dharma ingeniería

MailMerge Reports

User Guide

Ver. 1.2

MailMerge Reports. User Guide

Version 1.2, 2013

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Contents

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)*

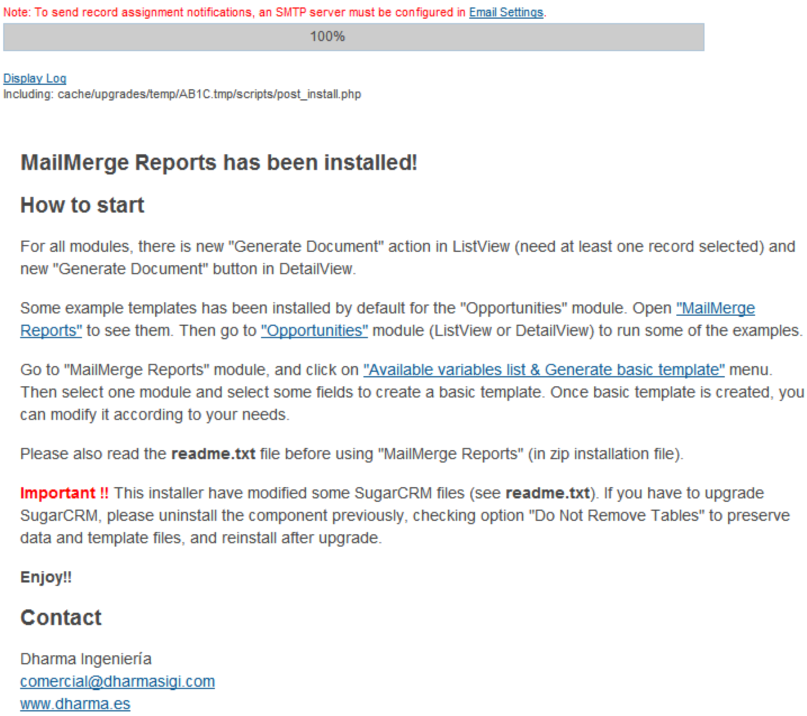
*You can create calculated fields for each module creating a file called 'DHA_DocumentTemplatesCalculatedFields.php' in module folder or in custom/modules folder.
See example in:

“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©.



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',

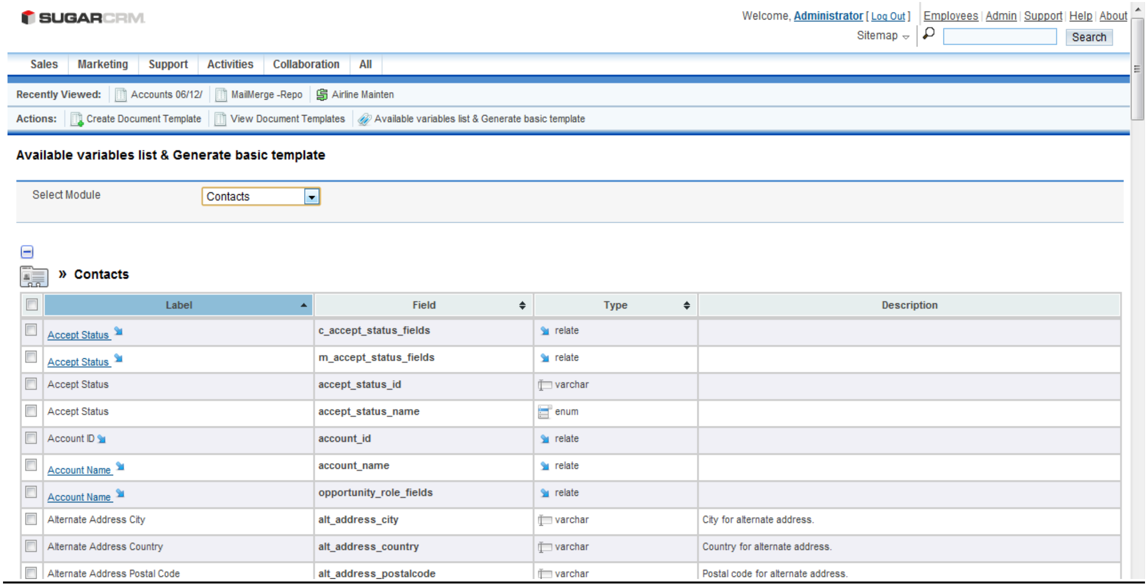
Creating Merge & Report

Using "Available variables list & Generate basic template"

