



# OfficeLink – Microsoft Word

## Support Note

For MYOB Accounting V15, MYOB Accounting Plus V15, MYOB Premier V9, MYOB Premier Enterprise V3 and AccountEdge V5

### Introduction

With MYOB Accounting, you can instantly harness the power of Microsoft Word. MYOB OfficeLink is the easiest way ever to use your standard office software with the information you keep in MYOB Accounting. All the work is done for you, forget mail merge hassles. To take advantage of OfficeLink you need to use OfficeLink compatible software. Your computer should have enough memory (RAM) and hard disk space to be able to run MYOB Accounting and your OfficeLink compatible software at the same time.

This support note provides some information on how MYOB and Word interact.

### Compatible OfficeLink Word Processing Software:

Microsoft Word - Windows: 8 (Office 97),  
Mac: Microsoft Office 98.

Note: Mac users require Mac OS 8.0 or higher to use OfficeLink.

### What does OfficeLink do?

In its card file, MYOB Accounting tracks a lot of information about your customers, suppliers, employees, and personal contacts. OfficeLink allows you to tap this information to quickly create personalised letters (mail merges) in Word. You can do this both in the **Card File** window if you need to send a letter to one card, or in the **Personalised Letters** window if you need to mail merge a number of customers or other cards.

### What is a Word Template?

Essentially, a template is a "shell document" that has preset fonts, styles, headers, footers, margins, etc. People use templates for lots of reasons, but most of the time they use them to standardise their business letters with the same "look." Saving a document as a template saves them from having to reformat every letter they write.

Available Fields	
Field	Description
Company	Your Company Name
CPhone	Your Company Phone no.
CID	Your ACN number
CAdd1	Your Company Address Line 1
CAdd2	Your Company Address Line 2
CAdd3	Your Company Address Line 3
CAdd4	Your Company Address Line 4
Name	Card Name
Add1	Card's Mailing Address Line1
Add2	Card's Mailing Address Line2
Add3	Card's Mailing Address Line 3
Add4	Card's Mailing Address Line 4
Add5	Card's Mailing Address Line 5
City1	Card's Mailing Address City
State1	Card's Mailing Address State
Post1	Card's Mailing Address Post Code
SAdd1	Card's Shipping Address Line 1
SAdd2	Card's Shipping Address Line 2
SAdd3	Card's Shipping Address Line 3
SAdd4	Card's Shipping Address Line 4
SAdd5	Card's Shipping Address Line 5
City2	Card's Shipping Address City
State2	Card's Shipping Address State
Post2	Card's Shipping Address Postcode
Phone1	Card's Phone Number 1
Phone2	Card's Phone Number 2
Fax	Card's Fax Number
Salutation	Salutation specified for Card
Contact	Contact Name specified for Card
Balance	Total Card's Receivable
Overdue	Receivable Amount Overdue
X	Card's Identifier



## How do I identify a Template?

Microsoft Word templates end with the extension ".dot", whereas regular Word documents end with ".doc".

## How does OfficeLink use Templates?

MYOB OfficeLink uses templates to do seamless "mail merges." A mail merge is when you use the same letter based on a template to create a batch of letters, each addressed to a different person, at one time. With OfficeLink, you select one or more cards, pick the template, and OfficeLink merges the card data into the template producing a letter for each card selected. It is important to remember that OfficeLink does not change the template. OfficeLink simply uses the template letter as its "shell" for creating multiple letters. The newly created letters are saved as Word and not as templates. MYOB Accounting is installed with a handful of Word. Each template deals with a different business subject such as overdue receivable and bounced cheques. You are free to edit these templates.

Just remember, when editing a template, save it as a template (.dot). Do not change it to a document (.doc).

## How does MYOB OfficeLink merge data into a Template?

Most word processors have mail merge capabilities, but even with wizards and the like, creating a mail merge document is a pain in the neck. The beauty of MYOB OfficeLink is that creating OfficeLink templates is simple. Each data field in an MYOB card has a name (see the table on the previous page for fields that can be used in the mail merge). When creating a template, simply place the field name in double brackets. There is no need to use the word processor's mail merge wizard; simply create a new document, put double brackets around the field names, and save as a template.

Note: The template document needs to be placed in the Letters folders found in the MYOB directory. That's where OfficeLink looks for its templates. Following is some sample text from a template:

[[Contact]]

[[Add1]]

[[Add2]]

[[City1]],

[[State1]]

[[Post1]]

Dear [[Salutation]]:

*Please accept my sincere apology, on behalf of [[Company]] for the difficulties we've caused you.*

*Sincerely, [[Company]]*

When you use OfficeLink mail merge, it first displays a list of templates. Once you select a template, it launches the appropriate word processor, opens the template letter, and scans it for any text within double brackets. It then substitutes the relevant card data for the double bracket fields and creates a letter for each selected card. In the sample above, once OfficeLink scans the fields in the double brackets, it knows where to put the contact name, address, salutation, and company name.

## **In the MYOB sample Templates, what are the other fields?**

Although we don't have to, we get a bit fancy with the sample templates. We use Microsoft Word IF commands to consolidate blank lines in the address fields. We also use Word commands to prompt the user for their name, the amount of the bounced cheque, the items on backorder, and so on. It is important to remember that OfficeLink just deals with the fields in double brackets. All the other fancy embedded commands come from the word processor. If you have any questions or problems with these commands you should consult your word processor's help systems. If you don't like them, you can open the template and delete them.

## **Can I edit Templates?**

Yes, if you expect to get real benefit from OfficeLink for Word. You should change the text of the letters to reflect your business as our letters are fairly generic. You may also want to fill in your name and title at the end of the letters so you don't get prompted to fill in your name every time you run a template. You may want to add your logo at the top of the template. If you use your company stationery you should delete the company name and address at the top of the template.

## **What if I install a newer/older version of an Office compatible Word Processor?**

You will need to reinstall MYOB Accounting from your CD/floppy disks to be able to use the word processor with Office Link.

**Tip:** You can reduce the time it takes to mail merge documents by loading the Word Processor you are using before starting the OfficeLink procedure. This way, MYOB Accounting is able to start the mail merge quickly, without having to start the program first. You should also ensure that there are no other programs running apart from MYOB Accounting and the word processor.

**Disclaimer:** This information is of a generic nature. For specific advice regarding your particular circumstances please seek assistance from your Accountant, the Australian Taxation Office or your IT Consultant as appropriate.