

# Ecco MagicMerge

Direct Merge for MS Word  
(with Direct E-Mail)

## Introduction to Tool:

The idea of tool is to provide a '1-step' instant merge feature for Ecco via Word.

There is no need to select folders to 'output'. (The folder selection comes into play only when you create new Word templates and use the Template Building Tool.)

There is no need to 'export' anything.

There is no need to open Word, or to manually point Word to anywhere.

You can instantly create a template merge file 'on the fly' from any ordinary ".doc" file-- just insert the folders you want wherever you desire in the document. You can freely control merge formatting through normal Word merge formatting options, and include date folders as actual dates (ie., instead of ecco date codes).

You can even use existing 'correspondence manager' templates, and freely copy and modify existing templates without any special procedures or tools.

**You simply open any Ecco file, either manually select items, or use any selection filter or query in the phone book, and then "Merge!" (or print, or email) with \*any\* Word document or Dot file.**

## Activating Word Merge:

Any of the following will activate MagicMerge:

- 1) Left click on the MagicMerge tray icon.
- 2) Right click on the tray icon and select 'Word Merge!'.  
3) Press the Windows Key + Shift + W from within Ecco.

**Note:** If a Ecco is active with a Word document as the current item, that document will be automatically opened in Word for merging.

You can thus keep a 'library' of forms in your Ecco file, and merge as easy as 1-2-3. If the phonebook is filtered with the items you want to merge, simply: 1) select the desired form in Ecco, 2) activate MagicMerge and 3) click "Merge".

Note: You do not have to open Word documents to merge them. Only documents saved inside an Ecco file need to be opened in order to merge them (because they have no independent address in the windows file system).

Pressing the "Shift" key when executing a merge (eg, by clicking on the "MERGE" button), allows multiple merges from the same MagicMerge dialog.

## Activating Word Merge for Email:

To activate Word merge for EMAIL:

- 1) press Windows Key + Shift + W + E, or,

2) hold down the 'Shift' key while clicking on the MagicMerge tray icon, or when selecting 'Word Merge!' from the tray icon menu.

Note: The "Advanced E-Mail Options" on the MagicMerge tray icon menu allows for selection of advanced email options such as HTML text formatting, attaching the merged output as a .Doc attachment to the email, or the use of email plain text. (Older versions of Word do not support HTML formatting.)

Using the Advanced E-Mail Options you can also modify the 'Recipient Options' to have recipients selected either from the first folder containing the word "E-Mail" used in the Word template file, or from a folder manually entered. Because you can use 'hidden' folders in the Word template, it is recommended to use this option. For example, at the start of your template include:

```
TO: {Outgoing_E_Mail}
[Part of your template -- not
hidden]
```

-or-

```
{ IF 1 = 2
"{Outgoing_E_Mail }"}
[Hidden]
```

You can use the MagicMerge template building tool to automatically insert the field (in the correct form) for the folder you desire.

If the "Subject" line is left blank in the MagicMerge activation dialog, the Subject of the Document is used as the subject line for the outgoing email. You can also edit the subject field in Word (via File > Properties >

Summary > Subject: ). This way each Word Template can have its own default Subject for emailing, which you can always override simply by manually entering a subject in the activation dialog.

Note that E-Mail, Fax, and direct Printing is not available in MS Word for "Report" type merges. (See "Document Type Control", below ). Since reports use multiple records to print a single document, there is no way MS Word can determine which record was intended to hold the "To:" information, etc.

## Activating Word Merge direct Printing:

To directly print a merge (without creating a merged Word output file), hold down the 'Control' key when selecting 'Word Merge!' from the tray icon menu.

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## Activating Word Merge Faxing:

Note: This feature is not 'officially' a part of MagicMerge because the internal support for faxing is so varied across different systems. It is included as a 'bonus' feature. If it works for you, enjoy! If it doesn't, and you need support to get it to work on your particular system or set-up, we can help, but you'll have to pay hourly for us to figure out your system & structure the tool to fit. If you have Word versions prior to 2002 or 2003 (or in some cases prior to 2007), the fax feature will likely not be available to you. Depending on your set-up (eg., Home, Vista, Premium, etc.) you may be able to fax but not auto-select the fax to phone number. Some 3rd party fax drivers may also cause this feature to fail. A wide variety of system security settings can also interfere with the faxing feature.

To directly fax a merge, hold down the 'Shift' and 'Windows' keys when selecting 'Word Merge!' from the tray icon menu, or when left clicking on the tray icon.

