

# Mail Merge Rules, OK!

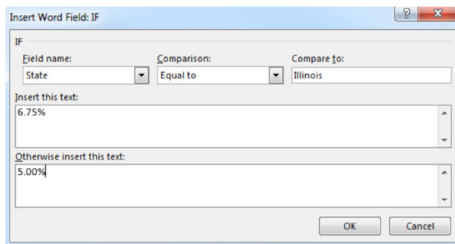
WRITER  
MARIE  
HERMAN

Make the world of mail work for you with Marie Herman's advanced guide...

Mail merge is a powerful function in Microsoft Word, but most of us don't really know how to tap into the more advanced features to reduce our workload. Built-in rules are one of the enhancements that can really make mail merges sing. The instructions that follow are written for Microsoft Word 2013, but they will work with Office 2007 and 2010 as well. This article assumes you know the basics of creating a mail merge.

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

Let's say you have information you want to incorporate into a letter, but you want one phrase to show if they are in a certain geographic area and you want a different phrase to show if they are anywhere else. You might think you need to run two mail merges to accomplish this output or add extra fields to your mail merge data, but the rules in Word will let you do it easily.



Once you have your mail merge set up, then click **Rules** on the **Mailings** tab. One of the options is **If... Then... Else...** When you select that option, the **Insert Word Field If** window appears. Select the appropriate options on the various fields.

With the above example, you would make the **Field Name** the geographic area you are referencing, such as **State**, change the **Comparison** field to **Equals to**, and then type the appropriate value into the **Compare To** field, let's say **Illinois** for this example. Next you'll type the text you want to insert into the **Insert this text** field. In the next field, **Otherwise insert this text**, you'll enter the text you will use for everyone else (in this case everyone *but* Illinois). So, using our above example, you might type "6.75%" in the **Insert This Text** field and "5%" into the **Otherwise Insert This Text** field.

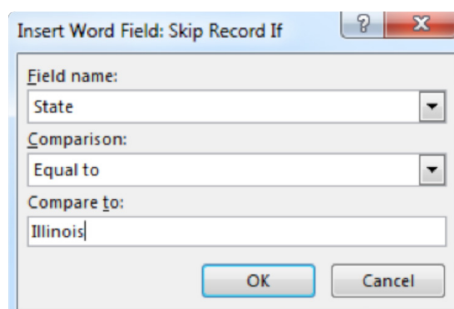
Choices available in the *Comparison* field include **Equal To**, **Not Equal To**, **Less Than**, **Greater**



**Than**, **Less Than** or **Equal To**, **Greater Than** or **Equal To**, **Is Blank**, **Is Not Blank**.

## Skip Record If

There may be times when you want to skip a record entirely. You might choose to skip records where the company name field is blank, for instance. As another example, you might have a database that continually adds new records. You could set up a field in your original data called **Letter Sent**, marking the records where you already sent an introductory letter with an **X**. You can then use the mail merge rule **Skip Record If** to have Word skip that record if there is an **X** in that field. (Then go one step further and create a macro that adds



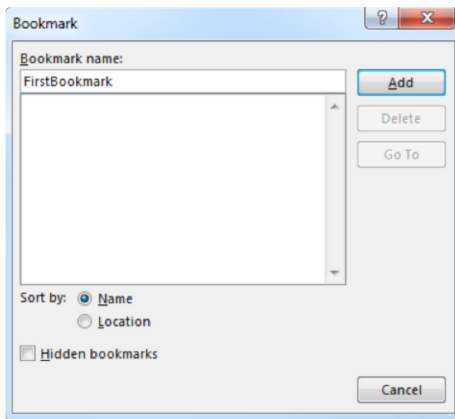
an **X** to the field when you are done – but that's a different article!).

To do that action, once you have set up your mail merge, go to the **Rules** button on the **Mailings** ribbon, select **Skip Record If**. There are three fields on this window: the **Field Name**, the **Comparison**, and the **Compare To** criteria. Using the example of skipping clients who had already received letters, you would use **Letter Sent** in the **Field**, **Equals To** as the **Comparison** field, and **X** as the **Compare To** field. By setting that rule up, the mail merge would skip every record that had an **X** in the **Letter Sent** field.

Using our earlier example of clients in the State of Illinois, we would select **State** as the **Field Name**, **Equal To** as **Comparison** operator, and **Illinois** as the **Compare To** field value.

## Pause the mail merge for input

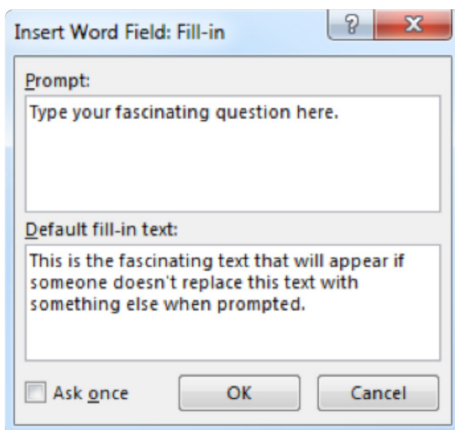
Don't you sometimes wish you could pause a mail merge and have it ask you for input, which you would then insert into your document before processing? Well, actually you can. The rule that allows you to do this is called **Fill-in**.



