

Paper series for typical word processing applications

mail merge

Generate Form Letters with Ease

Document generation is an integral part of most business processes. Letters are written, invoices generated and sales reports created.

Typically, such documents are very similar in nature; they are mainly generated from a static, pre-formatted template and then populated with data.

In some causes, the data population process can be fully automated; in others, there must be some human intervention and manual processing.

About "hands-on"

"hands-on" is an article series that describes typical word processing applications. Examples include 'mail merge', 'document management' and 'reporting'. The series strives to offer an executive summary of what can be achieved with word processing components: requirements, technologies and architectures.

Content

Creating Documents Automatically	2
Mail Merge - A Typical Application for TX Text Control	3



Creating Documents Automatically

Generally speaking, the term 'mail merge' describes the creation of multiple documents from a single template combined with data from a structured data source, such as a database table or an XML file.

Today, the usage of this term has been expanded to include automatic document creation processes, such as:

- Electronic procurement
- Report creation
- Online invoicing

All of these processes are based on standardized documents that must be personalized depending upon the current data set.

What is a template?

A pre-designed document with merge fields that can be merged with data from various data sources like databases or XML files. Templates help developers to ensure enterprise wide consistency as the final document is created on a centralized server.

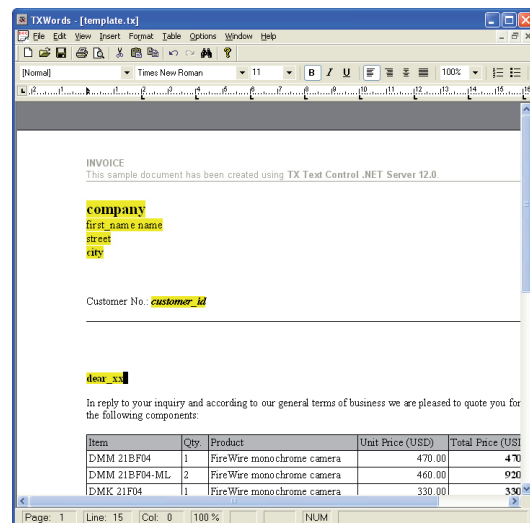
A template consists of a number of text blocks and an enterprise-wide design that enforces consistency. Additionally, these templates contain text fields or merge fields that can be populated with content from various data sources (XML, databases etc).

Sample: Creating invoices

At a bare minimum, an invoice consists of the following:

- Name and billing information of addressee
- Company's name and address, including corporate logo
- Product information (part number, name, description, item price, quantity etc)
- Shipping costs, sales tax and total amount
- Some blocks of text (bank details, payment terms etc.)

As most of this data can be automated or calculated, the end user should be able to simply select the addressee, the product information, their quantity and enter terms of payments. Using this information, the document can be created automatically. The text fields in the template are merged with the appropriate data and the current pricing information is retrieved from a specific database.



The screenshot above illustrates a typical template for an invoice: The text fields - marked in yellow - will be merged with the real data.

Manual post-processing?

An invoicing application or an invoicing module in business software can display the finished, merged document to the end user. The application might allow the end user to make changes to the document, using a WYSIWYG editor interface.

However, this option should be used with caution, as these modifications may break the corporate identity and enterprise-wide consistency of business documents. Additionally, changes cannot be saved for post-processes, such as sales report generation or statistical analyses.

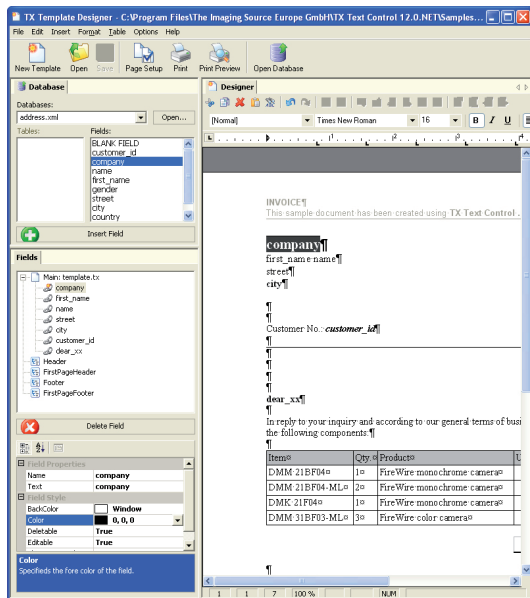
To analyze business quotations for instance, the data should be stored in a database and not be embedded in the document.

It is better to create documents on demand, based on the current data and the template. The final document is presented to the end-user, thus allowing him/her to check its validity.

Mail Merge - A Typical Application for TX Text Control

Sophisticated word processing engines provide powerful text modification functionality that enable the advanced formatting of documents, thus rendering manual modifications as unnecessary.

TX Text Control offers a broad palette of mail merge functions, which makes the development of complex mail merge applications very simple. It ships, for example, with 'TX Template Designer', an application to create formatted templates. The feature set of TX Text Control allows developers to create their own template designers. The source code for the shipped template designer is included.



The screenshot above illustrates 'TX Template Designer' with an opened template and the appropriate database. This enables developers or template designers to create highly formatted templates within a matter of minutes.

TX Text Control offers an object-oriented class design with easy-to-use collections for all elements in a document. Thus makes it very easy to merge the appropriate data into the text fields.

Every element of the document is accessible from program code, so that any kind of logic

can be applied: From conditional fields that are merged based on a specific programmed business logic, all the way to dynamic formatting options.

TX Text Control supports all kinds of databases that can be used to merge data from various sources into one template. This enables developers to assemble complex documents, such as sales reports where data comes from disparate databases.

Server-side mail merge

The TX Text Control product family offers components for all scenarios and architectures in which word processing is a part. A common trend in business applications is to centralize document creation processes. TX Text Control .NET Server has been specifically developed to create or modify documents server-side and offers its flexibility to all server-side ASP.NET applications.

TX Text Control allows developers to centralize the creation of documents in all supported formats (PDF, DOC, RTF etc.) on demand.

One of the most important aspects during the development of TX Text Control .NET Server was the speed at which applications built on this technology platform execute. It has been built from scratch to create documents in batch processes at the maximum possible speed.

TX Text Control gives you a powerful set of tools to create professional, fast and flexible mail merge applications. Download your free trial version directly at:

www.textcontrol.com

If you would like to discuss your project with our engineers, contact us by email:

support@textcontrol.com



About TX Text Control .NET Server:

TX Text Control .NET Server is a fully programmable word processing engine for deployment in an ASP.NET server environment. It primarily has been designed to develop document automation applications.

