



Installing and Using the Infor CRM Mail Merge for Microsoft Word add-in

For Infor CRM Web Clients v8.3.0.0 and later

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About this Guide



This document describes the Infor CRM Mail Merge for Microsoft Word add-in for the Infor CRM Web Client. The Infor CRM Mail Merge for Microsoft Word add-in is a replacement for the existing Web Client Mail Merge feature which was only supported on Internet Explorer browsers.

The Infor CRM Mail Merge for Microsoft Word add-in enables Web Client users to create, edit, or manage Infor CRM mail merge templates and perform mail merges to any Infor CRM template managed in Word with the output to file, printer, or email from the Microsoft Word Mailings menu.

Mail merges can be performed for one or more contacts or leads. For contacts, you can also select contacts that are related to one or more accounts, opportunities, sales orders, quotes, contracts, returns, or tickets.

To access these features, a supported version Microsoft Word must already be installed and configured and the Infor CRM Mail Merge for Microsoft Word add-in must be installed and configured.

Intended audience

The audience for this document is administrators of Infor CRM who plan to distribute the Microsoft Word add-in to Infor CRM users and Infor CRM users who plan to install and use the Microsoft Word add-in.

Requirements

The Infor CRM Mail Merge for Microsoft Word add-in is supported for:

- Infor CRM Web Client version 8.3.0.0 and later
- For implementations prior to v8.5.0.01 the SData portal and SlxClient portal must use the same authentication method.
- Microsoft Office versions 2016, 2019, and 365.
 - Microsoft Word
 - Microsoft Outlook (for mail merges output to email)

Additional considerations



- The Mail Merge for Microsoft Word add-in is not needed in Infor CRM Windows Client only environments.
- Templates created in the Microsoft Word add-in will not be available for use anywhere outside of the Word add-in.

- If you have installed a previous version of the Infor CRM Mail Merge for Microsoft Word add-in, you must first uninstall that version before installing a new version.
- After installing and configuring the Infor CRM Mail Merge for Microsoft Word add-in, the administrator must convert any legacy Infor CRM Mail Merge templates for them to be available for Infor CRM mail merges.
 - Converting a template creates a new .docx copy of the template plugin. The original mail merge templates will remain and continue to be accessible from the Infor CRM Windows Client, Architect, and Administrator. See "[Converting Legacy Mail Merge Word Templates](#)" on page 5 for more information.
- To perform a mail merge output to email, a supported version of Microsoft Outlook must be installed, configured, and open prior to starting the mail merge.

Contacting Infor

If you have questions about Infor products, go to Infor Concierge at <https://concierge.infor.com/> and create a support incident.

The latest documentation is available from docs.infor.com or in the KB article for your version of Infor CRM. For Infor CRM version 9.1 see KB . For all other versions see KB 2289845.

If you have comments about Infor documentation, contact documentation@infor.com.

Installing and Configuring the Infor CRM Mail Merge for Microsoft Word add-in

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Installing the Infor CRM Mail Merge for Microsoft Word add-in

Provide the following instructions to all Web Client users who will use the Infor CRM Mail Merge for Microsoft Word add-in.



If a previous version of the Infor CRM Mail Merge for Microsoft Word add-in is installed, you must first uninstall that version before installing a new version

To install the Microsoft Word add-in

1. Close Microsoft Word.
2. Sign in to the Infor CRM Web Client.
3. On the **Tools** menu, click **Options**.
4. Click the **General** tab.
5. Click Install Mail Merge for Microsoft Word.
6. Click **Install**.
7. If prompted, click **Yes** to confirm that you want to install the add-in.
8. Click **Close**.
9. Open Microsoft Word.
10. If prompted, "Are you sure you want to install this customization?", click **Install**.
11. Once installed, you must set Infor CRM Database Connection Options.



These options may already be configured for users who set these options for Infor CRM Xbar for Microsoft Outlook.

- a. On the Microsoft Word **Mailings** tab, click the **Infor CRM SLX Options** button and, if necessary, click **Connection**.
- b. In the **SData URL** field, specify the server name and SData portal.
 - Specify the URL that your administrator provided in order to connect to Infor CRM. Use the following format: `http://servername:port/sdata` or `https://servername:port/sdata`
 - Offline Web Client users - Specify the URL to connect to your local Infor CRM server. Use the following format:
`http://localhost:port/sdata` The port is usually 8088.
- c. If your implementation does not use the standard SixClient portal for the Web Client, then in the Web Client URL field, specify the server name and Web Client portal.

