Mail Merge Reports

User Guide

Ver. 2.5.0

Mail Merge Reports. User Guide

Version 2.5.0, 2015

This document is subject to change without notice.

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Contents

Preface

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

Mail Merge Reports 2.0 version or upper is compatible with SugarCRM CE, Professional and Enterprise Editions. Mail Merge Reports 2.4 is compatible with SuiteCRM (7.1.3).

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.

What's new in each Version

Please, review the changelog.txt for detailed information about what's new in each Mail Merge Reports version.

* Important!! Please, remind that you have to uninstall the component previously to update it to a new version, checking the option "Do Not Remove Tables" to preserve data and template files.

Overview

For all modules, there is a new "Generate Document" action in List View (need at least one record selected) and a new "Generate Document" button in Detail View. The user will be able to download the generated document, to attach it to an email or to attach it to a note (the note will be created automatically).

Some example files will be installed by default for the Opportunities module. Please, open Mail Merge Reports List View to see them. Then go to Opportunities module (List View or Detail View) to run some of the examples.

Go to Mail Merge 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

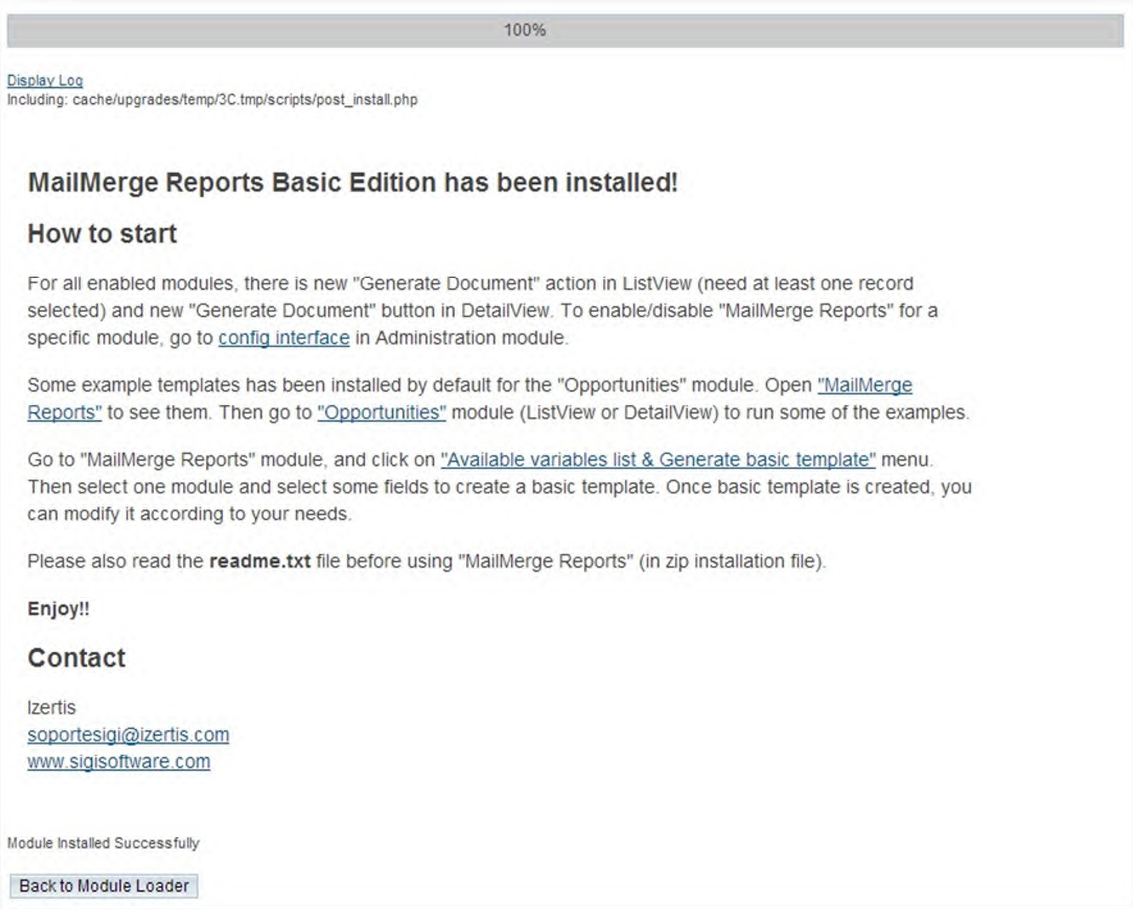
Editions	Feature
Basic & Premium	To generate documents in format .docx, .odt and .pdf
Basic & Premium	To generate document for any number of record
Basic & Premium	To generate document for any module
Basic & Premium	SuiteCRM support
Premium	Related and subpanel modules fields (parent modules and subpanel modules).
Premium	Custom fields (created in Studio)
Premium	Mail Merge Reports calculated fields (see "Calculated Fields" section)*
Premium	Spreadsheet generation (.xlsx and .ods)
Premium	SugarCRM 7 support
Premium	Attach generated documents to Email or Note
Premium	Roles-based permissions to access templates

*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 Module Loader within SugarCRM©.



