology Pty Ltd. All Rights Reserved.

Disclaimer

MYOB Technology Pty Ltd has made every attempt to ensure the accuracy, relevance and completeness of this material but excludes (to the extent allowed by legislation) any warranties regarding it. Furthermore MYOB, its staff and agents shall not be liable for any loss, cost or damage (however incurred including negligence) arising out of errors or omissions in the material, especially if such materials contain information sourced from third parties or the ATO/IRD. In some cases the materials provided contain case studies (applying particular accounting standards or legislation) and anecdotes which may not directly apply to the user's circumstances and are used as representative examples only and should not be considered as authoritative advice regarding any accounting standard, law or industry opinion. MYOB advises that if the user wishes to rely on the case studies contained in the material then it must seek professional advice before doing so. Furthermore reliance on the representative examples in the seminar materials is at the user's own risk.

Special Permissions

MYOB acknowledges the permission of Thomson Legal and Regulatory Limited to utilise the templates from the XYZ Model Financial Accounts written by Moore Stephens Pty Ltd.

Copyright

MYOB claims copyright in respect of all published content. None of the material published herein may be copied or altered or distributed in any format without the prior written consent of MYOB.

Trademarks

All trademarks used in this material are owned by MYOB Technology Pty Ltd or the indicated registered owners of the trademarks. Users are forbidden from using, copying or transporting the trademarks without express prior written consent. AppleShare and Macintosh are registered trademarks of Apple Computer, Inc., registered in the United States and other countries. LiveLinks is a trademark of Ceedata Holdings Pty Ltd. Microsoft, MS-DOS, Windows, Windows NT, Windows BackOffice and Outlook are either registered trademarks or trademarks of Microsoft Corporation in the United States and other countries. Novell and Netware are registered trademarks of Novell, Inc.

MYOB Technology Pty Ltd ®
ABN 30 086 760 269
Level; 3
235 Springvale Road
Glen Waverley VIC 3150

MYOB AE Practice Manager 5.4.29+
Printed: 29 March 2019

Contents

Introduction	4
Mailing names	4
Mailing name fields	4
Document Templates.....	5
Template location	5
Create Document Templates	6
Mail merge fields available	7
Amend Document Templates	8
Mail Merge Wizard	9
Append to Search Mail Merge	13
Mail Merge using Extra Fields/Lists	14
Newsletter or Xmas Card List	14
Mail Merge Lists.....	15
Introduction	15
Create a list.....	15
Mail Merge from a List	16
How to use a saved list in a mail merge.....	16
Label Templates	17
How to create label templates.....	17

Introduction

Mailing names

MYOB recommends the use of mailing names. Mailing names give you more flexibility with the presentation of the addressee details.

If the mailing name field for a client or contact has been completed, the mailing name can be used in your letters and labels.

Amend Contact Name

Type Organisation

Title

First

Middle

Last

Suffix

Gender Male Female

Mailing Name

Initials

OK Cancel

Mailing name fields

When you are setting up your templates, you should include the fields MailingName and AddresseeMailingName. The MailingName comes from the client or contact. The AddresseeMailingName comes from the associated contact.

5th July 2006

«AddresseeMailingName»

«MailingName»

«Address1»

«Address2»

«Address3»

«Town» «County» «PostCode»

Dear «Salutation»

Please find enclosed the forms and documents to meet your annual statutory requirements.

Document Templates

Template location

The Mailing Settings Template Path is where document templates are opened from. To check the location of your document templates go to **Maintenance > Documents > Mailing Settings**.

Billing Startup Path	M:\VIZBILLS	...
Templates Path	M:\TEMPLATES*.dot	...
Document Startup Path	M:\VIZDOCS	...
Mailing Salutation	[FN]	
Mailing Name	[PR] [FN] [MN-1] [LN]	
Mailing Initials	[FN-1/1][MN-1/1]	
Mailing Formal Name	[PR] [FN] [MN-1/1] [LN]	
Mailing Name Separator	[.]	

Templates Path	C:\TEMPLATES*.dot	...
Document Startup Path	C:\VIZDOCS	...

