

Mail Merging with Charts

1 The Data Source

The Data Source must be in the form of an Excel Workbook with a sheet named Data that contains the data for the mail merge and the charts and a sheet named Chart.

While not essential, it is best if the data that will be used for the chart for each record in adjacent columns.

Select those columns and then assign the name XLChartData to them as shown in the following screen shot

The screenshot shows an Excel spreadsheet with a table of data. The table has columns for Name, Dash 40yd Rank, ProAgility Rank, KPBT Rank, VJ Rank, Percentile rank, Dash 40 yd sec, and ProAgil. The data is as follows:

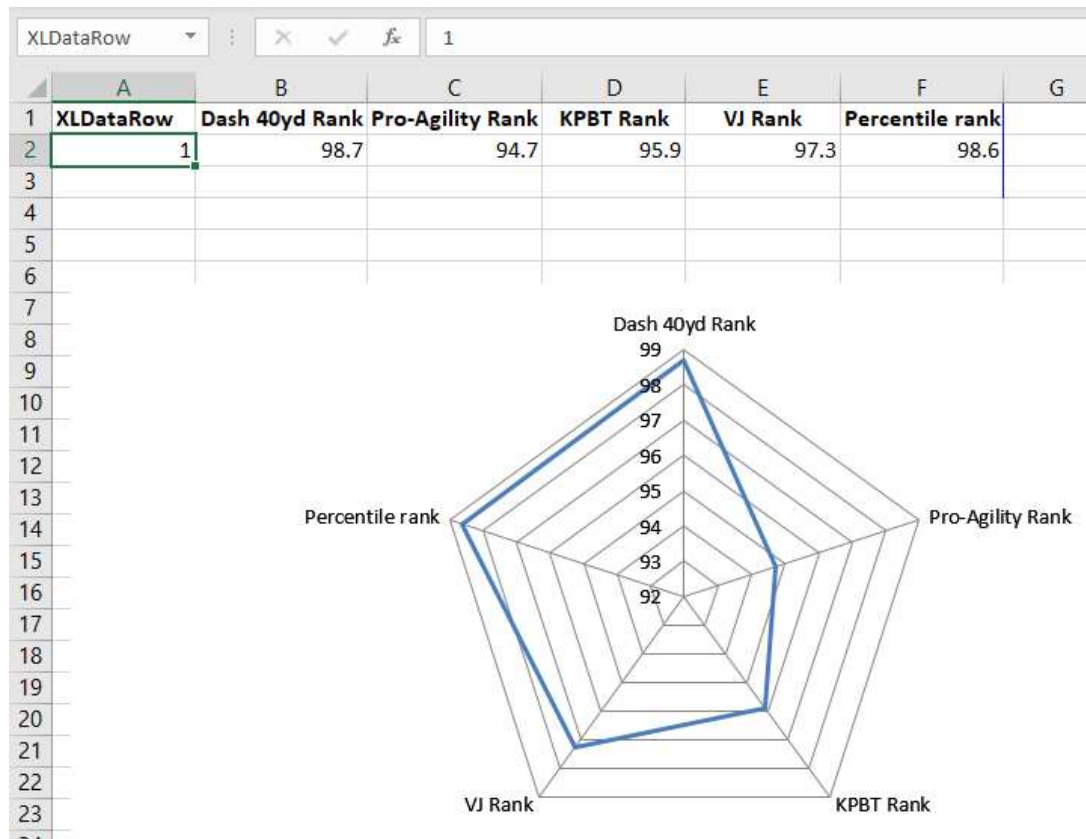
	A	B	C	D	E	F	G	H
1	Name	Dash 40yd Rank	ProAgility Rank	KPBT Rank	VJ Rank	Percentile rank	Dash 40 yd sec	ProAgil
2	Mike Washington	98.7	94.7	95.9	97.3	98.6	4.33	4.0
3	Osze Ogbebor	97.4	80.0	94.5	93.3	95.9	4.36	4.0
4	Tyler Mcguagge	96.0	89.4	58.1	86.6	91.8	4.41	4.0
5	Bubba Ogbebor	94.7	96.0	90.5	98.6	97.2	4.42	4.0
6	Austin Brakens	93.4	62.7	37.8	85.3	79.7	4.53	4.0
7	Jaylan Anglin	93.4	57.4	10.8	84.0	68.9	4.53	4.0
8	Greg Bosoworth	90.7	98.7	56.7	77.3	90.5	4.58	4.0
9	Keaton White	90.7	97.4	93.2	86.6	94.5	4.58	4.0
10	Ian Colbert	88.0	77.4	55.4	69.3	77.0	4.59	4.0
11	Drew McGee-Collins	86.7	68.0	97.2	96.0	93.2	4.6	4.0