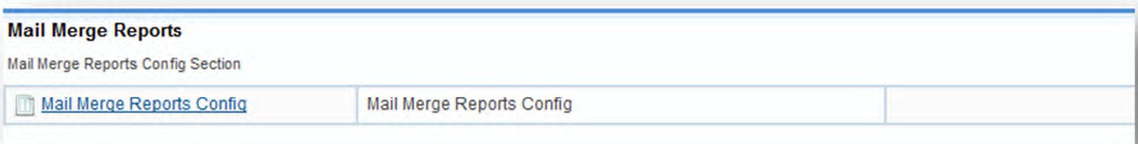
Upgrading

The component is ‘upgrade safe’, so you can upgrade SugarCRM© without uninstall the component.

* Important!! Please, remind that you have to uninstall the component previously to update it to a new version, checking the option "Do Not Remove Tables" to preserve data and template files.

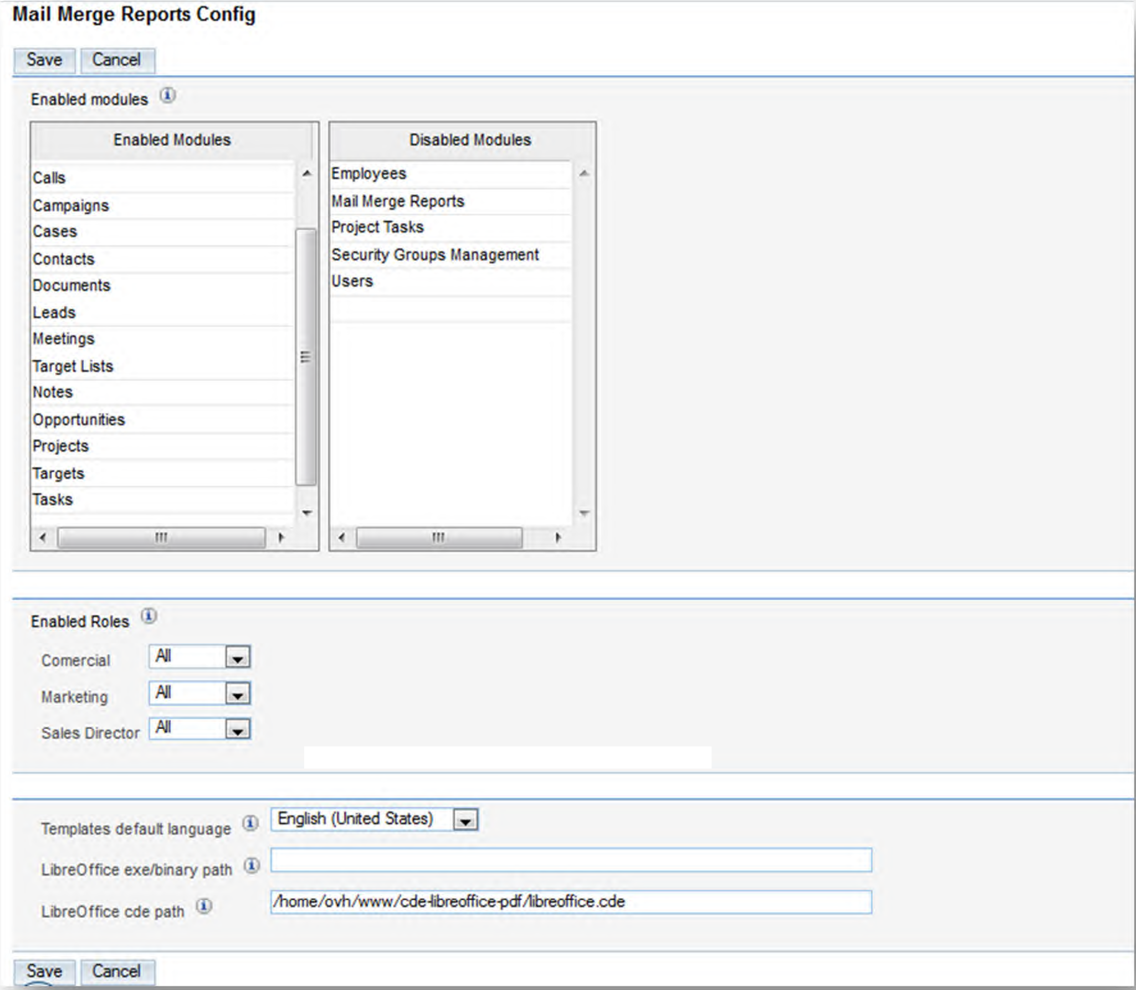
Configuration

You can configure the component in “admin” -> “Mail Merge Reports Config” section.



Enable / Disable Modules

We can select those modules that we desire to generate documents for.



Enabled Roles

This panel shows all the roles, for each role you can select the output formats that you want. You can select one of the options bellow:

All: the role can generate any available formats (Odt / Doc - PDF)

Only DOCX/ODT: the role can generate only DOCX/ODT document

Only PDF: the role can generate only PDF document

None: the role can not to generate documents

Default Language

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

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',
'sk_SK' => 'Slovak',

- 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',

Requirements for PDF Documents

-Option 1 (Windows or Linux)- OpenOffice exe/binary path

Install Libre Office (http://libreoffice.org) or Apache Open Office (http://www.openoffice.org) and set 'DHA_OpenOffice_exe' config variable with correct path in the field “**OpenOffice exe/binary path”.** To set this variable, enter into the Sugar administration module, go to the

Mail Merge Reports Config section and enter the path of the LibreOffice exe into the "LibreOffice exe/binary path" field.