Create Document Templates

Practice staff can quickly and easily generate standard correspondence using pre-defined document templates.

5th July 2006

«AddresseeMailingName»
«MailingName»
«Address1»
«Address2»
«Address3»
«Town» «County» «PostCode»

Dear «Salutation»

Please find enclosed the forms and documents to meet your annual statutory requirements.

There are 2 ways to create templates. It can be done via the documents tab on the client or via the mail merge wizard from the client search screen.

From the Documents Tab

1. Open the Documents tab for a client.
2. Click *New template* in the Task Bar.
3. Insert the required mail merge fields and complete the document content.
4. Save the template with an appropriate name into the location specified in Mailing Settings.

or

From the Mail Merge Wizard

1. Select at least one client in the Find Clients page and start the **Mail merge wizard**.
2. Select Add New Template from within the wizard.

Note: Templates cannot be created directly from within Word. If you have existing templates which you want to use from Word, then create the template via AEPM and then copy and paste the wording from the old template.

Mail merge fields available

«ContactType»
«Pref»
«FName»
«Mname»
«LName»
«Tel»
«Fax»
«Mobile»
«AddresseeLine1»
«AddresseeLine2»
«Address1»
«Address2»
«Address3»
«Town»
«County»
«PostCode»
«Country»
«EMail»
«Salutation»
«Sex»
«DateOfBirth»
«BirthPlace»
«ClientCode»
«DepartmentName»
«DepartmentCode»
«OfficeName»
«OfficeCode»
«DateOfDeath»
«AssignmentName»
«AssignmentCode»
«AssignmentDescription»

«PartnerPref»
«PartnerFName»
«PartnerSName»
«PartnerFullName»
«PartnerMailingName»
«PartnerUsername»
«PartnerEmail»
«PartnerEmployeeCode»
«PartnerCDSCode»
«CreatedBy»
«DateCreated»
«MailingName»
«AddresseeMailingName»
«AssociatedAddress»
«AssignmentManager»
«AssignmentPartner»
«Manager»
«ClientPartner»
«Employee»
«FileName»

Amend Document Templates

You might need to amend a template from time to time. If you need to modify the mail merge fields, you must edit the template from within the **Mail merge wizard** in AE PM.

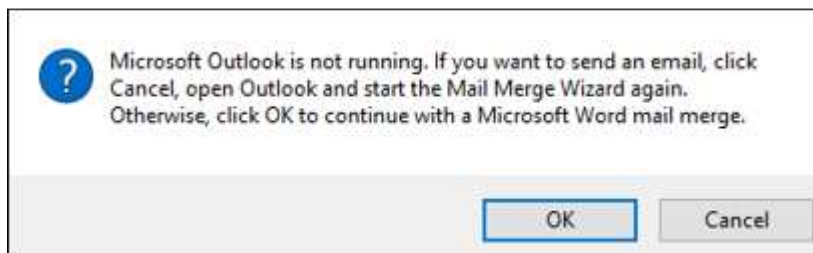
1. Select at least one client in the Find Clients page and start the **Mail merge wizard**.
2. Right mouse click on the required template and choose Edit Template.
3. Make the required changes.
4. Save the updated template.

Note: You must amend templates from within the Mail merge wizard in AE PM and not via Windows Explorer.