The same rules that apply to E-Mail merging also apply to fax merging. To designate which folder contains the "To:" phone number, in place of "E-Mail", substitute "Fax". The E-Mail option settings apply to fax sending.

The fax merge field should be formatted in any one of the following ways:

```
9, (XXX) ###-####
9, XXX-###-####
9, XXX#####
[FAX:9,XXX-###-####]
```

In these examples, "9," is used at the beginning of the number (in some offices you must dial 9 first and wait for a dial tone in order to access an outside line). The "9" can be omitted if you do not need to dial 9 to access an outside line. "XXX" is optional if the fax numbers are local and do not require an area code.

## Selection of Ecco items to merge

A wide variety of source items can be merged:

### **Currently SELECTED Ecco Items**

Will merge the data from the current selection. Items can be selected in Ecco manually (click and control+click; Shift + Pagedown, Shift + control + end, etc.

Items (and folder contents) can

items (and folder contents) can also be mass selected in Ecco via a search by selecting the "All in view" option.

### **Filtered Ecco PHONEBOOK**

Will merge the data from whatever phonebook items are currently displayed in the phonebook view. (Even if the phonebook is not currently displayed).

The phonebook search, advanced search and "Query", as well as a filter and 'Alt + A' (display all) allow for easy listing of items in the phonebook.

### **Active Ecco notepad TLIs**

Will merge the data from the top level items (TLIs) of the currently active notepad (including the calendar).

In multi-view notepad views, the *base* notepad provides the data (not 'added in' additional views).

If any filters are active in the notepad, they will also be applied to the merge data.

### **Active Ecco notepad (Folder Items)**

Will merge the data from the items in the currently active notepad that belong to the notepad because of their folder setting. (ie. not 'context parents' or children of items, unless the parent or child is also assigned to the relevant folder).

Whereas the 'Active Ecco notepad (TLIs)' dataset will use the data from top level items even if they are not assigned to any

folder displayed in the notepad, 'Active Ecco notepad (Items)' will use data from **any** item (child or TLI), so long as the item directly belongs to the notepad (ie. not a context parent or child of a belonging item). Child items **are** included if they are independently associated with any of the folders in the notepad.

### **Active Ecco notepad (Every Item)**

Will merge the data from the items shown in the currently active notepad. (ie. includes 'context parents' and children regardless of any folder assignments).

## Selection of a Word Template file:

There are several ways to select which Word file to merge. You can:

- 1) Drag & Drop the file from windows explorer onto the file selection box.
- 2) Type in "Browse.." or select "Browse.." from the bottom of the pull-down selection list.
- 3) Paste the file name into the selection box.

You can also select (from the pulldown box), previously merged files, or, the currently Active Word Document.

Use of the "Active Word Document"

option allows you to save Word templates directly in your Ecco file, double click to select (and open) that template, and then merge. (This allow keeping the Template and data in a single .eco file). Typing "A" and down arrow in the file selection box will instantly bring up the first matching item starting with the letter "A", and typically will be a shortcut to the 'Active Word Document' option.

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## Document Type Control

By right clicking on the MagicMerge tray icon and selecting "Document Type" you can override the type of the merged document.

This control relates to how the merged document will be created-- one document per data set (such as letters), a linear report of data (such as a multi-line report in a single document), etc.

Typically in Word, the type of document is set when using the Tools > MailMerge Tools > (Document) Create feature. With MagicMerge you can merge to the format originally set for such a Template, or you can override and manually select a different merge type.

The default MagicMerge setting is to use the existing type of the Word file of the merging template.

Note: You can use any Word document or .dot as a MagicMerge template, even if the document is a standard, plain old Word document-- ie. there is no need to use the Tools-MailMerge-Create feature of Word.

To override the Word 'created' merge type for 'created' merge files, or to set



a default merge type in 'plain jane' Word files, you can use the "EMType" file property. To do so:

1. Create a file property called "EMType". (Typically in Word via File > Properties > Custom).
2. Enter in the "EMType" property the desired type:

"Letter" for Form Letters

"Report" for multi-line reports

"Envelopes"

"Labels"

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## Date Style Control

By default dates merge in "Short" date format.

From the MagicMerge tray icon "Options > Date Styles" menu you can select "Long" dates, or, the "Raw" Ecco date format

## Date Format Options

From the Date Format Control menu ("Options > Date Formats"), you can select the default format for dates:

Full (Dates and Times) (This option is ignored when raw ecco date format is used) ;

Dates only ;

Times only ;

Only the *starting* date and time ;

Only the starting date ; and

Only the starting time.

