



HELP - Mail merge email requests

Requirements

Desktop platforms: Windows 10/8/7/Vista/XP, Mac OS X/9, Linux
Desktop software: Notes 9/8/7, Optional data import: Excel 2016/2013/2010/2007/2004/2003
Server platforms: Windows 2016/2012/2008/2003, Linux, IBM i, AIX, Solaris
Server software: Domino 9/8/7

The Domino administrator should sign the "Print Merge Reporter" and "PMR Mail Merge App" database, or you can click the button below to add/edit "**Lotus Notes Template Development/NotesMail**" entry in your Notes ECL with full Workstation security access. Click Refresh - OK after updating ECL and restart Notes.

[Edit Lotus Notes ECL](#)

Instructions

The interface is comprised of 2 Lotus Notes databases as seen below. The second database is optional as noted below, however, it is required if you plan to mail merge data from Excel.

1. Print Merge Reporter (printme.nsf): This is the mail merge engine and configuration database. It stores the mail merge email requests. After opening the database you click "Mail merge email request" in the left menu frame to access the requests. Click "Create mail merge email request" request to create a new request, or select and edit an existing request. The mail merge functionality is very flexible with many advanced options. The request has many instructional comments displayed which can be quite helpful when filling it out. Once you configure the request you would most likely edit only the Subject and Body in the future when using it again --- easy as editing an email message from that point going forward. You can manually insert mail merge field names <<1>>, <<2>>, <<3>>, etc. into the Body. Each mail merge field number is directly mapped to a Notes View column or Excel spreadsheet column. i.e. column 1 = <<1>> , column 2 = <<2>> , column 3 = <<3>> , etc.

You can mail merge data from Excel, Notes Contacts or any existing Notes app as seen below. It is **important** to understand that the first 2 options below require the email address to be contained within the first spreadsheet column or first Notes View/Folder column.

A. Excel: The spreadsheet must have an email address in the first column. Open the "PMR Mail Merge App" as seen in #2 below to import the spreadsheet.

B. Notes app: You have 2 options to mail merge data from a Notes app as seen below.

i. Create a new Notes View or Folder in your Notes app: It must contain the email address in the first column with any data required in the other columns. Use a Notes View if you want to mail merge all data in the View, otherwise, use a Notes Folder which will mail merge any records (documents) you move into the Folder -- basically allowing you to select which data is mail merged. NOTE: This requires using the Domino Designer client ([free download](#)) and you must have at least Designer ACL access to your Notes app to create the design element. If you are interested in seamlessly performing mail merges from an existing Notes View in your app, then contact our technical support team. This is an advanced configuration option which allows users to select records (documents) in your Notes View, then click a View action button to perform the mail merge. Our team will provide code for you to copy/paste, but it still requires a new Notes Folder and users cannot perform mail merges concurrently since data in the folder will overlap and cause issues (especially during large mail merges).

[or]

ii. Export the data from your Notes app data to Excel: If your Notes app has an export feature then export to either Excel or Comma Separated Value (CSV) file, then follow option A above. NOTE: If your Notes app contains a View that has the email address and all other data required, then you can manually export using Notes 8 or higher... Click File - Export, then change Save as type to "Comma Separated Value" and type a file name (i.e. MyFile.csv), then click Export - Include View titles - OK.

C. Notes Contacts: You have 2 options to mail merge data from a Notes Contacts as seen below.

i. Use the customized Notes Contacts template design: Click the button below, or open the Print Merge Reporter database, then click "1 - Install customized Notes Contacts template design". You can now configure a mail merge email request and follow the instruction in the top right while

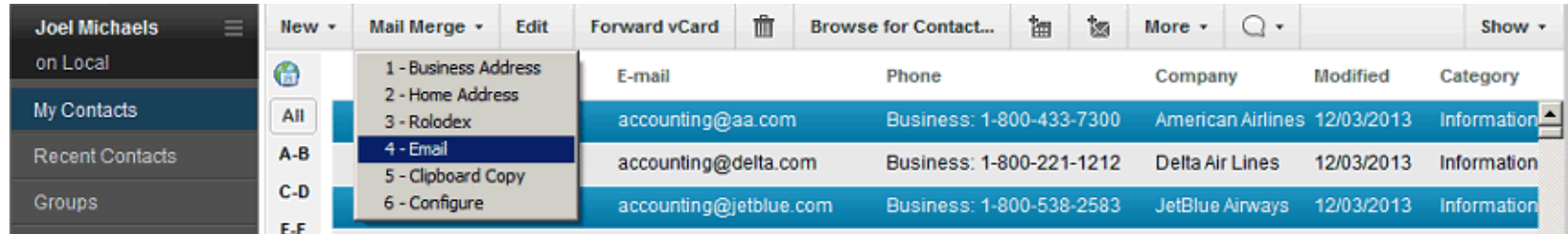
editing it. The end user can now simply use the native Notes Contacts interface after the customized template design installation is successful. The end user can select contacts by Ctrl-clicking each one, or select all by clicking Edit - Select All, then click the Mail Merge - Email button which is a new button which will now appear in their Notes Contacts.

