

MANY TO ONE MERGING

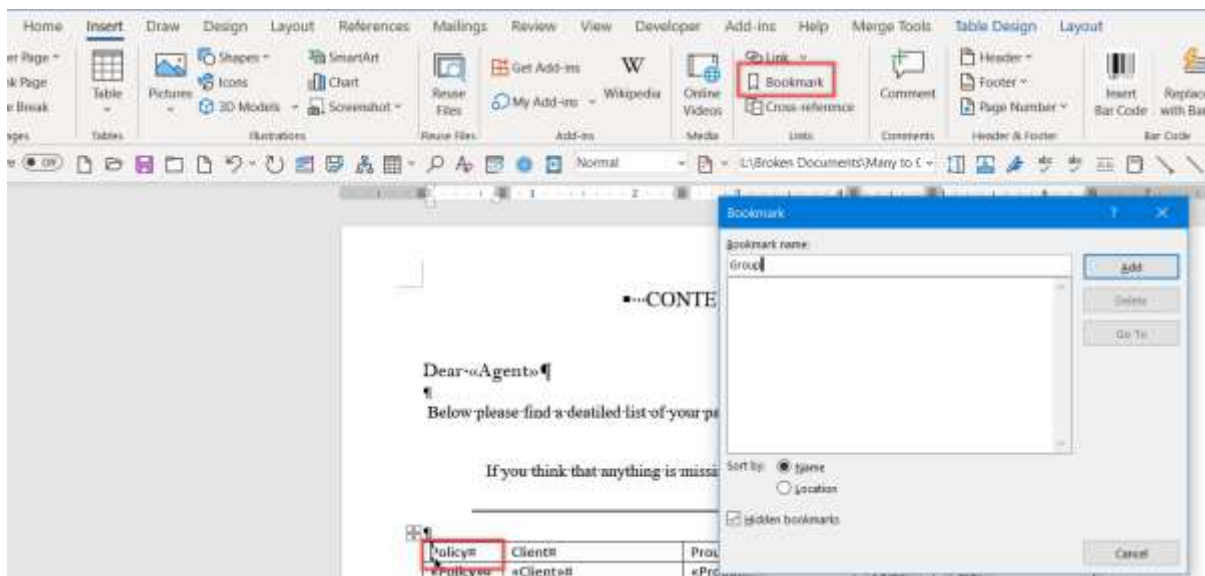
The Many to One Mail Merge Facility combines data from multiple records in the data source where there is data in at least one field (Key Field) that is common for each of the records that are to be combined.

	A	B	C	D	E	F
1	account_number	Subjectline	Case	bill_id	Surgery Date	Surgeon
2	074445	Zimmer Biomet - ST VIN HOSP-WORCESTER MC Pending PO Report - 3/29/21	7237877	4984039	3/14/2021	Brian Burroughs
3	074445	Zimmer Biomet - ST VIN HOSP-WORCESTER MC Pending PO Report - 3/29/21	7256874	5008864	3/23/2021	Brian Burroughs
4	074445	Zimmer Biomet - ST VIN HOSP-WORCESTER MC Pending PO Report - 3/29/21	7189085	5009475	3/23/2021	Brian Burroughs
5	074445	Zimmer Biomet - ST VIN HOSP-WORCESTER MC Pending PO Report - 3/29/21	7248657	5011301	3/23/2021	Brian Burroughs
6	074445	Zimmer Biomet - ST VIN HOSP-WORCESTER MC Pending PO Report - 3/29/21	7189087	5011350	3/24/2021	Brian Burroughs
7	069329	Zimmer Biomet - STAMFORD ASC Pending PO Report - 3/29/21	7204651	5010869	3/22/2021	Jonathan Berliner
8	080375	Zimmer Biomet - STAMFORD HOSPITAL Pending PO Report - 3/29/21	7137584	5005885	3/22/2021	corinne vanbeek
9	080375	Zimmer Biomet - STAMFORD HOSPITAL Pending PO Report - 3/29/21	7147671	5003732	3/22/2021	corinne vanbeek
10	080375	Zimmer Biomet - STAMFORD HOSPITAL Pending PO Report - 3/29/21	7112396	5004693	3/22/2021	corinne vanbeek
11	080375	Zimmer Biomet - STAMFORD HOSPITAL Pending PO Report - 3/29/21	7239022	5010964	3/24/2021	Russell Cavallo
12	082523	Zimmer Biomet - UMASS MEM MARLBOROUGH HSP Pending PO Report - 3/29/21	7114135	4985547	3/9/2021	Markian Stecyk
13	082523	Zimmer Biomet - UMASS MEM MARLBOROUGH HSP Pending PO Report - 3/29/21	7114135	4973288	3/9/2021	Markian Stecyk
14	082523	Zimmer Biomet - UMASS MEM MARLBOROUGH HSP Pending PO Report - 3/29/21	7242749	4993195	3/16/2021	Markian Stecyk
15	082523	Zimmer Biomet - UMASS MEM MARLBOROUGH HSP Pending PO Report - 3/29/21	7240837	4997074	3/16/2021	Markian Stecyk
16	082523	Zimmer Biomet - UMASS MEM MARLBOROUGH HSP Pending PO Report - 3/29/21	7239244	5009093	3/23/2021	Markian Stecyk
17	082460	Zimmer Biomet - UMASS MEM MED-MEM CAMPUS Pending PO Report - 3/29/21	7221141	4986559	3/15/2021	David Ayers
18	082460	Zimmer Biomet - UMASS MEM MED-MEM CAMPUS Pending PO Report - 3/29/21	7247645	5003038	3/22/2021	Daniel Aaron
19	082460	Zimmer Biomet - UMASS MEM MED-MEM CAMPUS Pending PO Report - 3/29/21	7246450	5011413	3/24/2021	David Ayers

The facility is designed for use with a "Letters" type mail merge main document to which is attached Excel or Access database table or query as the data source.