Examples of LibreOffice exe:
[WINDOWS] ->"C:\Program Files (x86)\LibreOffice 3.5\program\swriter.exe"
[LINUX]-> "/usr/lib/libreoffice/program/soffice"

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

-Option 2 (Only for Linux) - OpenOffice cde path

In web hosting services where you can't install Libre Office or Apache Open Office, download Libre Office cde-package (from http://www.sigisoftware.com/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 field "**OpenOffice cde path**" with your path to Open Office.

Examples:
[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.

Important: The cde package does not work in virtualized servers.

Note:
"OpenOffice exe/binary" has preference over "**OpenOffice cde"** if both parameters are defined.

Fonts of the PDF generated

You need to install the fonts in your server or the fonts will not be included in the generated PDF.
For installing the font you can do the next below if the copyright of the font let you:

- If you use cde package in a Linux server: copy the .ttf font files into the ***cde-libreoffice-pdf/cde-root/usr/share/fonts/truetype*** directory. If it is a OpenType font, copy the .otf file in the ***cde-libreoffice-pdf/cde-root/usr/share/fonts/opentype*** directory

- If you use LibreOffice in a Linux server: copy the required font into the system font directory (maybe /usr/share/fonts/truetype or /usr/share/fonts/opentype or other).

- If you use a Windows server, copy the required font into **C:\Windows\fonts** directory

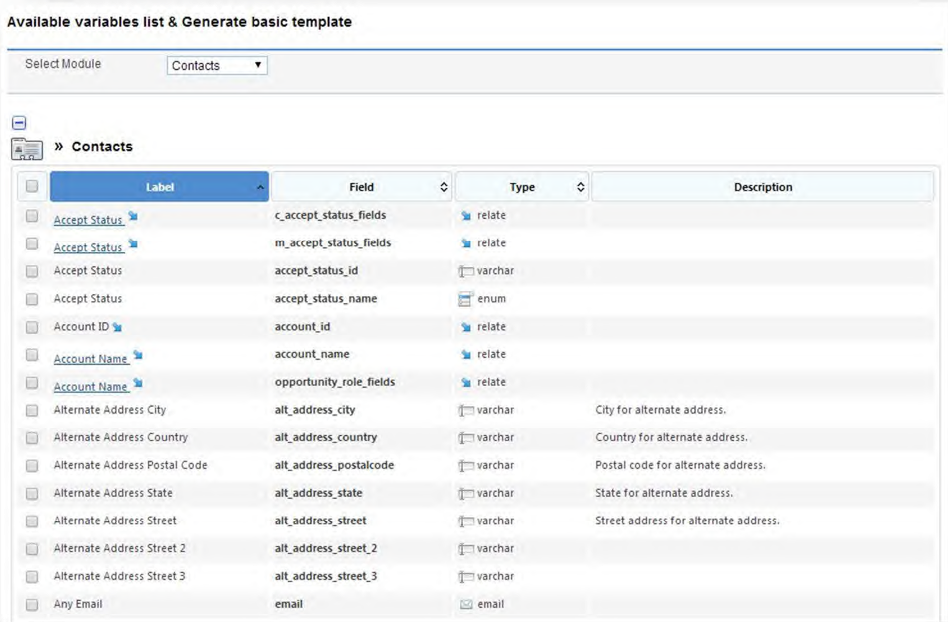
Creating Merge & Report Templates

Using "Available variables list & Generate basic template"

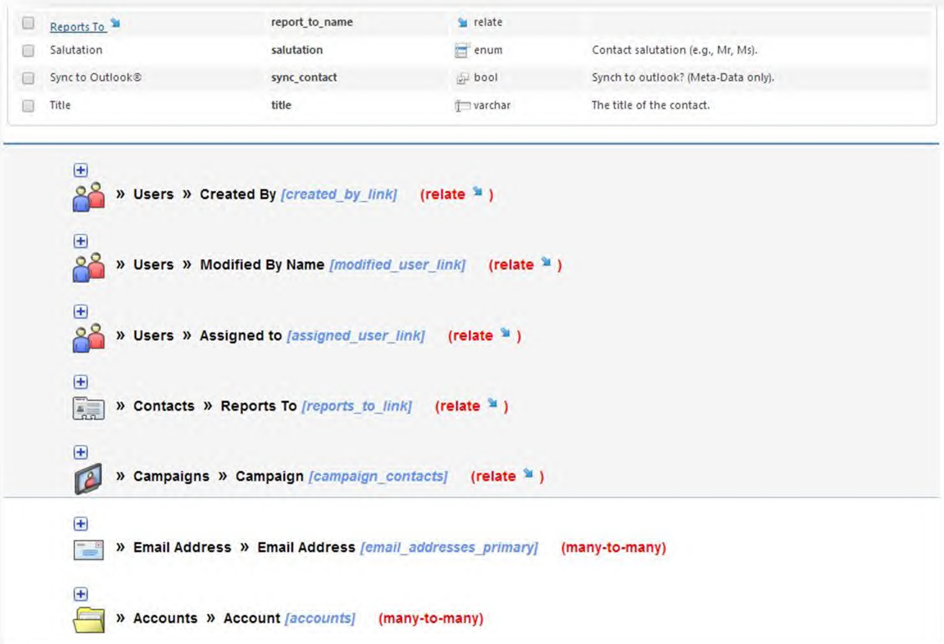
If the user has edit permission over the Mail Merge Reports module, he will be able to generate a basic template. See an example for contacts module:

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.