This is automatically completed for you if your implementation uses the standard SixClient portal, and no changes are needed.

- Specify the URL that your administrator provided in order to connect to the Infor CRM Web Client. Use the following format: `http://servername:port/<portal name>` or `https://servername:port/<portal name>`
 - Offline Web Client users - Specify the URL to connect to your local Infor CRM Web Client Use the following format: `http://localhost:port/<portal name>` The port is usually 8088.
- d. If you use your Windows account information to log in to Infor CRM, select the **Use Windows Authentication** option, otherwise leave this option cleared.
- e. Specify the **User Name** and **Password** you use to sign in to Infor CRM. This may be your Infor CRM or Windows user name and password.



If your implementation uses Ming.le, you will not enter your credentials in this dialog box. You will be prompted to enter your Ming.le credentials.

- f. Click **Test**.
- If the test fails, review your connection information. If the information is correct and you still cannot connect, contact the administrator.
- g. Click **OK** when you are finished setting your options and your connection test is successful.

Converting Legacy Mail Merge Word Templates



Only the system administrator can perform these steps.

To use Mail Merge in Microsoft Word, any templates created in Infor CRM prior to installing the Infor CRM Mail Merge for Microsoft Word add-in must be converted to .docx files.

Legacy mail merge Word templates can only be converted in Microsoft Word after installing the Infor CRM Mail Merge for Microsoft Word add-in.

To convert a template

1. In Microsoft Word, on the **Mailings** tab, click **Manage Templates**.
2. If none of the templates have been converted, a message box displays “There are no mail merge templates available.” Click **OK** to close the dialog box.
3. In the **Manage Templates** toolbar, click **Convert**.
A message box displays with the number of legacy (DOC) mail merge templates.
4. In the message box, click **Yes**.
5. When the conversion is finished, click **OK** to close the **Convert Mail Merge Templates** dialog box.



If additional templates are created in the Infor CRM Windows Client, Web Client, or Architect, after converting templates, you will need to convert those templates for them to be available for mail merge in Microsoft Word.

Using the Infor CRM Mail Merge for Microsoft Word add-in

When the Infor CRM Mail Merge for Microsoft Word add-in is installed, you can create, edit, or manage Infor CRM mail merge Word templates and perform mail merges from the Mailings tab.

For more information see the Web Client Help topic "Using Mail Merge"

Opening Infor CRM Mail Merge Templates

Use Open Template to access the public and private templates that are available to you.

To open a template

1. In Microsoft Word, on the Mailings tab, click **Open Template**.



To open a recently used template, click the Open Template arrow to see a list of the five most recently used templates and click the template you want to open.

2. Expand the tree view to find the template you want, select the template, and then click **OK**.

Saving or Importing a New Word Template

You can create a private Word template by opening and saving a document or importing a document.

To save or import a new template

1. In Microsoft Word do one of the following:
 - a. Open the template, document or a blank document that you want to save as a new template, and on the **Mailings** tab, click **Save as New Template**.
 - b. On the **Mailings** tab, click **Manage Templates**, click **Import**, browse to the document you want to import as a template, and then click **Open**.
2. Set the template properties, and then click **OK**.
You may receive a pop-up notification that your Infor CRM Template has been saved.
3. To add Infor CRM merge fields to the template, place the cursor in the template where you want the merge field to appear, on the **Mailings** tab click **Insert Field**, then from the merge field list, select a field.
The new merge field appears in the template.
4. Continue adding or deleting merge fields, and text as needed.
5. When finished editing, click the **Save** button.

Inserting or Editing Merge Fields

Use the Mail Merge Field Editor to edit new and existing merge fields. You can view the template merge fields in the list view pane and your edit options in the edit pane. You can also remove merge fields from the template by clicking Remove From Template on the toolbar.

