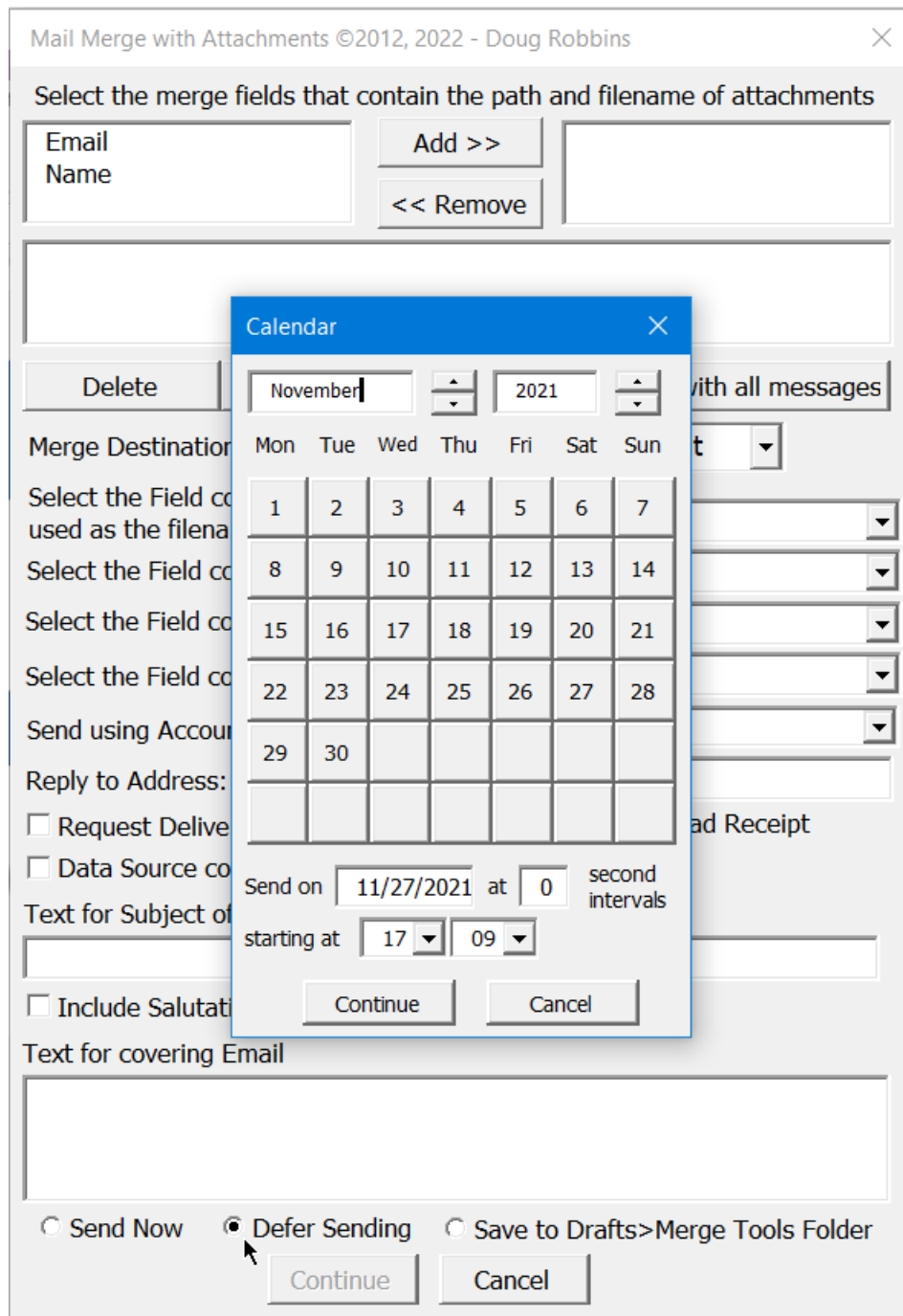


MERGE TOOLS – 2021/2022 ENHANCEMENTS

The following additional features have been incorporated into my MergeTools - 2022.dotm add-in:

MERGING WITH ATTACHMENTS

A Defer Sending option has been added, which when selected will display a Calendar dialog by means of which the user can select the date and time at which the messages will be sent, and optionally a time interval that will elapse between the sending of each message.



Send using Account

If multiple email accounts are set up in Outlook, each of those accounts will appear in the "Send using Account" dropdown and the messages will be sent from the account that is selected in that dropdown. For the selection to be effective, in Outlook, under File>Options>Mail>Send Messages, the box for "Always use the default account when composing new messages" should not be checked.

Merge Tools – 2021/2022 Enhancements

Reply to Address

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 this facility is optional and the controls can be left empty if not required.

MANY TO ONE MAIL MERGE

The above facilities (Defer Sending, Send using Account, and Reply to Address) have also been added to the Many to One Merge facility.

In addition, that facility now has the capability of sending either attachments that are unique to each recipient, or are common for all recipients, or a combination of both types of attachment. That capability is used in the same way as the Merge with Attachments facility.