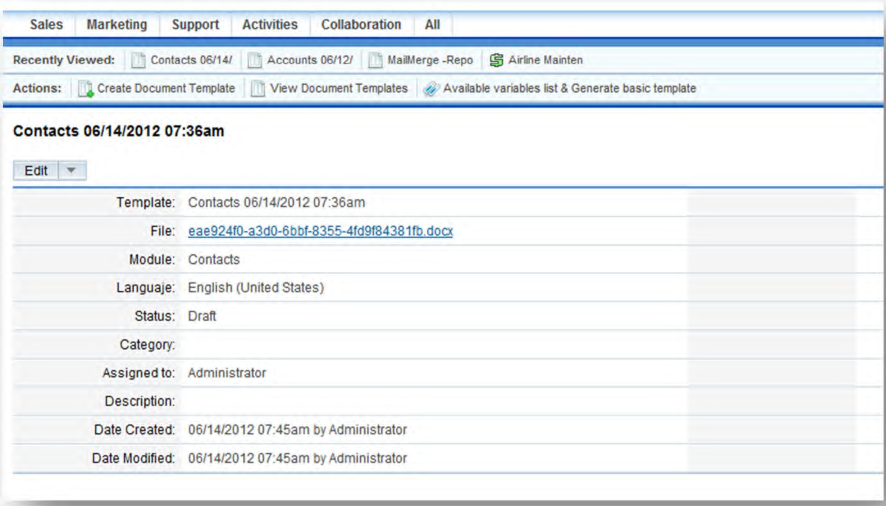
To access to related and subpanel modules variables, click the (+) icon (**only in Premium Edition**).



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.



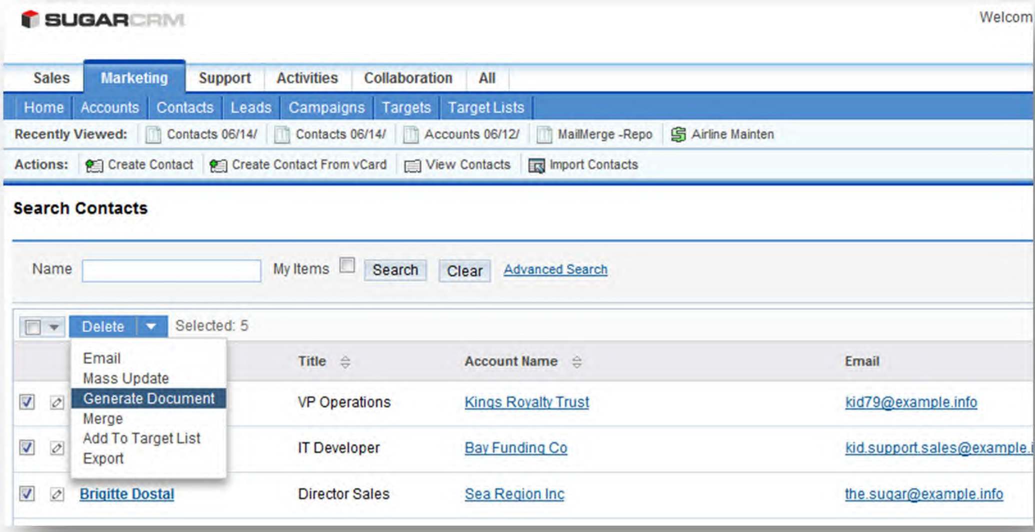
Third step: Loading personalized templates

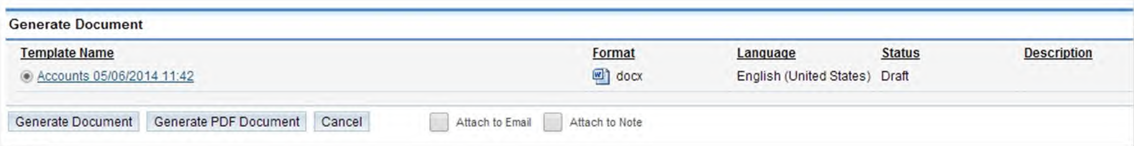
After editing the template, you can upload it on the same template record or create a new template.

Upload and Running Templates: Generate Document option

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

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





2) **Detail view:** you can also have the Generate Document button in the detail view.

You can attach the generated document to an email selecting the flag “Attach to email”. If the “Attach to email” flag is checked, the Generate Document button will open the Sugar email window. If you generate a document for only one record and this record is in a module related with email module, the email will be saved in Sugar related to the record.