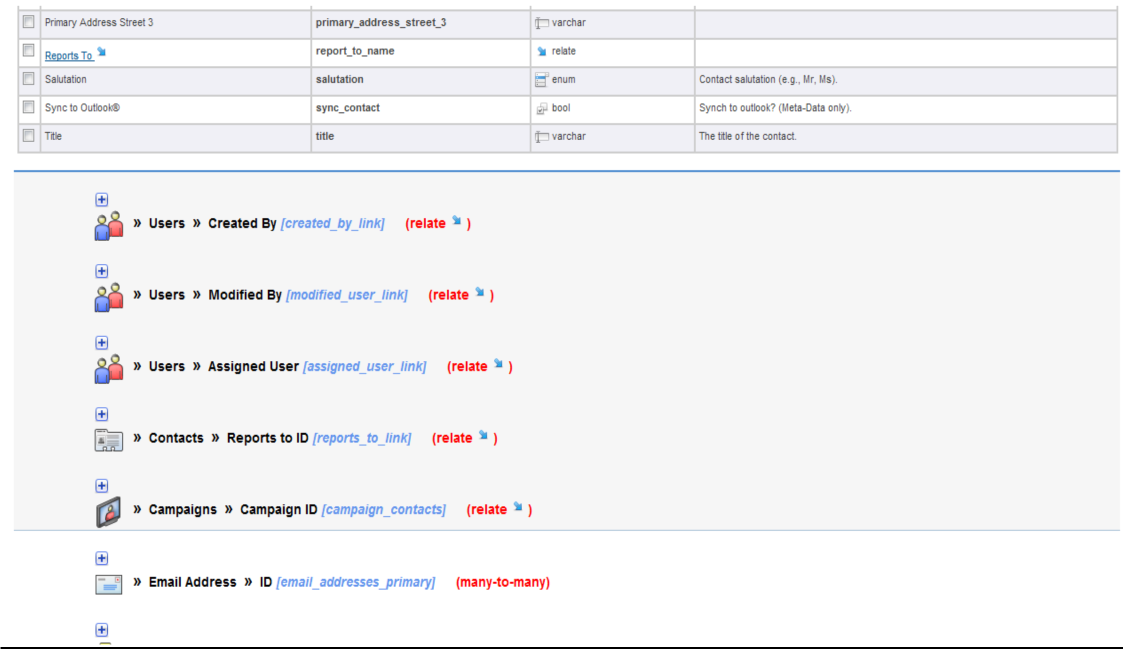
If the user has edit permission over the MailMerge Reports module, he will be able to generate a basic template. See an example for contacts module:

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.



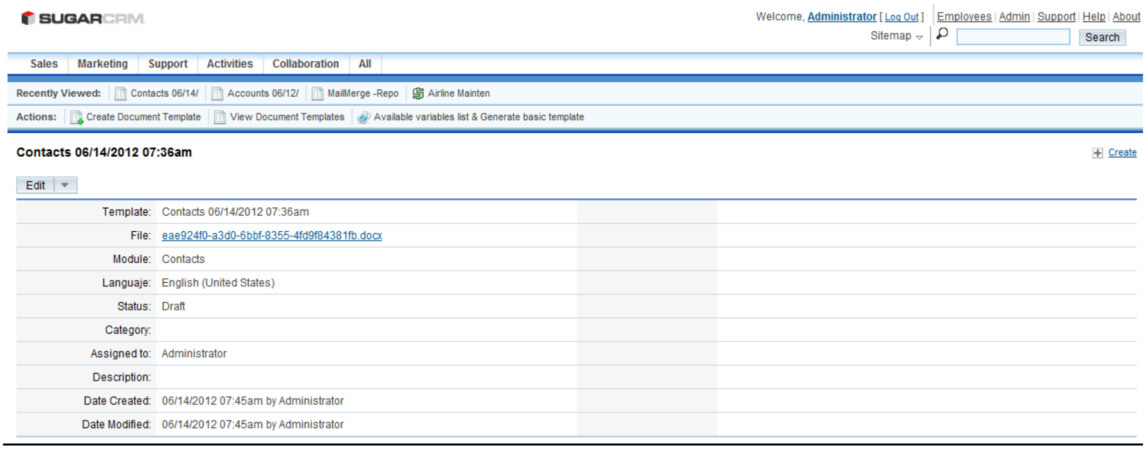
To access to related and subpanel modules variables, click the (+) icon (**only in Premium Edition**).



