

MYOB Accountants Office

MAIL MERGE TO WORD

Version 5.4.29 and above



myob



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MYOB Accountants Office Mail Merge to Word 5.4.29 and above

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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.

The screenshot shows a dialog box titled "Amend Contact Name". It contains the following fields and options:

- Type:** Radio buttons for Person and Organisation.
- Contact Type:** A dropdown menu currently showing "Individual".
- Title:** A text box containing "Mr".
- First:** A text box containing "John".
- Middle:** A text box containing "William".
- Last:** A text box containing "Smith".
- Suffix:** An empty text box.
- Gender:** Radio buttons for Male and Female.
- Mailing Name:** A text box containing "Mr J Smith" with a refresh icon to its right.
- Initials:** A text box containing "J W" with a refresh icon to its right.

Buttons for "OK" and "Cancel" are located in the top right corner of the dialog box.

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 > Maintenance Map > Mailing Settings**.

Billing Startup Path	<input type="text" value="C:\MYOBAO\AOSQL\Bills"/>
Templates Path	<input type="text" value="C:\MYOBAO\AOSQL\Document Templates"/>
Document Startup Path	<input type="text" value="M:\MYOBAO\Data\Documents"/>
Mailing Salutation	<input type="text" value="[FN]"/>
Mailing Name	<input type="text" value="[PR] [FN-1/1] [MN-1/1] [LN]"/>
Mailing Initials	<input type="text" value="[FN-1/1][MN-1/1]"/>
Mailing Formal Name	<input type="text" value="[PR] [FN-1/1] [MN-1/1] [LN]"/>
Mailing Name Separator	<input type="text" value="[]"/>

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

Open the Documents tab for a client and click *New template* in the Task Bar.

Insert the required mail merge fields and complete the document content.

Save the template with the appropriate name into the location specified in Mailing Settings.

or

From the Mail Merge Wizard

Select at least one client in the Find Clients page and click *Mail merge wizard* in the Task Bar.

Click the Add New Template button inside the wizard.

Note: Templates cannot be created directly from within Word. If you have existing templates which you want to use create the template via MYOB AO and then copy and paste the wording from the old template (excluding any old merge fields).

Mail merge fields available

«Auto Merge Field»

«Contact Type»

«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»

Plus any Extra Field and Extra List items.

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 MYOB AO.

Select at least one client in the Find Clients page and click *Mail merge wizard* in the Task Bar.

Right mouse click on the required template and choose Edit Template.

Make the required changes.

Save the updated template.

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

Mail Merge Options

First you need to establish how you want to obtain the clients you want to send your letter to. The options are:

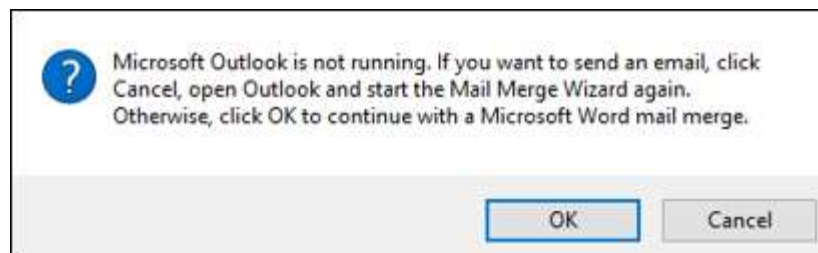
- Running a mail merge from a client search by ticking the required clients.
- Append to search which is very useful for creating a one-off list of clients for labels or letters.
- Mail merge using Extra Fields/Extra Lists via a report

Refer to full instructions on each option in this guide – page 15 onwards.