To edit merge fields:

1. In Microsoft Word, open an Infor CRM template.
2. Do one of the following:
 - On the **Mailings** tab, click **Edit Fields**.
 - On the **Mailings** tab, click **Insert Field** and select any of the following:
 - SQL Value
 - Table
 - List
 - Image
 - Mail Merge Date Stamp
 - Opportunity Product Table
3. The Infor CRM Mail Merge Field Editor window opens. The template merge fields display in the list view. The list view consists of the following columns:
 - **Field** - Displays the name of the merge field as it appears in the template and an icon that is associated with the field type.
 - **Type** - Displays the merge field type. Valid types are: Regular, Outlook Signature, Opportunity Product Table, SQL, and Custom.
4. Highlight the merge field you want to edit in the list pane.
5. Depending upon the merge field type, different edit options are displayed. Make your changes and when finished, click **OK**.

Starting a Mail Merge in Microsoft Word

You can perform a mail merge from the Microsoft Word Mailings tab. After the first mail merge, some selections will be remembered from the previous mail merge.

To start an Infor CRM mail merge

1. In Microsoft Word, on the **Mailings** tab, click **Compose Mail Merge**.
The Mail Merge dialog box opens with the Merge Options tab selected.
2. If necessary, click the **Template** ellipsis button to select a template.



If you open the template you want to merge with prior to starting the merge (from the Mailings tab, click Open Template), the template is automatically listed in the Template box.

- When selecting a template, look in the right pane details and view the Main Table.
 - If you are merging with leads, you must select a template where the main table is LEAD.
 - For all other merges you must select a template where the main table is CONTACT.
3. Select your **Merge With** options:
You can merge with leads, contacts, or contacts associated with accounts, opportunities, sales orders, quotes, contract, returns, or tickets.

- Select one of the following:
 - **Select Record:** To merge with a single lead, contact, or contacts associated with a single record.
 - Select **Select Record**, click the drop-down arrow, and then select the entity that contains the contacts or leads you want to merge with.



The selected entity also provides the context to be used during the merge if the template includes fields related to the merge with entity.

- **Select Group:** To merge with leads, contacts, or contacts associated with records in a group.
 - Select **Select Group**, click the drop-down arrow, and then select the entity that contains the contacts or leads you want to merge with.



The selected entity also provides the context to be used during the merge if the template includes fields related to the merge with entity.

- Click the ellipsis icon to find and select a record or group.
4. If you selected Account or Opportunity as the entity in step 3, the **Primary contact only** option is available.
 - Select this option to merge with only the primary contact of an account or opportunity.
 - Clear this option to merge with all contacts associated with an account or opportunity.
 5. Click the **Select Address** drop-down arrow and select which address type you want to use for address merge fields. Options include: Primary, Mailing, or Shipping.
 6. Select the **Enforce Do Not Solicit** option to enforce Do Not Solicit rules because the content of the merged document contains content that contacts or leads have specifically asked not to receive. Clear the option only if the merged document does not contain content that contacts or leads can opt out of. For example, requested or mandatory information.
The Do Not Solicit check box appears on the Infor CRM contact and lead detail views.
 7. Click the **Count** button to see how many records will be included in the merge based on your Merge with and Enforce Do Not Solicit selections.
The button label changes from Count to display the number of records that will be included in the merge.
 8. Click the **Output Type** drop-down arrow to select one of the following:
 - **Email** – Selecting output to email creates a separate email message for each contact or lead with merged content from the selected template and information for each contact or lead.



This option requires you to be signed in to a supported version of Microsoft Outlook prior to starting the mail merge. If Microsoft Outlook is not open the mail merge will fail.

- **Subject** – Type the text you want to appear in the email message Subject.
- **Send emails to the contact/lead email address**
 - Select this option if you want the email messages to be sent to the email address defined for each contact or lead.



If a contact or lead does not have a defined email address, the record will be skipped during the merge and an email message will not be created for that record.

- Clear this option if you want to specify the recipients. Click the Recipients ellipsis to open a Select Names dialog box that will allow you to specify the e-mail addresses for the To, CC, and BCC fields.

- **Review individual emails prior to sending** – Select this option to review each email message prior to sending. After the merge, each email message will be available to review or edit before sending the email message. If you do not select this option, the email messages will be automatically sent when the merge completes.



If an email message is edited prior to sending, the attached file will not contain the updated text if either the Attach merged document to each record or Create history record to each contact or lead options are selected. If Infor Xbar for Outlook is also installed and configured, Infor CRM recommends using the Send to CRM button to record the updated email to history.