The screenshot shows the 'Many to One Mail Merge' dialog box, version ©2012 by Doug Robbins. The dialog is titled 'Many to One Mail Merge ©2012 - Doug Robbins' and has a close button (X) in the top right corner. The main area contains several sections for configuring the mail merge:

- Select the Key Field (the field that contains data that is common for each group of records):** A dropdown menu showing 'account_number'.
- Does the table in your document contain a:** Two checkboxes: ☒ Header Row? and ☐ Total Row?.
- Merge Destination:** A dropdown menu showing 'Merge to Email as PDF Attachment'.
- Select the Field containing the name to be used as the filename for each document:** An empty dropdown menu.
- Select the merge fields that contain the path and filename of attachments:** A list box with 'Add >>' and '<< Remove' buttons.
- Delete | Browse for attachments to be included with all messages:** A button and a text field.
- Select the Field containing the Email Addresses:** A dropdown menu.
- Select the Field containing the CC Addresses:** A dropdown menu.
- Select the Field containing the BCC Addresses:** A dropdown menu.
- Send on behalf of:** A text field.
- Reply to Address:** A text field.
- ☐ **Data Source contains a Subject Field**
 - Text for Subject of Email:** A text field.
- ☐ **Include Salutation in E-mail**
 - Text for covering Email message:** A text field.

At the bottom, there are three radio buttons: ☐ Send Now, ☐ Defer Sending, and ☒ Save to Drafts>Merge Tools Folder. Below these are 'Continue' and 'Cancel' buttons.

Merge Tools – 2021/2022 Enhancements

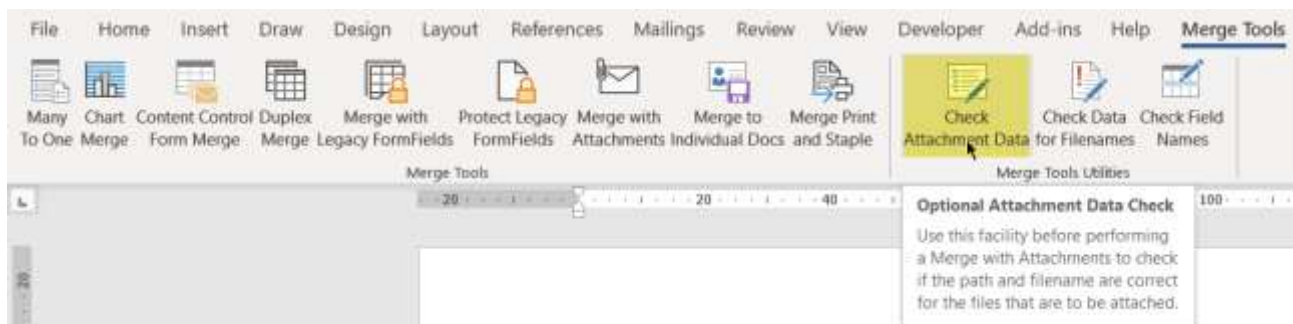
MERGING WITH CHARTS

The above facilities (Send using Account, and Reply to Address) have also been added to the Merging with Charts facility.

At this time, the Defer Sending facility has not been added to the Merging with Charts utility. If there is a demand for that facility, I am prepared to make the necessary modification to incorporate it.

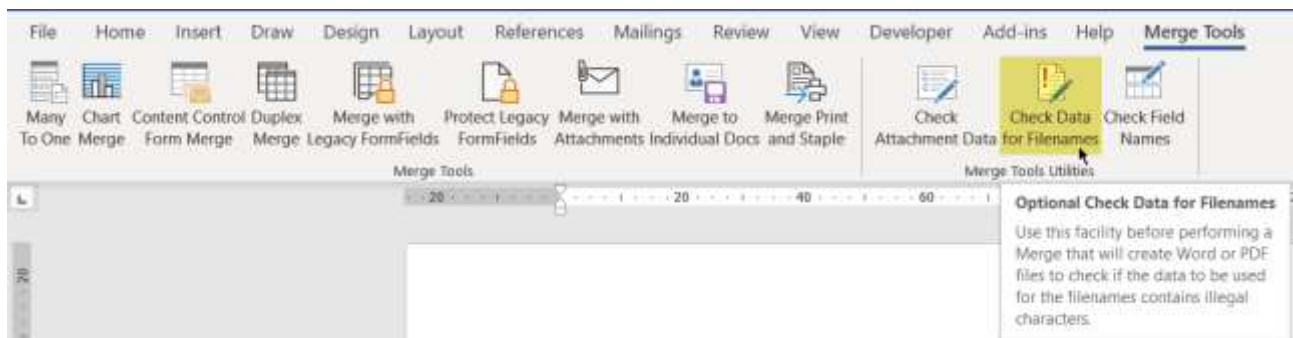
CHECK ATTACHMENT DATA

Use this facility before performing a Merge with Attachments and Many to One Merge where unique files are to be attached for each recipient to check if the path and filename are correct.



CHECK DATA FOR FILENAMES

Use this facility before performing a Merge that will create Word or PDF files to check if the data to be used for the filenames contains characters that cannot be used in a filename.



CHECK FIELD NAMES

Use this facility before performing a Merge to check for issues with the Field Names in the Data Source..