The mail merge main document must contain a table that is identified by the insertion of a "Group" bookmark, into a header row of the table, which can be an empty row without borders if such a row is not otherwise required.

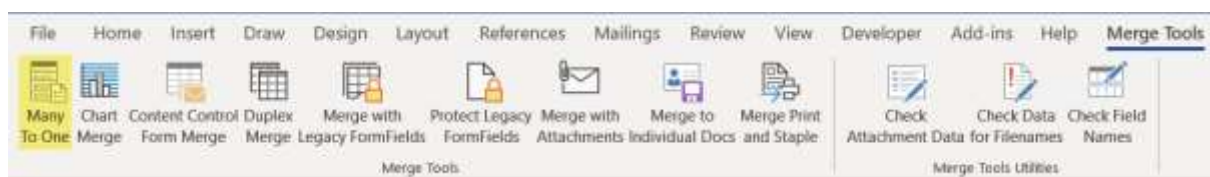
With the selection in the first cell of the first row of the table, click on Bookmark in the Links section of the Insert tab of the ribbon and in the Bookmark name control of the Bookmark dialog, type the word "Group" and then click on the Add button.



In the second row of the table, a set of the mergefield fields for the data that is to be displayed must be installed.

Optionally, the table can also include a row into which totals of selected data will be inserted by the use of a Sum(Above) formula.

When the mail merge main document is set up in this way and has been saved, clicking on the Many to One button on the Merge Tools tab of the ribbon



will cause the Many to One Mail Merge dialog box shown below to appear.

The field in the data source, that contains the data that is common for multiple records, must be selected from the Key Field dropdown and if a total row is required, the Total Row box must be checked.

Many to One Mail Merge ©2012 - Doug Robbins

Select the Key Field (the field that contains data that is common for each group of records) account_number

Does the table in your document contain a ☒ Header Row? ☒ Total Row?

Merge Destination: |

- Merge to Individual Word Files
- Merge to Individual PDF Files
- Merge to Printer
- Merge to Email Message
- Merge to Email as Word Attachment
- Merge to Email as PDF Attachment

If the merge is to be executed to the Printer, nothing more is required and the Continue button can then be used.

If the merge is to be executed to Individual Word Files, or Individual PDF Files, and additional control will appear from which the field in the data source that contains data that can be used to name each of the files must be selected. After doing that, the Continue button can be used.

Many to One Mail Merge ©2012 - Doug Robbins

Select the Key Field (the field that contains data that is common for each group of records) account_number

Does the table in your document contain a ☒ Header Row? ☒ Total Row?

Merge Destination: Merge to Individual PDF Files

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

Using the Many to One facility, documents such as the following can be created:

Dear Customer,

Please forward the hardcopy purchase orders for the open surgeries listed below as soon as possible.

****Our month end is Wednesday, March 31st. ****

Let us know if you need additional copies of the usage/po requests.

Case #	Surgery Date	Surgeon	Procedure	Patient	Subtotal	Days Elapsed
7237877	3/14/2021	Brian Burroughs	Hip - Total	C.C.	\$4,667.50	12
7256874	3/23/2021	Brian Burroughs	Knee - Persona PS	A.C. (W001132629)	\$5,017.50	3
7189085	3/23/2021	Brian Burroughs	Hip - Total	M.L. (W000569214)	\$8,338.50	3
7248657	3/23/2021	Brian Burroughs	Knee - Persona CR	J.F. (W000126914)	\$3,900.00	3
7189087	3/24/2021	Brian Burroughs	Hip - Total	B.B. (W000506933)	\$4,667.50	2
TOTAL					\$26,591.00	

Thank you,

For the destinations that involve the use of Email, additional controls will appear as shown below.

For Merge to Email Message:

Many to One Mail Merge ©2012 - Doug Robbins

Select the Key Field (the field that contains data that is common for each group of records) Account_Name

Does the table in your document contain a ☒ Header Row? ☐ Total Row?

Merge Destination: Merge to Email Message

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

Account_Name Primary_Contact_Name Primary_Contact_Email Add >> << Remove

Delete Browse for attachments to be included with all messages

Select the Field containing the Email Addresses. 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:

☐ Data Source contains a Subject Field

Text for Subject of Email

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

Continue Cancel

For Merge to Email as Word Attachment or Merge to Email as PDF Attachment

Many to One Mail Merge ©2012 - Doug Robbins

Select the Key Field (the field that contains data that is common for each group of records) Account_Name

Does the table in your document contain a ☒ Header Row? ☐ Total Row?

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 merge fields that contain the path and filename of attachments

Account_Name Primary_Contact_Name Primary_Contact_Email Add >> << Remove

Delete Browse for attachments to be included with all messages

Select the Field containing the Email Addresses. 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:

☐ Data Source contains a Subject Field

Text for Subject of Email

☐ Include Salutation in E-mail

Text for covering Email message.

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

Continue Cancel

These controls are used in the same way and for the same purpose as the identical controls described in the Merging with Attachments document, and in each of these cases involving the use of Email, it is possible to have attachments that are unique for each recipient, or that are common for all recipients, by completing the appropriate parts of the dialog.