[Install customized Notes Contacts \(Personal Address Book\) template design](#)

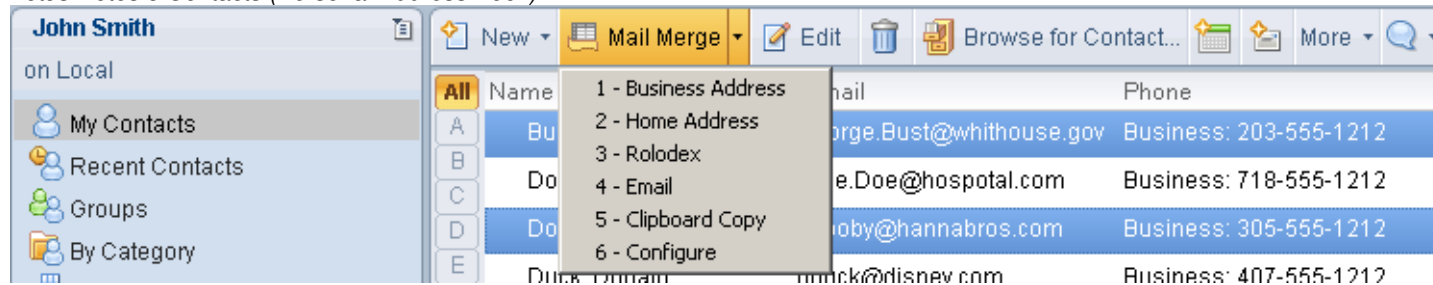
[or]

ii. **Import Notes Contacts into PMR Mail Merge App:** Open the "PMR Mail Merge App" as seen in #2 below to import the Notes Contacts.

IBM Notes 9 Contacts:



Lotus Notes 8 Contacts (Personal Address Book):



2. PMR Mail Merge App (pmmmerge.nsf): This is the Excel and Notes Contacts import engine database which includes an end user mail merge interface. The end user interface is seamlessly integrated with the Print Merge Reporter database. It allows you to import Excel or Notes Contact data, then use the interface to perform mail merging to e-mail messages or printer (labels, envelopes, letters, directory). If you decide to install the customized Notes Contacts template design, then this database is not required to mail merge Notes Contacts. Click <Administration> - Import in the left menu frame to access all import options. NOTE: You can also copy/paste Notes Contacts into this database, otherwise, it will import all Notes Contacts.

Click Mail merge - Email data in the left menu frame to access the mail merge end user interface. The interface will allow you to perform mail merges and configure mail merge email requests in the Print Merge Reporter database. You also have the ability to manually create and edit mail merge data records (documents). Imported data can be edited as well.

It is **important** to understand that multiple users cannot perform mail merges concurrently since temporary mail merge data that is processed in a hidden folder (not displayed to end user) will overlap and cause issues (especially during large mail merges). If more than one user is performing mail merges it is recommended to create another non-replica copy of "PMR Mail Merge App" for each user, or be sure not to perform mail merges concurrently and use categories for mail merge data that is specific to each user.

3. Scheduler - Print Merge Reporter (printme.nsf):

The "Schedule" field can be set to None, Daily, Weekly or Monthly as seen below. As of PMR 6.6 version, the times below are the default and cannot be changed unless you contact the [NotesMail technical support](#) to request a different time for a small customization fee.

None: [Run Ad hoc by end user.](#)
 Daily: [Run once a day at 7:00 AM.](#)
 Weekly: [Run once a week on Sunday 2:00 AM.](#)
 Monthly: [Run once every month on day 1 at 2:00 AM.](#)

The "Type" field can be set to All, Daily Alpha Map, Daily Load Balance, Weekly Alpha Map, or Weekly Load Balance as seen below.

All: [Submit all email at once.](#)

Daily Alpha Map: Submit email alphabetically each day starting with letter as seen below. Day 1 submits all numerics.

Day 1 = A, Day 2 = B, Day 3 = C, etc.

None:

Daily Load Balance: Submit email each day based on date duration load balance. i.e. Total Load / (End Date - Start Date) = Daily Load

Weekly Alpha Map: Submit email alphabetically each week starting with characters as seen below.

Week 1 = 0,1,2,A,B,C,D,E,F, Week 2 = 3,4,5,G,H,I,J,K,L, Week 3 = 6,7,8,M,N,O,P,Q,R, Week 4 = 9,S,T,U,V,W,X,Y,Z

Weekly Load Balance: Submit email each week based on 4 day load balance. i.e. Total Load / 4 = Weekly Load

A. Set the schedule: Click the "Create mail merge email request" button.

i. Set the "Status" field to Disabled.

ii. Set the "Schedule" field, for example, to Daily.

iii. Select a start date in the "Start Date" field and end date in the "End Date" field. NOTE: The end date should be the last day the mail merge will be generated. For example, the start and end date should be the same day if you plan to mail merge all emails in the data source at a specific time on a single day.

iv. Set the "Type" field, for example, to All.

v. Configure the remaining fields as needed.

