

ffice Doc



# **MS-OFFICE 2016 - WORD**

*English version*

Mail Merge

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# 1 The concept of field codes

Office 2007 has introduced a new element : the content controls, that you may have used in headers/footers, table of contents ... One could think these controls have replaced our traditional « field codes » but not at all, they can still be used, particularly in the mail merge process.

## 1.1 What is a field code ?

It is an instruction given to Word that will generate a result. Examples :

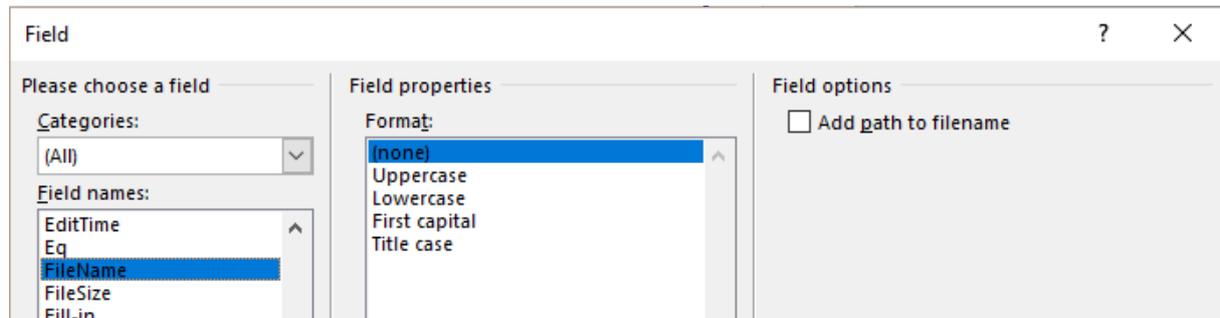
A field code used to calculate. To create an easy mathematical calculation, display its result and still keep access to the formula.  $\{=345/1.66 \# "###0.00"\} = 207.83$

Name and path of the current document  $\{ \text{FILENAME } \backslash p \ \backslash * \text{ MERGEFORMAT } \} = \text{D:\Office 2013\Word\WD-2013-English-MailMerge.docx}$

## 1.2 How do you get them ?

For some, it is necessary to create them manually. It is the case for the above two codes (previous topic). They have been created through :

- INSERT Tab – TEXT Group – QUICKPART Button – FIELD Option ...



But most of the time field codes are inserted in the document simply because the function you are using generates them automatically. It is the case when you insert a table of contents, an index .... and use the mail merge process.

## 1.3 What is a field code made of ?

- |                      |   |
|----------------------|---|
| { }                  | Encapsulation (the braces). Caution : these are not characters you can type on the keyboard ! |
| {DATE}               | The name of the field.  |
| {DATE \@ "d-MMM-yy"} | Switch or other indications - here the date format.   |

## 1.4 Handy shortcuts for field codes

If necessary : cursor inside the field :

<b>F9</b>	To update the field.
<b>CTRL + A then F9</b>	To select the whole document and update all its fields.
<b>SHIFT + F9</b>	To switch between code and result for a given field.
<b>ALT + F9</b>	To switch between code/result for the whole document codes.
<b>CTRL + SHIFT + F9</b>	To freeze (there is no field anymore, only the result).
<b>F11</b>	To jump from one field to the other and select it (forwards).
<b>SHIFT + F11</b>	To jump from one field to the other and select it (backwards).
<b>CTRL + F11</b>	To lock a field to prevent any change.
<b>CTRL + SHIFT + F11</b>	To unlock a field.
<b>CTRL + F9</b>	To create manually a field : the user must type the name of the instruction and the codes if there are any

### Right-clicking the field :

Right click a field and the shortcut menu will display various commands including : *Update*, *Edit* or *Toggle*.

## 1.5 Formatting a field

You format the whole code to ensure that the assigned attributes will be kept, even when the field is updated. One exception : a table of contents as the formatting comes from the TC1, TC2 ... styles).

## 1.6 General settings related to field codes

- FILE - OPTIONS – Category :

### **Display / Printing options**

Update fields before printing

### **Advanced / Show document content**

Show field codes instead of their values

Field shading :

*When selected*

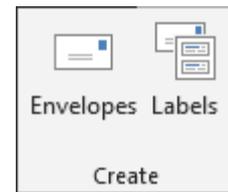
*Never*

*Always*

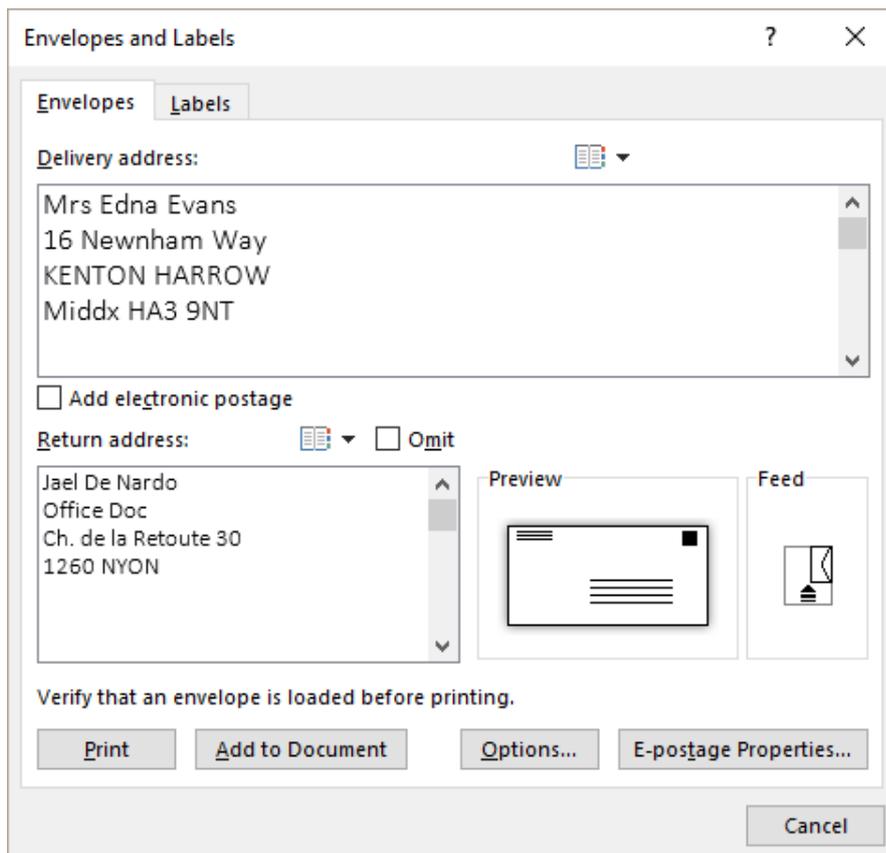
## 2 Envelopes and labels OFF MAIL MERGE

Select the address in your document (usually top right)

MAILINGS Tab – CREATE Group



### 2.1 Creating envelopes



#### Delivery address

Automatically retrieves your selection  
You can work on the font size by right clicking the text – option FONT

#### Buttons representing an open book

Opens the Outlook Address Book. You can search any address (sender or recipient)

#### Return address

The address – if existing – typing into the Word options :  
FILE - OPTIONS – ADVANCED Category – GENERAL Topic

#### Omit

The delivery address can be omitted. This avoids having to manually delete it

#### PRINT Button

Address is sent to the printer (no dialog box)

**ADD TO DOCUMENT Button**

A page 0 is added at the beginning of document. It is in landscape orientation.

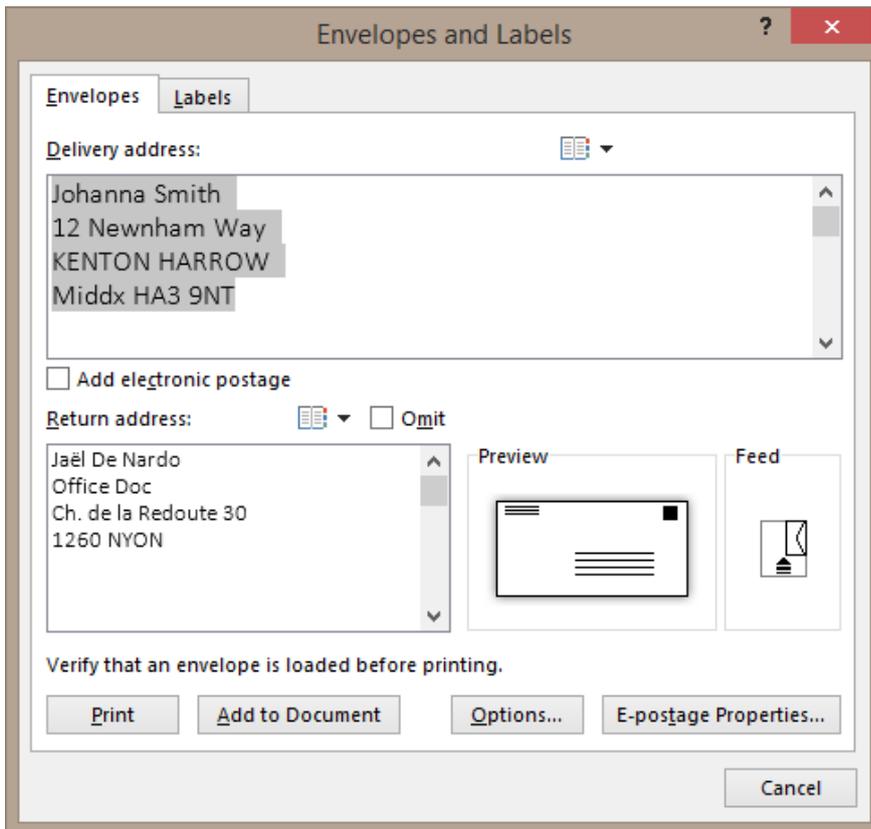
**OPTIONS Button**

Two tabs : *Envelopes Options* and *Printing Options*  
To let you change the font, place the address at the mm on the envelope, set the entry direction into the printer and so on...

