



# ZuckerReports Tutorial: Mail Merge with Microsoft Word



go-mobile  
[office@go-mobile.at](mailto:office@go-mobile.at)  
<http://www.go-mobile.at/>



**Table of Contents**

Introduction .....	3
Step-By-Step Tutorial .....	4
Contact .....	11



## Introduction

This Step-By-Step tutorial shows how to use the free software “iReport” to design, deploy and run a simple report with ZuckerReports and export the result as PDF. iReport is a powerful, intuitive and easy to use visual report designer, suitable for use with ZuckerReports (<http://ireport.sourceforge.net/>). ZuckerReports is an extension module for Sugar Suite, the well-known Open Source Customer Relationship Management software. In short, it provides the following functions:

- Management of report definitions and query templates
- Management of parameter selection lists
- Parametrization and execution of report definitions and query templates
- Categorization of executed reports and query results for later use
- Export of executed reports and query results in various formats



## Step-By-Step Tutorial

First you have to prepare ZuckerReports to build a data source document for Microsoft Word.

- Login to Sugar with your admin-account and open the „ZuckerReports“ module
- First of all lets define a parameter for industry selection. Click on „Report and Query Parameters“

Friendly Name	Default Name	Default
Account	ACCOUNT_ID	
Contact	CONTACT_ID	
Date	DATE	
Meeting	MEETING_ID	
User	USER_ID	



- Click on „New Report Parameter“
  - „Friendly Name“ – enter „Industry“
  - „Default Name“ – enter „INDUSTRY“ (beware of case)
  - „Selection“ – select „User-Defined List“
  - „User-Defined List“ – enter the list of industries you use to assign to your clients.

For Example:

*Apparel, Biotechnology, Chemicals, Communications, Construction, Consulting, Education, Electronics, Energy, Engineering, Entertainment, Environmental, Finance, Food & Beverage, Government, Healthcare, Hospitality, Insurance, Machinery, Media, Not For Profit, Other, Recreation, Retail, Shipping, Technology, Telecommunications, Transportation, Utilities*

- Click on the „Save“-button

**Note: starting with ZuckerReports 1.6f it is possible to select „Drop-Down List“ as selection type and use the preconfigured “industry\_dom” list coming with Sugar.**

## )) ZuckerReports: INDUSTRY

Save	Delete	Cancel
<b>Friendly Name *</b>	Industry	
<b>Default Name *</b>	INDUSTRY	
<b>Default Value</b>		
<b>Description</b>		
<b>Selection</b>	User-Defined List	
<b>User-Defined List</b>	Apparel, Biotechnology, Chemicals, Communications, Construction, Consulting, Education, Electronics, Energy, Engineering, Entertainment, Environmental, Finance, Food & Beverage, Government, Healthcare, Hospitality,	



- Now lets prepare the query for contacts selection. Click on „Report and Query Templates“

**Shortcuts**

- On-Demand Reporting
- Report Archive
- Report and Query Templates
- Report and Query Parameters
- About us

## ZuckerReports: Home

### Template List

Name	Type	Description
Account Activities	Report	
All Opportunities By Lead Source	Report	
Meeting Printout	Report	
My Sales Pipeline	Report	
Pipeline By Sales Stage	Report	
All Contacts	Query	
Contacts by Account	Query	

- Click on „New Query Template“
  - „Query Name“ – enter „All Contacts for Industry“
  - „Query“

```
select c.id, c.first_name, c.last_name, a.name as account_name, a.billing_address_street,
a.billing_address_city, a.billing_address_state, a.billing_address_postalcode,
a.billing_address_country, a.industry
from contacts c, accounts_contacts ac, accounts a where
c.deleted = 0 and ac.deleted = 0 and a.deleted = 0 and
c.id = ac.contact_id and ac.account_id = a.id and c.first_name != "" and c.last_name != ""
and a.industry = "$INDUSTRY" order by account_name, last_name
```

- Click on the „Save“-button

## New Query Template

<b>Query Name *</b>	<input type="text" value="All Contacts for Industry"/>
<b>Query *</b>	<pre>c.id = ac.contact_id and ac.account_id = a.id and c.first_name != "" and c.last_name != "" and a.industry = "\$INDUSTRY" order by account_name, last_name</pre>
<b>Description</b>	<input type="text"/>



- Now select the „Industry“-Parameter in the „Parameter Selection“ Box and click on the „Attach“-button
- Click on the „Run Report“-button

## )) ZuckerReports: All Contacts for Industry

Edit	Delete	Run Report
Query Name	<b>All Contacts for Industry</b>	
Query	select c.id, c.first_name, c.last_name, a.name as account_name, a.billing_address_street, a.billing_address_city,	
Description		

### ↳ Parameters

Friendly Name	Parameter Name	Selection
Industry	INDUSTRY	User-Defined List

### ↳ Parameter Selection

Attach	
Parameter	Account (User-Defined Query) ▾
Parameter Name *	ACCOUNT_ID
Default Value	



- In the „Format“-Box select „Simple HTML (\*.html)“
- Check „Include Header“
- In the „Industry“ box select the industry you want to do a mail merge
- Click on the „Run Report“-button

## » On-Demand Reporting: All Contacts for Industry

### » Report Selection

Report	All Contacts for Industry	
Attach Report To	--None--	<input type="button" value="Change"/>

### » Format Preferences

Format	HTML (*.html)
Include Header	<input checked="" type="checkbox"/>

### » Parameters

Industry	Entertainment
<input type="button" value="Run Report"/>	

- You can now see the report result as a HTML file.

