

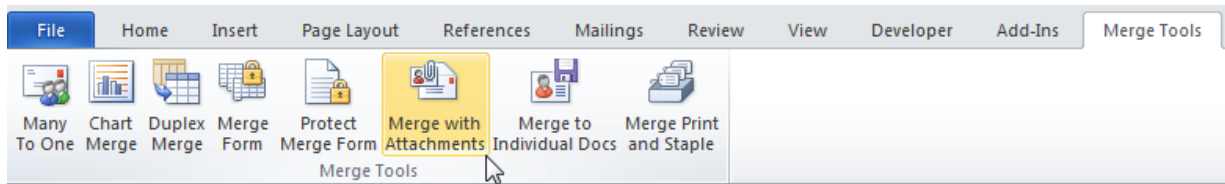
## MERGING WITH ATTACHMENTS

The communication that you want to send to the addressees needs to be created as a Letter type Mail Merge main document to which is attached a data source in the form of an Excel Workbook in which the data must be in the first sheet in the workbook. If your data is not in the first sheet, you can click on the sheet tab and then drag it into the first position.

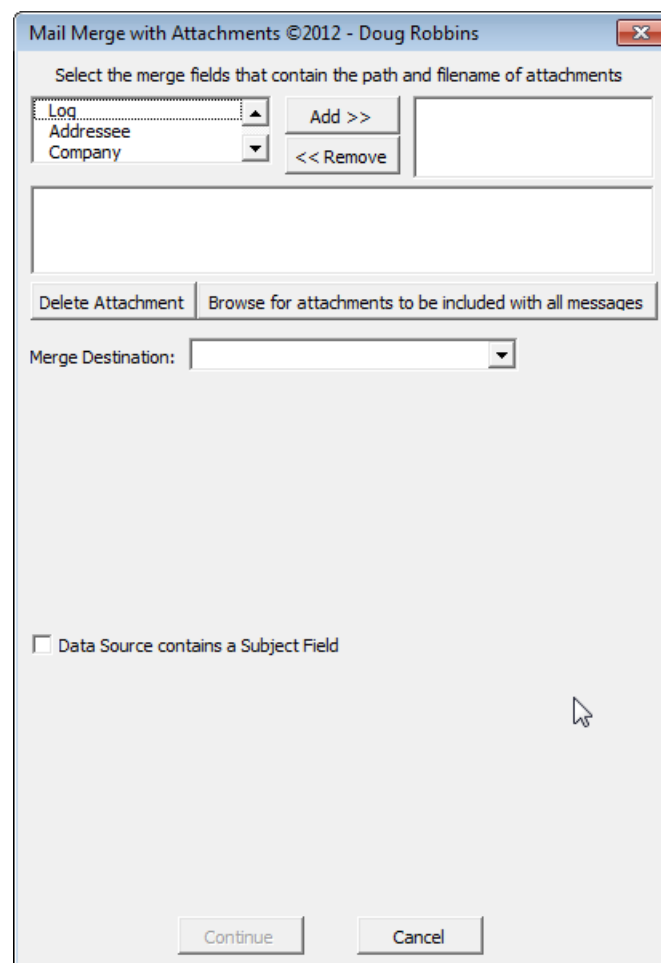
The field names in your data source must contain only alphanumeric characters (No @, #, \$, %, &, (, ), etc) and the field names must not start with a numeric character (0-9). Also make sure that there is not a space before the first letter of the field name.

If there are individual attachments for each record in the data source, the path and filename 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 of the attachment.

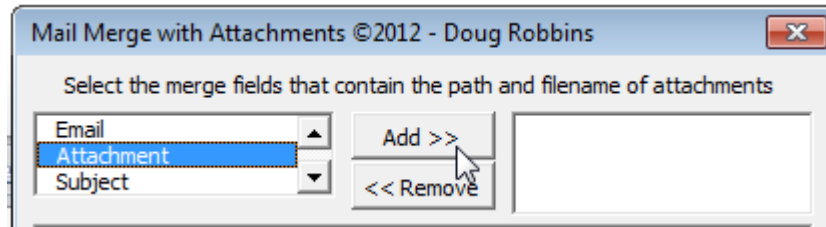
When the communication is ready to be sent, clicking on the Merge with Attachments button in the Merge Tools section of the Merge Tools tab of the ribbon



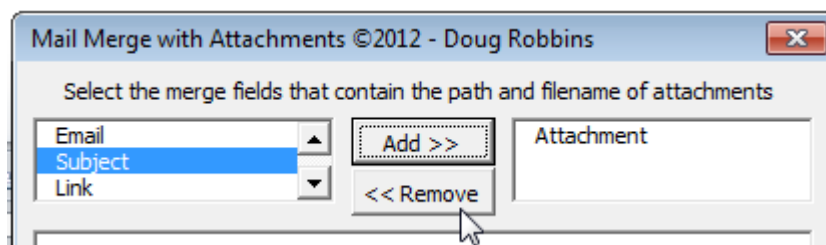
will cause the following dialog to be displayed:



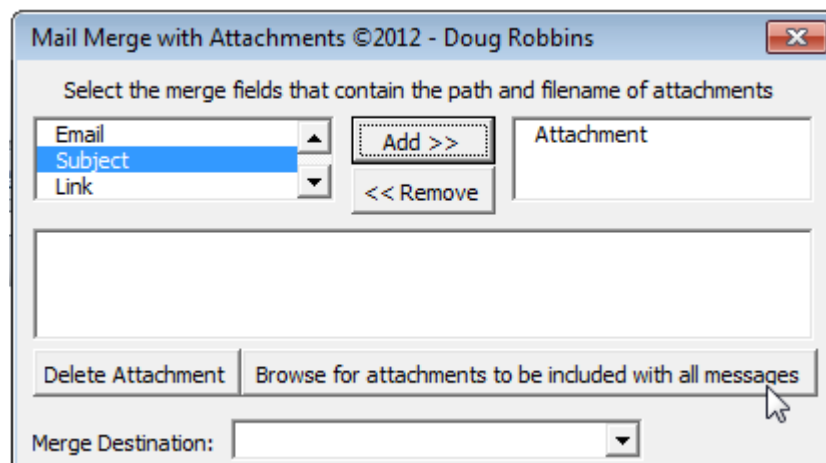
If your data source includes a field or fields that contain the path and filename of files that are to be attached to the email messages, those fields can be selected. Clicking on the Browse for attachments to be included with all messages button will open the following dialog in which the files that are to be attached to the email message 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.



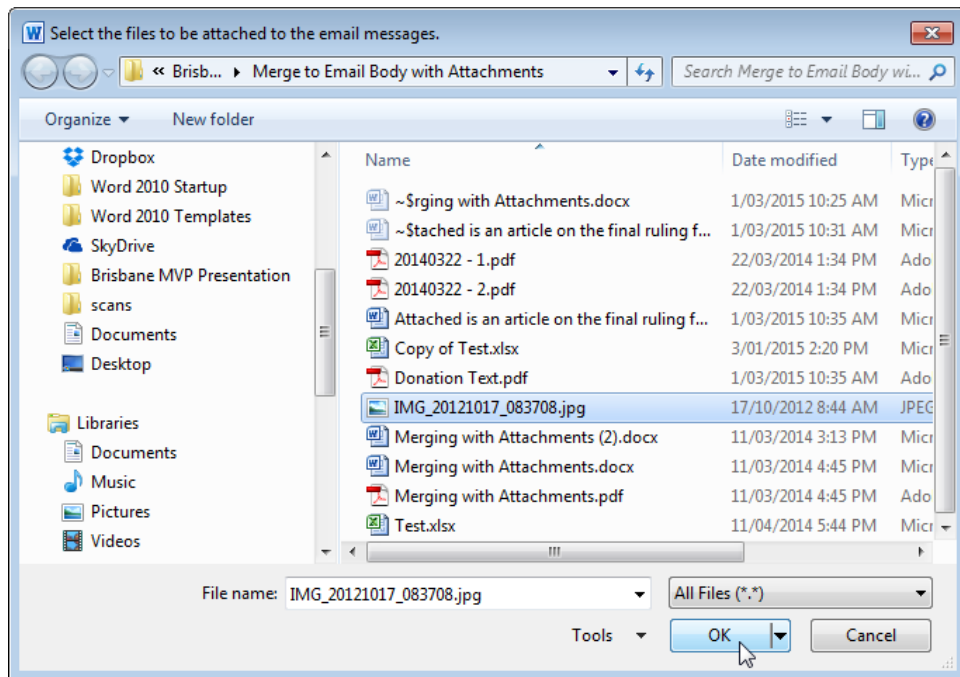
If a field is added to the right hand pane in error, it can be removed by selecting it and then clicking on the “<<Remove” button



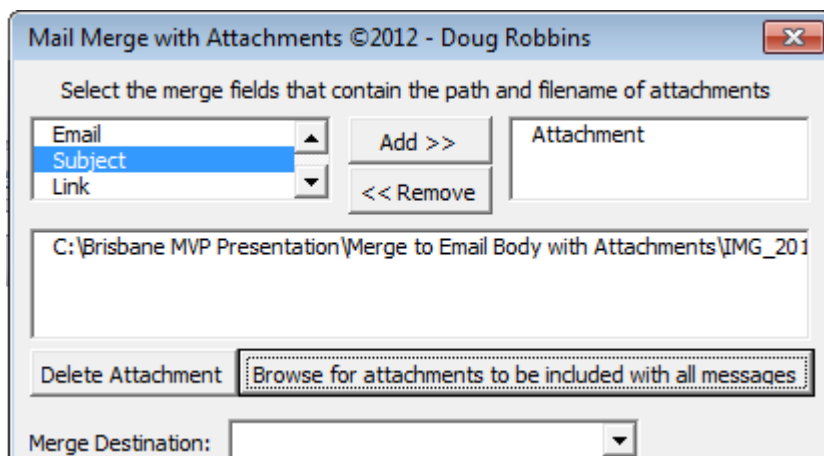
If there are attachments that are to be added to all of the messages, they can be selected by clicking on the “Browse for attachments to be included with all messages” button



