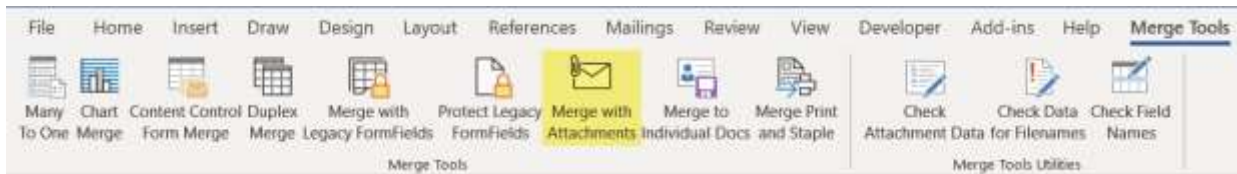


## MERGING WITH ATTACHMENTS

The communication that you want to send to the addressees needs to be created as a Letters type Mail Merge main document to which is attached a data source in the form of an Excel Workbook or an Access Table or Query

If there are individual attachments for each record in the data source, the path and filename, including the file extension, of those attachments must be included in fields (one attachment per field) in the data source. The data in such fields must be an exact match for the path\filename.extension of the attachment.

When the communication is ready to be sent, clicking on the Merge with Attachments button in the Merge Tools section of the Merge Tools tab of the ribbon



will cause the following dialog to be displayed

Mail Merge with Attachments ©2012 - Doug Robbins

Select the merge fields that contain the path and filename of attachments

First_Name	Add >>	
Last_Name		

<< Remove

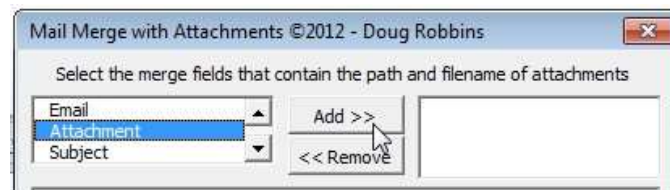
Delete | Browse for attachments to be included with all messages

Merge Destination: [ ]

☐ Send Now   ☐ Defer Sending   ☒ Save to Drafts>Merge Tools Folder

Continue   Cancel

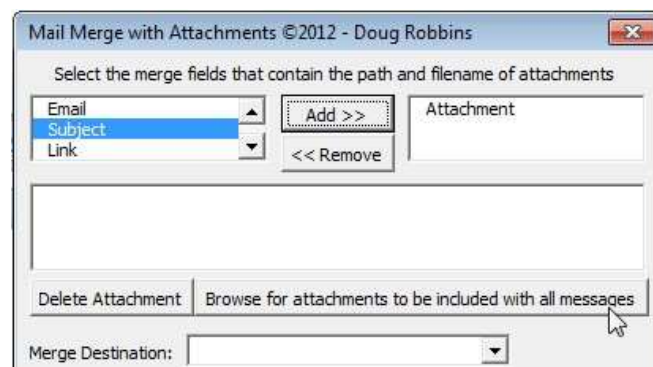
If your data source includes a field or fields that contain the path and filename of files that are to be attached to the email messages, those fields can be selected can be selected from the list of fields that appears in the left hand pane and by clicking on the "Add>>" button, they will be moved to the right hand pane.



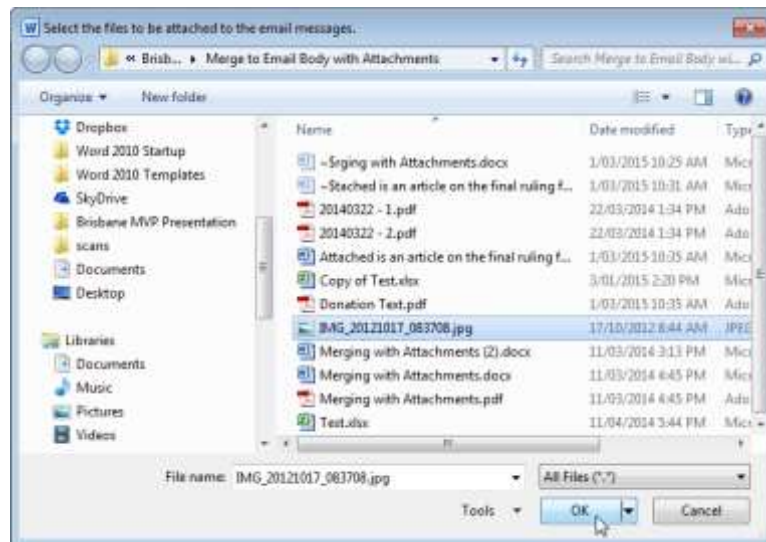
If a field is added to the right hand pane in error, it can be removed by selecting it and then clicking on the "<<Remove" button