**ADD ELECTRONIC POSTAGE Button**

Software to download from Microsoft website. For the USA

**2.2 Creating labels**



**Use return address**

If the option is active, the delivery address is replaced by the return address.

**Full page of the same label**

The NEW DOCUMENT button is then available. The labels are automatically created as a Word table where each cell corresponds to the label size. Two possibilities : click on the PRINT button to print the page of labels. Click on the NEW DOCUMENT button to create a document that you will be able to keep and modify for a later use

**Single label**

Only the PRINT button is available. Use the row and column boxes to set which label should be used.

**OPTIONS Button**

To choose the type of labels, create a brand new label (you will need a ruler to set exact measures)

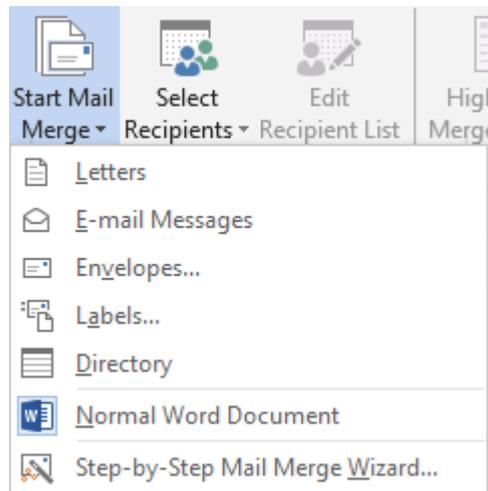
## 3 Standard Mail Merge

Mail merge needs 3 files :

1. **The main document** containing the standard text and the merging codes
2. **The data file** containing the source *entries* (each set of variables is called a « record »). It can be a Word table, an Excel workbook or any other database file.
3. **A unique final merged document**, (*the document will have as many pages as the number of recipients*)

### 3.1 The Main Document

- MAILINGS Tab – START MAIL MERGE Group – Button showing the same name :



#### Letters

The usual case : the main document is a Word file : a blank document, an existing one, one based onto a given template ...

#### E-Mail Messages

The mailmerge will produce electronic messages rather than a Word document. Word automatically applies the web view mode. But this has no incidence on Word commands or formatting tools. Do as usual. But caution : the recipient e-mail address must absolutely be part of the source data file.

#### Envelopes

The main document is a Word file whose layout is automatically that of an envelope.

#### Labels

The main document is a Word file containing a table whose cells are automatically sized for labels

#### Directory

Unique document in the form of a catalog or a list  
A little bit special : see topic on the subject.

#### Normal Word Document

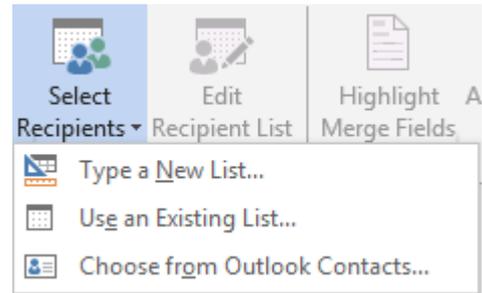
To reset the main document as a standard Word document (no longer a mail merge document)

#### Step by Step Mail Merge Wizard

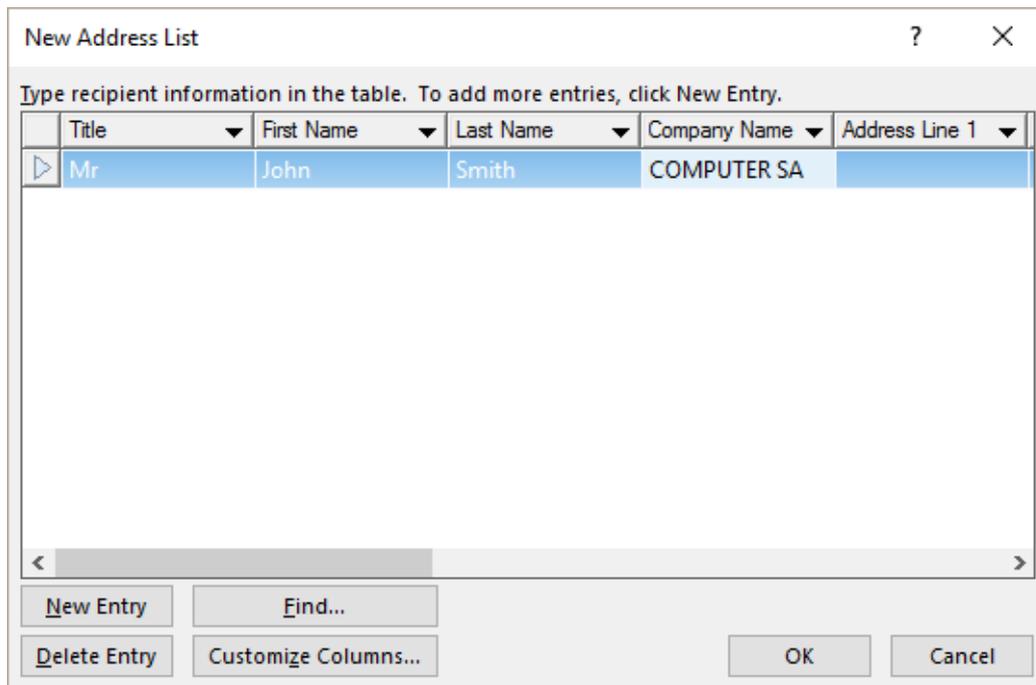
The Wizard of the previous version. If you feel more comfortable using the Wizard ...

## 3.2 The Data File

- MAILINGS Tab – START MAIL MERGE Group – SELECT RECIPIENTS Button



### 3.2.1 Type new List



Title	First Name	Last Name	Company Name	Address Line 1
Mr	John	Smith	COMPUTER SA	

#### Columns

The preset fields might well not suit it. If you click on the CUSTOMIZE COLUMNS button, you will be able to rename, remove, add ... fields according to your needs.

#### Typing

Directly in the fields

#### Managing entries

Click on the NEW ENTRY and DELETE ENTRY buttons

This file will be your *data file* and you will be prompted to save it. The default folder will be the MY DATA SOURCES folder, a subfolder of DOCUMENTS.

**Important : Word creates an Access file, showing the .mdb extension.**

#### Opening the file outside the merge process

If Access has not been installed on your workstation, Excel will be able to open it but caution, it will open A COPY of the file and not the source file itself.

### 3.2.2 [Use Existing List](#)

A File-Open dialog box will be displayed, showing the MY DATA SOURCES folder (a subfolder of DOCUMENTS)

*Note : the dialog box always shows this path, regardless of your previous navigation.*

#### An .mdb file, coming from a previous merge

##### A Word document

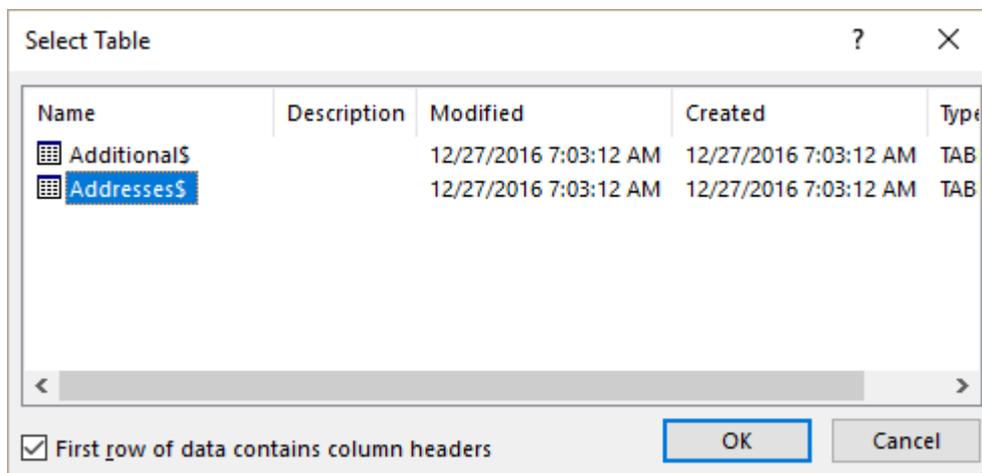
Entries are inside a table, as shown in the screen capture below :

Title	Name	Company	Address	City
Mr.	John Smith	COMPUTERS SA	5 Rue des Bains	GENEVA
Mrs.	Johanna Kento	COMPUTERS SA	5 Rue des Bains	GENEVA

#### An Excel workbook – certainly the most common situation

	A	B	C	D	E	
1	Title	Name	Company	Address	City	Post
2	Mr.	Arnaud Dupont	MODE BOUTIQUE	12 rue des Jardins	GENEVE	1205
3	Mrs.	Françoise Durand	L'HOMME ELEGANT	45 ch. des Primevères	GENEVE	1204
4	Mrs.	Jullie Périllat	MODE 2000	55 ch. des Vignes	LAUSANNE	
5	Mr.	Michel Tartempion	MODE FEMININE	23 avenue Le Blanc	MONTREUX	

If the workbook contains several tables, they will be listed and a dialog box will prompt you to select the one containing your merge entries :

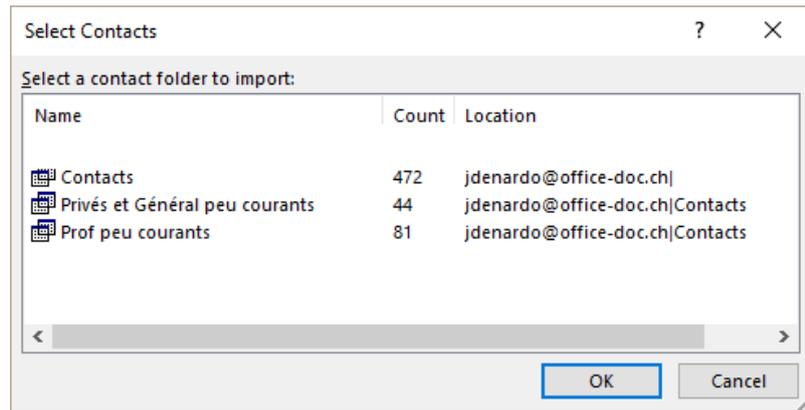


### 3.2.3 [Select from Outlook contacts](#)

Selecting directly from Word is possible but true to say you will never get a precise and exact control over the contacts as if you had run the merge from Outlook. *See the final chapter about this subject.*

Moreover, it is less likely that your merge will concern all your Outlook contacts (you might have tens of contacts). Advice : create in Outlook a subfolder, dedicated to mail merge, into which you will **copy** the required contacts.