## » ZuckerReports: 050626\_210202\_all\_contacts\_for\_industry.html

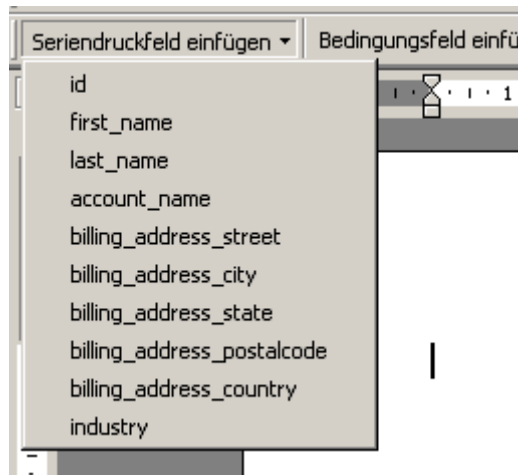
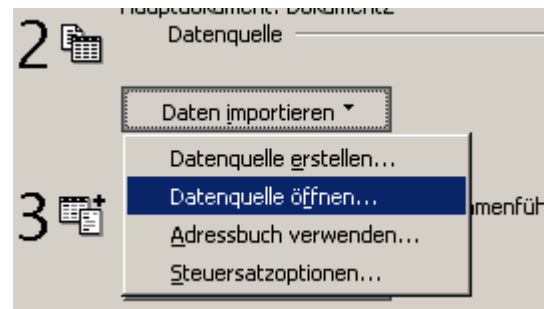
<input type="button" value="Up"/>	<input type="button" value="Publish Report"/>	<input type="button" value="Delete"/>
Filename	<u>050626_210202_all_contacts_for_industry.html</u>	
	<b>Not Published</b>	
Description	<pre>Query: select c.id, c.first_name, c.last_name, a.name as account_name, a.billing_address_street, a.billing_address_city,</pre>	

- By clicking on the filename, you can have a look at the generated data source.
- Right-Click on the filename and select „Save Target As ...“ (or appropriate for your browser)
- Save the file somewhere on your harddisk

id	first_name	last_name	account_name	billing_address_street	billing_address_city	billing_adre
49cea7c0-ee75-4f88-f717-425cfb237e72	Sophie	Abbott	A & E Capital Funding Inc	999 Baker Way	Ohio	CA
cf3befde-7e26-fb50-1d8d-41a47a592c3e	Sophie	Abbott	A & E Capital Funding Inc	999 Baker Way	Ohio	CA
...						

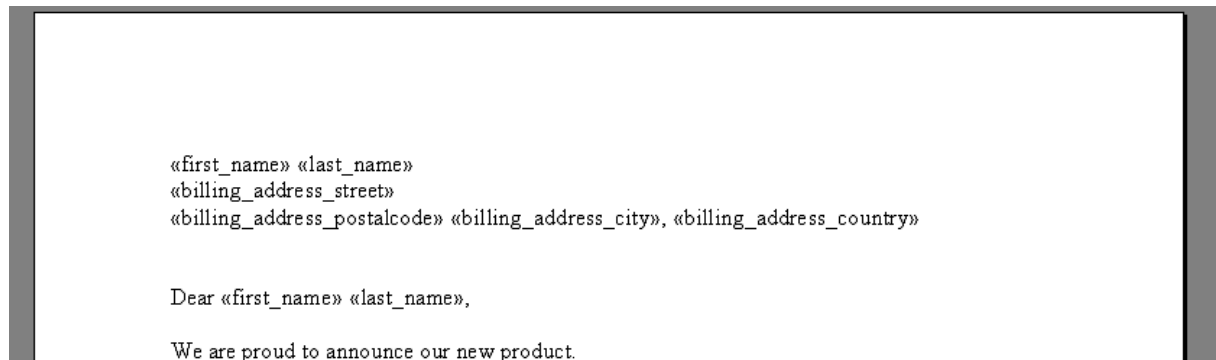


- Now let's design a mailmerge letter with Microsoft Word. Start the application and create a mailmerge letter with the menu item „Tools -> Mail Merge“.
- In the Mailmerge-Dialog select item „Open Datasource“ in the „Import Data“-Box. Select the HTML file you saved from ZuckerReports in the steps above.