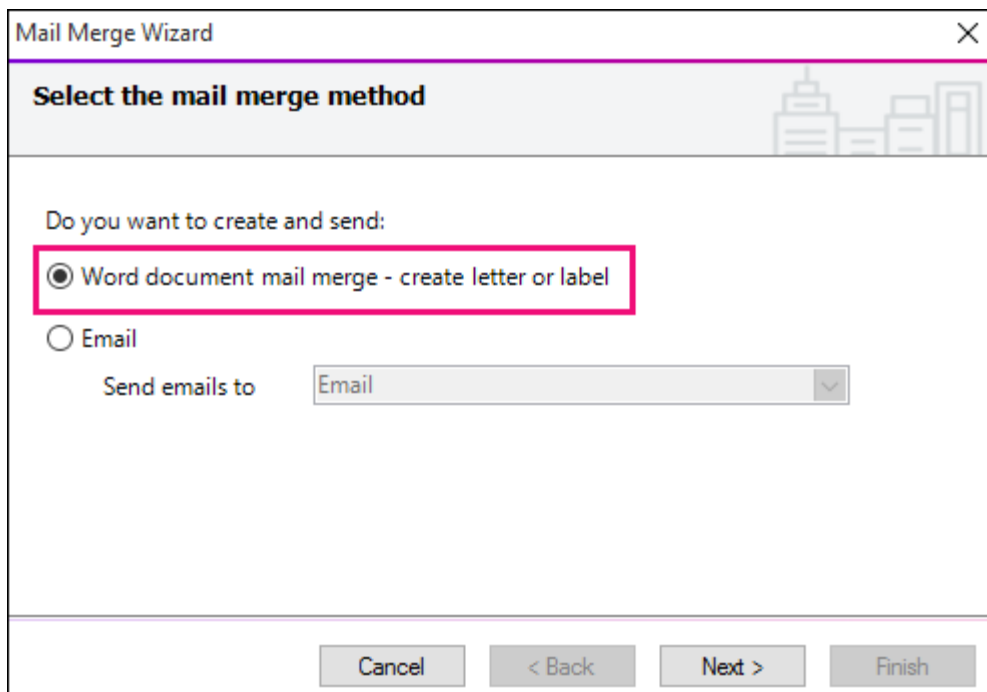
Mail Merge Wizard

Once you have selected the clients you want to mail merge, and you select **Mail merge wizard** from the Task Bar the wizard takes you through 5 stages as follows:

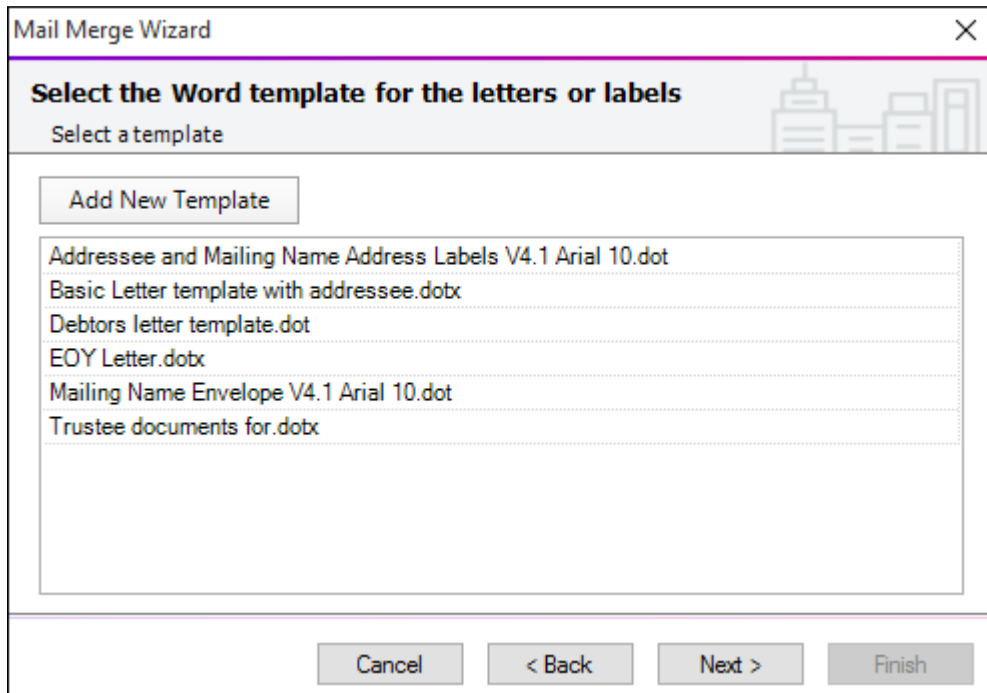
1. Click **Mail Merge Wizard** in the **Documents menu** on the **Task Bar** and the following screen now appears if Outlook is not running. As you are doing a mail merge and not emailing you can just **OK** this screen to continue.



