

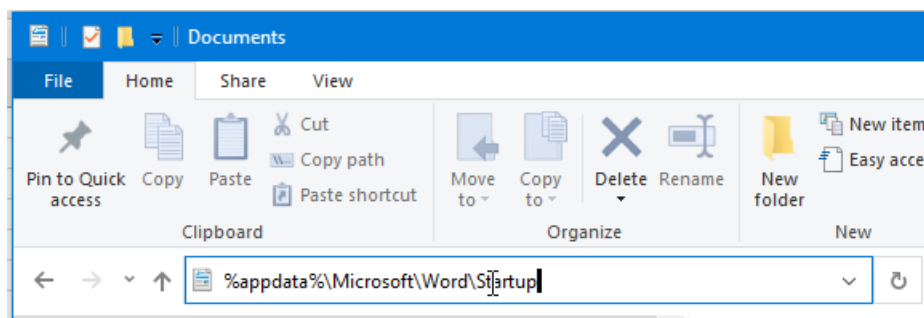
## Instructions for Installing and Using the Merge Tools Add-in

**Do NOT open the MergeTools – 2022.dotm file.** (There are no user serviceable parts inside and it should NOT be used as the basis for creating your mail merge main document.)

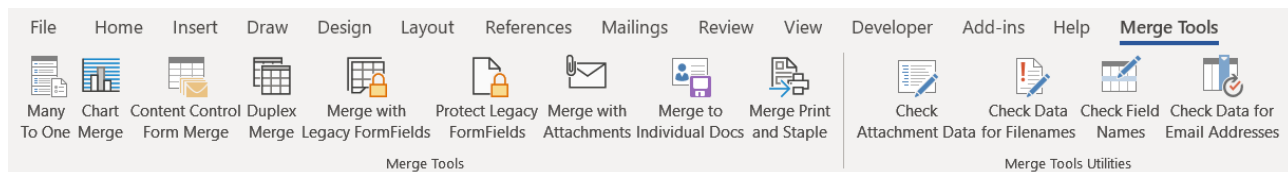
The MergeTools – 2022.dotm file needs to be saved in the Word Startup folder. If the location of the startup folder has not been changed, it can be located by typing, or copying and pasting

%appdata%\Microsoft\Word\Startup

into the Windows File Explorer Address bar and press Enter.



When that has been done and Word is started/re-started, the tab shown below will be added to the Ribbon:



To ensure success in using the Merge Tools utilities, please carefully read the instructions on the next pages.

When using the Merge with Attachments facility on the Trial Version of the Merge Tools – 2021 Add-in, which allows you to use it 20 times, if you select the Save to Drafts > Merge Tools Folder radio button, and then click on Continue, the messages will be saved in a Merge Tools folder in the Outlook Drafts folder and that will not count as a Trial Use of the facility.

It is therefore recommended that in the first instance, you make use of the Save to Drafts > Merge Tools Folder option.

To see the Merge Tools folder inside the Drafts folder, you will need to click on the > to the left of >Drafts in the Outlook Folder Pane. If you have multiple Email accounts set up in Outlook, you may need to check the Drafts folder for each of those accounts for the one with >Drafts

If you do run into any issues when using the utilities, contact me via email at

[dougrobbinsmvp@gmail.com](mailto:dougrobbinsmvp@gmail.com)

providing details of any error message that you receive and also providing a copy of the mail merge main document and the data source.

If the data source contains confidential information, that information can be removed or replaced with non sensitive data. If the information is removed, do leave the field name in the first row of the worksheet on which the data is located.

The requirements for using the system are:

1. The mail merge main document must be of the Letters type, though that does not mean that the output cannot be sent as an e-mail message.
2. For the Many To One, Merge with Attachments and Merge to Individual Docs utilities, the data source may be either a table or query in an Access database, or in the form of an Excel worksheet. For the Chart Merge utility, download the Mail Merging with Charts document that is also on that page of my OneDrive for additional requirements of the data source for use with that utility
3. For a data source in the form of an Excel worksheet:
  - a. Attach the data source to the mail merge main document using the (default) OLE DB Database fields method of connection. You will then see a dialog that contains a list of the sheets in the workbook with a \$ following the sheet name, in which you need to select the sheet that contains the data that is to be merged.
  - b. The mergefield names must be in the first row of the worksheet and there must be a field name in all of the cells in that row that are within the range of columns that contain the data.