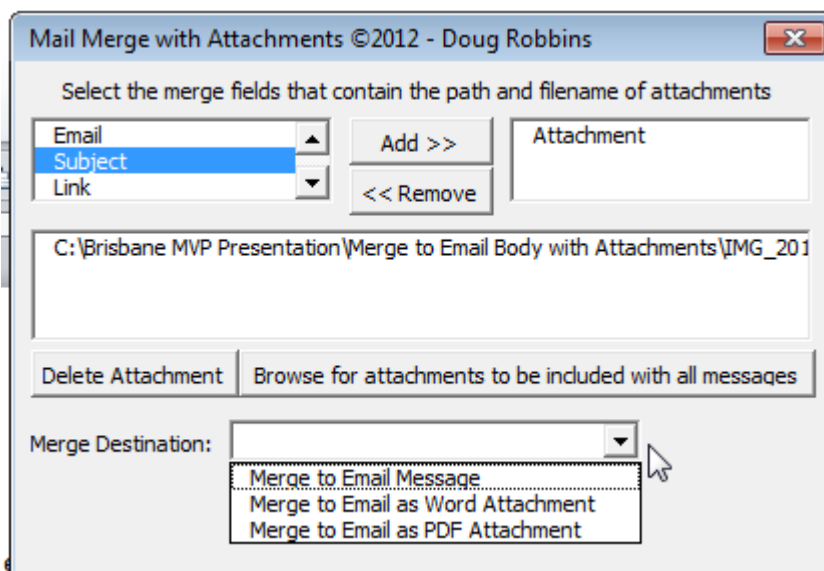
Clicking on that button will open a “File Picker” dialog that can be used to browse to and select files that are to be included with each message



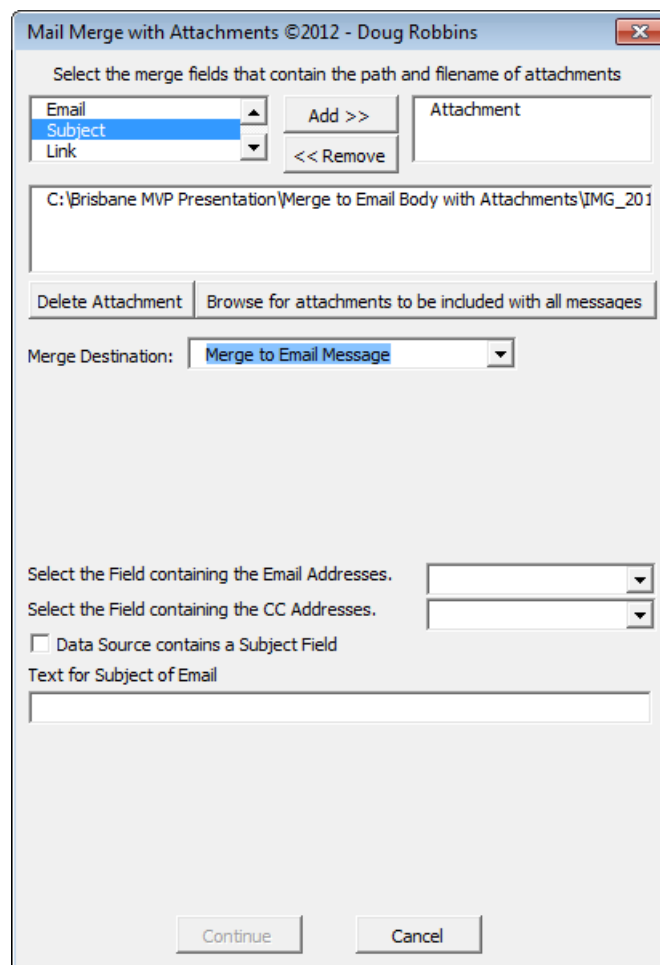
The selected file(s) will then appear in the dialog as shown below.