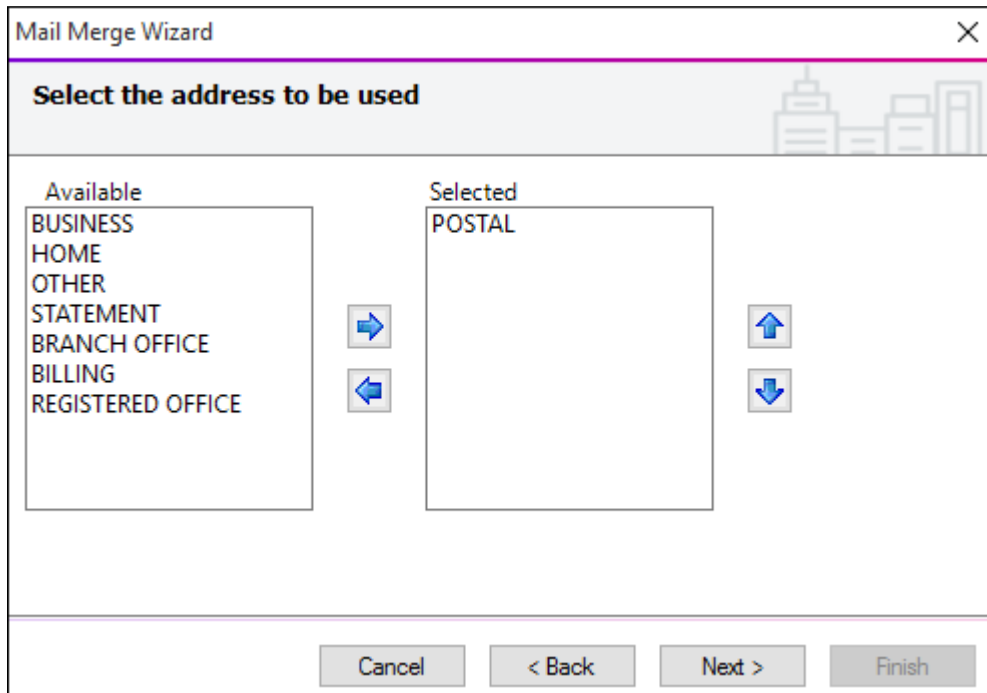
Step 1 - Select the mail merge method **Word document mail merge – create letter or label** and click **Next**.



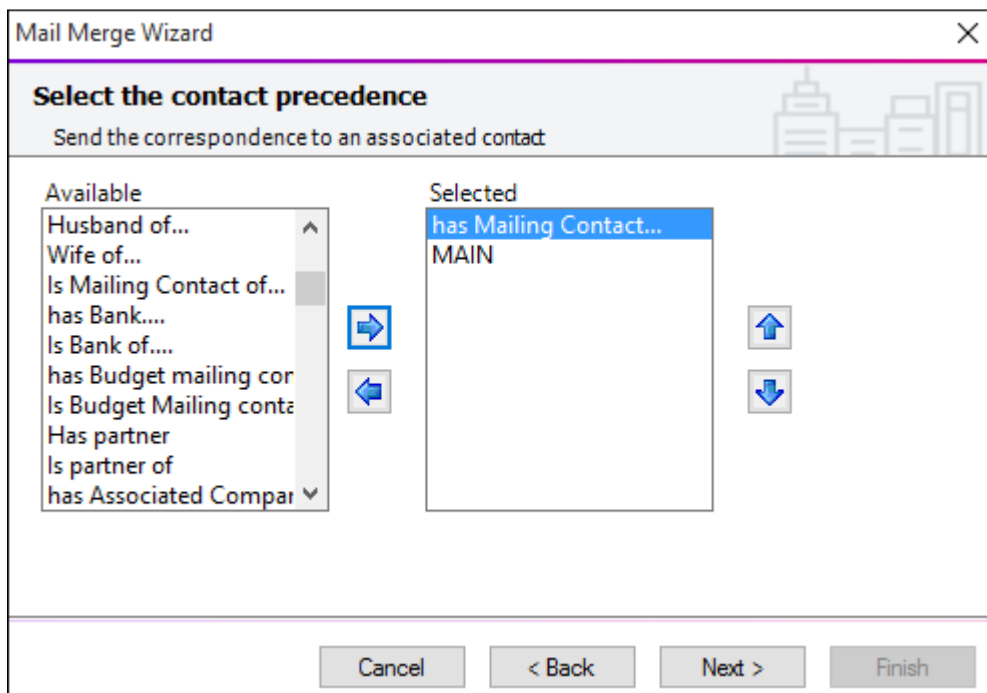
Step 2 – Highlight an existing Word template or click Add New Template to create a new template and click **Next**.



