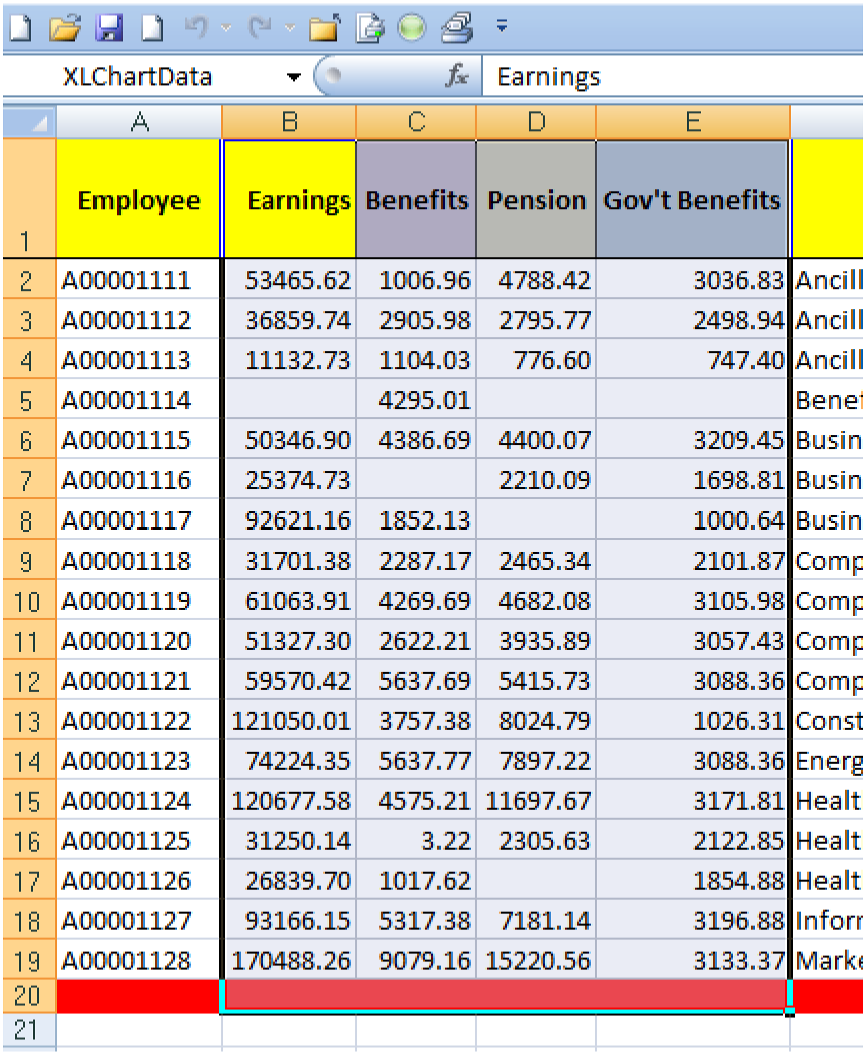
Mail Merging with Charts

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.

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.

All of the data that will be used for the chart for each record must be in adjacent columns as shown in the following screen shot