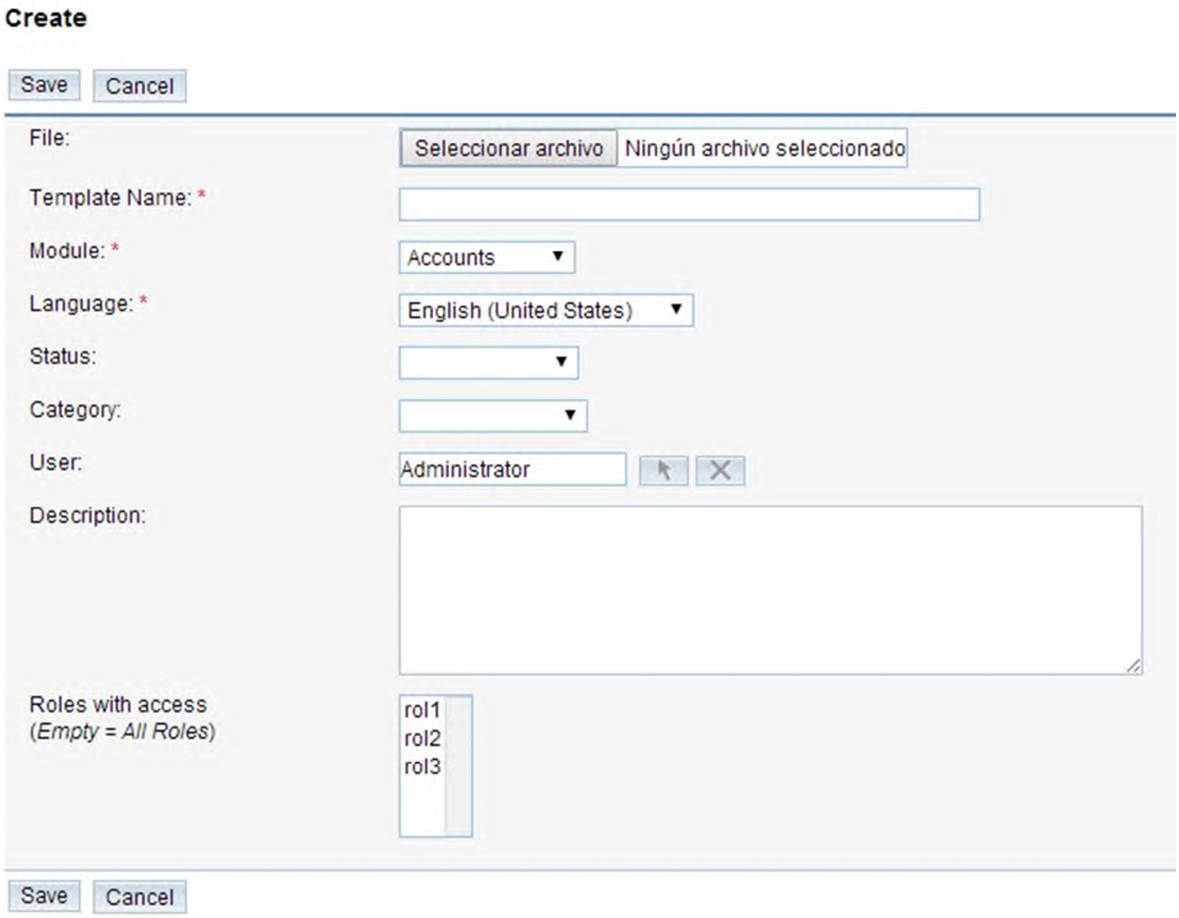
There is also a flag “Attach to Note”, if this flag is checked, when the user clicks one of the two buttons (Generate Document or Generate PDF Document), MMR will create a note related to the parent object record and will attach the document to the new note. The name of note record will be the name of the document. The new check will be only in the DetailView, not in the ListView, because we need to have only a parent object record to relate the new note with. The new check will be only in modules related with Notes module (modules included in the 'record_type_display_notes' list).

Creating Templates

Roles-based permissions to access templates

Premium version only.

Roles-based permissions to access templates: This is an addition to the functionality Roles-based permissions to launch templates ('All', 'Only DOCX/ODT', 'Only PDF' and 'None')



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 from a 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* (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]**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]

Header and Footer

In the header and footer you cannot use fields from the dataset of the document. You only can use global variables of Sugar, variables like [*onshow.xxx*].

For example, to show the global variable of Sugar 'current_user', you can put the variable [*onshow.current_user.full_name*] (this is equivalent to *$GLOBALS['current_user']->full_name* value in the Sugar code). Other example is [*onshow.sugar_version*]

If you need a variable which is not a Sugar global variable, you can create an event into the calculated fields of your module like the next example:

```
function BeforeMergeBlock() {
  $GLOBALS['TemplateCurrentUserName'] = $GLOBALS['current_user']->full_name;
}
```

With this code you can use the [*onshow.TemplateCurrentUserName*] variable into the header or the footer.

Images

You can use the default ***'cf_image_file_path'*** calculated field for Notes and Documents modules. If attached file to a Note or Document is an image (jpg, png, gif o tiff), we can merge the image to the generated document.

Example:
[a_sub1.cf_image_file_path;ope=changepic;default=current;adjust]

(*) Change an internal picture with a new one:
When having "ope=changepic" is merged in the template, then will search the first picture located before the field, and then it will change the picture assuming that the value of the field is the path for a picture file on the server.

They are other complementary parameters that are provided for the **changepic** parameter:

Default -- Define the picture that should be used when the expected one is not found. The parameter's value must be the path of a file on the server (*default=uploads/empty.jpg*) or the keyword "current". If you've set "default=current" then will let the picture of the template if the expected one is not found.

Adjust -- Adjust the size of the picture in the document. This parameter requires that PHP is configured with the GD extension, which is usually the case. Values for adjust can be on of the followings:

adjust (or adjust=inside)	The picture is adjusted to enter into the picture bounds of the template.
adjust=samewidth	The picture is adjusted to have the same width than the picture of the template.
adjust=sameheigth	The picture is adjusted to have the same height than the picture of the template.
adjust=100% (or another percentage)	The picture is adjusted to be proportional to the originial size.

The component will install the template example "*EXAMPLE - Opportunities Notes and Documents Images*" associated to the Opportunity module in order to test this kind of variables. This example can be found also in the next path: "*modules/DHA_PlantillasDocumentos/examples/Opportunities_Notes_and_Documents_Images.docx*"

Excel (.xlsx) and Calc Spreadsheet (.ods) files. Spreadsheets.