The Name Manager dialog box is open, showing the following table:

Name	Value	Refers To	Scope	Comment
XLChartData	("Dash 40yd Rank","Pr...	=Data!\$B:\$F	Workbook	
XLDataRow	4	=Chart!\$A\$2	Workbook	

The 'Refers to' field for XLChartData is set to '=Data!\$B:\$F'.

The Chart sheet must be setup as shown in the following screen shot and the cell A2 must be assigned the name XLDataRow and to start with, insert the number 1 into that cell.



NOTE: It is essential that when the XLChart Data and XLDataRow names are being assigned that the Scope not be changed from Workbook.

If the Scope of the names are not left as Workbook, an Error 1004 application defined or object-defined will occur when the utility is run.

The following formulae must be inserted into the cells B2, C2, D2, etc

B2 =INDEX(XLChartData,XLDataRow+1,1)

C2 =INDEX(XLChartData,XLDataRow+1,2)

D2 =INDEX(XLChartData,XLDataRow+1,3)

The chart that is to be used in the mail merge must be created from the data in the range B1:F2 (plus additional columns as required).

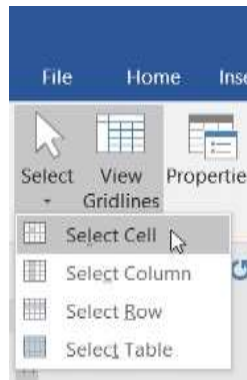
At this point, the chart that is constructed, will be based on the data for the first record in the data source.

You can test if this is set up correctly by changing the number that is inserted into cell A2, which will cause the data that is displayed in cells B2, C2, E2, etc changing to that from the record corresponding to the number that is inserted into cell B3 and the chart will change so that it now reflects that data.

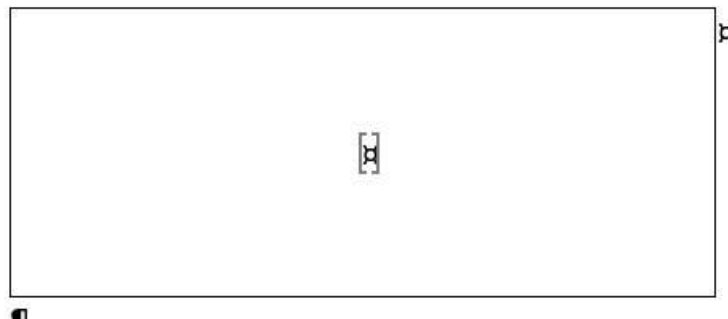
At this point, the workbook should be saved.

2 The Mail Merge Main Document

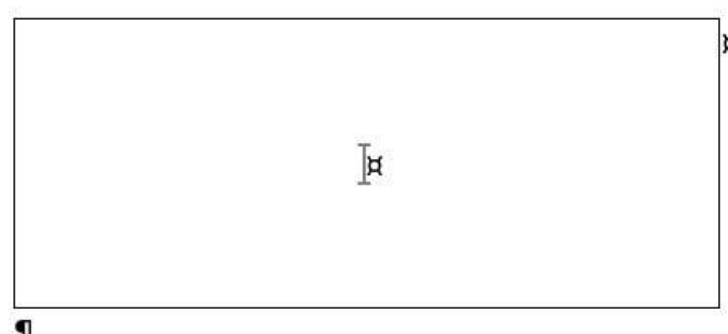
The Mail Merge Main Document must be set up as a Letters type main document to which you attach the data source (Data\$) referred to in 1 The Data Source above. The merge fields are inserted in the normal manner and at the location where the chart is to be displayed, a table must be inserted. It can be just a one row, one column table if desired, but the dimensions of the cell into which the chart is to be inserted must be set so that the chart will fit into it correctly. Into the cell into which the chart will be inserted you must insert a “Chart” bookmark. To ensure that the cell is selected in the required manner, use the Select Cell facility on the Select dropdown on the Table Tools Layout tab of the ribbon