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

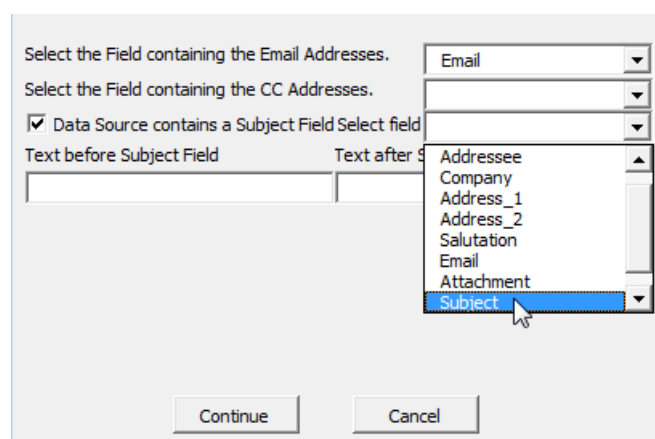


The dialog box is titled "Mail Merge with Attachments ©2012 - Doug Robbins". It contains several sections:

- Select the merge fields that contain the path and filename of attachments:** A list box on the left contains "Email", "Subject", and "Link". "Subject" is selected. To the right are "Add >>" and "<< Remove" buttons. An "Attachment" text box is on the right.
- Attachment Path:** A text box containing "C:\Brisbane MVP Presentation\Merge to Email Body with Attachments\IMG\_201".
- Buttons:** "Delete Attachment" and "Browse for attachments to be included with all messages".
- Merge Destination:** A dropdown menu with "Merge to Email Message" selected.
- Select the Field containing the Email Addresses:** An empty dropdown menu.
- Select the Field containing the CC Addresses:** An empty dropdown menu.
- Data Source:** A checkbox labeled "Data Source contains a Subject Field" which is unchecked.
- Text for Subject of Email:** An empty text box.
- Buttons:** "Continue" and "Cancel" at the bottom.

Using the relevant controls, the field in the data source that contains the Email Addresses and CC Addresses (the latter is 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 text for the Subject of the Email message can be entered into that control, of, 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.



This is a close-up of the "Mail Merge with Attachments" dialog box, focusing on the "Data Source" section:

- Select the Field containing the Email Addresses:** A dropdown menu with "Email" selected.
- Select the Field containing the CC Addresses:** An empty dropdown menu.
- Data Source:** The checkbox "Data Source contains a Subject Field" is now checked.
- Select field:** A dropdown menu is open, showing a list of fields: "Addressee", "Company", "Address\_1", "Address\_2", "Salutation", "Email", "Attachment", and "Subject". "Subject" is highlighted.
- Text before Subject Field:** An empty text box.
- Text after Subject Field:** An empty text box.
- Buttons:** "Continue" and "Cancel" at the bottom.

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

At this point, the "merge" can then be performed by clicking on the "Continue" button.

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

Mail Merge with Attachments ©2012 - Doug Robbins

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

Email  
Subject  
Link

Add >> << Remove

Attachment

C:\Brisbane MVP Presentation\Merge to Email Body with Attachments\IMG\_201

Delete Attachment Browse for attachments to be included with all messages

Merge Destination: Merge to Email as PDF Attachment

Select Fields containing data to be used as the filename for each document that is created.

Log  
Addressee  
Company

Add >> << Remove

☒ Include Date 20150301 File Text

Select the Field containing the Email Addresses. Email

Select the Field containing the CC Addresses.

☒ Data Source contains a Subject Field Select field Subject

Text for Subject of Email Text after Subject Field

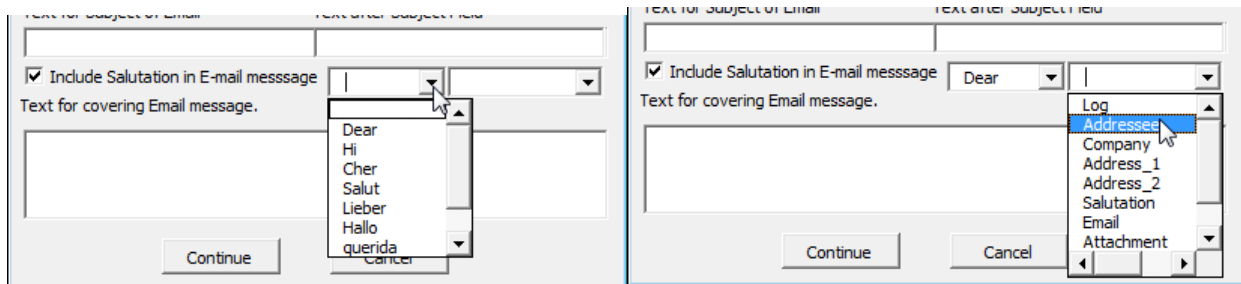
☐ Include Salutation in E-mail message

Text for covering Email message.

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 (or fields) to be selected to provide data to be used for the filename, optionally with the date and other text included in the filename.

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 optionally, a field in the data source that contains data to be used in the salutation.



The text for the covering Email message can either be typed, or pasted into the control provided and 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 sent with the attachments to each of the addressees.