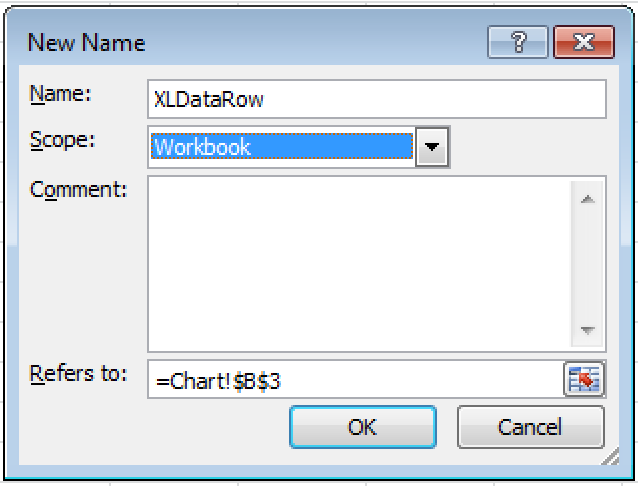
	A	B	C	D	E	
1	Employee	Earnings	Benefits	Pension	Gov't Benefits	
2	A00001111	53465.62	1006.96	4788.42	3036.83	Ancill
3	A00001112	36859.74	2905.98	2795.77	2498.94	Ancill
4	A00001113	11132.73	1104.03	776.60	747.40	Ancill
5	A00001114		4295.01			Bene
6	A00001115	50346.90	4386.69	4400.07	3209.45	Busin
7	A00001116	25374.73		2210.09	1698.81	Busin
8	A00001117	92621.16	1852.13		1000.64	Busin
9	A00001118	31701.38	2287.17	2465.34	2101.87	Comp
10	A00001119	61063.91	4269.69	4682.08	3105.98	Comp
11	A00001120	51327.30	2622.21	3935.89	3057.43	Comp
12	A00001121	59570.42	5637.69	5415.73	3088.36	Comp
13	A00001122	121050.01	3757.38	8024.79	1026.31	Const
14	A00001123	74224.35	5637.77	7897.22	3088.36	Energ
15	A00001124	120677.58	4575.21	11697.67	3171.81	Healt
16	A00001125	31250.14	3.22	2305.63	2122.85	Healt
17	A00001126	26839.70	1017.62		1854.88	Healt
18	A00001127	93166.15	5317.38	7181.14	3196.88	Inforr
19	A00001128	170488.26	9079.16	15220.56	3133.37	Marke
20						
21						

After the last record, a row should be colored Red, and range of cells starting with the heading row and finishing with the cells in the row that is colored Red must have the name XLChartData assigned to them.

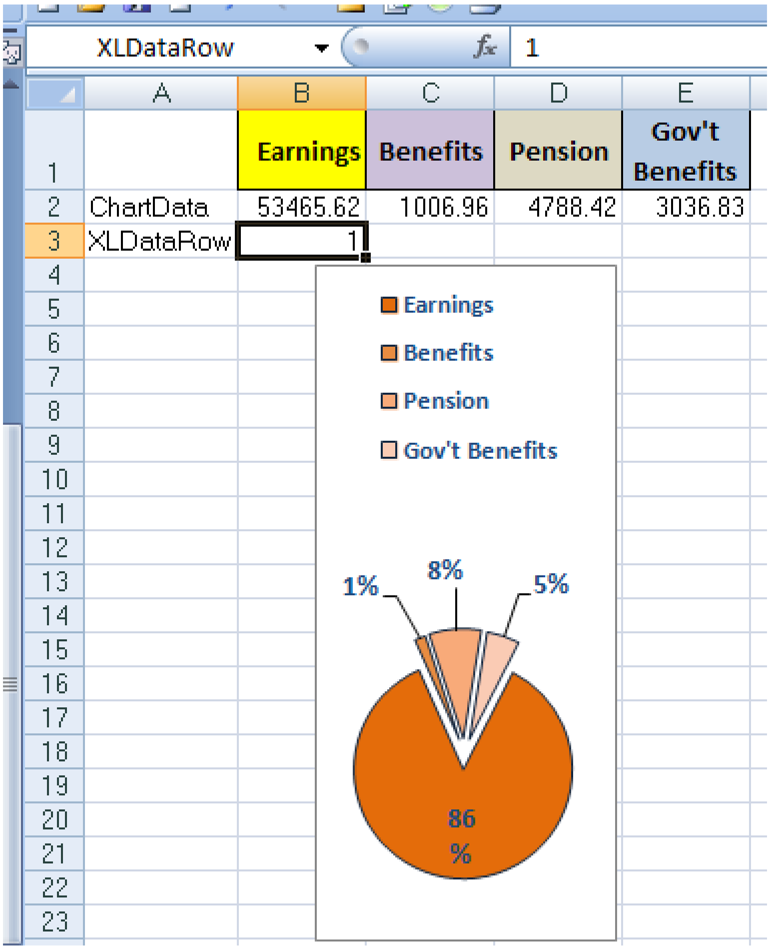
If it becomes necessary to add additional records to the data source, the necessary number of rows must be inserted above the Red row and the data inserted into those rows. If that is done the range to which the name XLChartData is assigned will automatically expand to include the new data.