When the bookmark is inserted correctly, with the display of bookmarks turned on, it will look like:



If it looks like

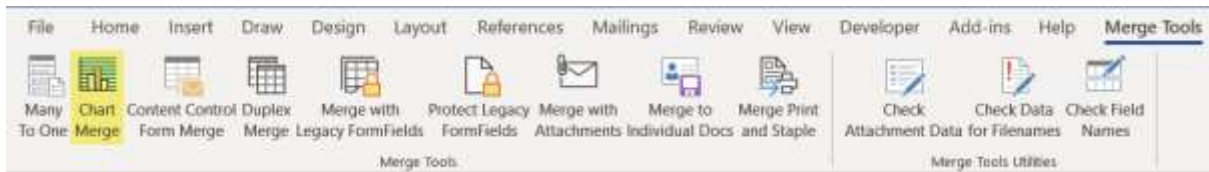


The cell was not selected in the correct manner and the result will be that when the merge is executed, the first document will contain the correct chart, but the second will contain two charts and the third, three charts and so on.

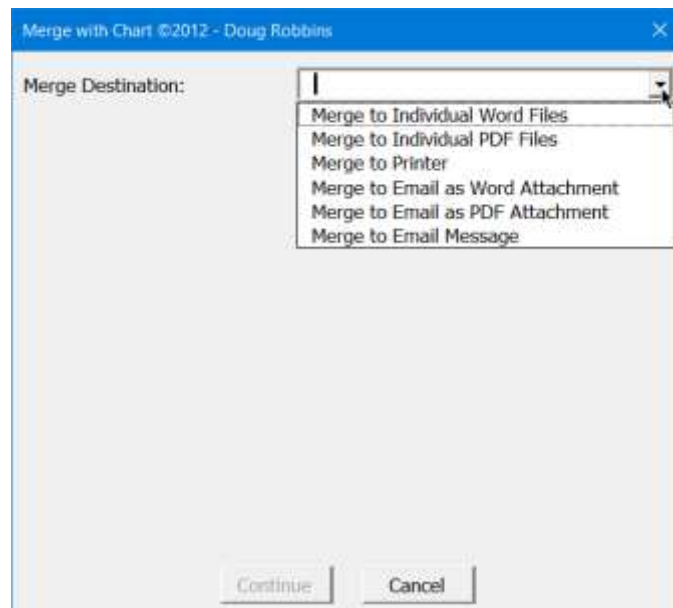
After setting up the Mail Merge Main Document in this way, it must then be saved.

3 Executing the Merge

If the MergeTools - 2022.dotm addin has been saved in the Word Startup Folder, the following Merge Tools tab will appear on the ribbon



After setting up the Data Source and the Mail Merge Main Document as described in 1 and 2 above, when the Chart Merge button is used, the following dialog will appear:



Depending on which destination for the merge is selected, additional controls will appear.

Merge with Chart ©2012 - Doug Robbins

Merge Destination: Merge to Email as PDF Attachment

Select the Field containing the text to be used as the filename for each document that is created.

Select the Field containing the Email Addresses.

Select the Field containing the CC Addresses.

Send using account: dougrobbinsmvp@gmail.com

Reply to Address:

☐ Data Source contains a Subject Field

Text for Subject of Email

☐ Include Salutation in E-mail

Text for covering Email

☐ Send Now ☒ Save to Drafts>Merge Tools Folder

Continue Cancel

When data has been inserted or selections have been made in all of the necessary controls, the Continue button will become enabled and upon clicking on it, the merge will be executed.