I am in the Word Document to print a Billing Manager Invoice, but when I go to Mailings ribbon, I do not have a choice to Finish and Merge

Last updated: Mon, 22 Jul 2019 19:02:03 GMT

Symptom

- You are in the Word Document to print Invoices, but you cannot use the Finish and Merge because it is grayed out

Applies to

- ILLiad

Resolution

When you are working with the Billing Manager, the data source goes to the location you have set up in the Customization Manager in the key called BillingManagerPrintDataPath. So you need to know what that is first. Next, you need to know where your print documents path is so that you know where ILLiad looks for the Word Documents. That is in the PrintDocumentPath key. Here is what I recommend you do:

1. Go to where the PrintDocumentPath key says your Word Documents are.
2. Open the LendingBillingManagerInvoice.doc
3. After it opens, go to the Mailings Ribbon and then on the Select Recipients drop down, choose "Use an Existing List."
4. Go to where the BillingManagerPrintDataPath says the data source. Then select your Data Source, which is InvoicesLending.
5. Next, you should see the table InvoicesLending$, choose OK.

Now, you should be able to use your Mail merge.

Additional information

ILLiad can print without setting up the Mail Merge because ILLiad updates the header information and does it. If you are editing a Word Document, then you need to set up the data source.

https://help.oclc.org/Resource_Sharing/ILLiad/Troubleshooting/I_am_in_the_Word_Document_to_print_a_Billing_Manager_Invoice_...