Then, the following dialog box will be displayed to let you select either the general Contacts folder and one of its subfolders :

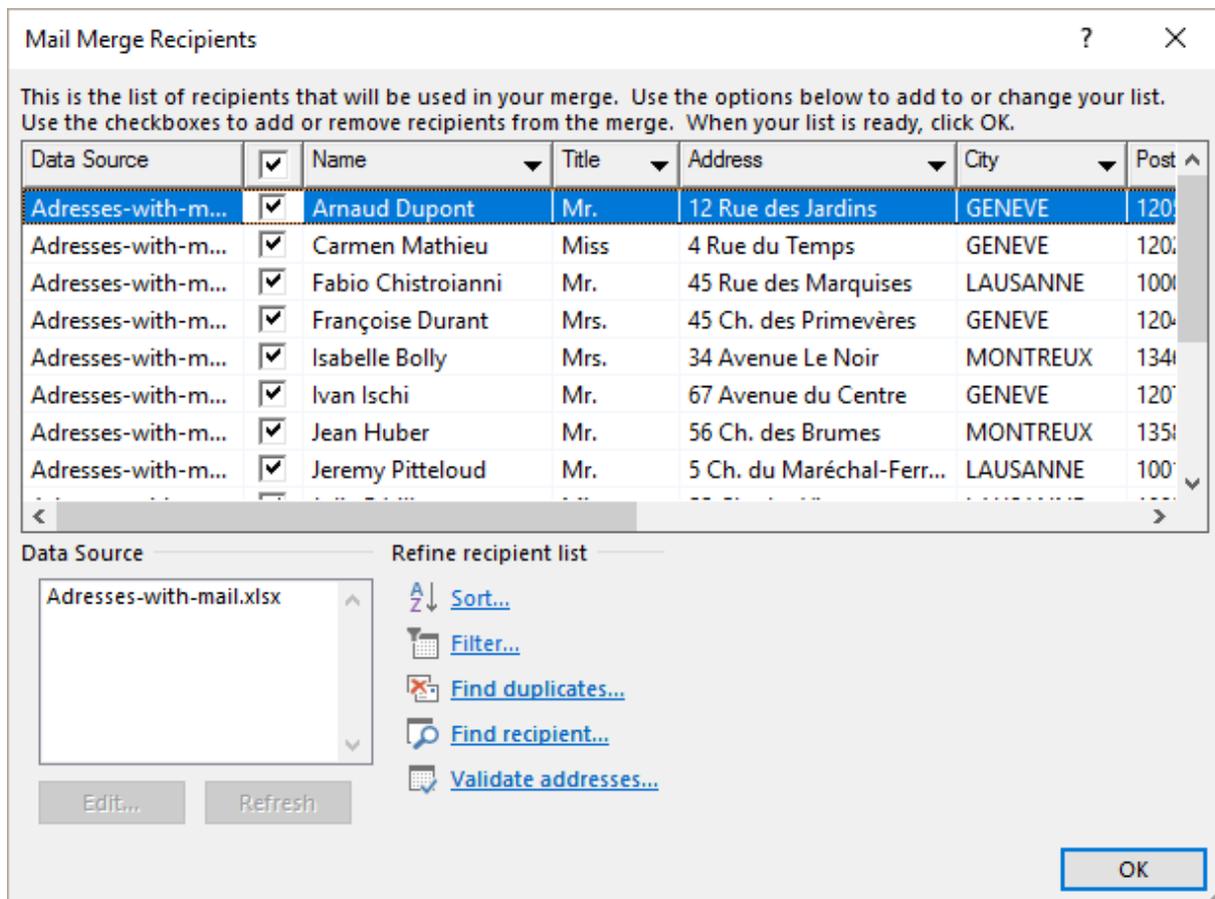
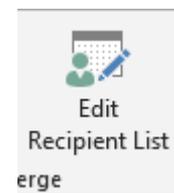


• **What if the subfolder is not listed ?**

Make sure that the folder has been set as *an e-mail address book* : right click the folder and select the PROPERTIES option. OUTLOOK ADDRESS BOOK Tab - SHOW THIS FOLDER AS AN E-MAIL ADDRESS BOOK Option.

3.2.4 Managing the list of recipients

- MAILINGS Tab – START MAIL MERGE Group – EDIT RECIPIENT LIST Button



-  [The order of the fields](#) might not necessarily match the one you set when creating the records.
-  [Managing the width of the columns](#). You can use the same techniques as you do in Excel (click and drag the right separation or double-click for an autofit) but note that when you exit the list, these modifications are lost.

### Special Outlook

All contacts fields are retrieved (tens of them !)

It does not affect the merge process itself but can make the reading of the entries a bit fastidious because most fields are empty or of no interest.

You cannot modify an address in Outlook directly from the Word merge process. But you may update them.

### 3.2.5 Modifying the entries or updating them

It is sufficient to select the file in the *DATA SOURCE* list and to click on the EDIT button that becomes available. According to the type of file, the edit form can be slightly different. Once you have finished, you will be prompted to confirm the saving in order to update the file.

-  It the main document is opened, it is not possible to run the source program and then try to open the data file independently.

If you have the feeling that the source file has been modified since the previous merge, simply click on the file and click on the REFRESH button.

### 3.2.6 Selecting the entries

Check on or off the selection boxes

### 3.2.7 Filter and sort as in Excel

Click on the triangle located to the right of each field

*If there are more than 10 items in the column, they will not all be listed. You'll want to use the **ADVANCED** option to select them.*

**Advanced** ... generates the dialog box explained in the next topic



### 3.2.8 Sort

The screenshot shows the 'Filter and Sort' dialog box with the 'Sort Records' tab selected. It features three rows for sorting criteria. The first row is 'Sort by: Name' with a dropdown arrow, and radio buttons for 'Ascending' (selected) and 'Descending'. The second row is 'Then by:' with a dropdown arrow and radio buttons for 'Ascending' and 'Descending'. The third row is 'Then by:' with a dropdown arrow and radio buttons for 'Ascending' and 'Descending'. At the bottom, there are buttons for 'Clear All', 'OK', and 'Cancel'.

 Simple sort : click on the column field ( ascending or descending order)

### 3.2.9 Filter

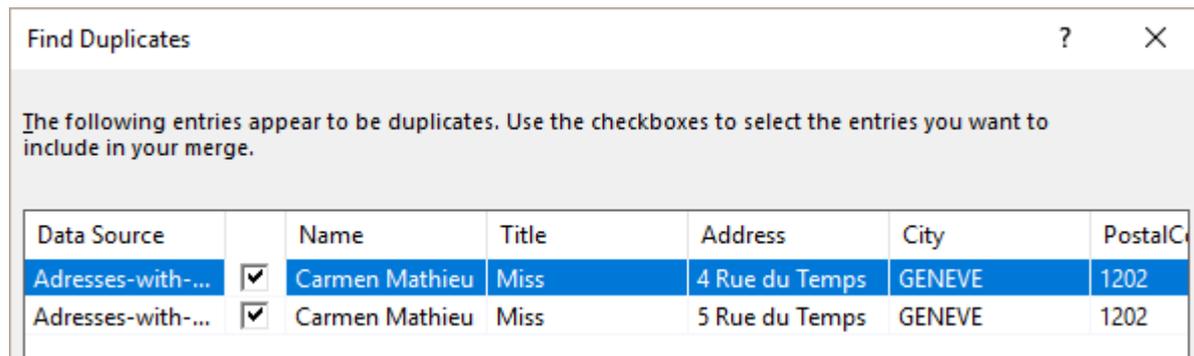
The following dialog box will let you set more than one criteria

As usual : caution with the spoken « logic », that can be tricky. You can say : I need to filter on *Geneva and Vevy* or on *Mrs and Mrs*. But the real pure logic link is not and but **or**.

The screenshot shows the 'Filter and Sort' dialog box with the 'Filter Records' tab selected. It features a table for defining filter criteria. The table has three columns: 'Field:', 'Comparison:', and 'Compare to:'. The first row has 'City' in the 'Field:' column, 'Equal to' in the 'Comparison:' column, and 'Lausanne' in the 'Compare to:' column. The second row has 'City' in the 'Field:' column, 'Equal to' in the 'Comparison:' column, and 'Montreux' in the 'Compare to:' column. There are also 'Or' and 'And' dropdown menus between the rows. At the bottom, there are buttons for 'Clear All', 'OK', and 'Cancel'.

Caution : filter criteria remain active until the next time you open the main document. Make sure you click on the CLEAR ALL button if you need to fully reset the list.

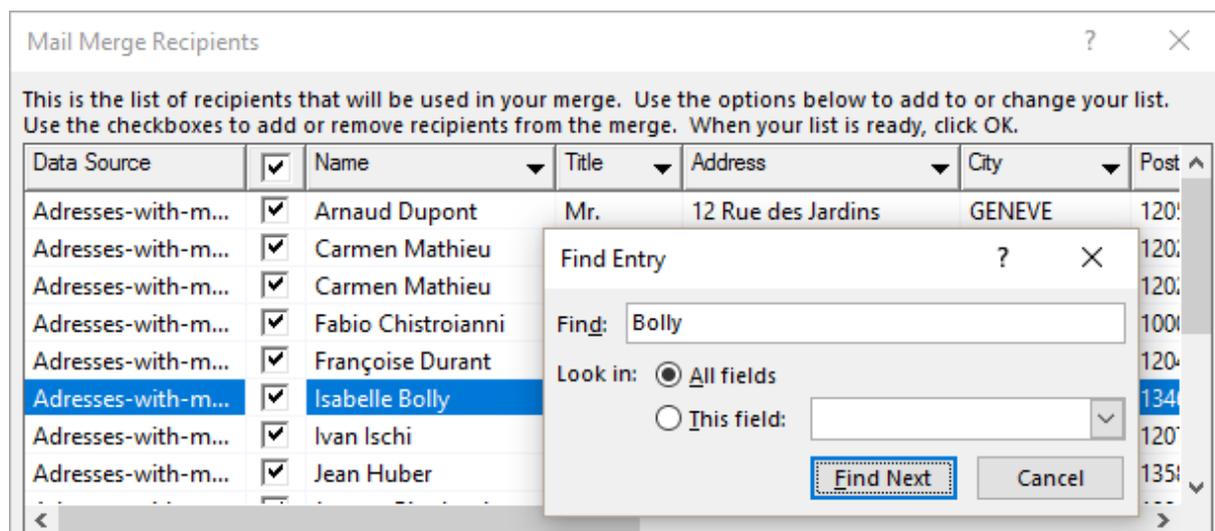
### 3.2.10 Find Duplicates



Note : you can only check off the duplicates as the dialog box does not provide any option to delete them. To delete them you will have to open the source file.