Premium version only.

Support to generation of spreadsheets files is added starting from 2.5 version. This kind of files has a number of limitations not present in document files:

- Submodule merge ("*a_subx*" blocks) are not allowed in this type of document, but you can merge fields from related modules (not subpanels)

- Only two types of blocks are allowed: "*tbs:row*" and "*tbs:cell*"

- Date cells needs to be formated as date (or time or long date) in the template. Otherwise dates will be displayed as numbers (but cell format can be changed once template is merged)

- Do not use a formula in a cell that may have its position changed after the merge (for example under a block). Otherwise Excel will raise an error message. If a formula uses a reference to a cell that has moved during the merge, then the reference will not be arranged to be the new cell reference.

Example of a valid formula:

=SUM(E20 : INDIRECT(ADDRESS(ROW()-1;COLUMN()))))

- When you put a field into a cell, then by default Excel assumes the cell has a string content and will not use the format you expect for the cell.

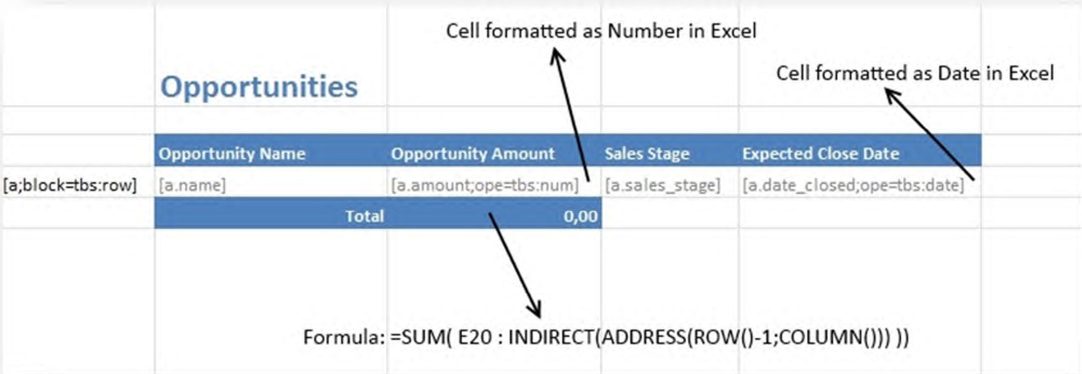
But you can change the type of data in a cell using parameter « *ope* ». Example: *[a.date_entered;ope=tbs:date]* Supported types are listed below:

Number → tbs:num

Boolean → tbs:bool

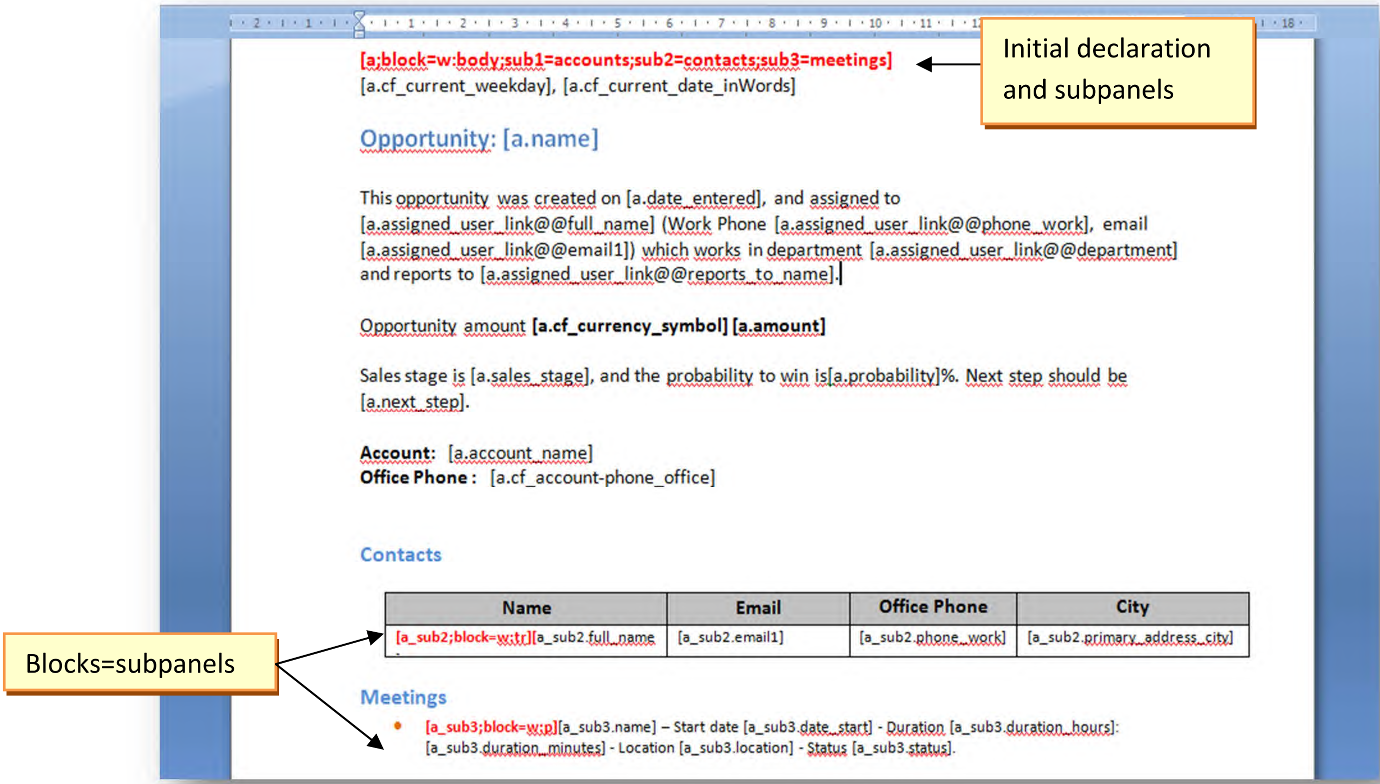
Date/time → tbs:date

Example:



Some template examples are provided for the Opportunities module (see directory *modules/DHA_PlantillasDocumentos/examples*).

Example: Template and Generated Document



Initial declaration and subpanels

Blocks=subpanels

[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].

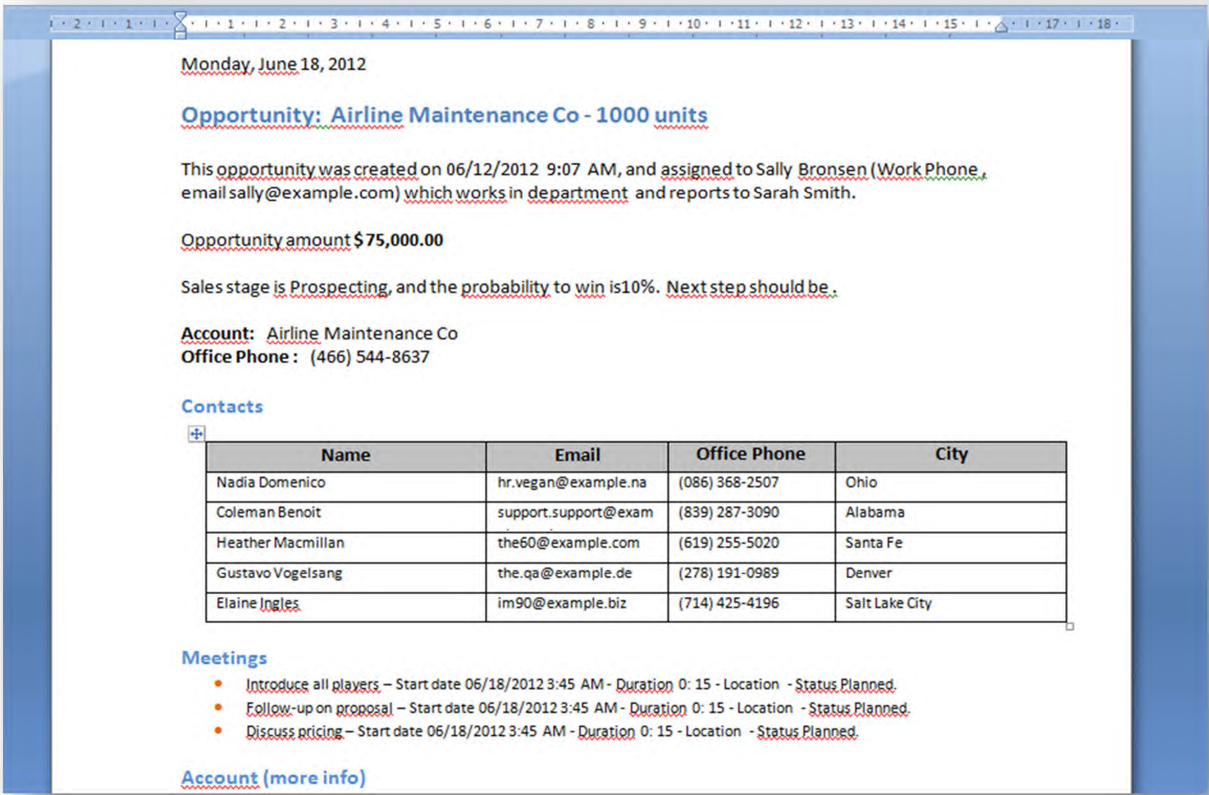
Account: [a.account_name]
Office Phone : [a.cf_account-phone_office]

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)

Example: Documents from Subpanels data

Sometimes we need to create full documents for data coming from Subpanels, eg documents for Contacts from Target List. These templates are associated, for example, with Target List, but the data of the generated document is from Contacts.

To do this, change the document header, indicating that the sub-block of Contacts is repeated for each document body. In this way, we would have to change the following statement block (eg LibreOffice)

[a;block=office:body;sub1=contacts]

To this other

[a;block=office:body;sub1=contacts][a_sub1;block=body]

Within the template, now you can use anywhere Contact data (*[a_sub1.first_name], [a_sub1.last_name]*, etc.) or even data from parent Target List if necessary (*[a.name]*, etc.)

SugarCRM 7 Notes

- If you are updating from SugarCRM from 6.x version to 7.x it's important to uninstall previously the component, without removing tables (remember), and install again after the update

- No module will be enabled in the component installation process to be linked automatically with the component. It will be always necessary to open the "Mail Merge Reports config" page after installing (through the Admin module) and to select which modules you need to be enabled.

- It is mandatory to perform a Repair and Rebuild always after enabling or disabling modules in the "Mail Merge Reports config" page. After that always refresh current page in the browser to see changes.

