

## MailMerge Reports

### User Guide

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Ver. 1.2

MailMerge Reports. User Guide

Version 1.2, 2013

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## Preface

MailMerge Reports helps organizations to solve the needs to generate documents with information of any module of SugarCRM©. The formats included are: docx, odt and pdf. You can obtain any number of documents from any SugarCRM© module using templates.

## Audience

This guide is intended for system administrators, who have to install the component, as well as users who have to create the document's templates.

## Overview

For all modules, there is a new "Generate Document" action in ListView (need at least one record selected) and a new "Generate Document" button in DetailView.

Some example files will be installed by default for the Opportunities module. Please, open MailMerge Reports ListView to see them. Then go to Opportunities module (ListView or DetailView) to run some of the examples.

Go to MailMerge Reports module, and click on "Available variables list & Generate basic template" menu. Then select a module and select some fields to create a basic template. Once basic template is created, you can modify it according to your needs.

## Editions & Core Features

Editions	Feature
Basic & Premium	To generate documents in format .docx, .odt and .pdf
Basic & Premium	To generate document for any number of record
Basic & Premium	To generate document for any module
Premium	Related and subpanel modules fields (parent modules and subpanel modules).
Premium	Custom fields (created in Studio)
Premium	MailMerge Reports calculated fields (see "Calculated Fields" section)*

\*You can create calculated fields for each module creating a file called 'DHA\_DocumentTemplatesCalculatedFields.php' in module folder or in custom/modules folder.

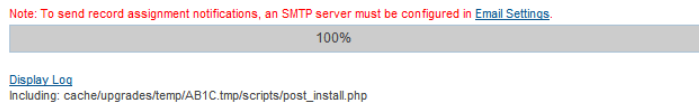
See example in:

“custom/modules/Opportunities/DHA\_DocumentTemplatesCalculatedFields.php”

## System Administration

### Install

Install works the same as most any SugarCRM® module. Download the latest zip file from Sugar Forge (<http://www.sugarforge.org/projects/plantillasword/download>) and install using ModuleLoader within SugarCRM®.



#### MailMerge Reports has been installed!

##### How to start

For all modules, there is new "Generate Document" action in ListView (need at least one record selected) and new "Generate Document" button in DetailView.

Some example templates has been installed by default for the "Opportunities" module. Open "[MailMerge Reports](#)" to see them. Then go to "[Opportunities](#)" module (ListView or DetailView) to run some of the examples.

Go to "MailMerge Reports" module, and click on "[Available variables list & Generate basic template](#)" menu. Then select one module and select some fields to create a basic template. Once basic template is created, you can modify it according to your needs.

Please also read the [readme.txt](#) file before using "MailMerge Reports" (in zip installation file).

**Important !!** This installer have modified some SugarCRM files (see [readme.txt](#)). If you have to upgrade SugarCRM, please uninstall the component previously, checking option "Do Not Remove Tables" to preserve data and template files, and reinstall after upgrade.

Enjoy!!

##### Contact

Dharma Ingeniería  
[comercial@dharmasigi.com](mailto:comercial@dharmasigi.com)  
[www.dharma.es](http://www.dharma.es)

### Upgrading

If you have to upgrade SugarCRM®, please uninstall the component previously, checking the option "Do Not Remove Tables" to preserve data and template files, and reinstall after upgrade.

### Requirements for PDF Documents

**\*This feature is only available for dedicated servers**

#### Option 1 (Windows and Linux)

Install LibreOffice (<http://libreoffice.org>) or Apache OpenOffice (<http://www.openoffice.org>) and set 'DHA\_OpenOffice\_exe' config variable with correct path in "[config\\_override.php](#)" file:

```
- $sugar_config['DHA_OpenOffice_exe']
```

Examples :

```
[WINDOWS] 'C:\Program Files (x86)\LibreOffice 3.5\program\swriter.exe'
```

```
[LINUX] '/usr/lib/libreoffice/program/soffice'
```

If everything is correctly configured, a new button "Generate PDF Document" will appear beside the "Generate Document" button.

### Option 2 (Only for Linux)

In web hosting services where you can't install LibreOffice or Apache OpenOffice, download LibreOffice cde-package (from <http://www.dharma.es/downloads> ).