### 3.2.11 Find recipient

Type the characters to find in the dialog box and the matching record will be highlighted in the list of recipients.



### 3.2.12 Validate addresses

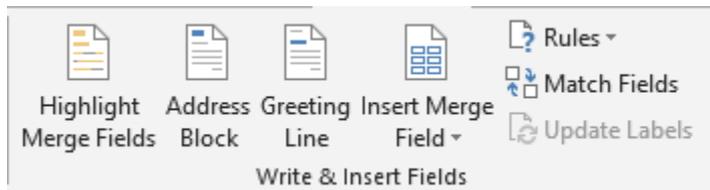
You need to download a special application. Only for the USA

### 3.2.13 E-mail messages : the address

To turn a « standard » mailmerge into an electronic one, you must make sure that the e-mail address is one of the *Recipient List* fields. This is automatic if the list has been created from *Outlook Contacts*. If the list has been created manually (.mdb, .doxx, .xlsx file), make sure to add this field to the list fields.

### 3.3 Writing the letter and inserting the fields

- MAILINGS Tab – WRITE & INSERT FIELDS Group:

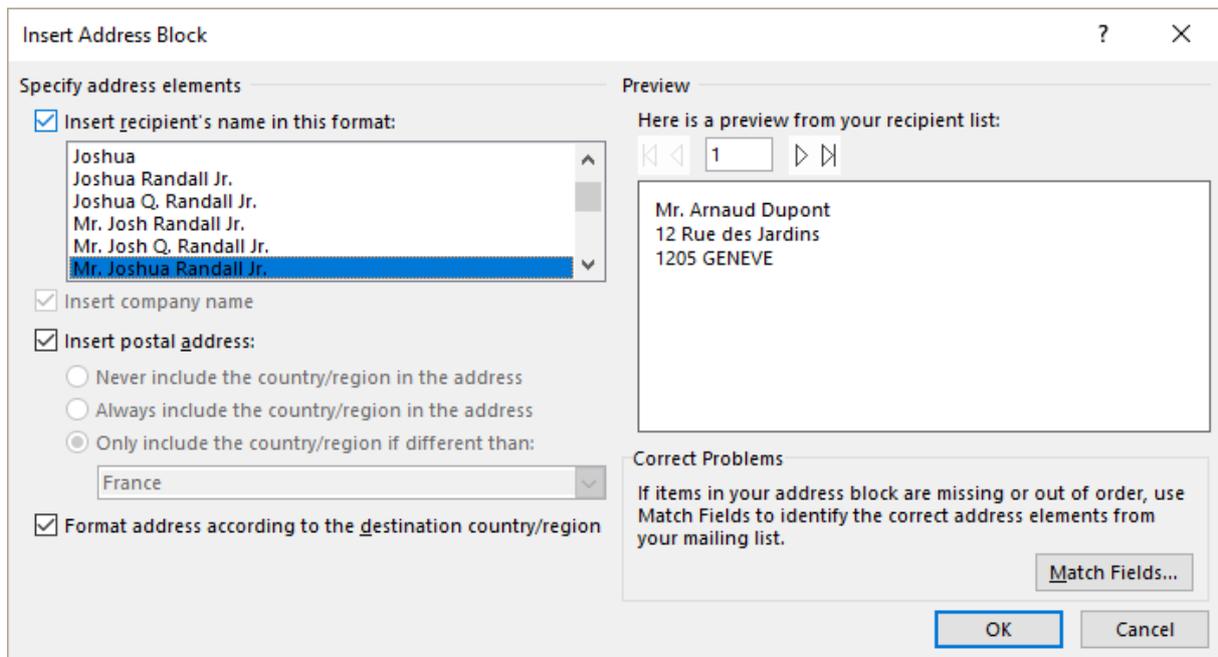


#### Highlight Merge Fields

By default, only a selected field will be highlighted. If you click on this button, all fields you have inserted will be highlighted.

#### Address Block et Greeting Line

**Address Block**: to insert the address as one block in order to avoid inserting manually the address fields one by one. You can choose the presentation and turn on some other options in the following dialog box:



**Is a field missing or shown double ?** .... click on the MATCH FIELDS button. Indeed Word « translate » in order to make the match between what it expects to find and the real label you have typed. And sometimes this fails ...

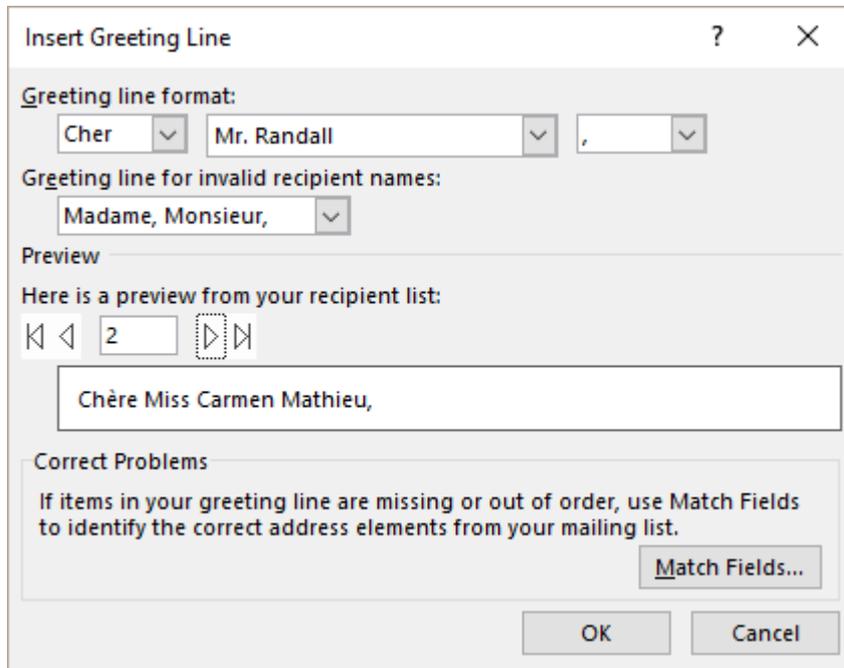


Word failed to read the label corresponding to *First Name* and *Company*.

When you click on OK, the following field will be inserted : «AddressBlock»

How to get back to this dialog box to modify something ? Right click the field and select the EDIT ADDRESS BLOCK option.

*Greeting Line* : Mr. Randall, Dear Mr Randall ?  
Here below the dialog box to make your choice :



**Anything missing ?** As for the previous dialog box : MATCH FIELDS button

When you exit the box, the following field will be inserted . «GreetingLine»

How to get back to this dialog box to modify something ? Right click the field and select the EDIT GREETING LINE option.

Note :

The field syntax (whether Address Blok or Greeting Line) is always the same, regardless of the language and regardless of the real name of the fields. Word recognizes them automatically.

Here after the syntax :

```
ADDRESSBLOCK-If"<<_COMPANY_¶
>><<_TITLE0_>><<_FIRST0_>><<_LAST0_>><<_SUFFIX0_>>¶
<<_STREET1_¶
>><<_STREET2_¶
>><<_POSTAL_>><<_CITY_>><<¶
_COUNTRY_>>"\i-4108\c-2\le-"Suisse"\d ¶
```

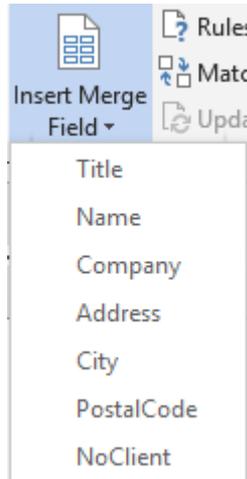
```
GREETINGLINE-If"<<_BEFORE_Dear>><<_TITLE0_>><<_LAST0_>> <<_AFTER_
,>>"\i-4108\le-"Mr.-or-Mrs." ¶
```

As you notice and might agree, the syntax is not really « user-friendly ». To modify, better to proceed field by field.

If the « translation » fails, an address field can be missing. Simply click on the MATCH FIELD button (whether Address Block or Greeting Line) to help Word set back its links. Here below the dialog box that will be displayed .

### Insert Merge Field

When you click on the triangle located to the right of the button (or on the lower part of the button when fully expanded)

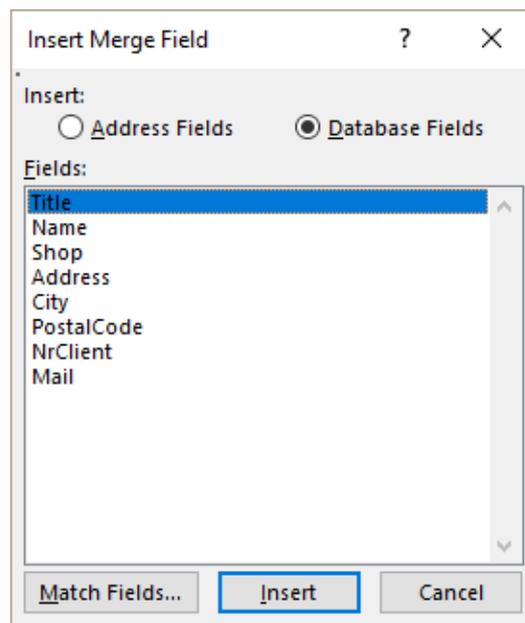


Select the field  
It is inserted at the cursor  
insertion point

Repeat as many times as  
necessary

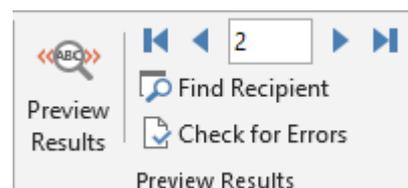
Click on the upper part of the  
button

You cannot insert a return or a  
space between fields inside this  
dialog box. But you may insert all  
fields and then add returns and  
spaces afterward.