- **Attachments** – Use the add buttons to select local files or Infor CRM Library files to include in the merged email messages.



The selected files will be attached to each merged email message, but will not be saved as an attachment or attached to a history record if either the Attach merged document to each record or Add history record to each contact or lead options are selected.

- Click **Add File Attachment**, browse to the location of and select one or more files to attach to the e-mail, and then click **Open**.
 - Click **Add Infor CRM Library File**, expand the Infor CRM Library tree view to find and select the document you want to attach, select one or more files in the left pane, and then and then click **OK**.
 - To remove an attachment, select the item in the list and click the **Delete Attachment** button.
- **File** - Selecting output to file creates a separate document for each contact or lead with merged content from the selected template and information for each contact or lead.
 - **Directory** – Click the ellipsis button and browse to the location where you want the merged files to be saved, and then click **OK**.



If merging to multiple records, the individual documents will be added to a zip file in the specified directory.

- **File Format** – Click the drop-down arrow and select the format you want the merged files to be saved as.
- **Printer** - Selecting output to printer creates and prints a separate document for each contact or lead with merged content from the selected template and information for each contact or lead.
 - **Printer** – Click the **Printer** drop-down arrow and select from the list of available printers.



After clicking Merge, the documents will begin printing to the selected printer immediately. If you want to view or edit the documents prior to printing, change the Output to option to File.

9. Click the **History Options** tab to set options to create a history items for the mail merge.
 - a. To attach the correspondence to each record's Attachments tab, select **Attach merged document to each record**.
The merged file is attached to each lead or contact, account and if applicable, the in-context entity from the Merge With options.
 - b. To add a history record, select **Create history record for each contact or lead** . The history record is created and associated with each lead or contact, account and if applicable, the in-context entity from the Merge With options.
You can merge with leads, contacts, or contacts associated with accounts, opportunities, sales orders, quotes, contract, returns, or tickets.



History records will be associated with contacts and other records according to standard history behavior for your current version of Infor CRM. Prior to version 8.4.0.03, activities and history items are only associated with contacts, accounts, opportunities, tickets or leads.

However, if merging with the contacts associated with a contract, the history records will not be associated with contracts as history and activities are not supported for contracts in any version of Infor CRM.

- c. In the **Result** field, type or select a result type from the list.
 - d. In the **Regarding** field, type or select a regarding type from the list.
 - e. In the **Category** field, type or select a category type from the list.
 - f. In the **Notes** field, specify notes or important items you want to include in the history.
10. Click the **Follow-up Options** tab to schedule a follow-up activity.
- a. If you want to schedule follow-up activities, select **Schedule a Follow-Up**, and select the type of follow-up activity you want to schedule.
If you do not want to schedule follow-up activities, clear this option and proceed to step 11.
 - b. If the **Schedule separate follow-up activities for each contact** option is available do one of the following:
 - Select this option if your Merge With criteria was in-context of another entity, such as account, or sales order, and you want to create a separate follow-up activity for each contact associated with that record.



Follow-up activity records will be associated with contacts and other records according to standard activity behavior for your current version of Infor CRM. Prior to version 8.4.0.03, activities and history items are only associated with contacts, accounts, opportunities, tickets or leads.

- Clear this option, if you want to create a single follow-up activity for each in-context record that includes all contacts associated with that record.
- c. To carry over the notes to the follow-up activity, select **Carry Over Notes**.
 - d. Do one of the following
 - Select **Timeless** if the follow-up activity does not need to be scheduled for a specific time or duration, and then click the **Start Time** button to select the date.
 - Clear the **Timeless** options if the follow-up activity will be scheduled for a specific time or duration, click the **Start Time** button to select the date and time, specify or select a **Duration** number and time increment, and then, if desired, select **Reminder** and specify or select a number and time increment to be notified before the activity start time.
 - e. Click the **Regarding** type or select a regarding type.
 - f. Click the **Priority** type or select the importance of the activity.
 - g. Use the **Leader** lookup to select an activity leader.
 - h. Click the **Category** type or select a category type.
 - i. In the **Notes** area, do one of the following:
 - Specify notes in the field.
 - Click **Notes** to open a larger field for specifying notes. Specify the notes, and then click **OK**.
11. When finished, click **Merge**.