[cde-libreoffice-odt docx export pdf-allFonts.tar.gz](#) (All - fonts 180 Mb)  
[cde-libreoffice-odt docx export pdf-light.tar.gz](#) (70 Mb)

Unpack tar file anywhere and set 'DHA\_OpenOffice\_cde' following the command in current directory:

```
tar xvzf cde-libreoffice-odt_docx_export_pdf.tar.gz
```

If pdf generation does not work, try this command to change the owner and group of the cde-package folder to the Apache server user (or any server you are using).

Substitute APACHE\_SERVER\_USER and APACHE\_SERVER\_GROUP to real Apache user and group.

```
chown -R APACHE_SERVER_USER:APACHE_SERVER_GROUP cde-libreoffice-pdf
```

Edit file "**config\_override.php**" modifying the parameter `sugar_config['DHA_OpenOffice_cde']` with your path to OpenOffice:

Examples :

```
- $sugar_config['DHA_OpenOffice_cde']  
  [LINUX] '/home/USER_NAME/cde-libreoffice-pdf/libreoffice.cde'  
  [LINUX] '/var/www/vhosts/DOMAIN_NAME/httpdocs/cde-libreoffice-pdf/libreoffice.cde'
```

If everything is correctly configured, a new button "Generate PDF Document" will appear beside the "Generate Document" button.

Note: 'DHA\_OpenOffice\_exe' config variable have preference over 'DHA\_OpenOffice\_cde', so leave empty 'DHA\_OpenOffice\_exe' if you plan to use 'DHA\_OpenOffice\_cde'.

## Languages

The language selected for the templates will affect to dates, numbers and boolean fields format.

The available options are:

```
'es_AR' => 'Spanish (Argentina)',  
'es_MX' => 'Spanish (Mexico)',  
'en_US' => 'English (United States)',  
'en_GB' => 'English (United Kingdom)',  
'es' => 'Spanish',  
'ca' => 'Catalan',
```

'de' => 'German',  
'fr' => 'French',  
'fr\_BE' => 'French (Belgium)',  
'it\_IT' => 'Italian',  
'pt\_BR' => 'Portuguese (Brazil)',  
'nl' => 'Dutch',  
'dk' => 'Danish',  
'ru' => 'Russian',  
'sv' => 'Swedish',  
'pl' => 'Polish',  
'bg' => 'Bulgarian',  
'hu\_HU' => 'Hungarian',  
'cs' => 'Czech',  
'et' => 'Estonian',  
'lt' => 'Lithuanian',  
'tr\_TR' => 'Turkish',  
'he' => 'Hebrew (Israel)',  
'id' => 'Indonesian',

- If you need to add a new language, follow this steps:
  - Add a new item to 'dha\_plantillasdocumentos\_idiomas\_dom' global list
  - Add a new item in \$lang\_format\_config in 'modules/DHA\_PlantillasDocumentos/lang\_format\_config.php' file or create a new 'custom/modules/DHA\_PlantillasDocumentos/lang\_format\_config.php'.
- If you need to modify output format in some language, edit the 'modules/DHA\_PlantillasDocumentos/lang\_format\_config.php' file or create a new 'custom/modules/DHA\_PlantillasDocumentos/lang\_format\_config.php'.
- If you need to modify default language edit file “**config\_override.php**” set parameter 'DHA\_templates\_default\_lang' => 'en\_US',

## Creating Merge & Report

### Using “Available variables list & Generate basic template”

If the user has edit permission over the MailMerge Reports module, he will be able to generate a basic template. See an example for contacts module:

#### **First Step: Selecting available variables**

The available variables for the selected module appear in a list when you are a user with view permission over the selected module. You can select the variables that you need clicking one to one, or you can select all of them clicking in the head of the table.

SUGARCRM

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Sales | Marketing | Support | Activities | Collaboration | All

Recently Viewed: [Accounts 06/12/](#) | [MailMerge -Repo](#) | [Airline Mainten](#)

Actions: [Create Document Template](#) | [View Document Templates](#) | [Available variables list & Generate basic template](#)

### Available variables list & Generate basic template

Select Module:







**» Contacts**

Label	Field	Type	Description
<a href="#">Accept Status</a>	c_accept_status_fields	relate	
<a href="#">Accept Status</a>	m_accept_status_fields	relate	
Accept Status	accept_status_id	varchar	
Accept Status	accept_status_name	enum	
Account ID	account_id	relate	
<a href="#">Account Name</a>	account_name	relate	
<a href="#">Account Name</a>	opportunity_role_fields	relate	
Alternate Address City	alt_address_city	varchar	City for alternate address.
Alternate Address Country	alt_address_country	varchar	Country for alternate address.
Alternate Address Postal Code	alt_address_postalcode	varchar	Postal code for alternate address.