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.



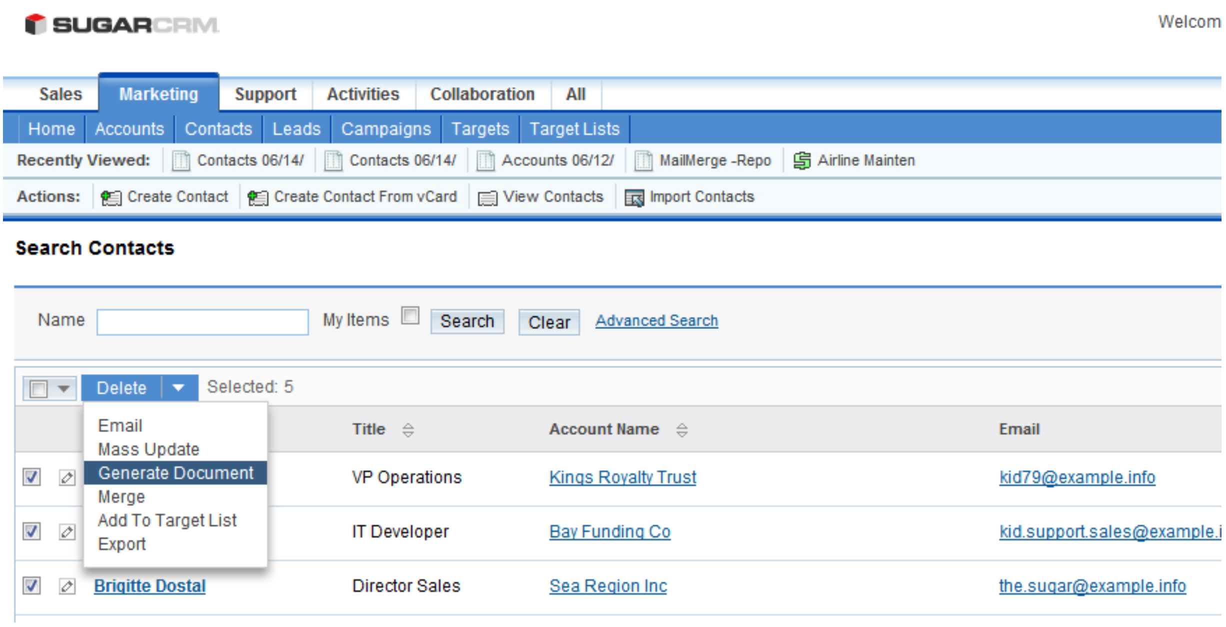
Third step: Loading personalized templates

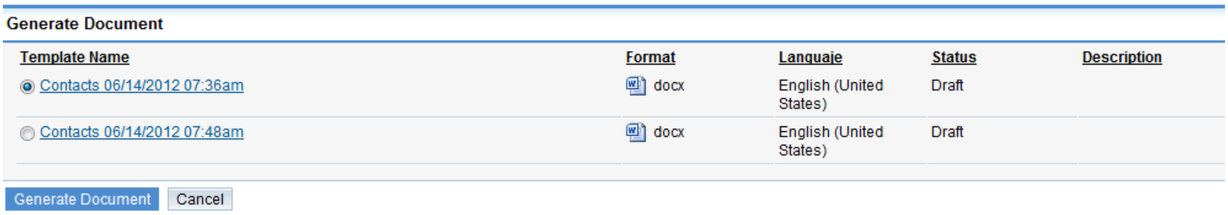
After editing the template, you can upload it on the same template record or create a new template.