## Setting Style/Format in Word

Date style and formatting will be overridden if explicitly set in any Word template.

To set date style and formatting for any template:

1. Create a file property called "EMDate". (Typically in Word via File > Properties > Custom).

2. Enter in the "EMDate" date property the desired style:

"Short" for short dates

"Long" for long dates

3. Add any special formatting:

"/S" for Starting Date & Time

"/SD" for Starting Date

"/ST" for Starting Time

Note: This works very similar to setting default Email Subjects using the file's "Subject" property.

But note,

- 1) "EMDate" will always be added

(and edited) from the "Custom" Properties dialog in Word while "Subject" is typically found in the Word File properties "Summary", and

2) Manual selection of a subject during an Email Merge will override the Word file's 'Subject' property, but the Word file's 'EMDate' property will override manual selection of date style and format.

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## Header Record

The "Header Record" option allows using the first currently displayed phonebook item as record "1" within the merge.

Thus, for example, the address and salutation data can be merged from the phonebook item and the 'report items' merged from elsewhere in Ecco.

Ie. the main data can be merged, for example, from a filtered notebook view, while the phonebook view contains the addressee for the letter/report. The data will be merged, as if the phonebook item was the first item in the filtered notebook view. (For more information on how to take advantage of this type of merge see the 'Advanced Ecco/Word usage Note' below).

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## Font Codepage

For those who have non-English (or special English/Graphics) in either Ecco items or folders.

Via the tray icon right click "Options" menu, select "Font CodePage":

**Default CodePage** uses whatever

default codepage is currently configured for windows at the time the merge is run.

**Change CodePage** allows selecting whatever alternative codepage desired. You can instantly change back and forth between using the default codepage, or the selected alternative.

If unsure about which codepage to use, look at Window's control panel 'Regional and Language Options', "Advanced" tab, for a full list of codepages supported by that windows setup.

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## Merge Tracking

The "Merge Tracking" option allows automatic recording each merge, e-mail, fax, or print run in your Ecco file.

Because this modifies (adds data to) your .eco file, this option will only be enabled if you do two things:

1. Enable the option in MagicMerge.
2. Include in the file a folder named "MagicMerge Tracking".

A MagicMerge Tracking folder must exist in *each* file you want to activate Merge Tracking for. This is required to insure that you never accidentally modify a file's data with

## MagicMerge.

With this option enabled, each merge will add a folder with the date and time of the merge to each item included in the merge. By viewing an item's attached folders you can see a complete record of merges (including, when less than 16000 items are included in the same merge, with what file the item was merged), *and*, by double clicking on any merge record folder (in the ecco Folder pane), you can instantly see *all* items which were included in that particular merge.

If desired you can create a template with multiple "MM\_Blank" Pop-Up List folders setup as sub folders of the MagicMerge Tracking folder. If any such folders are available, the merge log will be placed there, instead of the default 'new folders' location. The Pop-Ups do not need any default values, and you can create multiple folder blanks easily by creating one, setting the properties to Pop-Up List, and then using control + C and control + V to copy and paste. Subsequent Control + Vs create multiple copies of the folder).

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## The Word Template Building Tool:

The tool is activated by right clicking on the MagicMerge tray icon and selecting the Template Builder (or by pressing Control + Winkey + W from within Ecco).

Simply check the folders you desire to be included in the template building

tool, and then click the 'Build' button. (You can instantly update the template after it has been built by simply clicking again on the "Build" button.) Items are included in the selection pad in the order they were selected.

**Shift checking/unchecking** any of the 'Parent' folders, will check or uncheck all of the children of that folder.

For large folder lists, typing any letter will "jump" to the next folder starting with that letter, and you can use 'Space' (or Shift+Space) to make selections and de-selections.

Double clicking on "ItemText" will display and allow selection of the Ecco 'internal' folders.

