



# Print Merge Reporter *for IBM Notes® and Domino®*

## Mail merge, printing and reporting tool Inventory barcoding included!

### Technical requirements

#### Mail merge to email messages

Desktop platforms:	Windows 8/7/Vista/XP/2000, Mac OS X/9, Linux
Desktop software:	Notes 9/8/7, Optional data import: Excel 2010/2007/2003/2002/2000
Server platforms:	Windows 2012/2008/2003/2000, Linux, IBM i, AIX
Server software:	Domino 9/8/7

Print Merge Reporter allows the IBM Domino mail system or stand-alone IBM Notes client to send email blasts such as invoices, billing statements, newsletters, product alerts, corporate news, etc. to your customers and employees. Email blasts can be configured to include personalized salutations, mail merge data into the Subject and Body, and dynamically merge unique attachments. The tool allows you to send email blasts to selected customer email contacts maintained in a Notes Contacts address book, Notes application or Excel spreadsheet. For example, it will send one email per contact which is addressed in the "To" field, so if you have 1,000 contacts then 1,000 individual emails will be sent. It supports personalizing the salutation of the email such as "Dear Mr. Smith,". The email blast can be sent immediately or scheduled daily, weekly, monthly with optional load balancing functionality. Customer contacts stored in non-Domino systems such as IBM DB2, Oracle Database, Microsoft SQL, Microsoft Access, etc. can be imported into Print Merge Reporter if initially exported to Excel format.

An "Email Blast Request" can be configured to pull data from a View/Folder residing in any Notes database on your network. The software is driven off a View/Folder to allow increased flexibility when including data in email mail merges since view/folder columns support concatenating fields and boolean operators. A user basically configures "Email Blast Requests" which can be saved for quick and easy future use as a "single click" solution.

The first visible View/Folder column must display a valid email address and should be categorized to prevent duplicate email notification. The second column must display a contact name if the "Email Blast Request" was configured to include a personalized salutation. If the View/Folder does not exist it can be created by any user in your organization. The data residing in each View/Folder column will be extracted for the email blast. The end user can generate an email blast simply clicking a View/Folder action button.

#### Mail merge to document and printer: Labels, Envelopes, Letters, Directory

Desktop platforms:	Windows 8/7/Vista/XP/2000 [or] Macintosh OS X/9
Desktop software:	Notes 9/8/7 and Word 2008/2007/2004/2003/2002/X/2001/2000 [or] Web client and Word 2010/2007/2004/2003/2002/X/2001/2000 [or] Web client and FREE Word Viewer
Server platforms:	Windows 2012/2008/2003/2000, Linux, IBM i, AIX Windows required for Web client access
Server software:	Domino 9/8/7, Word 2010/2007/2003/2000 required for Web client access

Print Merge Reporter supports 4 mail merge types: Labels, Envelopes, Letters, Directory

A Mail Merge Request pulls data from a Folder residing in any existing IBM Notes database on your network. The software is driven off a Folder to allow increased flexibility when including data in mail merges since folder columns support concatenating fields and Boolean operators. This incredible flexibility allows advanced customization which outperforms any other product on the market today. A user basically creates mail merge requests which can be saved for quick and easy future use as a "Single Click" solution.



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The simple Folder must contain between 1 and 256 columns of data. If the Folder does not exist it can easily be created by any user in your organization. The data residing in each Folder column will be mapped to a line on the hard copy print-out respectively. The end user can simply select documents in any existing view and then click a view action button to generate the mail merge.

Letters mail merge type requires a Word file which contains a maximum of 256 Merge Fields using field names A, B, C, D, E, F, G, H, I, J, K, L, M, N, O, P, Q, R, S, T, U, V, W, X, Y, Z, AA, AB, AC, etc. which are similarly named as columns in a spreadsheet.

i.e. In Word Click Insert - Field - MergeField - Field name A – OK

Each folder column will be mapped to a Merge Field in the Form Letter.

i.e. Column 1 = Merge Field A, Column 2 = Merge Field B, Column 3 = Merge Field C, etc.

NOTE: A customized Personal Address Book template is included with the software if your users would like to generate mail merges using their Personal Address Book. Simply open the Print Merge Reporter database and click “Actions – Install Customized Personal Address Book Template”. The Personal Address Book design will automatically refresh. It’s as easy as 1-2-3.

NOTE: If you are running Word 2010/2007 or Word 2003 SP3 each user must click the Help button in Print Merge Reporter to automatically re-enable certain file types that are blocked by default.

## Reports

Desktop platforms: Windows 8/7/Vista/XP/2000 [or] Macintosh OS X/9  
Desktop software: Notes 9/8/7 and Word 2010/2007/2004/2003/2002/2001/2000 [or]  
Web client and Word 2010/2007/2004/2003/2002/2001/2000 [or]  
Web client and Word Viewer (free)  
Server platforms: Windows 2012/2008/2003/2000, Linux, IBM i, AIX  
Windows required for Web client access  
Server software: Domino 9/8/7, Word 2010/2007/2003/2000 required for Web client access

The Report Request is similar to a Mail Merge Request. It pulls data from a Folder residing in any existing IBM Notes database on your network. The software is driven off a Folder to allow increased flexibility when including data in reports since folder columns support concatenating fields and boolean operators. A user basically creates report requests which can be saved for quick and easy future use as a “Single Click” solution.

The simple Folder must contain between 1 and 256 columns of data. If the Folder does not exist it can easily be created by any user in your organization. The data residing in each Folder column will be mapped to a merge field on the layout template respectively. The layout template is simply a Word document containing merge fields which is attached to the report request and can include tables, graphics, colors and other cosmetic layouts. The layout template can contain a maximum of 256 merge fields using field names A, B, C, D, E, F, G, H, I, J, K, L, M, N, O, P, Q, R, S, T, U, V, W, X, Y, Z, AA, AB, AC, etc. which are similarly named as columns in a spreadsheet.

i.e. In Word Click Insert - Field - MergeField - Field name A - OK

The end user can simply select documents in any existing view and then click a view action button to generate the report.

## Charts

Desktop platforms: Windows 8/7/Vista/XP/2000 [or] Macintosh OS X/9  
Desktop software: Notes 9/8/7 and Excel 2010/2007/2004/2003/2002/X/2001/2000 [or]  
Web client and Excel 2010/2007/2004/2003/2002/X/2001/2000 [or]  
Web client and Excel Viewer (free)



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Server platforms: Windows 2012/2008/2003/2000, Linux, IBM i, AIX  
Windows Server required for Web client access  
Server software: Domino 9/8/7, Excel 2010/2007/2003/2000 required for Web client access

A Chart Request pulls data from a View/Folder residing in any existing IBM Notes database on your network. The software is driven off a View/Folder to allow increased flexibility when including data in mail merges since view/folder columns support concatenating fields and boolean operators. A user basically creates chart requests which can be saved for quick and easy future use as a “Single Click” solution.

The first visible View/Folder column can display any data type, and additional columns should display a number data type. It is recommended to categorize the first visible column and activate the totals attribute on addition columns which will allow the software to display an easier user interface. If the View/Folder does not exist it can be created by any user in your organization. The data residing in each View/Folder column will be extracted for use with the chart. The end user can generate a chart by simply clicking a View/Folder action button and then select categories/documents to include in the chart.

NOTE: If you are running Excel 2010/2007 or Excel 2003 SP3 each user must click the Help button in Print Merge Reporter to automatically re-enable certain file types that are blocked by default.

Additional technical information is available in the online help documentation.

## Application Support

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Twitter: <http://twitter.com/ibmNotesMail>  
Facebook: <http://www.facebook.com/NotesMail>  
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