Step 3 – The system will default to your Primary address type. This can be changed if required. Select **Next** to continue.



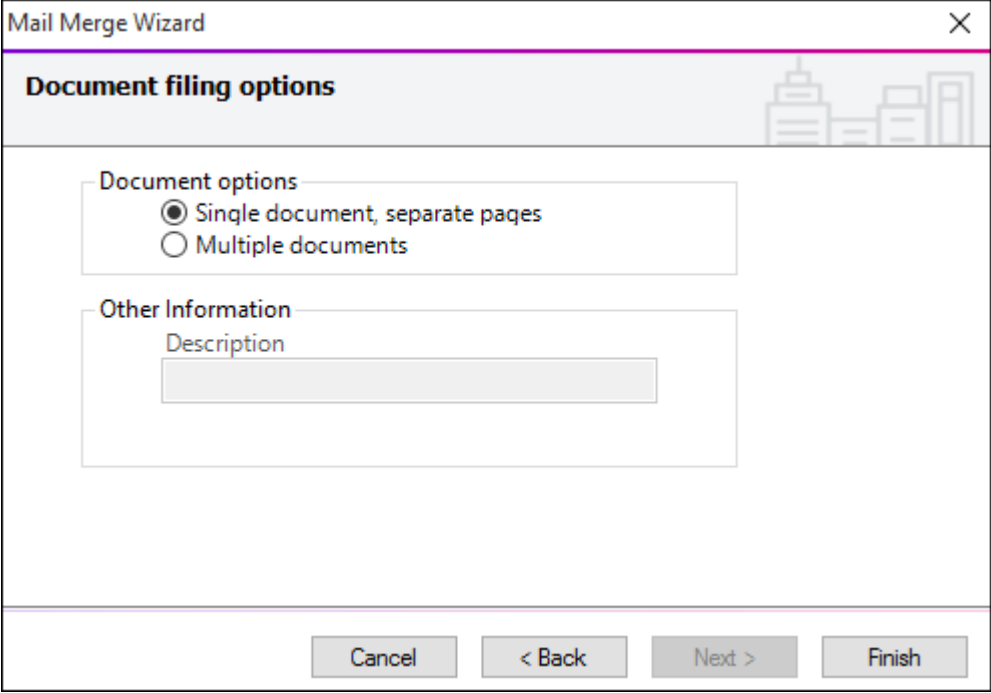
Step 4 – Select the contact precedence - this would usually be “has Mailing Contact” where the system will address the letter to a person at the company. If you are not using mailing contacts under Associations then leave as Main and click **Next**.



Step 5 – Being a bulk mail merge, you would leave **Document options** as **Single document, separate pages** where you are producing labels or newsletters and don't want a document saved to under each client.

Select **Multiple documents** when you do want to save a document in each client's document folder. With this option, you enter a description under **Other Information**.

Click **Finish**.



The screenshot shows the 'Mail Merge Wizard' dialog box, specifically the 'Document filing options' step. The window title is 'Mail Merge Wizard' with a close button (X) in the top right corner. The main heading is 'Document filing options'. Below this, there are two sections: 'Document options' and 'Other Information'. In the 'Document options' section, there are two radio buttons: 'Single document, separate pages' (which is selected) and 'Multiple documents'. In the 'Other Information' section, there is a label 'Description' followed by a text input field. At the bottom of the dialog, there are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.