Upload and Running Templates

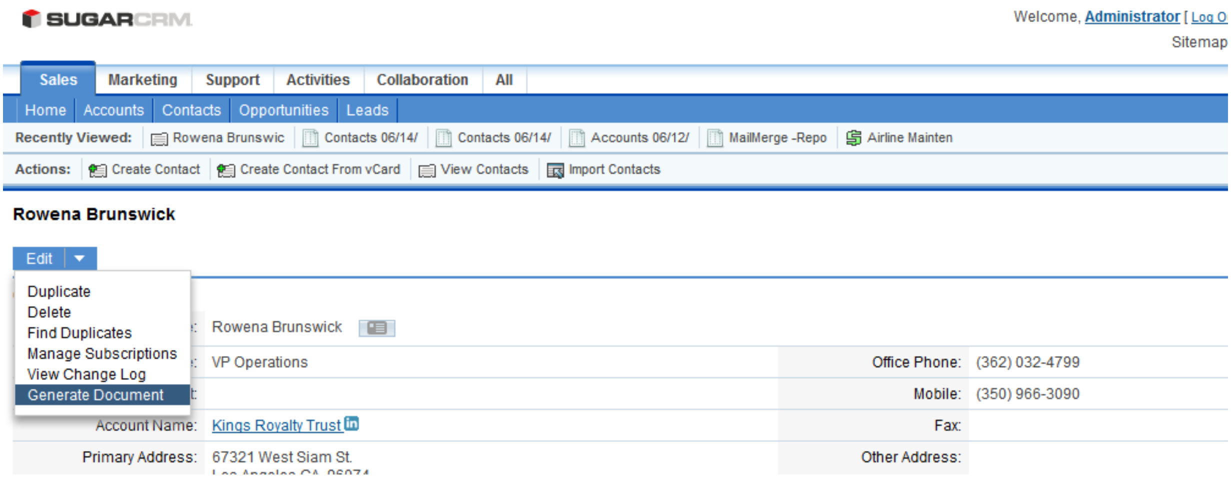
As we saw before, after installing the component, a new "Generate Document" option appears:

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





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



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'),* thesyntax 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 froma subpanel have to be used in more than a block (see Data block section), the relationship declaration have 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* (seeSet of initial relationships).

Thistype of variables hasalwaysto 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 designneeded:

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]

EExamples of block declarationsand 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]**Name**	[a_sub1. name]
Number	[a_sub1.number]

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

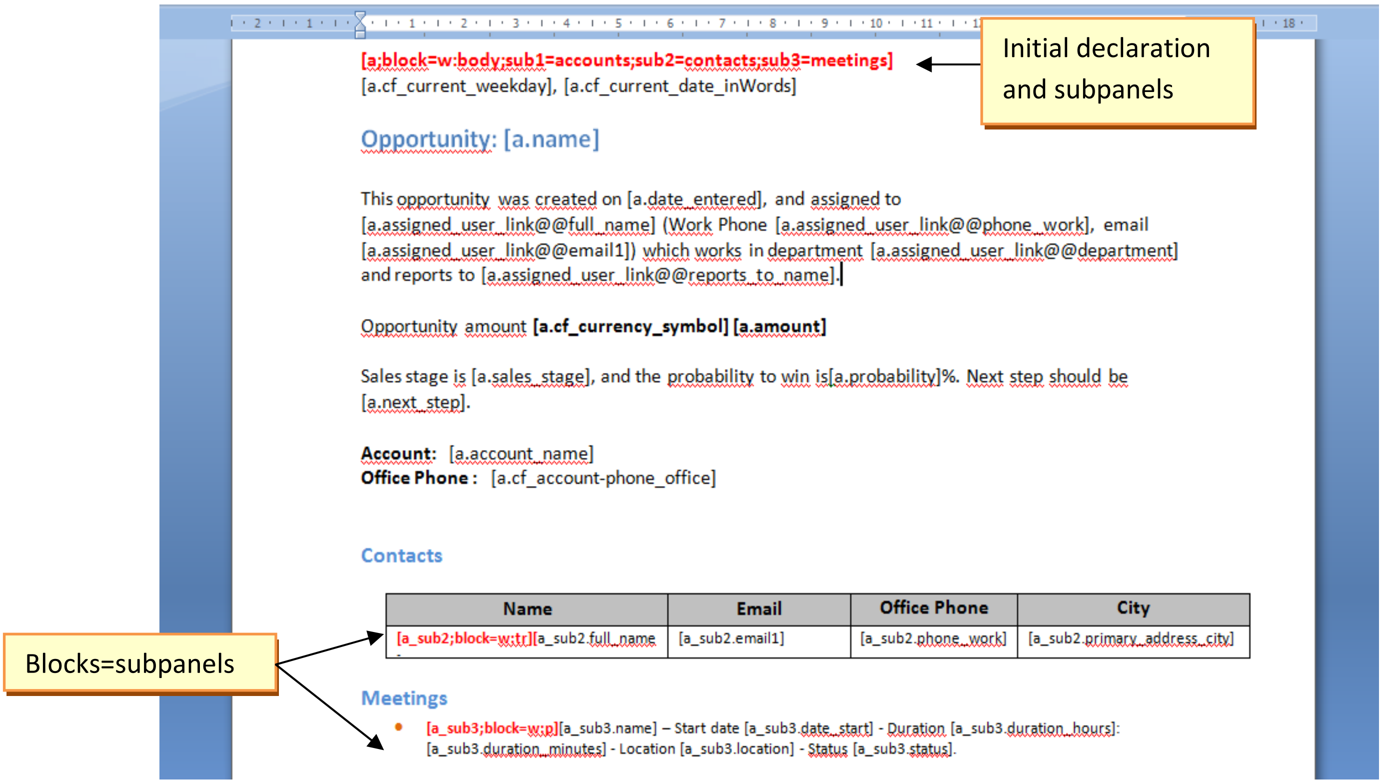
Name	Number
[a_sub1;block=w:tbl+w:p][a_sub1.name]	[a_sub1.number]