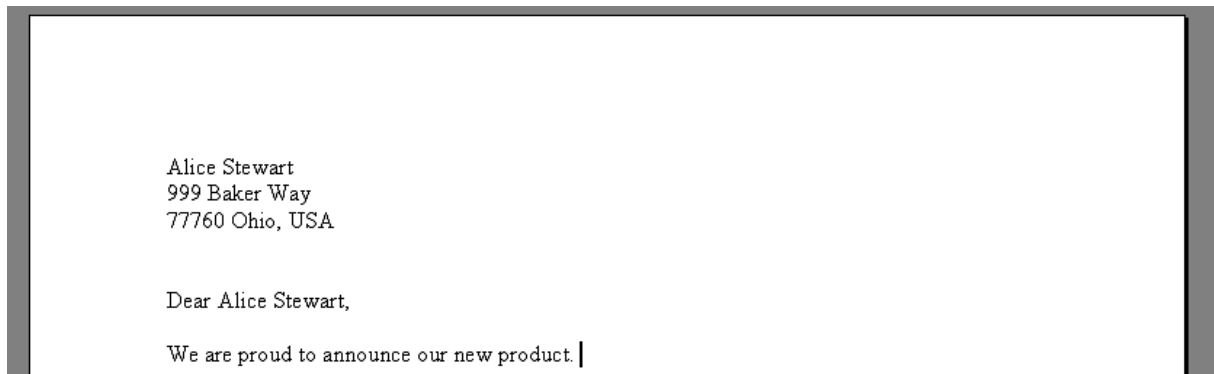
- You now can see all of the fields you can use in your letter in the mailmerge dropdown box.
- Design your letter and select an entry from this dropdown box to insert it at the selected position.

*Here is an example for a simple letter:*

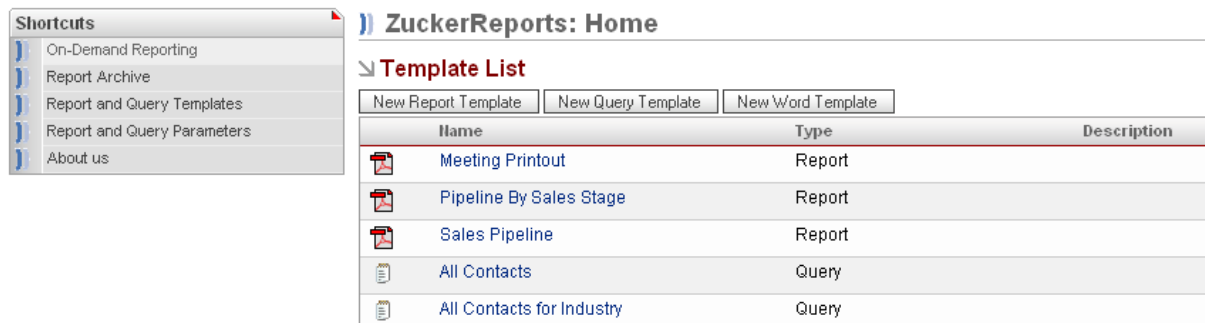




Hint: By using the arrow buttons in the Word toolbar, you can switch between your sugar contacts in design view.



- Save the word template as „All\_Contacts\_for\_Industry.doc“ to your local harddisk.
- Now lets upload the word template to ZuckerReports. Click on „Report and Query Templates“



- Select the query „All Contacts for Industry“
- Click on the button „New Word Template“
- Enter „All Contacts for Industry“ as template name
- Click the Browse button and select the word template „All\_Contacts\_for\_Industry.doc“ from your local harddisk
- Click the Save button



- Now lets execute the mail merge document. Click on „Report and Query Templates“
- Click on the new word template „All Contacts for Industry“



**Shortcuts**

- On-Demand Reporting
- Report Archive
- Report and Query Templates
- Report and Query Parameters
- About us

**ZuckerReports: Home**

**Template List**

New Report Template    New Query Template    New Word Template

Name	Type	Description
Meeting Printout	Report	
Pipeline By Sales Stage	Report	
Sales Pipeline	Report	
All Contacts	Query	
All Contacts for Industry	Query	
Contacts by Account	Query	
All Contacts for Industry	Word Template	
MailMergeTest (MS Office Mailmerge Demo)	Word Template	

➤ Click on the button „Create Report“

**Shortcuts**

- On-Demand Reporting
- Report Archive
- Report and Query Templates
- Report and Query Parameters
- About us

**ZuckerReports: All Contacts for Industry**

Edit    Delete    Run Report

Template Name	<b>All Contacts for Industry</b>
Template File	<u>all_contacts_for_industry.doc</u>
Description	
Query	<u>All Contacts for Industry</u>

- If you implement a serial letter first time, load and install the „ZuckerReports loader“
- Select your format settings, for example „New Document“
- Select your parameter, for example „Entertainment“

**Shortcuts**

- On-Demand Reporting
- Report Archive
- Report and Query Templates
- Report and Query Parameters
- About us

**On-Demand Reporting: All Contacts for Industry**

**Report Selection**

Report: All Contacts for Industry

**Format Preferences**

Format: New document

Please install the [ZuckerReports Loader](#) for Microsoft Office support.

**Parameters**

Industry: Entertainment

Run Report

➤ Click on the button „Create Report“ and open the file in your browser

## Contact

For licensing questions please contact us at [sales@go-mobile.at](mailto:sales@go-mobile.at)  
 For support questions please contact us at [support@go-mobile.at](mailto:support@go-mobile.at)  
 For general questions please contact us at [office@go-mobile.at](mailto:office@go-mobile.at)