- Example.
  - After installing, go to "Mail Merge Reports config" page (in the Admin module), enable Opportunities module and save config.
  - Run the Repair and Rebuild process.
  - Then go to the Opportunities module. Once the page is loaded, then refresh the browser window. After that, this module will be linked with MMR.
  - In the Opportunities List view, select one or several records and then select "Generate Document" in the dropdown actions of the List view to view the MMR panel with the options to generate desired document.

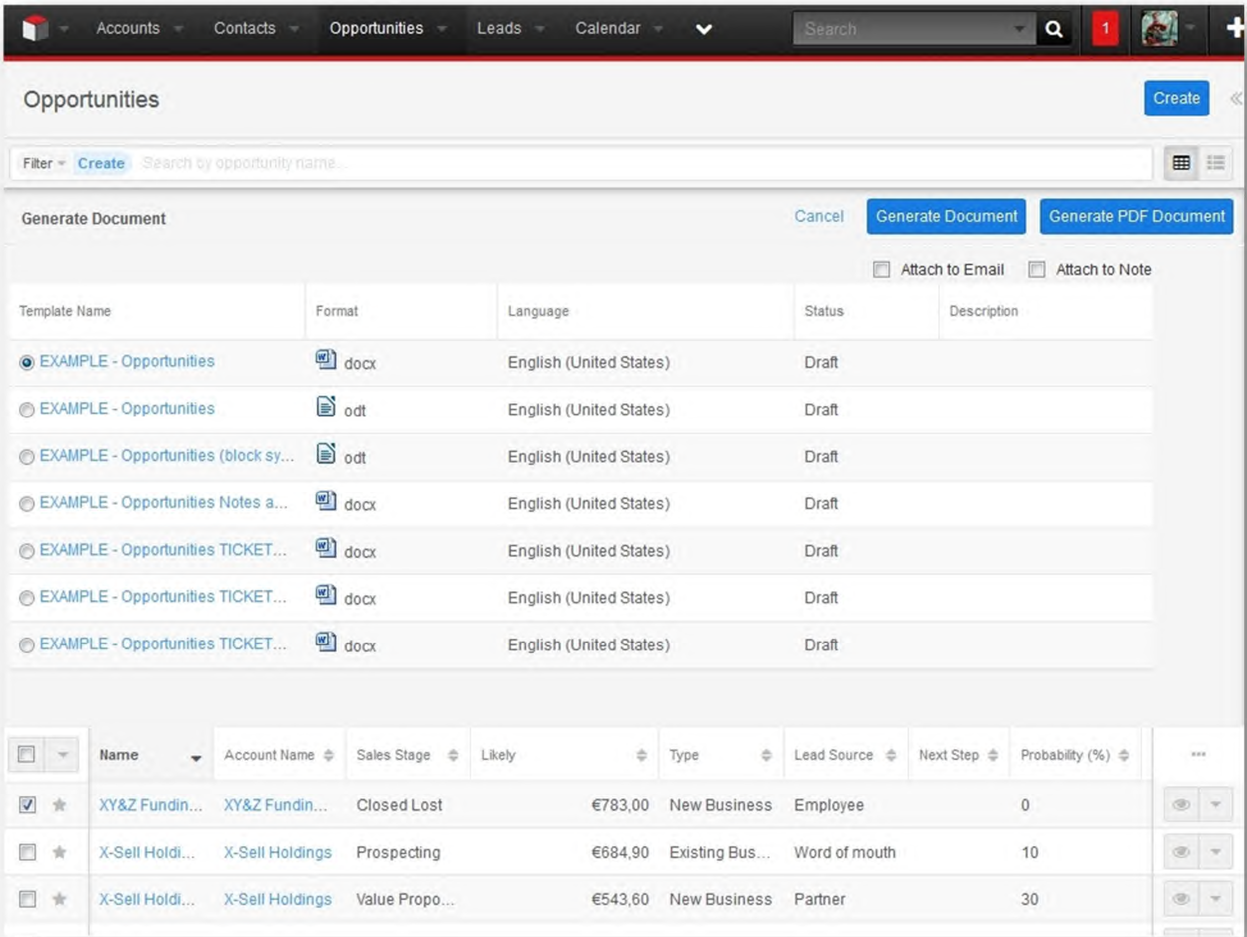
- There is no integration with the Record view yet for new sidecar modules (like old DetailView). Integration is developed only for the List view for now. The "bwc" modules (old style modules) still have this integration for both ListView and DetailView.

- “Attach to note” option will be available only if one record is selected (if more than one record is selected, this option will remain hidden) and if the parent module is linked with the Notes module

- Module label will be "Document templates" in main menu instead "Mail Merge Reports" like old SugarCRM versions.

- As a recommendation, outside the component, install the JSMIn php extension if you wish to speed up the process of generate minified javascript files. This is a internal process that SugarCRM do as administrative task (generate javascript cache files). This comment can be found in the source code of SugarCRM: "If the JSMIn extension is loaded, use that as it can be as much as 1000x faster than JShrink"

SugarCRM 7 List view integration screenshot :



FAQs

- **Is it compatible Mail Merge Reports with Sugar Professional Edition?**
  Yes, from Mail Merge v2.0.0.

- **Is it possible to install Mail Merge Reports with any SugarCRM version?**
  No, you must download and install the Mail Merge Reports version according to your SugarCRM version.

- **How can I change my Basic Mail Merge 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 defining 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, a variable without a result…). 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.