- c. The first row of data must be the second row of the worksheet and there should be no empty rows within the range of data that is to be processed. Processing will stop when an empty row is encountered.
  - d. There must be no data in the column immediately to the right of the last column in which there is a mergefield name.
  - e. The data source must be saved in a folder on the local drive. The Merge Tools utilities will not work with a data source that is located on OneDrive, or in a folder that is synchronized with OneDrive. The Word application will “freeze” if the data source is located on OneDrive.
4. For both types of data source, the field names must contain only alphanumeric characters (No @, #, \$, %, &, (, ), etc) and the field names must not start with a numeric character (0-9). The number of characters in the field names, including spaces, must not be more than 40.
  5. If there are multiple addressees in either the To, Cc, or Bcc fields of the data source, the email addresses need to be separated by a semi-colon.
  6. If using an If...then...Else field construction to test for an empty field, the test must be for a single space " " rather than ""

#### NOTES:

1. To avoid being asked if you want to check the spelling of each message that is created, in Outlook, go to File>Options>Mail and uncheck the box for "Always check spelling before sending."
2. If you have multiple Email accounts set up in Outlook, a “Send using Account:” dropdown will appear on the Merge with Attachments, Many to One Merge and Chart Merge dialogs, by means of which the account from which the messages will be sent can be selected. For that facility to work correctly, in Outlook, under File>Options>Mail>Send Messages, the box for "Always use the default account when composing new messages." should NOT be checked.
3. The MergeTools applications cannot handle “Compound” MergeFields such as the «AddressBlock» or «GreetingLine». Instead of using those fields, you will need to insert the individual merge fields. To avoid blank lines in the output when there is no data in some of the fields, an If...then...Else field construction such as that shown below can be used.

```
{·MERGEFIELD·First_Name·}·{·MERGEFIELD·Last_Name·}¶
{·MERGEFIELD·Address1·}·IF·{·MERGEFIELD·Address2·}·<>·"·"·"¶
{·MERGEFIELD·Address2·}·"·"·"¶
{·MERGEFIELD·City·}·{·MERGEFIELD·State·}·{·MERGEFIELD·PostCode·}¶
```

Press the Enter key where the ¶ appears in the above construction ¶ I

Note the space between the " " after the <> in the above construction, which is required when using the Merge Tools utilities as noted in 6. above.

4. The Merge Tools utilities do NOT recognise any filtering of the data set up via the Edit Recipient List facility. If there is a need to process only some of the records in the data source, add another column and populate the cells in that column with either a 0 or a 1 and then sort the data by that column so that the records that are to be processed are located at the top of the worksheet. Then, insert an empty row after the last row of data that is to be processed. The processing of the records will stop when it comes to that row.

Save the data source before using it.

5. If Execution of the merge does not complete properly for whatever reason, close the mail merge main document WITHOUT saving it as the process makes a number of modifications to that document, and you will NOT want to save the document with those modifications as:
  - a. it is no longer a mail merge main document,
  - b. it does not have the data source attached to it, and
  - c. the MERGEFIELD fields in the document will have been replaced by DOCVARIABLE fields.
6. The Trial Version of the Merge Tools Add-in can be used 20 times and will display a message each time that it is used that indicates how many more times it can be used. If you want a version that does not display that message, or you want to continue to use the Merge Tools Add-in after the trial has expired, if you make a payment of a minimum of US\$30 to my PayPal account:

[mergetools@gmail.com](mailto:mergetools@gmail.com)