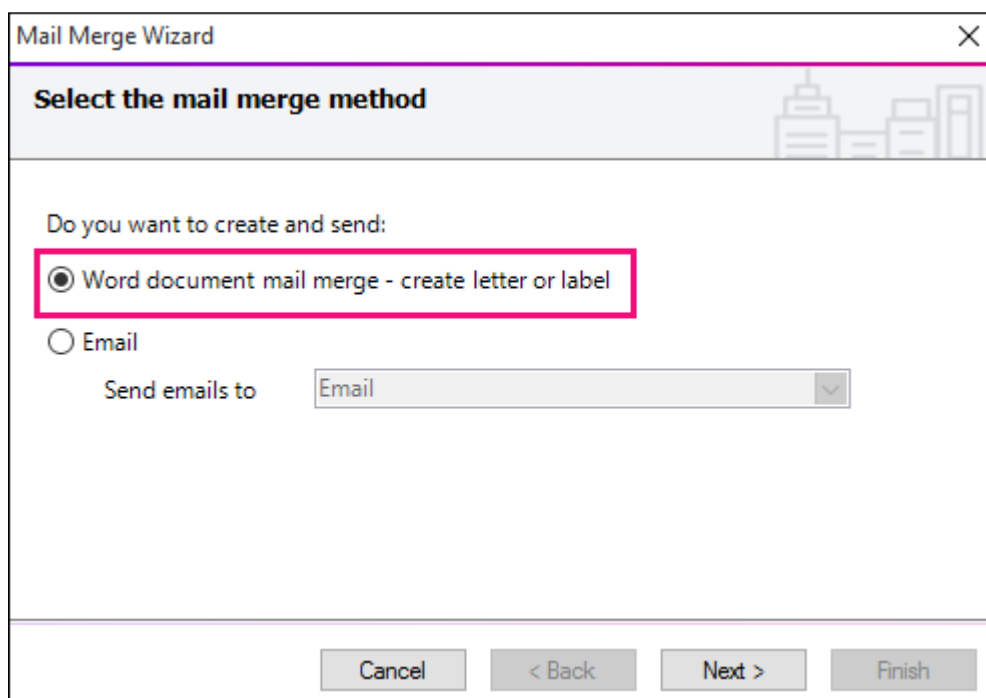
Mail merge wizard

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:

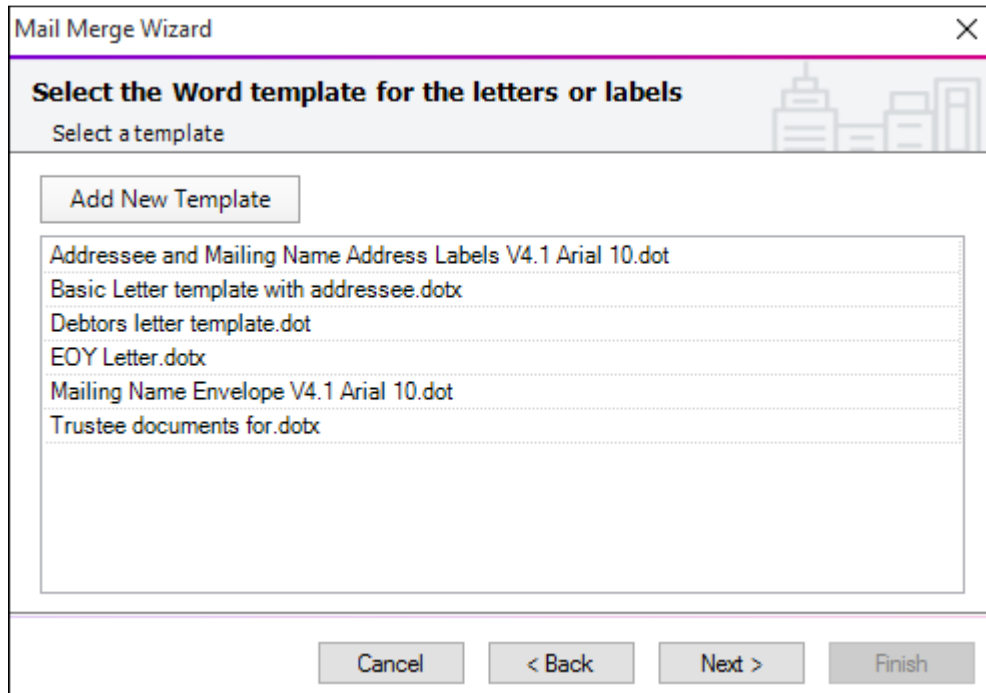
1. Click **Mail Merge Wizard** in the **Documents menu** on the **Task Bar** and the following screen now appears if Outlook is not running. As you are doing a mail merge and not emailing you can just **Okay** this screen to continue.