To access to related and subpanel modules variables, click the (+) icon (only in Premium Edition).

Primary Address Street 3	primary_address_street_3	varchar	
<a href="#">Reports To</a>	report_to_name	relate	
Salutation	salutation	enum	Contact salutation (e.g., Mr, Ms).
Sync to Outlook®	sync_contact	bool	Synch to outlook? (Meta-Data only).
Title	title	varchar	The title of the contact.

-  [Users](#) » Created By [[created\\_by\\_link](#)] (relate)
-  [Users](#) » Modified By [[modified\\_user\\_link](#)] (relate)
-  [Users](#) » Assigned User [[assigned\\_user\\_link](#)] (relate)
-  [Contacts](#) » Reports to ID [[reports\\_to\\_link](#)] (relate)
-  [Campaigns](#) » Campaign ID [[campaign\\_contacts](#)] (relate)
-  [Email Address](#) » ID [[email\\_addresses\\_primary](#)] (many-to-many)

After selecting the variables that you need, please introduce the name, language and format (.docx/.odt) for the basic template.

### Second step: Modifying the basic template

You can download the basic template generated in order to modify it, by clicking on the file link, generating a personalized template.



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Sitemap

Sales Marketing Support Activities Collaboration All

Recently Viewed: [Contacts 06/14/](#) [Accounts 06/12/](#) [MailMerge -Repo](#) [Airline Mainten](#)

Actions: [Create Document Template](#) [View Document Templates](#) [Available variables list & Generate basic template](#)

**Contacts 06/14/2012 07:36am** [Create](#)

[Edit](#)

Template:	Contacts 06/14/2012 07:36am
File:	<a href="#">eae924f0-a3d0-8bbf-8355-4f9984381fb.docx</a>
Module:	Contacts
Language:	English (United States)
Status:	Draft
Category:	
Assigned to:	Administrator
Description:	
Date Created:	06/14/2012 07:45am by Administrator
Date Modified:	06/14/2012 07:45am by Administrator

### Third step: Loading personalized templates

After editing the template, you can upload it on the same template record or create a new template.

## Upload and Running Templates

As we saw before, after installing the component, a new “Generate Document” option appears:

- 1) **Listview:**run a basic or advanced search to select the records whose information you will obtain with the template selected.

**SUGARCRM** Welcom

Sales Marketing Support Activities Collaboration All

Home Accounts Contacts Leads Campaigns Targets Target Lists

Recently Viewed: [Contacts 06/14/](#) [Contacts 06/14/](#) [Accounts 06/12/](#) [MailMerge -Repo](#) [Airline Mainten](#)

Actions: [Create Contact](#) [Create Contact From vCard](#) [View Contacts](#) [Import Contacts](#)

**Search Contacts**

Name  My Items    [Advanced Search](#)

<input type="checkbox"/>	Delete	Selected: 5	Title	Account Name	Email
<input checked="" type="checkbox"/>	<input type="checkbox"/>		VP Operations	<a href="#">Kings Royalty Trust</a>	<a href="#">kid79@example.info</a>
<input checked="" type="checkbox"/>	<input type="checkbox"/>		IT Developer	<a href="#">Bay Funding Co</a>	<a href="#">kid.support.sales@example.i</a>
<input checked="" type="checkbox"/>	<input type="checkbox"/>		<a href="#">Briqitte Dostal</a>	<a href="#">Sea Region Inc</a>	<a href="#">the.sugar@example.info</a>

Template Name	Format	Language	Status	Description
<input checked="" type="radio"/> <a href="#">Contacts 06/14/2012 07:36am</a>	docx	English (United States)	Draft	
<input type="radio"/> <a href="#">Contacts 06/14/2012 07:48am</a>	docx	English (United States)	Draft	

Generate Document Cancel

2) **Detailview:** you need to select the template if there is more than one as before.