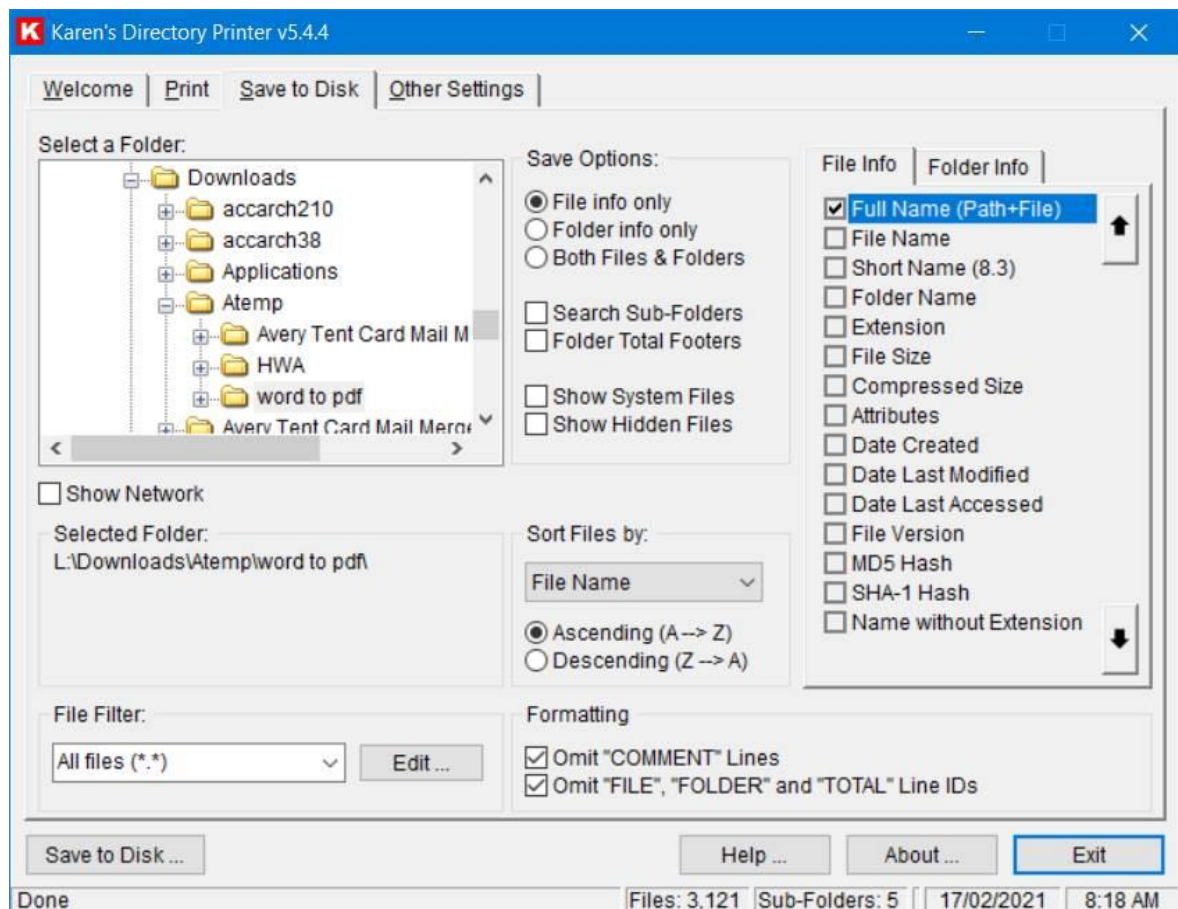
noting that the payment is for Merge Tools, a "message free" version of the Add-in, that has no limitation on the number of times that it can be used, will be sent to you.

7. In many cases, the file that is to be attached when using the Merge with Attachments facility can be created and sent by that facility alone. However if the files that are to be

attached have been created by some other application and it is therefore necessary to populate a field in the data source with the path and filename of those files, The easiest way to create a list of the file path and file name is to put all of the files that you want to attach into a folder and download and install Karen's Directory Printer from

<https://www.karenware.com/powertools/karens-directory-printer>

and then when you run that, complete the dialog as shown below, selecting the Save to Disk tab of the dialog and the folder into which you saved the files from the Select Folder tree view