The Chart sheet must be setup as shown in the following screen shot and the cell B3 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 arebeing 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)

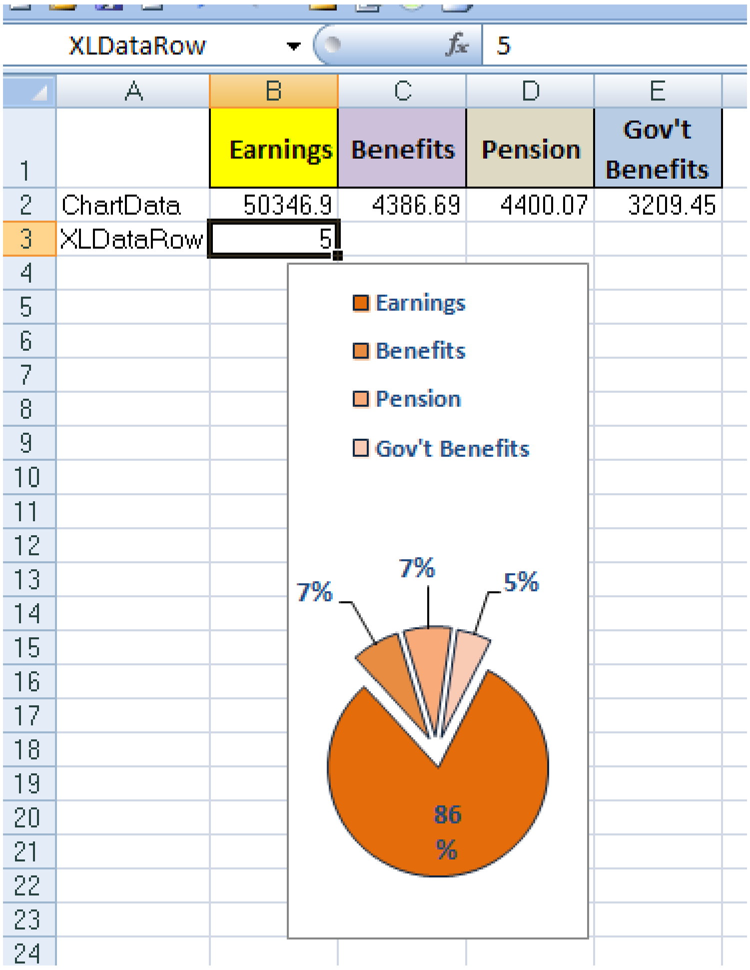
D2 =INDEX(XLChartData,XLDataRow+1,3)

The chart that is to be used in the mail merge must be created from the data in the range B1:E2 (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 B3, 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.

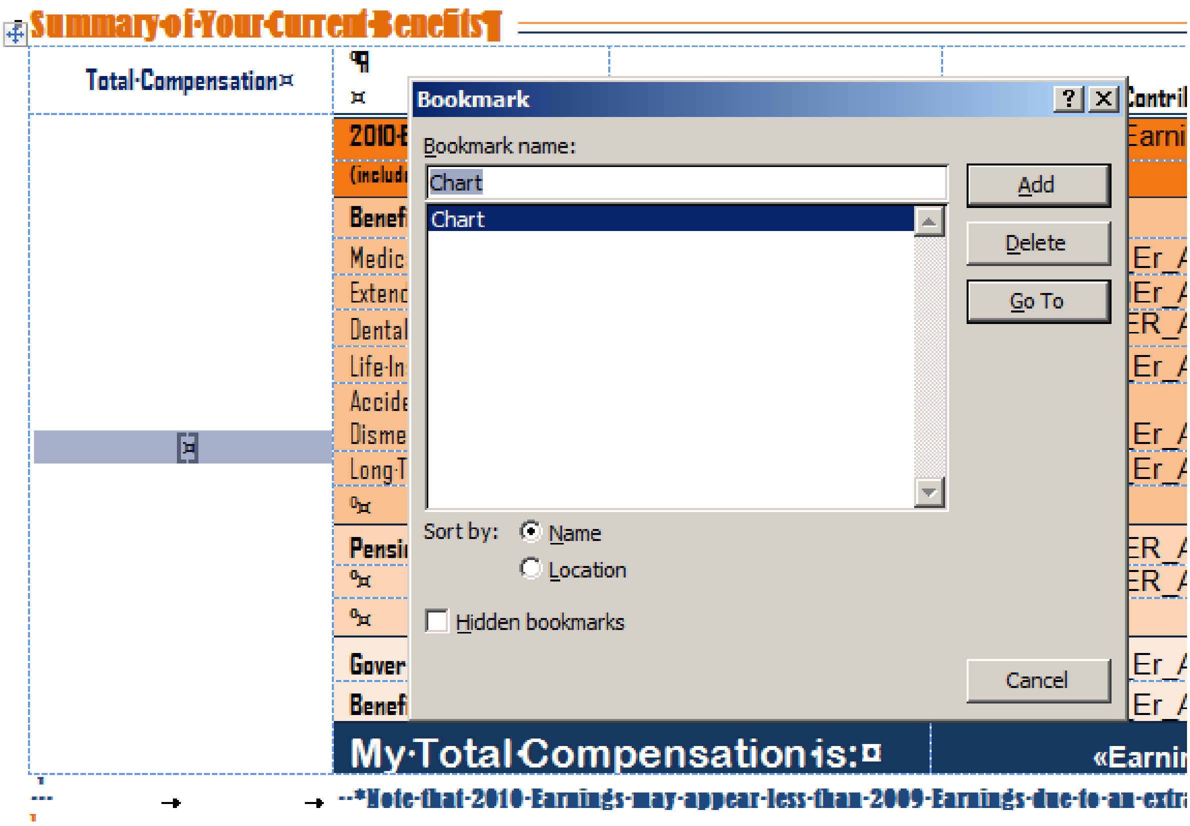
The following screen shot shows the effect of doing that:



You should now save and close the workbook.

2 The Mail Merge Main Document

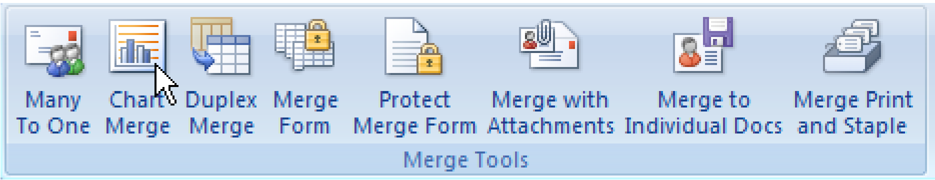
The Mail Merge Main Document must be set up as a Letters type main document to which you attach the data source (Data$) referred to in 1The Data Source above. The merge fields are inserted in the normal manner and in the location where the chart is to be displayed, a table must be inserted. It can be 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. The cell into which the chart will be inserted must be selected and the bookmark "Chart" must be assigned to that cell as shown below:



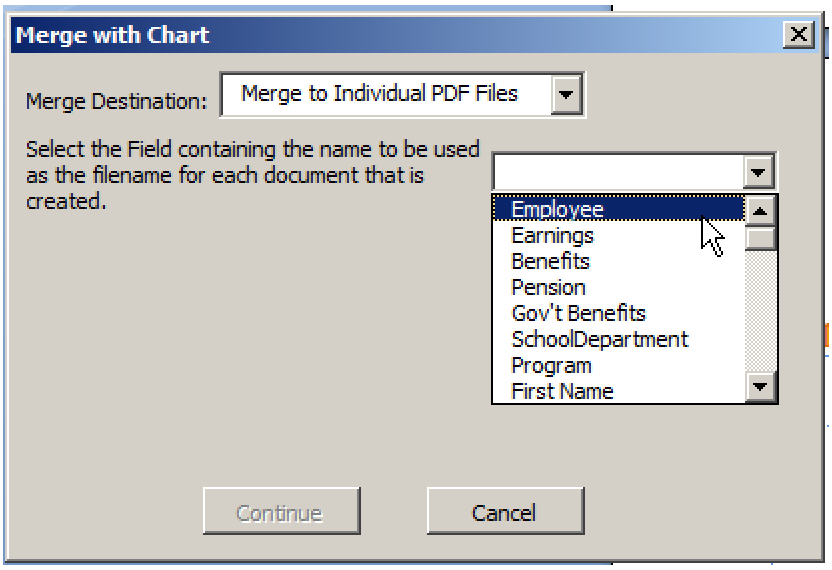
After setting up the Mail Merge Main Document in this way, it should be saved

3 Executing the Merge

If the MergeTools addin has been saved in the Word Startup Folder, the following will have been added to the Mailings tab of 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 dialog shown on the following page will appear



In this dialog, select the destination for the merged documents and the field in the data source that contains data that is unique for each record that can be used as a filename for the documents produced.

When both of these actions have been taken, the “Continue” button will become enabled and clicking on that button will cause the merge to be executed.