The screenshot shows the SugarCRM interface. At the top, there's a navigation bar with tabs for Sales, Marketing, Support, Activities, Collaboration, and All. Below that, there's a breadcrumb trail: Home > Accounts > Contacts > Opportunities > Leads. A 'Recently Viewed' section shows several items, including 'Rowena Brunswick'. Below that, there's an 'Actions' bar with options like 'Create Contact', 'Create Contact From vCard', 'View Contacts', and 'Import Contacts'. The main content area shows the contact record for 'Rowena Brunswick'. A dropdown menu is open over the 'Edit' button, showing options: Duplicate, Delete, Find Duplicates, Manage Subscriptions, View Change Log, and Generate Document. The contact details include: Name: Rowena Brunswick, Title: VP Operations, Office Phone: (362) 032-4799, Mobile: (350) 966-3090, Account Name: Kings Royalty Trust, and Primary Address: 67321 West Siam St.

## Creating Templates

### Initial declaration of relationships

The first line of a template always has to include the initial declaration of the relationships that the template will have.

When a template includes variables of the main module or variables from related fields, this initial declaration will be:

```
.docx: [a;block=w:body]
```

```
.odt: [a;block=office:body]
```

When the template includes variables from subpanels (relationship type 'one-to-many' or 'many-to-many'), the syntax will be "subX=relationshipsName" where X is an incremental value starting by 1. For example, a template showing data from calls and meetings modules, will start by:

```
.docx: [a;block=w:body;sub1=calls;sub2=meetings]
```

```
.odt: [a;block=office:body;sub1=calls;sub2= meetings]
```

**Important:** When variables from a subpanel have to be used in more than a block (see [Data block](#) section), the relationship declaration has to be repeated as many times as it is used (one time by block) as a new subX or the document generation will fail. In the previous example, if you want to show calls data in a table and also in a bullet point list; you will have to declare it twice, one time by block:

```
.docx :[a;block=w:body;sub1=calls;sub2=meetings;sub3=calls]
```

```
.odt: [a;block=office:body;sub1=calls;sub2=meetings;sub3=calls]
```

## Type of Variables

There are three types of variables in a template:

### 1.-Variables of main module

They are declared like *[a.FieldName]*.

Example:

```
[a.full_name][a.primary_address_city]
```

### 2.-Variables of “relate” type

They are declared like *[a.RelationshipName@@FieldName]*

Remember that the relationships don't have to be declared in the first line of the template like *subX*.

Example:

```
[a.assigned_user_link@@user_name]
```

### 3.- Variables of subpanel relationship type ('one-to-many' or 'many-to-many')

As we saw before, the relationships 'one-to-many' or 'many-to-many' have always to be declared at the first line of a template like *subX* (see [Set of initial relationships](#)).

This type of variables has always to be contained into a data block (see [Data block](#) section). They are always declared like *[a\_subX.FieldName]* where *subX* is the relationship declared in the first line of the templates.

Examples:

Initial Declaration ->[a;block=w:body;sub1=meetings ;sub2=calls]

Declaration of subpanels variables-> [a\_sub2.direction] [a\_sub2.date\_start] [a\_sub1.duration]

If we need data from a second level relationship, data from any operation or any conditional, it is mandatory to create calculated fields for the module.

## Data block (Subpanels)

Each data block corresponds to a subpanel. In this section we explain the different options to represent this information, see the following examples.

- **Example of “Paragraph”:**

Call 1, Description1, Call2, Description2

- **Example of “Table Row”:**

Call 1	Description1
Call 2	Description2

- **Example of “Table”:**

Call 1
Description1

Call2
Description2

- **Example of “List item”**

- Call 1, Description2
- Call 2, Description2

We declare blocks according to the design needed:

Block Type	.docx	.odt
Paragraph	w:p	text:p
Table Row	w:tr	table:table-row
Table	w:tbl	table:table
List item	w:p	text:list-item

A block also can be defined as the union of several basic blocks using the ‘+’ character to link them.

By example, two paragraph in .docx format are represented by **w:p+w:p**, three paragraph **w:p+w:p+w:p**, a paragraph plus a table **w:p+w:tbl** and two table rows are **w:tr+w:tr**

To declare a block we use “block” word.