B. Enable scheduler for a Local install: If you installed the PMR tool locally (on your desktop hard drive), then enable scheduled local agents as seen below. NOTE: If you already completed these steps, then you don't need to do them again unless you are planning on using a different Notes ID to click the "Enable scheduler" button.

WARNING: If any mail merge email requests are configured for a schedule which is set to run at a time on the current day, then you must first change the "Status" field to Disabled, otherwise, the mail merge will be sent out immediately after clicking the "Enable scheduler" button. CAVAET: If any of your mail merge email requests are load balanced (in which the Type field is **not** set to All) and already ran on a prior day, then this might reset the load balancing counter and cause issues.

i. If the warning above applies to you then change the "Status" field to Disabled. If you don't understand the warning, then just change it to Disabled to prevent any issues.

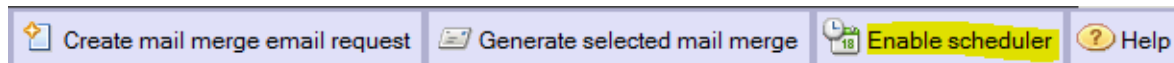
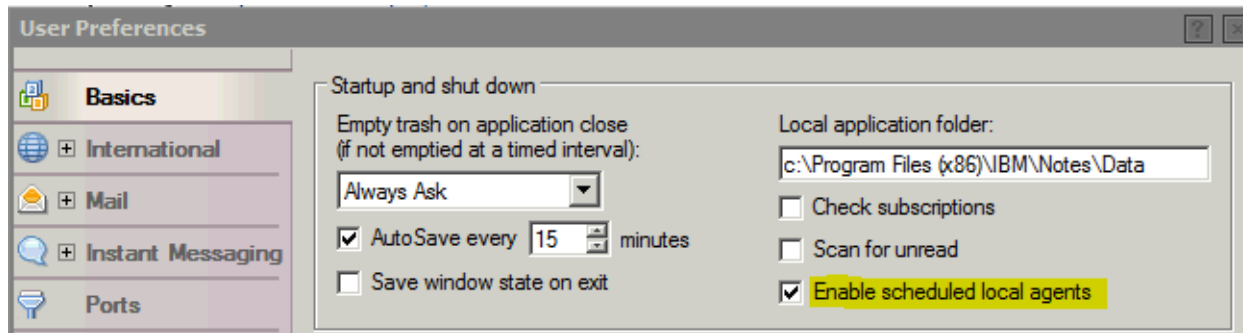
ii. Click File - Preferences - User Preferences.

iii. Select (check) "Enable scheduled local agents", then click the OK button. NOTE: If it is already selected, then simple click the Cancel button.

iv. Restart IBM Notes.

v. Click the "Enable scheduler" button. NOTE: If you only see a "Disable scheduler" button, then you can click it to display the "Enable scheduler" button.

vi. If the warning above applies to you (or if you don't understand the warning) then change the "Status" field to Enabled after waiting 20 minutes.

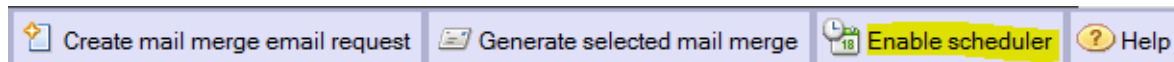


C. Enable scheduler for a Server install: If you installed the PMR tool on the server, then click the "Enable scheduler" button, or contact your Domino Administrator to click this button using a generic Notes ID or the Notes ID associated with the mail merge. NOTE: If you already completed these steps, then you don't need to do them again unless you are planning on using a different Notes ID to click the "Enable scheduler" button.

The Notes ID which clicks the button must be listed in the "Sign or run restricted LotusScript/Java agents" or "Sign or run unrestricted methods and operations" field in the IBM DD server document – Security tab, otherwise, the mail merge will not run. NOTE: If the Domino Administrator uses a generic ID, for example, "agent@company.com", then you might want to use the "Alternate From Address" field to display a specified email address on the recipient email as the sender and the generic ID will display as "on behalf of" (Sent by).

WARNING: If any mail merge email requests are configured for a schedule which is set to run at a time on the current day, then you must first change the "Status" field to Disabled, otherwise, the mail merge will be sent out immediately after clicking the "Enable scheduler" button. CAVAET: If any of your mail merge email requests are load balanced (in which the Type field is **not** set to All) and already ran on a prior day, then this might reset the load balancing counter and cause issues.

- i. If the warning above applies to you then change the "Status" field to Disabled. If you don't understand the warning, then just change it to "Disabled" to prevent any issues.
- ii. Click the "Enable scheduler" button. NOTE: If you only see a "Disable scheduler" button, then you can click it to display the "Enable scheduler" button.
- iii. If the warning above applies to you (or if you don't understand the warning) then change the "Status" field to Enabled after waiting 20 minutes.



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