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

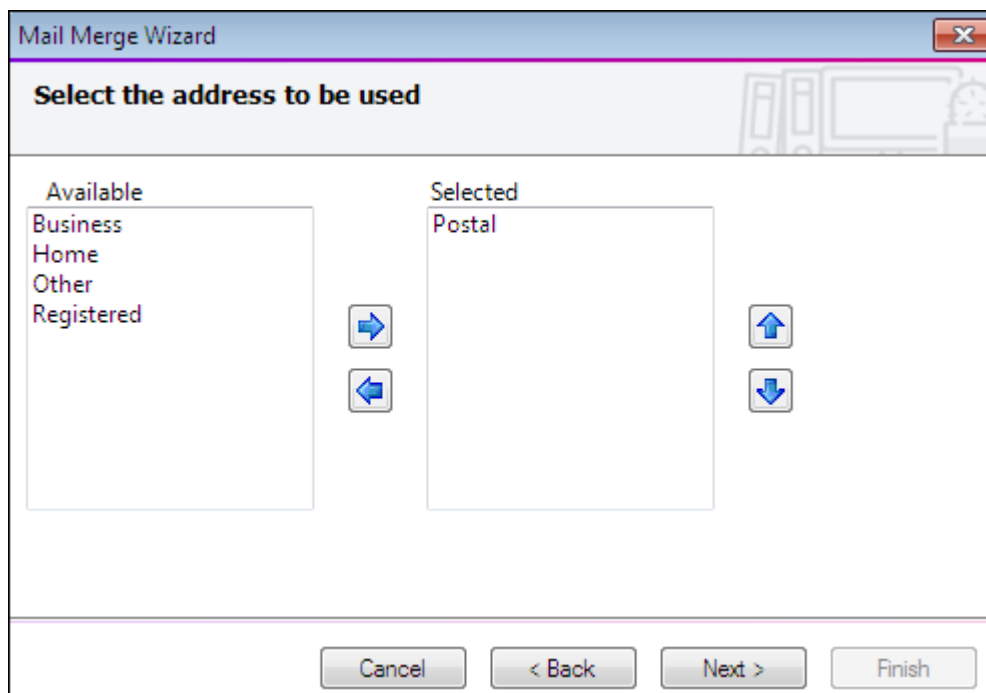


Step 2 – Highlight an existing Word template or click Add New Template to create a new template and click **Next**.

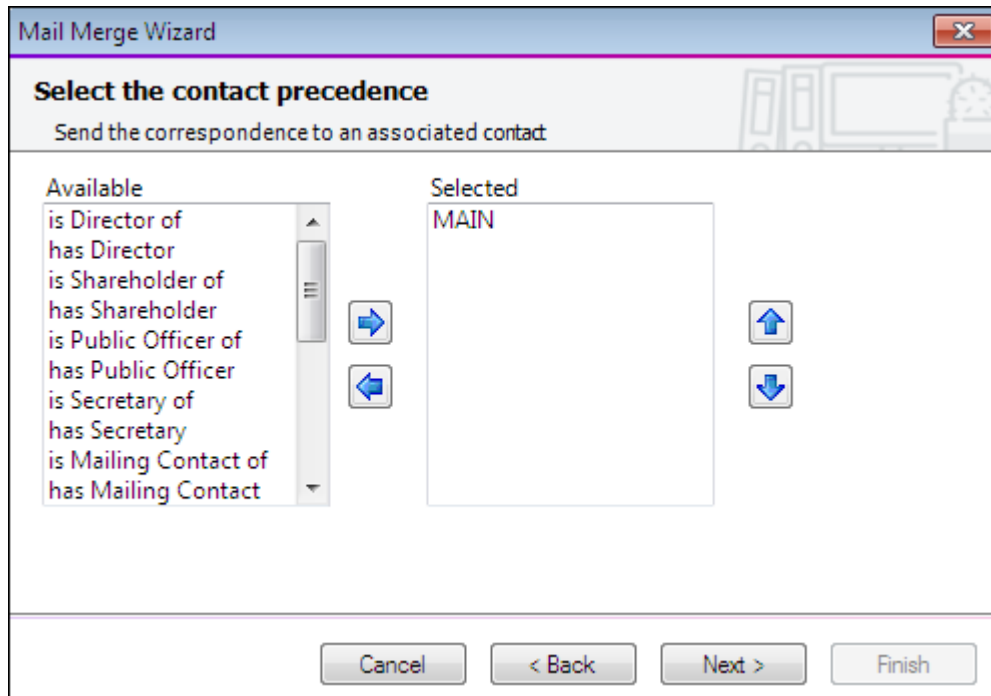


Step 3 – The system will default to your Primary address type. This can be changed if required by selecting another available address which will become the first address in the *Selected* box. This means the system will use this address first and if this address doesn't exist for the client it will then use the system default address, for example Postal. You cannot remove the system default address.