## 3.4 Previewing the result

- MAILINGS Tab – PREVIEW RESULTS Group



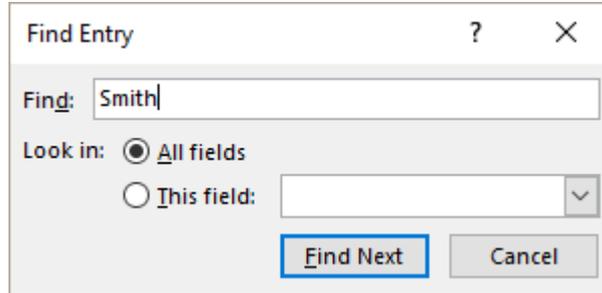
**Loupe button**

Fields are replaced with their values when you click on the loupe button

**Navigation**

You may navigate from one entry to the other : *first record, previous record, number of a given record, next record, last record*

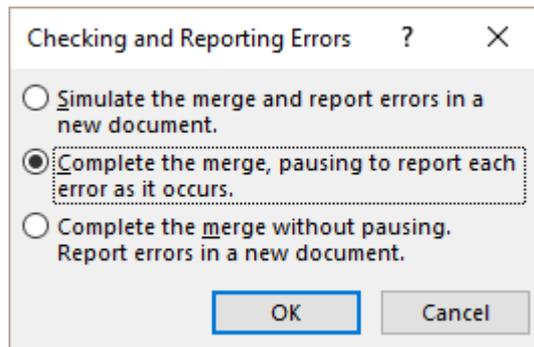
**Find Recipient**



Displays the matching entry (preview)

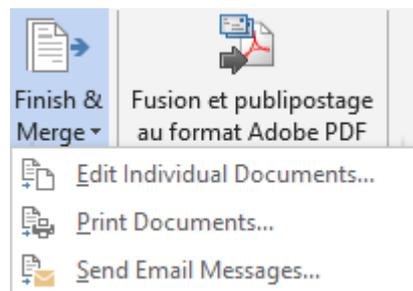
**Auto Check for Errors**

Check if the main document and the list of recipients are technically « mergeable » A dialog box will prompt you to choose how this check should be run :



**3.5 Finishing and Merging**

- MAILINGS Tab – FINISH Group



**Edit Individual Documents**

The merge generate a document where each entry appears on one page, separated with a section break. You can discard or save this final document.

**Print Documents**

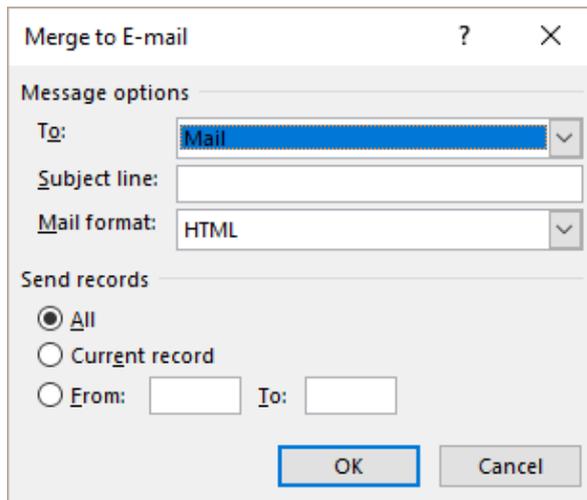
The merge is sent directly to the printer.

## Send E-mail Messages

You can set right from the beginning that the mailmerge will be electronic or you can set so when actually merging. Simply check that the e-mail address field can be found in the data file.

*Word automatically displays the document into the web view. But this has no incidence on Word commands : work as usual.*

The following dialog box will be displayed :



### Caution : no confirmation, the messages are instantly created AND SENT

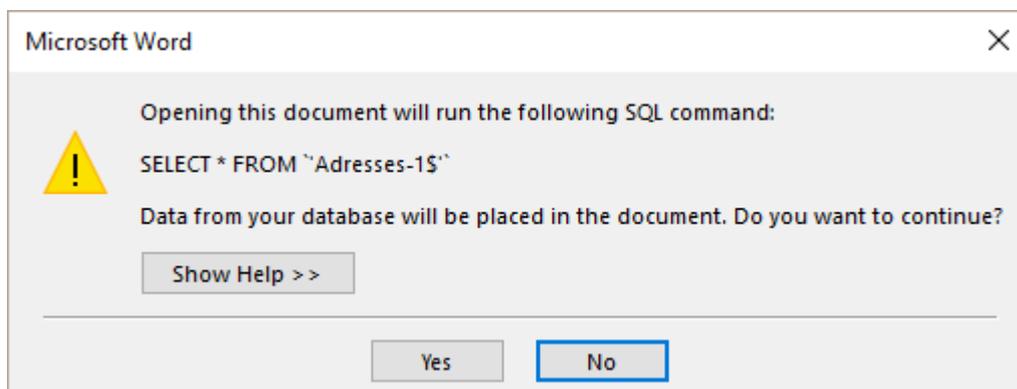


Thinking of sending a form (that people could send back to you) ?

The Word document should therefore contain form controls ... Bad news : Outlook messages do not support form controls whatever their type (content controls, field codes, ActiveX controls). If you need to work with such controls, you should rather create a Word document that you will attach to an Outlook message.

## 3.6 Opening a main document later on

When you open the document, here below the dialog box :



In plain words, the mail merge detects that a data file is linked to the current document and you are prompted to confirm this link.

**YES**            The link is confirmed – the data are updated in case there have been modifications done to the source file outside the merge process.

**NO**             The link is broken – the document is no longer a mail merge main document.

 The box also tells you if filter criteria have been set on the list of recipients.

### 3.7 When fields between the main document and the data file do not match

When you create the data file and the main document together, there is usually no problem of field matching. You type the letter, insert the field codes and everything matches nicely.

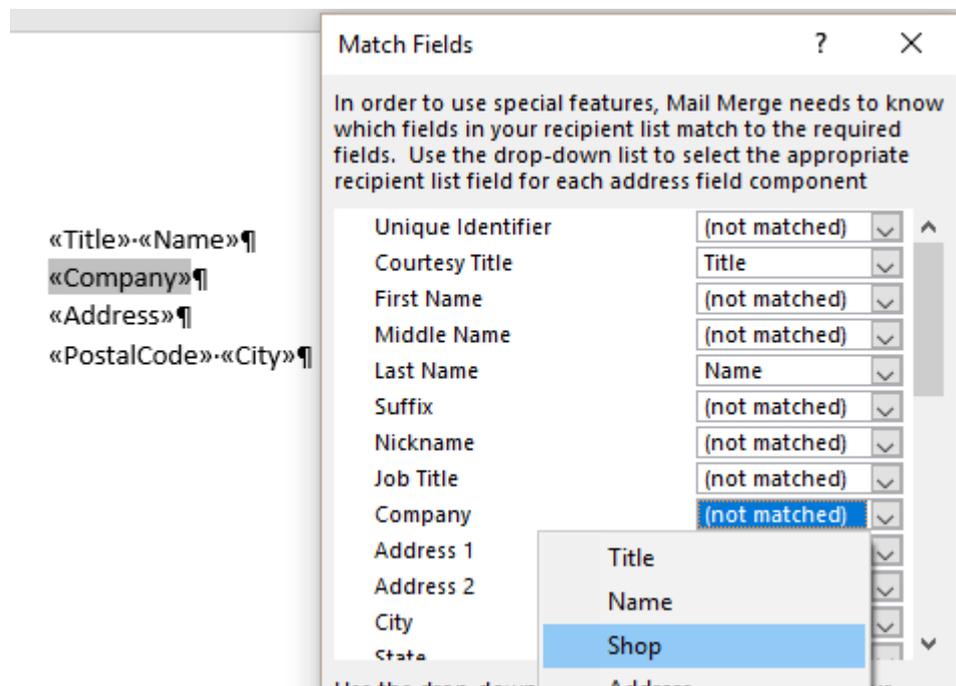
But if you try to attach an existing data file to another existing main document, then it is highly possible that the fields will not match completely. *Classical examples . you link an existing Word main document to an Excel data file whose fields are slightly different or you use Outlook contacts.*

Simply ask to match the fields. We saw how in the chapter about the Address Block and the Greeting Line. Reminder :

- MAILINGS Tab – WRITE & INSERT FIELDS Group – Button :

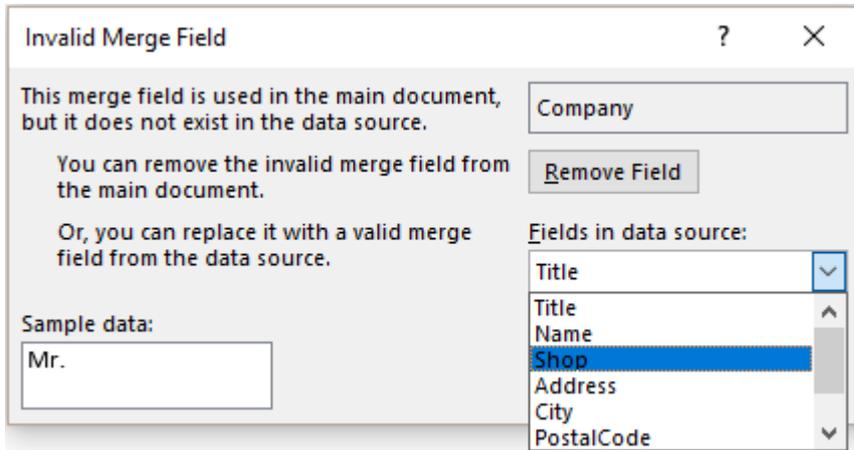


Here below the box :



The main document shows a field name *Société* (a translation problem). Word can't find the match as it expects *Company*. Display the drop-down list of fields and select the correct matching field from the data file.