- Block of 'Paragraph' + 'Table' (note the intermediate paragraph in white, between the initial paragraph and the table and the white paragraph afeter 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.namber]

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]

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].

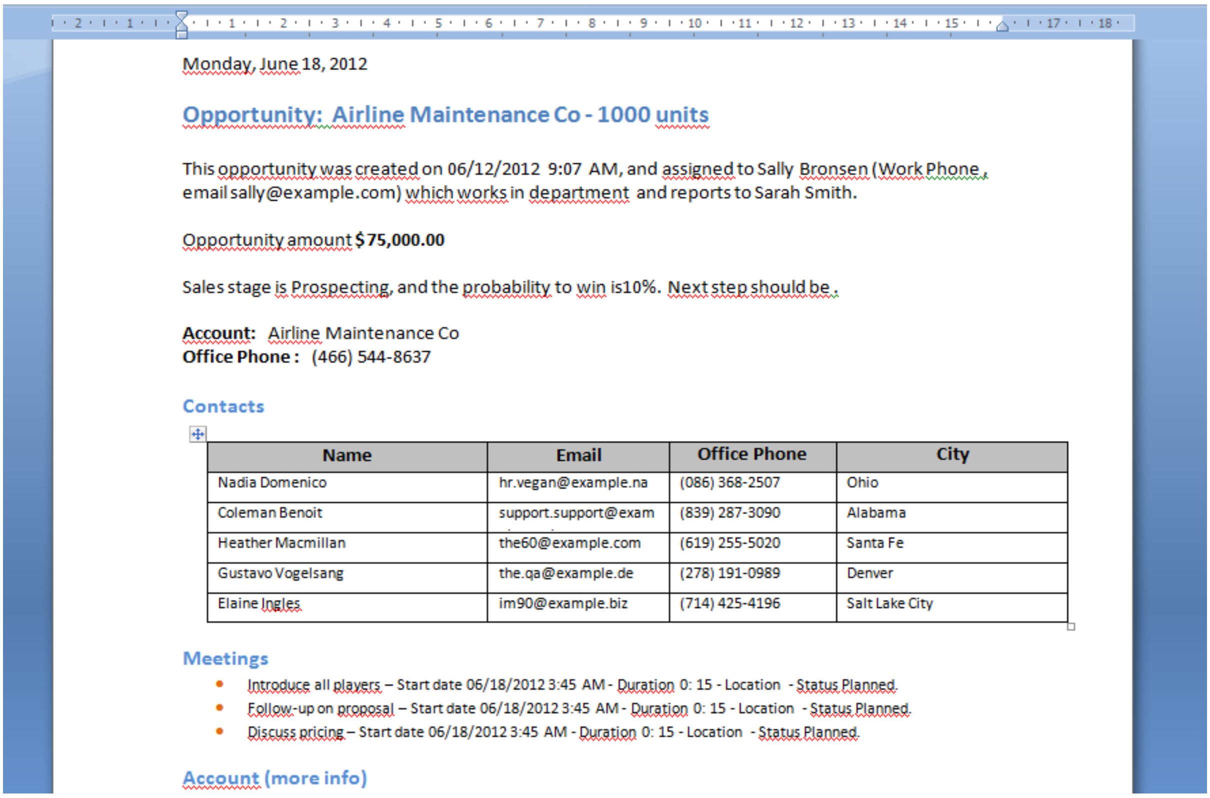
Account: [a.account_name]
Office Phone : [a.cf_account-phone_office]

Contacts

Name	Email	Office Phone	City
[a_sub2;block=w:tr][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].



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.