By default, the output will be created in a DirPrnInfo.txt file

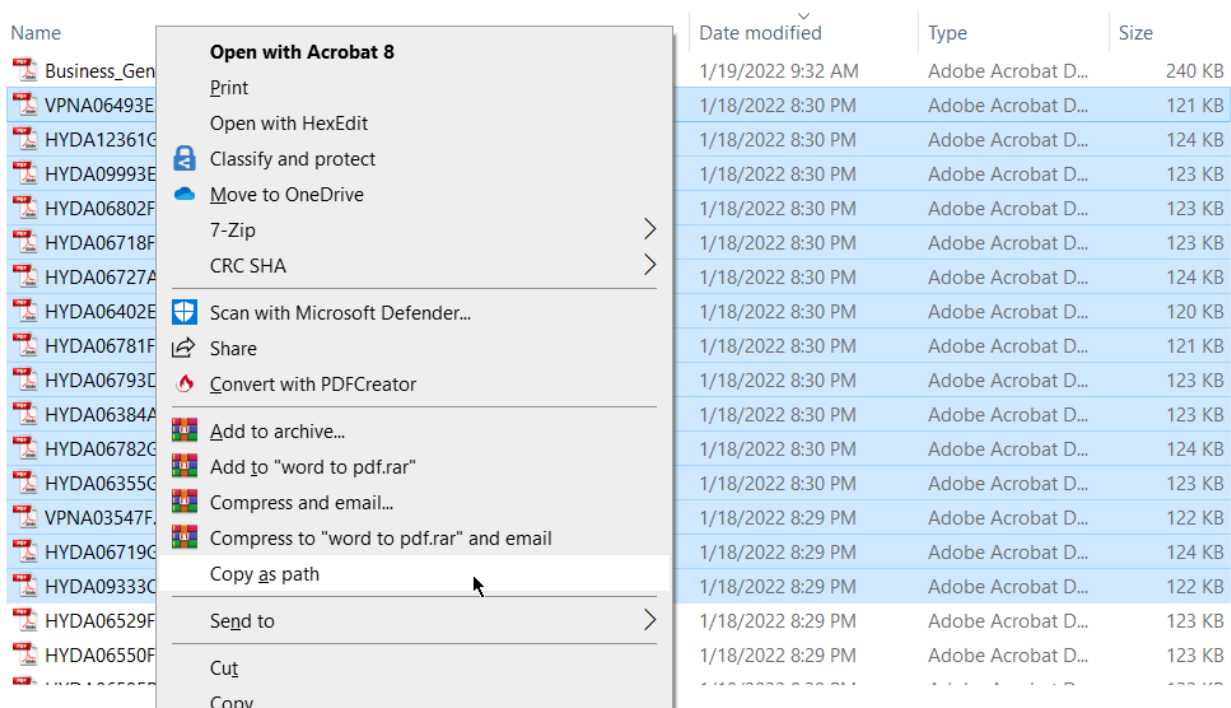
C:\Users\[user name]\AppData\Local\Karen's Power Tools\Directory Printer

You can then open that file in NotePad and copy the contents and paste them into a column in your data source.

OF COURSE THE ORDER OF THE FILES MUST MATCH THE ORDER OF THE RECIPIENTS

If you find that utility useful, do make a donation at the above website.

Another way to get the path and filename of the files is to select them in the File Explorer and while holding down the SHIFT key, right click and then left click on “Copy as path”



You can then move to the data source and use CTRL+V to paste the list into the data source.

NOTE: however that you will need to arrange the files in the required order in the data source so that the correct file is attached to each record.

## OPTIONAL MERGE TOOLS UTILITIES

The following utilities on the Merge Tools Utilities section of the Merge Tools tab of the ribbon can be used to perform the following checks of the data source to identify issues that would prevent the Merge Tools from producing the desired results

The **Check Attachment Data** will check that the files that are to be attached are available to be attached to the messages. If not, a document will be created that lists the files that cannot be found.

The **Check Data for Filenames** will check for issues that will prevent the system from creating files using as the filename the data from the selected field in the data source.

The **Check Field Names** will check for issues with the field names in the data source that may prevent the system from producing the desired results

The **Check Data for Email Addresses** will check for issues with the data in the data source that is to be used for the Email, CC and/or BCC addresses to which the messages created by the system are to be sent

**It is best to use these utilities BEFORE opening the mail merge main document as any issues that are revealed will require modifications to the data source that cannot be performed when the mail merge main document to which it is attached is open.**