Note: the 'flex' virtual address folders Address\_Line\_1, Address\_Line\_2, City, State, Zip\_Code, and Country, will look first for an actual folder with that name, and if existing, will merge from those existing folder. Currently MagicMerge will use the 'Business' addresses as the folder values for the 'virtual' addresses. Per item setting selection of Business vs. Home for the address folders is not currently supported. By setting up a separate folder to designate which (Business or Home) should be an item's default address, you can have Word (using the "If" field) select the appropriate folders (eg. Home or Business) based on that folder's setting. For example:

```
{ IF Default_address = "Home"
  { MERGEFIELD Address_1_Home }
  { MERGEFIELD Address_1_Business }
}
```

**Note: the first field (Folder) in the Word document containing the word "Email" or "E-mail" will be used to determine which Folder contains the email address for "Email" Merges.**

You may close or shrink the folder selection window when you have selected the desired folders to include in the template tool.

By **double clicking** on any of the folders from the template tool, you can instantly insert a merge field for that folder into the currently active word document. (The merge field will be inserted at the current cursor location in Word.)

(For long folder templates, Control + any key will 'jump' to the next item in the tool starting with that character.)

NOTE:

1. Pressing **the "Control" key** when selecting the "Template Builder", allows folders selected in the ecco folder tree to be **added** any currently listed folders on the tool.

2. Pressing **the 'Shift' key** when selecting "Template Builder" allows the folder tree selection to be bypassed. The Template Building Tool will be built based on the **already existing merge fields in the currently active Word document.**

In this alternate ('shift') mode, you can:

- 1) Instantly create a template

building tool using the already existing fields in any word file, and

2) 'Load' the merge fields in one file, and then open another file and insert the fields in the second file.

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## Advanced Configuration Notes:

An optional file, "MagicMergePIN.ini" can be placed in the MagicMerge directory, listing one-per-line standard files that will always be included in the MagicMerge file pulldown menu. If those files are merged, they will also appear in use order in the 'recent files' portion of the pulldown.

Using the <Clear> option of the pulldown, the recent files list can be cleared. The "PIN.ini" files can only be modified by modifying the ini file itself.

Saved configuration options can be cleared by holding down the "Shift" key when you click "OK" on the MagicMerge start-up dialog box.

MagicMerge is designed to merge a wide range of file structures. In order to maximize processing speed, aggregate blocks of merged data exceeding approximately 1/2 Meg per 16 items will be ignored. Single items (if item text is merged), or an item's merged folder text can each be up to about 32,000 bytes per item, so long as such items are not merged consecutively in the merge. Usual merge fields such as addresses, names, order info, etc., never reach 1/2 million characters of data per 16 items. If your particular merge needs require special printing of dense item text or folder data, you can order the industrial merge build which will do this. That build is designed for millions of bytes in merge data in



single merges and requires significantly more memory to run. Standard MagicMerge can still merge millions of bytes of item and folder data. The merged data (from the ecco file) just cannot have a merge density of more than approximately 1/2 million characters of merged ecco data per every 16 merged items.

## Advanced Ecco/Word usage Notes:

The outline structure of Ecco is especially suited for printing reports built where:

1. The first selected item is the TLI phonebook item containing folders relevant for name, company, address, etc.
2. Subsequent selected items are the 'transaction' level items desired in the report.

To take advantage of this structure in Word, you can use a special merge field to handle the First selected item. (eg. to include a letter header, inside address, salutation, etc.). This can be built with folders relevant to the phonebook item, and totally different from the folders used in the 'report' section (transaction level items) in the document. To do this simply use "Report" style merge with the Word structure:

```
{ IF { MergeSeq } = 1
```

```
"Place the FIRST ITEM  
SELECTION HERE (can be multi  
lines, include your folders to merge,  
etc.)"
```

```
} { NEXTIF { MergeSeq } = 1}[or]  
  { NEXTIF { MERGEFIELD  
Folder_in_report } = "" }
```

Text (Folders to merge, etc.) for transactions goes here....

.....

```
{ IF { MergeRec } = { DocProperty
EMRecordCount } "Put closing text
here" }
```

Note:

1. { } bracket pairs are Word 'Field' indicators and are created by pressing Control + F9 in Word.

2. A special field, "{ DocProperty EMRecordCount }", can be used to determine the number of records in a merge.

[Note: This field also allows listing, for example, "Item {MergeRec} of { DocProperty EMRecordCount }", etc. ]

3. To use extensive formatting and/or graphics as part of the 'first record only' section of a word document, an easy technique is to use the Word AutoText feature. Simply highlight the formatted text/graphics block you desire to use as the header, and save as a 'AutoText' block. Then in the 'first record only section' use "{ AUTOTEXT Text\_Name \* \ MERGEFORMAT} ". (You can have multiple 'first record only' sections if needed)

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