

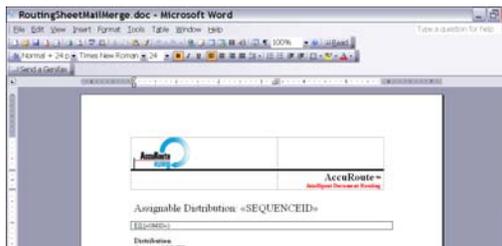
Creating Routing Sheets or barcode labels for Assignable Distributions

You can create Routing Sheets or barcode labels for unassigned distributions using a supported Mail Merge program and the output file that contains unassigned distributions. At this time, Omtool supports Mail Merge using Microsoft Word.

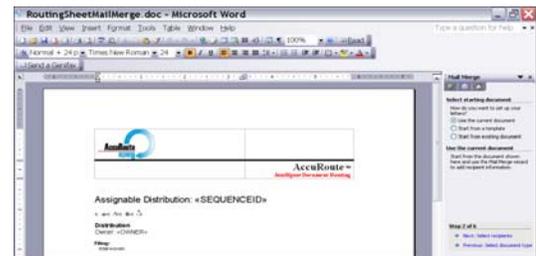
The mail merge template files, **RoutingSheetMailMerge.doc** and **AssignableDistributionBarcodeLabels.doc**, are located in **...\\OMTOOL\ACCUROUTE\DESKTOP\OUTPUT** folder.

To create Routing Sheets or barcode labels for Assignable Distributions using Microsoft Word 2003:

- 1 Open the template file using Microsoft Word.



- Step 2 of the Mail Merge process opens.

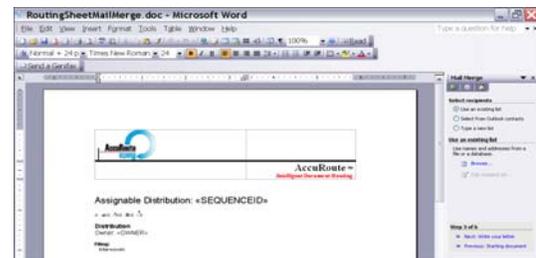


- To create Routing Sheets, open RoutingSheetMailMerge.doc

- 4 Select **USE THE CURRENT DOCUMENT** and click **NEXT: SELECT RECIPIENTS** on the bottom right.

- To create barcode labels, open AssignableDistributionBarcodeLabels.doc
 - ▶ **Step 2 - 10** shows the RoutingSheetMailMerge.doc modified. The process for modifying the AssignableDistributionBarcodeLabels.doc is similar.

- Step 3 of the Mail Merge process opens.



- 2 Click **TOOLS > LETTERS AND MAILINGS > MAIL MERGE**.

The Mail Merge task pane opens showing **Step 1** of the Mail Merge process.

- 5 Click **BROWSE** under **USE AN EXISTING LIST** in the task pane.



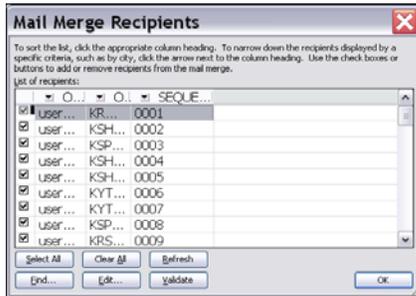
The **Select Data Source** page opens.

- 3 On the task pane, select **LETTERS** and click **NEXT: STARTING DOCUMENT** on the bottom right.

- 6 Navigate to the location of your output file (the default location is **...\\OMTOOL\ACCUROUTE\DESKTOP\OUTPUT**).

- 7 Select the output file and click **OPEN**.

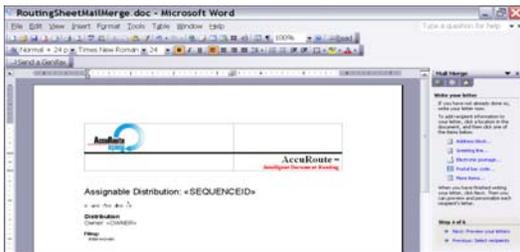
- 8 Click **OK**. The **Mail Merge Recipients** page opens.



9 Click **OK** to close the Mail Merge Recipients page.

10 Click **NEXT: WRITE YOUR LETTER** on the bottom right.

Step 4 of the Mail Merge process opens.



11 Click **NEXT: PREVIEW YOUR LETTERS** on the task pane.

Step 5 of the Mail Merge process opens.

- If you are editing the RoutingSheetMailMerge.doc, you see a preview of a Routing Sheet complete with an Assignable Distribution.



- If you are editing the AssignableDistributionBarcodeLabels.doc, you see a preview of the barcode labels complete with an assignable distribution.



12 Click **NEXT: COMPLETE THE MERGE** on the bottom right.

Step 6 of the Mail Merge process opens.

13 Click **EDIT INDIVIDUAL LETTERS** in the right panel.

The **Merge to New Document** window appears.



14 Select **ALL** and click **OK**.

Each unassigned distribution is written to an individual Routing Sheet. For example, if you created 50 unassigned distributions, the Mail Merge program creates 50 Routing Sheets.

15 From the **FILE** menu, select **SAVE AS**, assign a unique file name to the document, and click **SAVE**.

16 Close RoutingSheetMailMerge.doc / AssignableDistributionBarcodeLabels.doc file that you were editing.

17 When the following message box appears, click **No**.



Do not select Yes to this question. Selecting Yes saves the data from the output file within the template itself.

Enabling Microsoft Word macro to auto-complete mail merge and print Routing Sheets or barcode labels to the default printer

The Assignable Distribution Creator also has the ability to enable a Word macro that automatically completes the Mail Merge process and prints the converted document (Routing Sheets or barcode labels) to the default printer. To enable the Word macro, you must edit the `config.xml` file.

To edit the `config.xml` file:

- 1 Navigate to...`\OMTOOL\ACCUROUTE LEGAL OPTION PACK`.
- 2 Locate `config.xml` file.
- 3 Make a backup copy of the file.
- 4 Edit the file using the instructions below.
- 5 Save the file.
- 6 For **Field delimiter**, choose “**(Tab)**” from the drop down menu and for the **Record delimiter**, choose “**,**” from the drop down menu.
- 7 Click **OK** to close the page. Follow the rest of the steps involved in creating the Distribution.



- For **RoutingSheetMailMerge.doc**, remove the default code and add the following code:

```
<configuration>
<emailintegration>Outlook</
emailintegration>
<wordmacro>DoMailMerge</wordmacro>
<wordtemplate>RoutingSheetMailMerge.doc</
wordtemplate>
</configuration>
```

- For **AssignableDistributionBarcodeLabels.doc**, remove the default code and add the following code:

```
<configuration>
<emailintegration>Outlook</
emailintegration>
<wordmacro>DoMailMerge</wordmacro>
<wordtemplate>AssignableDistributionBarco
deLabels.doc</wordtemplate>
</configuration>
```

Now when you create Routing Sheets or barcode labels for Assignable Distributions, the **Header Record Delimiters** page opens and prompts you for the **Field delimiter** and **Record delimiter** values.