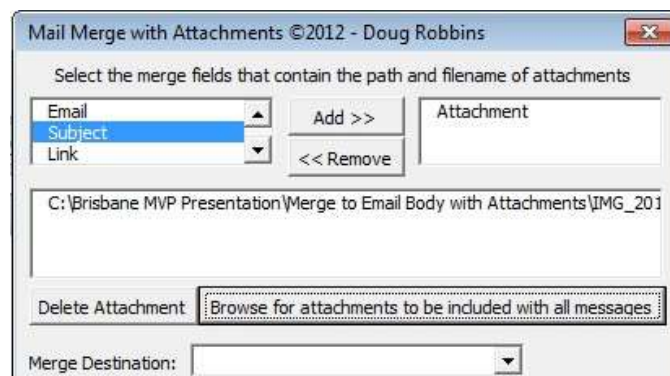
If there are attachments that are to be added to all of the messages, they can be selected by clicking on the "Browse for attachments to be included with all messages" button



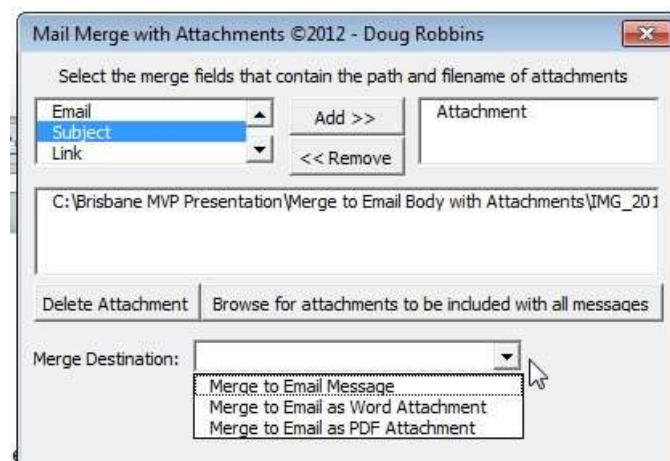
Clicking on that button will open a "File Picker" dialog that can be used to browse to and select files that are to be included with each message



The selected file(s) will then appear in the dialog as shown below.



Next select the format in which the merge letters are to be created, which can be any of the options shown



If the destination that is selected is Merge to Email Message, the additional controls shown below will appear

Mail Merge with Attachments ©2012, 2022 - Doug Robbins

Select the merge fields that contain the path and filename of attachments

Email Name	Add >>	
	<< Remove	

Delete Browse for attachments to be included with all messages

Merge Destination: Merge to Email Message

Select the Field containing the Email Addresses.

Select the Field containing the CC Addresses.

Select the Field containing the BCC Addresses.

Send using Account: dougrobbsmvp@gmail.com

Reply to Address:

☐ Request Delivery Receipt ☐ Request Read Receipt

☐ Data Source contains a Subject Field

Text for Subject of Email

☐ Send Now ☐ Defer Sending ☒ Save to Drafts>Merge Tools Folder

Continue Cancel

Using the relevant controls, the field in the data source that contains the Email Addresses, CC and BCC Addresses (the CC and BCC are optional) can be selected. The system can handle multiple addresses in each of those fields provided that in the data source, the addresses are separated by a semi-colon (;).

The use of the Request Delivery Receipt and Request Read Receipt controls is optional. Those requests are only honored if the recipients of the messages are using Outlook as their mail application and they allow the sending of such receipts.

The text for the Subject of the Email message can be entered into that control, or, if the data source includes a field that contains data for the Subject, checking the "Data source contains a subject field" box will reveal another control from which that field can be selected.

Reply to Address:

☐ Request Delivery Receipt ☐ Request Read Receipt

☒ Data Source contains a Subject Field Select

Text before Subject Field  ☒ Add space

Email  
Name

If that option is used, controls will appear into which text that is to appear before or/and after the data contained in the subject field in the data source can be entered.