If are using the Mail Merge wizard for 1 client only and you want to save the document into the Documents tab of the client, you would select **Multiple documents**.

Note: If you are doing a mail merge for 1 client only it would be easier to do it via the Documents tab of the client.

Append to Search Mail Merge

This feature is very useful for creating envelopes or labels for a group of selected clients.

From the Find Client page

1. Untick 'Hide form when only one item found'.
2. Select *Clear search* from the Task Bar.
3. Then select *Append to search* from the drop down to the right of the *Search for* field.
4. Type the first client you want in the list (the trick here is to key in part of the client name and ENTER - do not select the client from the auto complete drop down).
5. Select the next client to add to the list.
6. Repeat step 4 until the list is complete.
7. Select the clients by checking the tick box and then click *Mail merge wizard* in the Task Bar.

Mail Merge using Extra Fields/Lists

Newsletter or Xmas Card List

You have been asked to generate a list of clients pertaining to one of the partners in your firm. The list will then be used to send the Practice newsletter or Xmas cards on behalf of this partner.

1. Create the report with the required fields and filters.

This is done via **Reports > Client > Client list** (if wanting clients only).

If wanting clients and contacts it would be done via **Reports > Contacts > Contacts and clients**.

2. Perform the mail merge based on the report. From the **Find Clients** search page, select **New search from reports** and click Search.
3. The list of reporting areas is displayed. Run the report created at step 1.
4. The list of clients that meet the report criteria are displayed.
5. You now need to toggle the clients you want to mail merge.
6. Select *Mail merge wizard* from the Task Bar.

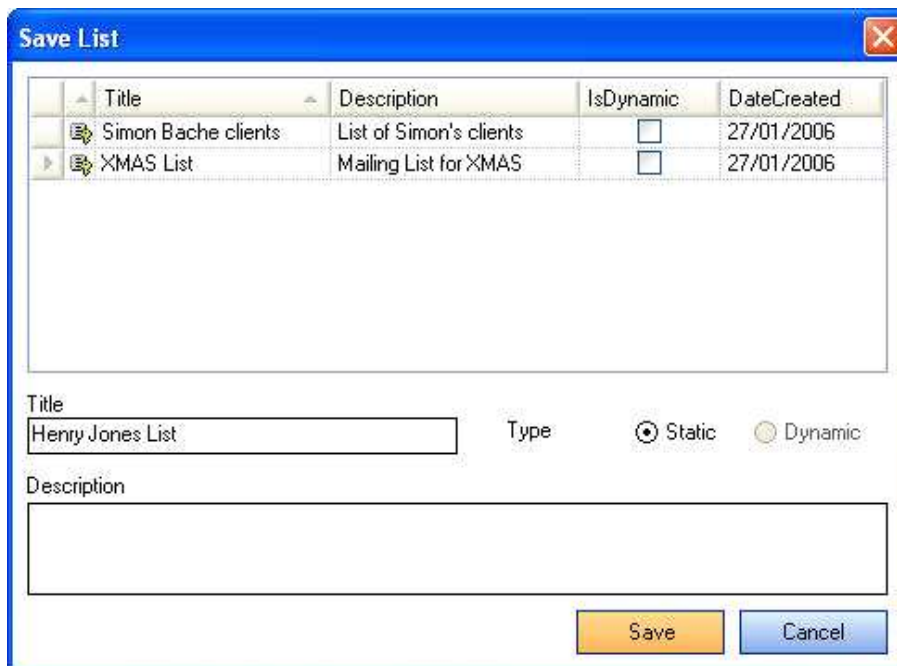
Mail Merge Lists

Introduction

You can save the results of a search into a list. Once you have created the list you can use it over and over again without redoing the search. Lists could be used for situations such as sending clients invitations to marketing events or seminars.

Create a list

You can display a list of clients for mail merge purposes using the Find Clients approach. Once you have produced this list, the save list option allows you to save all the names in the currently displayed list.



1. Use the search options to display a list of clients or contacts.
2. Click *Save list* in the Task Bar.
3. Complete the list name and description and save the list.

