

The Word XP: Mail Merge Notes is intended for those users who are familiar with the Mail Merge Process. You must have familiarity with Word and the Mail Merge Wizard to fully understand these Problems and Solutions. It is NOT intended for a beginner. If you are a beginner, please review the Mail Merge manual to get acquainted with the process prior to using this guide.

**Thank you.
Software Training Services**

Problem A

You experience problems with formatting when you are completing a mail merge. When you preview the merge, you will notice that fields are not formatted correctly. This may occur when you are using a pre-XP data source and mail merge file or when you are starting a new mail merge with a new data source. Some of the formatting that may be affected:

- Currency
- Phone Numbers
- Dates
- Fields with Letters and Number combinations
- Capitalized letters
- Percentages
- Zip Codes

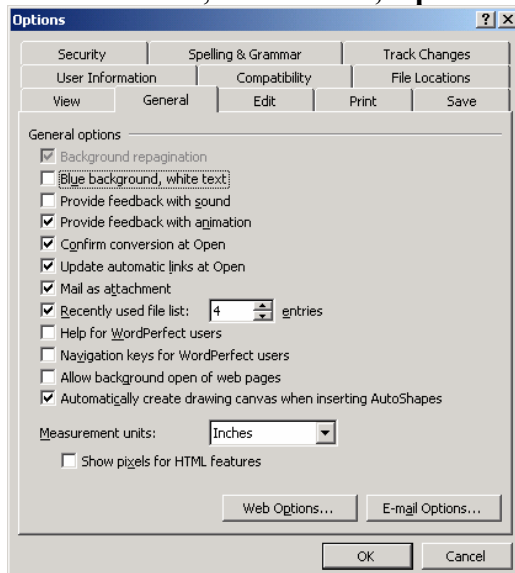
Solution A

Word XP has introduced a new connection method for connecting to the data file. In previous versions of Word, Dynamic Data Exchange (DDE) was used. Now, OLEDB is used and this new type of connection expects Word to provide formatting. There are two ways to fix most of these formatting issues.

1. Apply formatting by using a switch (see Problem/Solution B) to correct the fields
2. Revert to the DDE connection that was used in previous versions of Word.

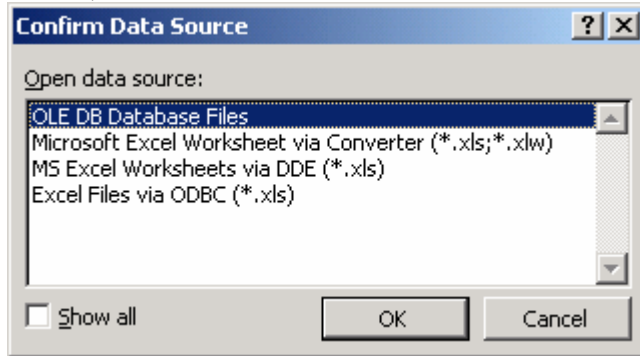
This Solution outlines how to revert to the DDE connection that was used in previous versions of Word.

1. From the menu, select **Tools, Options**. Advance to the General tab.



2. Turn on the option for **Confirm conversion at Open** (resulting in a checkmark in the field). Select **OK**.

- When you are working through the mail merge, and after you select the data source, the Confirm Data Source box returns:



- In most cases, you will select the option for **MS Excel Worksheets via DDE (*.xls)**. Select **OK**.
- Complete the mail merge and the fields should be formatted as they appear in the Excel spreadsheet.

Note: See Problem/Solution B for instructions on changing the formatting for a field using a switch. If you would prefer to use switches, then you do not need to follow this Solution. Or when you get to the Confirm Data Source box, select OLE DB Database.

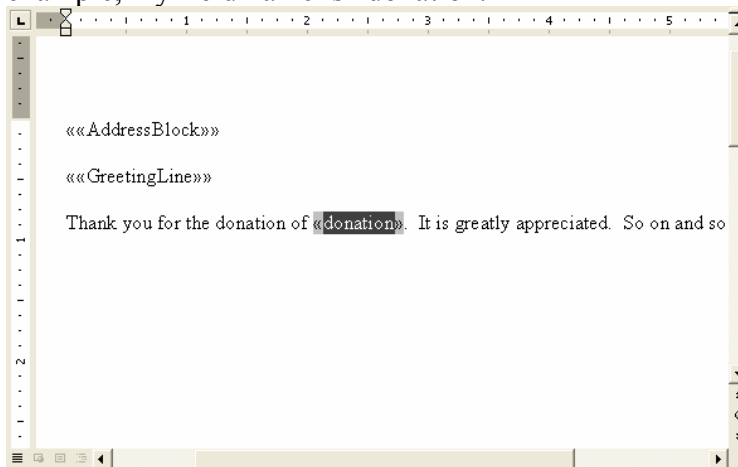
Problem B

Your data sheet has formatted currency, such as \$2,345.00 and when you complete the merge, your data appears as follows: 2345. See notes at the end for instruction on using phone numbers and dates.