By default, the "Save to Drafts>Merge Tools Folder" radio button is selected and if that option is not changed, at this point, the "merge" can then be performed by clicking on the "Continue" button and the messages will be saved to the Merge Tools folder inside the Outlook Drafts folder. This allows a check to be made on the content of the messages that would be sent if the "Send Now" radio button is selected.

If the messages are in order, the easiest way to then send them is to re-open the mail merge main document and run the process again, this time, selecting the "Send Now" option.

Upon gaining confidence in the system, the "Send Now" option can be selected in the first instance.

If the "Defer Sending" radio button is selected, an additional Calendar dialog will appear as shown below:

Mail Merge with Attachments ©2012, 2022 - Doug Robbins

Select the merge fields that contain the path and filename of attachments

Email Name Add >> << Remove

Delete

Merge Destination

Select the Field co  
used as the filena

Select the Field co

Select the Field co

Select the Field co

Send using Account

Reply to Address:

☐ Request Delive

☐ Data Source co

Text for Subject of

☐ Include Salutati

Text for covering Email

☐ Send Now ☒ Defer Sending ☐ Save to Drafts>Merge Tools Folder

Continue Cancel

Calendar

November 2021

Mon	Tue	Wed	Thu	Fri	Sat	Sun
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

Send on 11/27/2021 at 0 second intervals

starting at 17 09

Continue Cancel

By means of this dialog, the date and time at which the messages will be sent can be selected and optionally, a interval between the sending of each message can be set.

If multiple email accounts are set up in Outlook, the account from which the messages will be sent can be selected from the Send using Account dropdown.

If an email address is entered in the "Reply to Address:" control, when the recipient replies to the message (using Outlook), the "Reply to Address" will be used.

The use of those facilities is optional and those controls can be left empty if not required.

If the destination that is selected is either "Merge to Email as Word Attachment" or "Merge to Email as PDF Attachment" additional controls that will appear are as shown below

Mail Merge with Attachments ©2012, 2022 - Doug Robbins

Select the merge fields that contain the path and filename of attachments

Email Name Add >> << Remove

Delete Browse for attachments to be included with all messages

Merge Destination: Merge to Email as PDF Attachment

Select the Field containing the name to be used as the filename for each document

Select the Field containing the Email Addresses.

Select the Field containing the CC Addresses.

Select the Field containing the BCC Addresses.

Send using Account: dougrobbsmvp@gmail.com

Reply to Address:

☐ Request Delivery Receipt ☐ Request Read Receipt

☐ Data Source contains a Subject Field

Text for Subject of Email

☐ Include Salutation in E-mail

Text for covering Email

☐ Send Now ☐ Defer Sending ☒ Save to Drafts>Merge Tools Folder

Continue Cancel

In these cases, it is necessary for the utility to save each document created by the merge so that it can be attached to the email messages so controls are provided to allow a field to be selected to provide data to be used for the filename of each of the documents that are created.

The Subject for the email messages is dealt with in the same way as detailed for the "Merge to Email Message" option. In addition however, there is an option to include a personalized "salutation" in the body of the email message and if the "Include salutation in E-mail message" box is checked, controls will appear from which the user can select the form of salutation, and a field in the data source that contains data to be used in the salutation.

Text for Subject of Email

☒ Include Salutation in E-mail

Text for covering Email

Dear  
Hi  
Hello  
Cher  
Hallo  
Hola  
Kære

First\_Name

☐ Send Now ☐ Defer Sending

Continue Cancel

rafts>Merge Tools Folder

The text for the covering Email message can either be typed, or pasted into the control provided.

The messages will be created using a message template (MergeTools.oft) that it creates and saves in the Word Startup folder. That template will contain the signature that is assigned for new messages for the default email account via File>Options>Mail>Signatures

The Send using Account, Reply to Address, Save to Drafts>Merge Tools folder, Defer Sending and Send Now options function in the same way as for the Merge to Email Message option.

When everything has been completed, clicking on the Continue button will cause a folder picker dialog to appear into which the documents created by the merge will be saved and the email messages will be created with the attachments to each of the addressees.

In all cases, if the Trial version of the Add-in is being used, selecting the "Save to Drafts>Merge Tools Folder" option and clicking on Continue, will not result in the operation being counted as one of the twenty allowed trial uses of the Add-in. If either of the "Send Now" or "Defer Sending" options are selected and the Continue button is used, the operation will be counted as a trial use of the facility.