If you do not notice that a field has no match, Word will inform you when click on the LOUPE button (PREVIEW RESULTS). Indeed, whether it is missing on one side or on the other, the following dialog box will prompt you for an action :



A field that is in the Main Document but not in the Data File : get the match from the list or click on the REMOVE FIELD button.

True to say, Word is quite good at retrieving labels even though you may have used other labels ...

### 3.8 Mail merge example

The fields have been toggled to codes with ALT + F9

#### MAIN DOCUMENT

Address block and greeting line have been used



Geneva, 16th December 2016

Ref : { MERGEFIELD ClientNr }

.....  
{ GREETINGLINE \f "<<\_BEFORE\_ Dear >><<\_TITLE0\_>><<\_LAST0\_>> <<\_AFTER\_ ,>>" \l 4108 \e "Mr. or Mrs." }

This year is nearly over. We wish to thank all our clients for their support and we assure you that we shall always make our best to deserve your satisfaction.

Please find enclosed our new catalog for the year 2017. As you will notice, there are a lot of interesting new features : new products, new shops and so on.

Yours faithfully,

Marketing Department  
Luciana Pellati

---

## 4 Creating the envelopes or labels that are part of a mail merge

Creating the envelopes or the labels corresponds to going through a second mail merge. The envelope or the label becomes the main document, linked to the same data file. We will develop how to create labels (creating envelopes is similar).

### 4.1 Creating the labels

- Start the mail merge from a blank document
- MAILINGS Tab – START MAIL MERGE Group – START MAIL MERGE Button – LABELS Option

Label Options

Printer information

Continuous-feed printers

Page printers    Tray: Default tray ( Sélection automatique) ▼

Label information

Label vendors: Avery Zweckform ▼

[Find updates on Office.com](#)

Product number:

- 3657
- 3658
- 3659
- 3660
- 3661
- 3664

Label information

Type: Address Label

Height: 6.77 cm

Width: 9.7 cm

Page size: 21 cm × 29.69 cm

Details...    New Label...    Delete    OK    Cancel

- Select the label vendor that corresponds to your labels.

If there isn't any, choose the nearest one and modify it clicking on the DETAILS button. And if your labels are really custom, click on the NEW LABEL button and indicate all the necessary measures.

- The document is automatically formatted and will display a table where each cell has been sized at the label measures.
- Select the data file to be linked to the mail document

- Word automatically adds the field <<Next Record>> at the top of the cells (except the first one).

*This field code guarantees that when merging, Word will fill the page of labels and not separate each cell with a page.*



- Prepare the first label by inserting the address block or the address field codes one by one.



- Update all labels by clicking on the UPDATE LABELS button.



- The document is updated



- The rest of the merge is as usual. When you are ready : preview the result and if it is satisfactory print the labels.

#### 4.2 Question : is it possible to use an existing document even though the labels are different (number of labels on the page, measures ...)

Yes but when you will select a new type of labels in the *Label Vendors* list, Word will inform you that the document content will be removed. But the data file will remain linked to the document. Click on the EDIT RECIPIENT LIST button and the document will display all the <<Next Record>> fields. Then build your first label as usual.

#### 4.3 Question : is it possible to use a *standard* document that contains a table where each cell has the label size ?

At first it seems possible but you will encounter many problems because Word does not recognize the document as being a *merge document*. The problems will be the following :

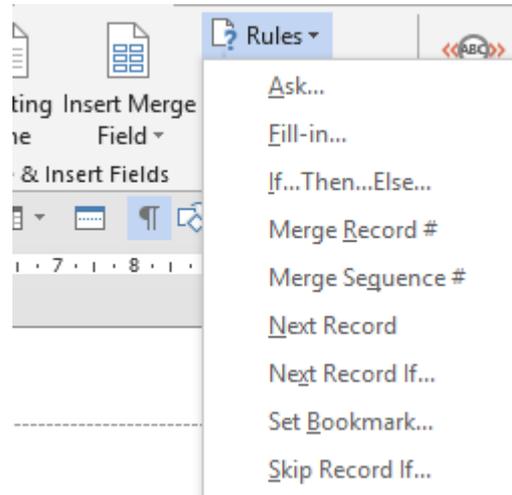
- 1 You start the merge and choose to create *Labels*  
Word prompts you to select the type of labels  
If you have chosen this standard document, the reason is certainly because the cells (labels) have special measures.  
You don't want Word to remove the table .... you are embarrassed ....  
You cancel
- 2 You try to link the data file to your standard document  
It is possible  
The only snag : the <<Next Record>> field is not automatically added into the cells and you will have to insert it manually with the RULES button (just above the UPDATE LABELS button)  
The UPDATE LABELS button is not available : you must copy manually the first set of fields codes into each cell of the table.

Conclusion : possible but with restrictions

## 5 Adding rules

- MAILINGS Tab – WRITE & INSERT FIELDS Group –RULES Button

- The HIGHLIGHT MERGE FIELDS button has no effect of those fields. They will show a shading only when selected.



### 5.1 If ... Then ... Else

A given text will be inserted if the condition is met. Here below an example :

Insert Word Field: IF

IF

Field name: Title Comparison: Equal to Compare to: Mr.

Insert this text:  
Dear Sir,

Otherwise insert this text:  
Dear Madam,

OK Cancel

- Comma inside the IF or after the code°?  
Up to you but it will be either one or the other, or you'll end with two commas ...

#### Syntax of the field code

```
{ IF {MERGEFIELD Title } = "Mr." "Dear Sir," "Dear Madam," }.
```

If the field Title is equal to Mr. then insert Dear Sir, else insert Dear Madam,

Or ... insert a given text according to a condition set in the main document

```
{ IF { MERGEFIELD City } = "Geneva" "A demonstration of our new product will take place at the PLACETTE SHOP on December 7th, 2016" "" }
```

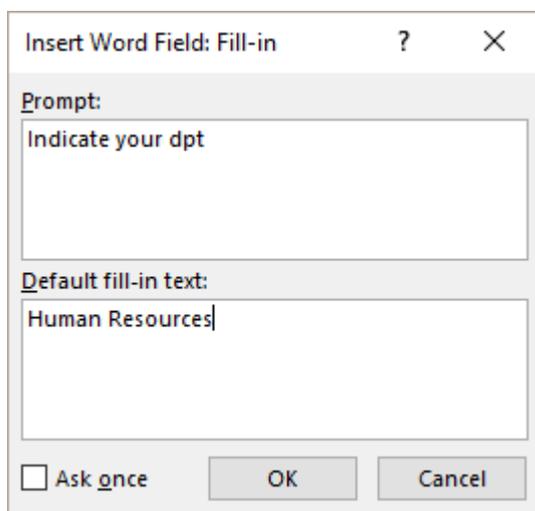
Insert a text if recipient lives in Geneva and nothing if he/she doesn't

\* Special in French : to get a : *Cher Monsieur, Chère Madame*,

```
{ IF { MERGEFIELD Titre } = "Monsieur" "Cher" "Chère" } { MERGFIELD Titre }  
If the field Titre is equal to Monsieur then insert Cher, else insert Chère, then add the Titre
```

## 5.2 Fill-in

A dialog box is generated to let the user type the required text.



### Prompt

What are you supposed to type ? Typing instructions

### Default fill-in text

Default text. It will be pre-selected. Leave it as such or type over it.

### Ask once

The question is only asked for the first record. It is then applied to all the other records.

### Syntaxe du champ

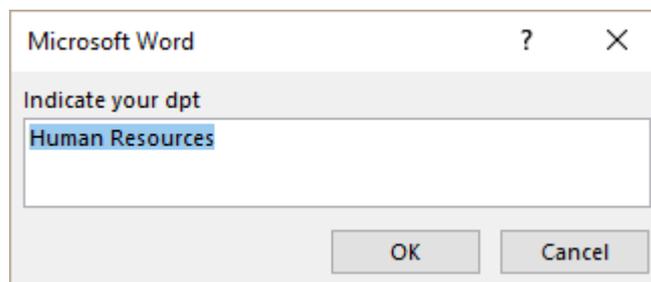
```
{ FILLIN "Indicate your dpt" \d "Human Resources" \o }
```

The \d and \o (the letter and not the digit) *switches* respectively set a default proposition and the fact that the dialog box will be displayed once only for the merge.

Here below the dialog box :

In grey : the prompt

Pre-selected : the default text

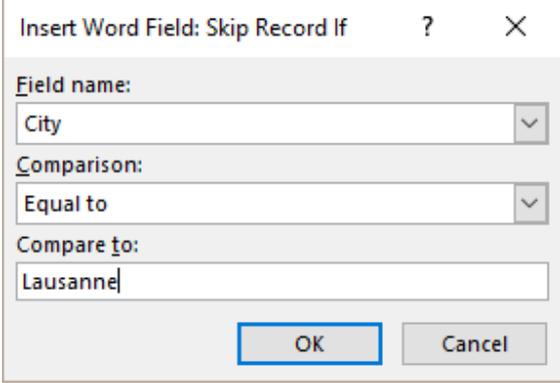


 Pressing the ENTER key does not correspond to clicking on the OK button but it will insert a new line.

- If no text has been typed, the field code is empty and will not appear in the document. Type at least a letter (example an X) so that it will be displayed in the text. The SHIFT + F9 combination will show at least the code. This box is displayed when merging and you can replace the X with the correct text.

### 5.3 Skip Record If

Any record matching the condition set is *skipped* during the merge process.



#### Syntax of the field

```
{ SKIPIF{ MERGEFIELD City }= "Lausanne" }.
```

- The above field does not generate a text. Therefore it is hidden when previewing the results.