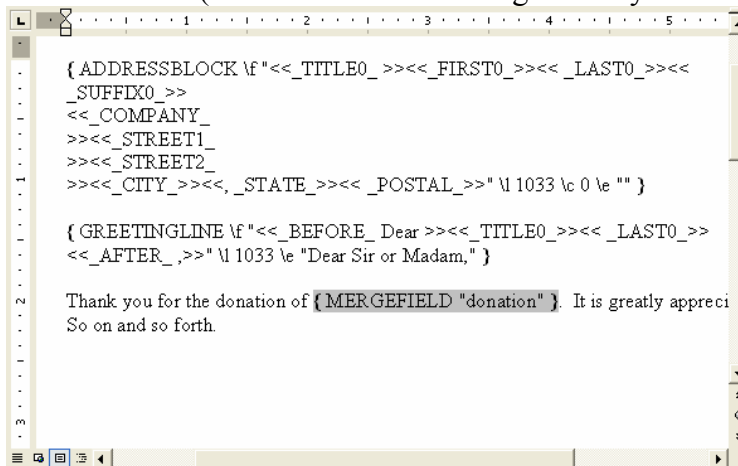
Solution B

This solution uses switches in Word to format the fields correctly. If you use formatted fields from Excel, you may want to consider using Problem/Solution A. That is a more permanent fix.

1. Follow the mail merge steps of choosing the document type, locating the data source, select recipients and inserting the merge fields into the letter.
2. Select the merge field that contains currency from the main document. In my example, my field name is "donation."



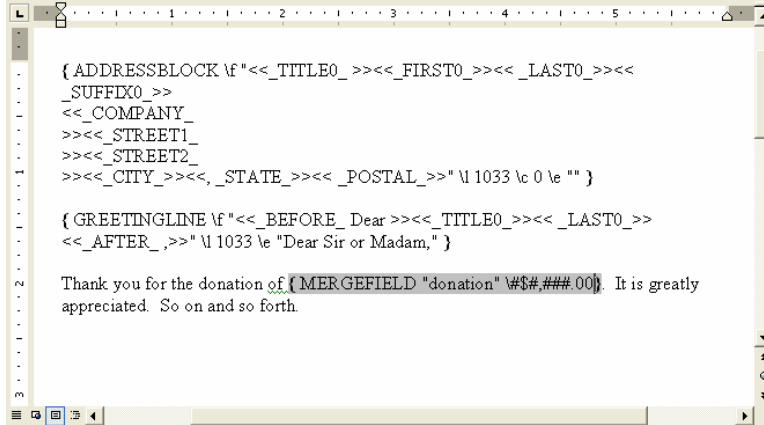
3. After you select the merge field press **Alt + F9** and the field will change and reveal its code (as well as the other merge fields you have created.)



- After the end quote of the merge field name (with no spaces before, after, or in between) type:

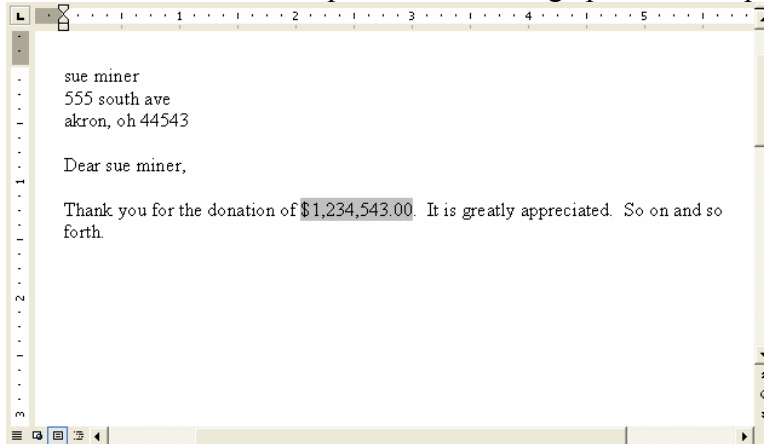
\#\$#,###.00

The main document will then appear similar to the following:



Note: This must be typed inside the }

- Press **Alt + F9** again to remove the field codes.
- Proceed with the next step of the mail merge process and preview the letters.



Notes:

For phone numbers, use the switch (step 4) of:

\# ### - ### - #####

or

\# "(000) - 000 - 0000"

For dates, use the switch (step 4) of:

\@ "MMM d, yyyy"

Problem D

When you get to the Preview Step, and you advance through the labels or letters it appears that there are too many labels or it appears that recipients are repeating.

Solution D

Using the Preview Step is not an accurate showing of what labels and how the labels will print. If you want a true representation of what will print, advance to the next step **Complete the Merge** and select the link to **Edit individual labels**. This will open a new (and separate) file which is a true representation of what is going to print.

For Labels:

When you use the forward and backwards arrows in the Preview Step of the Mail Merge Wizard, you are only advancing one label at a time and NOT one page at a time. When you click on the forward button, it will advance the next label to the top left position on the document. You can only advance through the labels by using the forward button and you cannot advance from page to page when previewing labels.

For Letters:

When you use the forward and backwards arrows in the Preview Step of the Mail Merge Wizard, you will advance from one sample letter to the next. This will show an accurate representation of what is going to print. You can only go to the next letter by using the forward arrow. You cannot advance through them all by using the scroll bar.

Other:

If you have a mail merge document with special formatting, such as three items per page (BUT NOT FOR LABELS) the Preview Step is similar to that when you are working with labels. It will appear that recipients are being repeated when using the forward and backward arrows. When you use these buttons, you are only advancing one record at a time. Use the explanation at the top of this Solution to get a true representation of what will print. You can only advance through the records by using the forward button and you cannot advance through them by using the scroll bar.