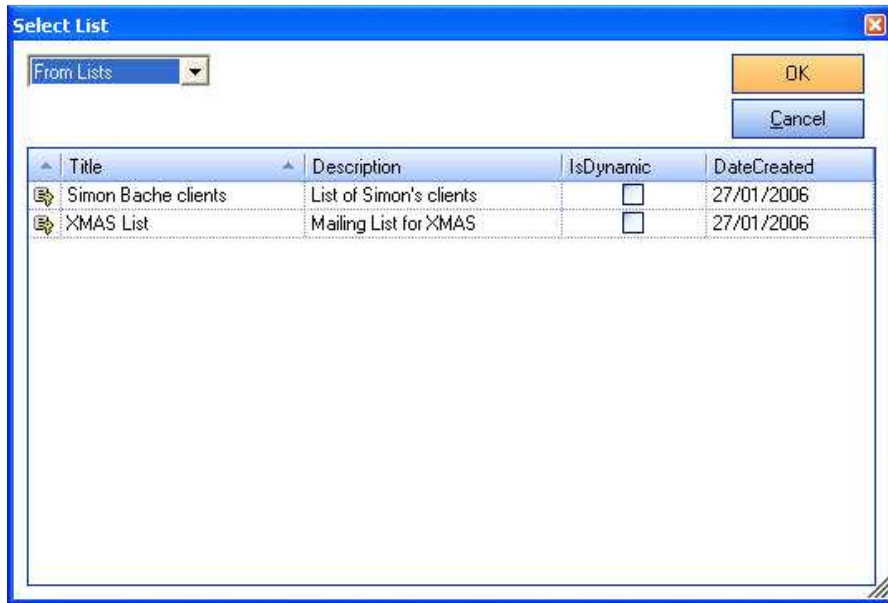
Key points: Create a list

- Lists can be produced and then saved from any type of client or contact search.
- The **Static** option fixes the list whereas the **Dynamic** option allows it to be updated from the source.

-
- A List is only available to the person that created it.

Mail Merge from a List

Once you have created a list, you can use it over and over again in mail merges without needing to repeat the search and selection steps.



How to use a saved list in a mail merge

1. Use the search options and select New Search from List and select Search.
2. Select the saved list and select OK.
3. Your list of clients now appears where you can toggle who you want and proceed with the Mail merge wizard.

Key points: Mail merge from a list

- Mail merges can be prepared from saved lists, but it should only be used in certain circumstances. If running a list of clients from a report, for example Newsletter, then you would not save this list unless you wanted to keep a list of people you sent that particular newsletter to. If wanting to run the mail merge again in a few months' time for people to receive the newsletter, then it is best not to pull up an old list but to run it off the report again as this will then pull up an updated list of clients.

Label Templates

The mail merge functionality in AE PM makes it very easy to generate mailing labels. The process is like any other mail merge except it uses an address label template.

«AddresseeMailingName» «MailingName» «Address1» «Address2» «Address3» «Town»«County»«PostCode»	«Next Record»«AddresseeMailingName» «MailingName» «Address1» «Address2» «Address3» «Town»«County»«PostCode»
---	--

AE PM comes with a sample address label format which is a standard Avery Label 2x7; however you can produce your own address label template for any label size.

How to create label templates

1. Create a new template using *New template* from the Task Bar on the **Documents** tab of a client.
2. Define the label details through MS Word (**Tools > Letters and Mailings > Envelopes and Labels**).
3. Insert the required mail merge fields into the first label.
4. Copy the mail merge fields from the first table cell to the subsequent table cells.
5. Save the template with the appropriate name.

Note: The <<Next Record>> merge field appears at the start of the second and subsequent cells.

Key points: Create a label template

- Address label templates for any label size can be created.
- Define the required labels layout in the first cell of a new labels template and then copy and paste these mail merge fields into each subsequent cell.
- Press **[Alt+F9]** to show or hide the hidden Word fields.
- Ensure that you paste your merge fields into subsequent cells after the <<NEXT>> field.