**Example :** the main document is linked to a data file of more than 1500 records. Impossible to set one unique criteria to filter only the required recipients. So you insert a new column and fill the required cells with the criteria. It will then be easy to « skip » all records containing this special criteria.

### 5.4 Nested IFs

Ex *if 1 then, if 2 then, if 3 then ..... or if 1 then, if 2 then, if three then .... else.*

Type either manually or insert through the dialog box of IF... THEN ... ELSE (rules)

SHIFT + F9 only shows the code partially.

To show ALL IFs : select the whole instruction and SHIFT + F9.

#### • **Caution**

*Manually*

Make sure the field code shows MERGEFIELD xxxx

For any new IF, place the cursor just before the last brace.

*Using the IF ... THEN ... ELSE (rules)*

The box automatically generates the « else » part of the function. With a nested if, there is either no else case or only one. So make sure to remove them. Check that the cursor is placed just before the last brace to start a new IF.

## The test needs more than 2 possibilities, of course ...

### Example 1

```
{ MERGEFIELD Title } { MERGEFIELD Name }  
{ MERGEFIELD Address }  
{ MERGEFIELD City }
```

```
{ IF { MERGEFIELD Title } = "Mr." "Dear Sir" { IF {MERGEFIELD Title } = "Mrs." "Dear  
Madam" { IF { MERGEFIELD Title } = "Miss" "Dear Mademoiselle" } } },
```

### Example 2

```
A demonstration of our new product will take place on { IF { MERGEFIELD City } = " Geneva"  
"December 4h, 2013 on the Place Fusterie" { IF { MERGEFIELD _City } = "Lausanne"  
"December 5th, 2013 on the Place Saint-François" { IF { MERGEFIELD City } = "Montreux"  
"December 6th, 2013 on the Place de la Gare" "You will be informed later on about the date  
and the location" } } }.
```

## 5.5 Ask

It is a rarely used field because users prefer the FILLIN field, fare more user-friendly. Here below the major differences between them :

**Fillin** For an information that varies for each record or each merge  
Example : a special offer  
If the information is set for the whole merge you can ask that the dialog box will appear only once – for the first record.

**Ask** The information is memorized into the **REF field code**, that can be inserted at various places in the document and that can vary for each record or each merge.  
If the information is set for the whole merge you can ask that the dialog box will appear only once – for the first record.

### First insert the ASK field code

Insert Word Field: Ask

**Bookmark:**  
MonthReport

**Prompt:**  
Which month for this report ?

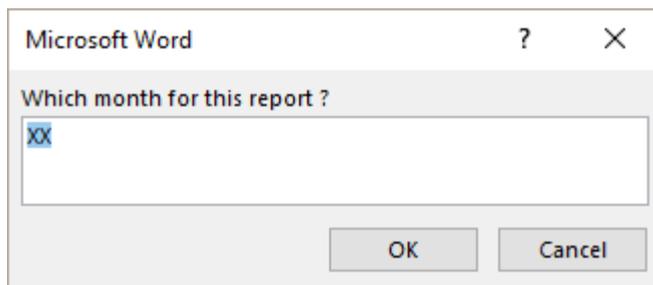
**Default bookmark text:**  
XX

Ask once

OK Cancel

<b>Bookmark</b>	Give the name of the <i>bookmark</i> that will store the text.
<b>Prompt</b>	The question that will be asked and whose answer will be the text stored in the bookmark.
<b>Default bookmark text</b>	The default answer or as in the above screen capture, some letters to ensure that the bookmark is not empty and consequently its reference in the document not hidden.
<b>Ask once</b>	Should the answer change for each record ? If not, check on the box and the question will be ask once only.

As soon as you validate, the following input box will be displayed :



 Pressing the ENTER key does not correspond to clicking on the OK button but it will insert a new line.

Type a real text or leave the XX, it makes no difference because the merge has not started yet.

For the time being the ASK code is invisible. But an ALT + F9 will display it.

#### Then insert the bookmark reference

- Place cursor AFTER the ASK field
- Create an empty code by pressing simultaneously CTRL + F9
- Type REF in capital letters, a space then the name of the bookmark set in the ASK dialog box.
- The REF field is only a string of characters, not yet a code. Press F9 to validate the field code and display the prepared text (real or the XX letters)
- Copy this code everywhere needed.

When merging : the input dialog box will be displayed for you to type the final text. Validate. All REF will be replaced with your typing.

 If you check the document bookmarks ( INSERT Tab – LINKS Group – BOOKMARK Button) you can notice that the bookmark has indeed been created.

#### Syntax of both fields :

```
{ ASK MonthReport "Which month for this report" \d "XX" \o }.
{ REF MonthReport }.
```

## 5.6 Merge Record – Merge Sequence

Merge Record Returns the number of the record in the list of recipients.

Syntax of the field { MERGEREC }  
<<Merge Record #>>

Merge Sequence Returns the merge number. This number can be different from the record number. Example : you run a merge for the records 10 to 15. The **record number** will be 10 but the **merge number** will be 1.

Syntax of the field { MERGESEQ }  
<<Merge Sequence #>>

## 5.7 Next Record – Next Record If

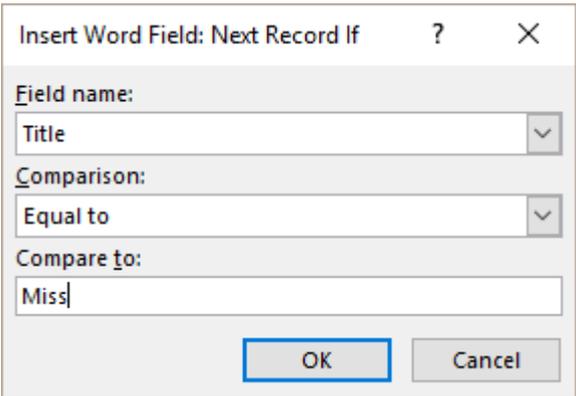
Practically used exclusively with labels. *See the example on labels*  
Or to merge a main document that has been repeated twice on the same page.

NEXT RECORD : <<Next Record>> that is the {NEXT} field

Merges the next record without inserting a page break (in other word without creating a “new document”).

NEXT RECORD IF : <<Next Record If>> That is the following field code NEXTIF {  
MERGEFIELD Title } = "Miss" }

The previous label will be repeated unless the set condition is matched :



Insert Word Field: Next Record If ? X

Field name:  
Title

Comparison:  
Equal to

Compare to:  
Miss

OK Cancel

## 5.8 Examples

### 5.8.1 If ... Then ...Else

*Address Block* et *Greeting Line* have not be used.  
MAIN DOCUMENT

{ MERGEFIELD Name }  
{ MERGEFIELD Company }  
{ MERGEFIELD Address }  
{ MERGEFIELD Postal\_code } {  
11  
MERGEFIELD City }

Geneva, 7<sup>th</sup> December 2013

Réf : {MERGEFIELD NrClient}

{ IF : { MERGEFIELD Title }= "Mr." "Dear Sir" "Dear Madam" },

This year is nearly over. We wish to thank all our clients for their support and we assure you that we shall always make our best to deserve your satisfaction.

Please find enclosed our new catalog for the year 2014. As you will notice, there are a lot of interesting new features : new products, new shops and so on.

Yours faithfully,

Marketing Department  
Luciana Petrolli

{ IF{ MERGEFIELD City } = " GENÈVE " "N.B. A special demonstration of our new product will take place on .... " }

---

#### LIST OF RECIPIENTS

Title	Name	Company	Address	Postal_code	City	NrClient
Mr.	Arnaud Dupond	MODE BOUTIQUE	12 rue des Jardins	1205	GENÈVE	23
	Françoise Durand	L'HOMME ÉLÉGANT	45 ch. des Moulins	1204	GENÈVE	56

## 5.8.2 Fill-in

### MAIN DOCUMENT

Using Address Block, Greeting Line ...

**{ MERGEFIELD Title } { MERGEFIELD  
Name }  
{ MERGEFIELD Company }  
{ MERGEFIELD Address }  
{ MERGEFIELD Postal\_code } {  
MERGEFIELD City }**

Geneva, 9<sup>th</sup> May 2014

**{ MERGEFIELD Title },**

We have the great pleasure to inform you that the latest novel of **{FILLIN "title - author - editor"\o}** has just been released

The author will dedicate the first sold books **{FILLIN "date and location ?" \o}**.

Do not hesitate to come

Press Department  
Janine Dupont

---

### LIST OF RECIPIENTS

Title	Name	Company	Address	Postal_co de	City	NrClient
Monsieur	Arnaud Dupond	GENEVE LIT	12 rue des Jardins	1205	GENÈVE	23
Madame	Françoise Durand	LECTURE POUR TOUS SA	45 ch. des Moulins	1204	GENÈVE	56

### 5.8.3 Skip Record If

MAIN DOCUMENT

{ SKIPIF { MERGEFIELD Client }= "" } Or { SKIPIF { MERGEFIELD Client }<>"Good"}

{ MERGEFIELD Title } { MERGEFIELD  
Name }  
{ MERGEFIELD Company }  
{ MERGEFIELD Address }  
{ MERGEFIELD Postal\_code } {  
MERGEFIELD City }

Geneva, 15<sup>th</sup> October 2014

# We have just moved

Please find here below our new address :

**35 chemin des Coquelicots  
1202 GENÈVE**

You are kindly invited to celebrate this event : food and drinks will be provided ....

**Friday, November 21<sup>st</sup> from 6 p.m**

Marketing Department  
Janine Dupont

---

#### LIST OF RECIPIENTS

Title	Name	Company	Address	Postal_co de	City	Client
Monsieur	Arnaud Dupond	GENEVE LIT	12 rue des Jardins	1205	GENÈVE	Bon
Madame	Françoise Durand	LECTURE POUR TOUS SA	45 ch. des Moulins	1204	GENÈVE	

## 6 Merge as a directory

Seldom used but can be interesting.  
Differences with the other types of merge :

- Letters**            The main document acts like a « skeleton » that will be « dressed up » by the fields of each record contained in the data file. Each entry – we could call it a *set of variables* – will be printed on a separate page.
- Labels**            A table where the size of each cell corresponds to the label measures. When merging, the fields of each record contained in the data file will build the address, cell after cell, with no page break. It is <<Next>> field that manages the cell « fill ».
- Directory**        The main document acts like a « skeleton » but the text does not cover the whole page. The entries of the data file are then linked to the document. When merging, the “skeleton” is repeated on the page for each entry, with no page break.