**Examples of block declarations (.docx format):**

- Block of Paragraph: [a\_sub1;block=w:p]
- Block of 'Table Row': [a\_sub1;block=w:tr]
- Block of 'Table' + 'Paragraph' : [a\_sub1;block=w:tbl+w:p]

**Examples of block declarations and variables (.docx format):**

- Block of paragraph :

[a\_sub1;block=w:p]The record name is [a\_sub1.name] and their number is [a\_sub1.number]

- Block of 'Table Row':

Name	Number
[a_sub1;block=w:tr][a_sub1.name]	[a_sub1.number]

- Block of two Table rows:

[a_sub1;block=w:tr+w:tr] <b>Name</b>	[a_sub1.name]
<b>Number</b>	[a_sub1.number]

- Block of 'Table' + 'Paragraph' (the entire table will be repeated even the head and the white line that follow it):

Name	Number
[a_sub1;block=w:tbl+w:p][a_sub1.name]	[a_sub1.number]

- Block of 'Paragraph' + 'Table' (note the intermediate paragraph in white, between the initial paragraph and the table and the white paragraph after the table):

[a\_sub1;block=w:p+w:p+w:tbl+w:p]The record name is [a\_sub1.name] and their number [a\_sub1.number]

Name	[a_sub1.name]
Number	[a_sub1.number]

## Example: Template and Generated Document

[a;block=w;body;sub1=accounts;sub2=contacts;sub3=meetings]  
[a.cf\_current\_weekday], [a.cf\_current\_date\_inWords]

**Initial declaration and subpanels**

**Opportunity:** [a.name]

This opportunity was created on [a.date\_entered], and assigned to [a.assigned\_user\_link@@full\_name] (Work Phone [a.assigned\_user\_link@@phone\_work], email [a.assigned\_user\_link@@email1]) which works in department [a.assigned\_user\_link@@department] and reports to [a.assigned\_user\_link@@reports\_to\_name].

Opportunity amount [a.cf\_currency\_symbol] [a.amount]

Sales stage is [a.sales\_stage], and the probability to win is[a.probability]%. Next step should be [a.next\_step].

**Account:** [a.account\_name]  
**Office Phone :** [a.cf\_account-phone\_office]

**Contacts**

Name	Email	Office Phone	City
[a_sub2;block=w;tj][a_sub2.full_name]	[a_sub2.email1]	[a_sub2.phone_work]	[a_sub2.primary_address_city]

**Meetings**

- [a\_sub3;block=w;p][a\_sub3.name] – Start date [a\_sub3.date\_start] - Duration [a\_sub3.duration\_hours]: [a\_sub3.duration\_minutes] - Location [a\_sub3.location] - Status [a\_sub3.status].

**Blocks=subpanels**

Monday, June 18, 2012

**Opportunity: Airline Maintenance Co - 1000 units**

This opportunity was created on 06/12/2012 9:07 AM, and assigned to Sally Bronsen (Work Phone, email sally@example.com) which works in department and reports to Sarah Smith.

Opportunity amount \$75,000.00

Sales stage is Prospecting, and the probability to win is10%. Next step should be .

**Account:** Airline Maintenance Co  
**Office Phone :** (466) 544-8637

**Contacts**

Name	Email	Office Phone	City
Nadia Domenico	hr.vegan@example.na	(086) 368-2507	Ohio
Coleman Benoit	support.support@exam	(839) 287-3090	Alabama
Heather Macmillan	the60@example.com	(619) 255-5020	Santa Fe
Gustavo Vogelsang	the.qa@example.de	(278) 191-0989	Denver
Elaine Ingles	im90@example.biz	(714) 425-4196	Salt Lake City

**Meetings**

- Introduce all players – Start date 06/18/2012 3:45 AM - Duration 0: 15 - Location - Status Planned.
- Follow-up on proposal – Start date 06/18/2012 3:45 AM - Duration 0: 15 - Location - Status Planned.
- Discuss pricing – Start date 06/18/2012 3:45 AM - Duration 0: 15 - Location - Status Planned.

**Account (more info)**

## FAQs

- **Is it possible to install MailMerge Reports with any SugarCRM version?**  
No, you must download and install the MailMerge Reports version according to your SugarCRM version.
- **How can I change my Basic MailMerge Reports version to the Premium version?**  
You only have to uninstall the component in 'Module Loader' without delete any table and install Premium version.
- **Can I change the format (font, size, color, etc.) of a variable?**  
Yes. We recommend to define the format of the entire variable including the brackets.
- **I think my template is correct but I get some errors during document generation like missing white spaces. What can I do?**  
First delete the paragraph, the variable or the text before and after the variable which has problems. Then, rewrite it manually (without copy-paste). This is because the copy-paste action can include strange characters.
- **Could I change the format of my template from .docx to .odt?**  
No. Our recommendation is not to transform a .docx template to .odt template, if you do this, unexpected errors will occurs because the way of Microsoft Word generate the internal xml format of a .docx document.