Go to the **Mailings** ribbon, click **Rules, Fill-in**. Enter any text you want as a **Prompt** (like “type your name here”). If you want to use the same text for all records, click **Ask Once**. Otherwise Word will prompt you for each record. Click **OK**. Word will show you a sample of the prompt. Click **OK**. This will immediately enter the information where you are typing. The challenge is, during the mail merge, it doesn’t show you information about the record you are on, so this is *not* as easy as it sounds.

#### Pause the mail merge for input and then insert that input into multiple places

Don’t you sometimes wish you could pause a mail merge and have it ask you for input... Oh wait a minute, you just learned how to do that. Well, what if you could then insert that input into your document *in multiple places*, rather than retyping it multiple times? Well, ha! You can do that too! The rule that allows you to do this is called **Ask** and it works in conjunction



with bookmarks that you have placed within your mail merge document.

To create the bookmark, go to the **Insert** ribbon and click **Bookmark**. Give your bookmark a name and click **Add**. The bookmark name can be up to 40 characters long with letters, numbers, underscore, but no spaces.

After you create the bookmark, you will go to the place in your mail merge where you want the information to go. Click **Insert Cross-Reference**. Change the **Reference Type** to **Bookmark** and the **Insert Reference To** field to **Bookmark Text**. Uncheck the box to **Insert as Hyperlink**. Click **Insert**. Repeat this as necessary wherever you want the information to be placed in your mail merge document.

Next go to your **Mailings** ribbon, click **Rules**, then click **Ask**. Select the bookmark you just created. In the **Prompt** field, type the text you would like Word to ask when it pauses for input. In the **Default Bookmark Text** field, enter the text you want it to insert if someone doesn’t type new text to replace it. The **Ask Once** check box allows you to insert the text that is typed into all the documents, rather than prompting for each document merge individually.

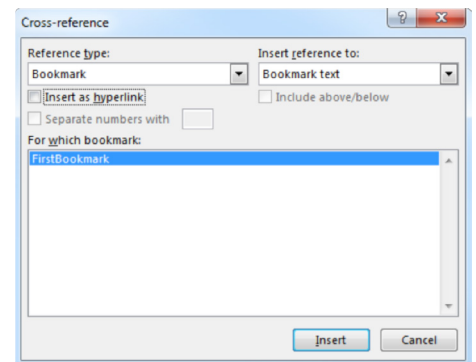
Most commonly, you would use this field for information that you don’t necessarily want to include in your original data spreadsheet, and which might change every time you run the mail merge, such as an upcoming date (please reply by...), a person’s name (assigned to John today, Bill tomorrow), etc.

#### Merge Record # / Merge Sequence #

Sometimes it is handy to be able to provide a reference number in our mail merges. Let’s say you want a mail merge survey to feel anonymous. You might not include a place for people to write their name on the document. However, maybe you secretly still want to know who the document was sent to. You can have the mail merge include a record number or a sequence number on the mail merge document.

To do this, go to **Mailings** and click **Rules**, then **Merge Record #**. This will insert the actual number of the record from the database or

spreadsheet where you are pulling the records. Record numbers are essentially just a line numbering applied to the records in order – the first record is #1, the second record is #2, and so on. So if you have 500 records, and you are including 5 of those records randomly in this particular mail merge, those record numbers would be printed on the appropriate page of your mail merge document (for example, #52, 163, 269, 384, 496).

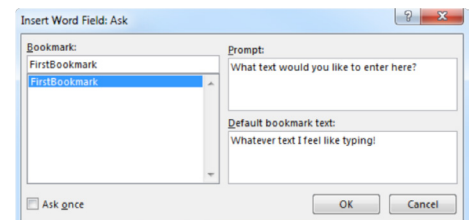


If you instead choose to use a sequence number, you would go to **Mailings**, click **Rules**, then **Merge Seq #**. It looks like nothing happened, but when you run the mail merge, you will see the sequence of numbers printed in the mail merge document (1, 2, 3, 4, 5).

If you are printing all the records in your database, the record number and the sequence number would be the same. But when you print a portion of your database (for instance when you filter by zip code), the two numbers won’t match.

#### Final thought

I encourage you to explore the Rules that are available to you in Microsoft Word mail merges. There is so much that can be done to fine tune and tweak our documents, if only we learn how to do it.



#### about the author



Marie Herman CAP-OM, ACS operates a successful business, MRH Enterprises ([www.mrbenterprises.com](http://www.mrbenterprises.com)), whose services include teaching computer and other classes in-person and via the internet, writing articles, and conducting workshops and other speaking engagements. She can be reached at [execsecmagazine@mrbenterprises.com](mailto:execsecmagazine@mrbenterprises.com).