Here below two samples of a merged directory :

❶

Ourmembers¶

Member number:¶	«MemberNr»¶
Title:¶	«Title»¶
First-Name:¶	«First_Name»¶
Last-Name:¶	«Last_Name»¶
Address:¶	«Address»¶
Zip-code:¶	«ZIP_Code»¶
City:¶	«City»¶
Age:¶	«Age»¶
Date of entry:¶	«DateEntry»¶
Membership fee:¶	«MembershipFee»¶

¶

The merge will repeat *the table + the 2<sup>nd</sup> paragraph that follow it* for each entry.  
(For Word, the first paragraph belongs to the table and will therefore not be repeated. This is why you need to insert one more paragraph, to separate the tables).

The merge will not repeat the title *Our members* because it has been inserted in the header.

❷

Member-number¶	Title¶	First-Name¶	Last-Name¶	Address¶	Zip-code¶	City¶
«MemberNr»¶	«Title»¶	«First_Nam e»¶	«Last_Nam e»¶	«Address»¶	«ZIP_Code»¶	«City»¶

¶

The header row has been placed inside the header so that it will not be repeated. We also worked on the borders to improve the esthetical result. Finally we only added one extra paragraph mark at the end of the table.

*Placing the merge fields can be done as usual.*

Here below the result :

❶

Our members¶

Member number :¶	1¶
Title :¶	Mr.¶
First Name :¶	John¶
Last Name :¶	Smith¶
Address :¶	5 Rue des Bains¶
Zip code :¶	1205¶
City :¶	Geneva¶
Age :¶	45¶
Date of entry :¶	01.01.2009¶
Membership fee :¶	paid¶
¶	
Member number :¶	2¶
Title :¶	Mrs.¶
First Name :¶	Mary¶
Last Name :¶	Kent¶
Address :¶	56 Rue des Aubépines¶
Zip code :¶	1000¶
City :¶	Lausanne¶
Age :¶	35¶
Date of entry :¶	01.01.2009¶
Membership fee :¶	paid¶
¶	
Member number :¶	3¶
Title :¶	Mrs.¶

❷

Member number	Title	First Name	Last Name	Address	Zip code	City	Age	Date of Entry	Membership Fee
1	Mr.	John	Smith	5 Rue des Bains	1205	Geneva	45	01.01.2009	paid
2	Mrs.	Mary	Kent	56 Rue des Aubépines	1000	Lausanne	35	01.01.2009	paid
3	Mrs.	Johanna	Binge	45 Avenue Wendt	1208	Geneva	29	01.02.2009	

 In both cases, « empty » repetitions do occur.

## 7 Merge directly from Outlook

- 1 Although you may "export" the total list of your contacts, it is certainly preferable to select the contacts related to the required mail merge. You can use the standard Windows selecting techniques (CTRL , SHIFT). You can also prepare a category grouping the contacts in question or you may create a contact sub-folder containing them.
- 2 From the main CONTACTS folder or any sub-folder dedicated to your mail merge :  
HOME Tab – ACTIONS Group – MAIL MERGE Button

Mail Merge Contacts

Contacts

All contacts in current view

Only selected contacts

Fields to merge

All contact fields

Contact fields in current view

To filter contacts or to change the columns in the current view, on the View tab, point to Current View, and then choose a command.

Document file

New document

Existing document:  

Contact data file

To save this contact data for future use or reference, specify a file name.

Permanent file:  

Merge options

Document type:

Merge to:

### Contacts

As indicated at point 1.  
All contacts of a subfolder dedicated to the merge?  
Selected contacts from the general list ?

### Fields to merge *All contact fields*

The current view is indifferent, but as you know, some views to not display the contacts mailing address. If you want to make sure to retrieve information such as the street, the city, the postal code ...), then you should select this option. But note that the list will be long and heavy as there are more than a hundred contact fields in Outlook.

*Advantages and drawbacks* : any field will be retrieved but the list are really long

**Fields to merge**  
**Contact fields in current view**

You modify or you create a view showing exactly the fields you need for your mail merge. For instance *Mailing Address* for a "block" address or *Street, Postal Code, City ....*for a "detailed" address. Or you may prefer *Full Name* to *File AS* etc....

Funny to mention, about ten other fields are automatically added to your list even though they are absent from your view  
(*Due\_Date, Flag\_Status, Message\_Class etc...*)

*Advantages and drawbacks* : it is the user's duty to make sure the view contains all the required fields. On the other hand, the lists will be shorter and therefore easier to manage.

**Document file**

A new main document is created in which you may type your text and insert the usual merge field codes. You can also indicate an existing document already containing the main text and field codes.

**Contact data file**

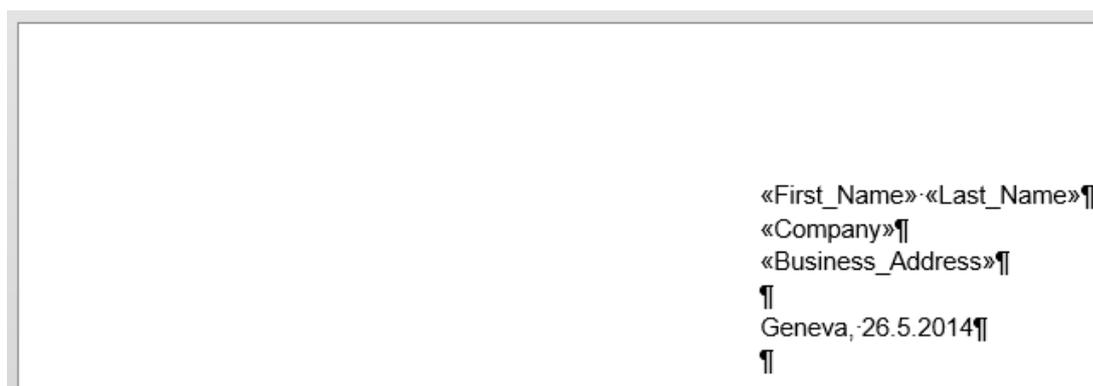
This is your data file containing the chosen fields. You can name and save this document if you wish to use it again later on.

**Merge options**

Choose what you need to create : form letters, labels ....?  
Do you wish to merge into a new document or directly to the printer ?

③ Here below the result in Word :

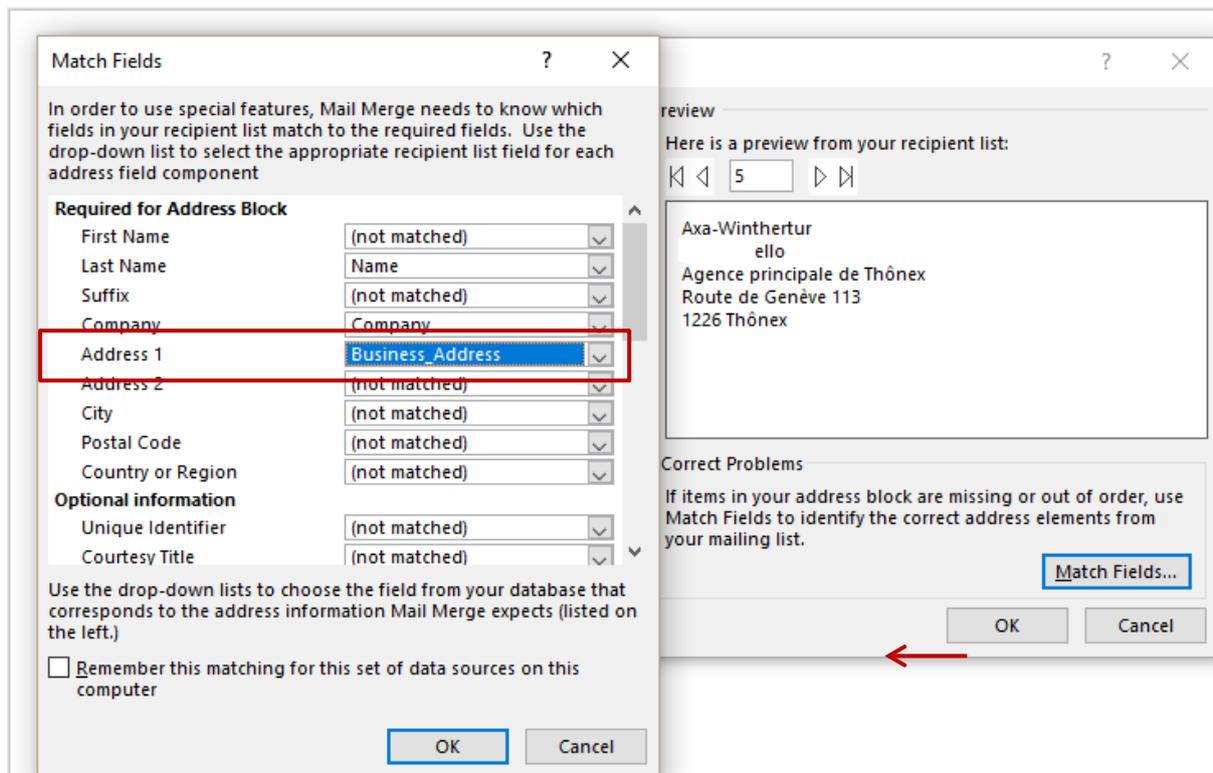
Word is run, an empty main document is created (it is up to you to type the text and insert the fields) and also the data source document (in the TEMP folder in your profil). The usual merge options are available.



**Common problem :**

When you insert an Address Block, the fields between Word and Outlook only partially match (they bear another name in Outlook). It is therefore necessary to *match fields*

In the Address Block dialog box for instance, click on the MATCH FIELDS button :



In the above case : *Country or Region 1* → *Country/Region* for example

The rest of the merge is as usual ...