Select **Next** to continue.



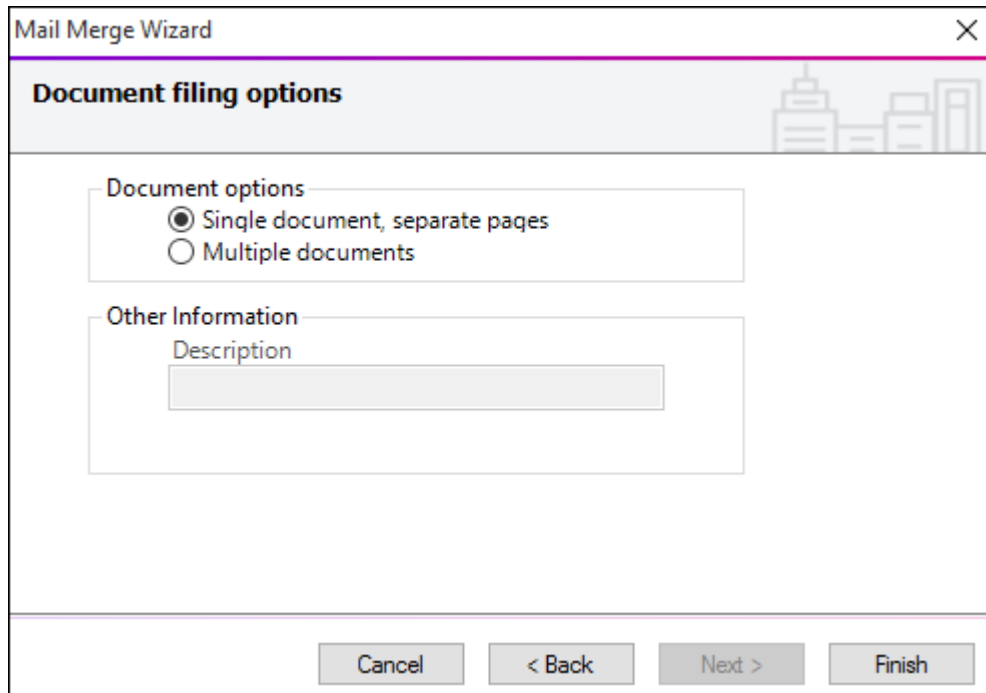
Step 4 – Select the contact precedence - this would usually be “has Mailing Contact” where the system will address the letter to a person at the company. If you are not using mailing contacts under Associations then leave as MAIN and select **Next** to continue.



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 with the 'Document filing options' tab selected. The 'Document options' section has two radio buttons: 'Single document, separate pages' (which is selected) and 'Multiple documents'. The 'Other Information' section has a 'Description' label and an empty text input field. At the bottom, 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.

Mail Merge from Client Search

This feature is very useful for running a mail merge from the list of clients that appear in your client search and not based on an Extra Field or Extra list via Reports.

1. From the Find Client page click Search to display all clients within your database. Take note of whether you have ticked "Include closed clients" or not.
2. Select the required clients by checking the tick box.
3. Select *Mail merge wizard* from the Task Bar.

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/Extra Lists via a Report

Newsletter or Christmas 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 Christmas 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** page, select *New search from reports* from the drop down to the right of the *Search for* field and click Search.

Note: Use Find clients if you have written the report in the **Reports > Client** area. If you have written the report in **Reports > Contacts** then use the Find contact search option.

3. The list of reporting areas is displayed. Run the report created at step 1. The list of clients that meet the report criteria will now display.
4. You now need to tick the clients you want to mail merge.
5. Select *Mail merge wizard* on the Task Bar.

Label Templates

The mail merge functionality in MYOB AO 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»
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MYOB AO 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

Create a new template using *New template* button on the Task Bar of the Documents tab of a client.

Define the label details through MS Word (Tools > Letters and Mailings > Envelopes and Labels).

1. Insert the required mail merge fields into the first label.
2. Copy the mail merge fields from the first table cell to the subsequent table cells.
3. 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:

- 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.