|  |
| --- |
| **Making your mail merge “intelligent” by using IF fields** |

Article contributed by [**Dave Rado**](http://word.mvps.org/AboutMVPs/dave_rado.htm)

|  |  |
| --- | --- |
| **1.** | [**Why and How**](http://word.mvps.org/faqs/mailmerge/MMergeIfFieldsContent.htm#WhyAndHow) |
| **2.** | [**Suppressing unwanted spaces and commas within a line of an address**](http://word.mvps.org/faqs/mailmerge/MMergeIfFieldsContent.htm#Suppress) |
| **3.** | [**Displaying gender-specific information in a letter**](http://word.mvps.org/faqs/mailmerge/MMergeIfFieldsContent.htm#Gender) |
| **4.** | [**Inserting different text, depending on various mail merge field conditions, in a document such as an offer letter or contract**](http://word.mvps.org/faqs/mailmerge/MMergeIfFieldsContent.htm#Offer) |
| **5.** | [**Inserting files at certain points in a document, depending on various conditions**](http://word.mvps.org/faqs/mailmerge/MMergeIfFieldsContent.htm#Report) |
| **6.** | [**Using (or not using) the MergeFormat switch**](http://word.mvps.org/faqs/mailmerge/MMergeIfFieldsContent.htm#MergeFormat) **(to return to top, press Ctrl+Home)** |

|  |  |
| --- | --- |
| **1.** | **Why and How**  Almost any mail merge will work better if you use IF fields, as the frequently used scenarios discussed below attempt to illustrate.  At their simplest, they can be used to suppress unwanted spaces and commas in an address, if a field is blank. They can also be used in the main body of a letter or other mail merge document for things like inserting “his” or “her”, “he” or “she”, depending on gender. At a more sophisticated level they can be used to insert different series of boilerplate files, depending on certain conditions stored in the data file, which could be used, for example, in an Employee Contract template.  At its simplest, an IF field works as follows: If a condition is met display one result, otherwise display another. A field of this sort would look a bit like this:  **{** IF **[**Condition**] [**Display Result 1**]**[Display Result 2**]** **}**  Where the curly brackets represent field braces, which you must insert by pressing**Ctrl+F9** (you can't type them). A real example might be:  **{** IF **{** MERGEFIELD Gender **}** = "Male" "Him" "Her" **}**  Again, *all*of the curly brackets must be inserted by pressing **Ctrl+F9**.  IF fields can be made more powerful than this, because you can nest them within each other.  For example, you can create a field with logic such as: “If Condition 1 is met, then if Condition 2 is *also*met, display Result 1”. This is equivalent to saying “if both conditions are met, display Result 1”; but unfortunately you can't use “and” in Word fields.  Such a field would look something this:  **{** IF **[**Condition 1**] {** IF **[**Condition 2**] [**Display Result 1**]** "" **}**"" **}**  The easiest way to create nested fields of this type is to create them separately, then cut and paste one field into the other.  You can also simulate “Or” statements, by using the logic: “If Condition 1 *is*met, display Result 1; on the other hand, if Condition 1 *isn't*met, but Condition 2 *is*met, also display Result 1”. That is a rather tortuous way of saying “if either condition is met, display this”, but it *does*work. |

|  |  |
| --- | --- |
| **2.** | **Suppressing unwanted spaces and commas within a line of an address**  A mail merge address frequently begins with a **Title** field (Mr/Ms/Mrs/Dr/etc). Typically, you would want the Title field to  be followed by a FirstName field; and you would want a space between the title and the first name.  But what if some of the records have a blank Title field? You don't want the address to start with a space! So to prevent that happening you can use a construction like the following:  **{** MERGEFIELD Title **}{** IF **{** MERGEFIELD Title **}** = "" "" " " **}**  In other words, if there is a title, display it, and follow it with a space; if there *isn't* a title, don't follow it with anything.  Or looking at the construction in more detail:  **{** MERGEFIELD Title **}**  inserts the title (if ther is one).  **{** IF { MERGEFIELD Title } = "" "" " " **}**  means if the title is blank (""), insert nothing (""), otherwise insert a space (" ").  Further down, you might want to have (in the UK) “Town, County” or (in the US)“City, State” on a single line. If, for a particular record, both fields contain some data, you would want the two fields to be separated by a comma and a space. If either field is blank, you don't want a space or a comma. You can achieve this as follows:  **{** MERGEFIELD Town **}{** IF **{** MERGEFIELD Town **}** = "" "" **{** IF **{** MERGEFIELD County **}** = "" "" ", " **}** **}{** MERGEFIELD County **}**  This inserts the Town if there is one; if there is no town, it inserts nothing in front of the County field. If there *is*a town, but no county, nothing is inserted between the two fields. Finally, if there is both a town and a county, a comma and a space is inserted between the two fields.  http://word.mvps.org/Images/BulletShadedSmall.jpg http://word.mvps.org/Images/BulletShadedSmall.jpg http://word.mvps.org/Images/BulletShadedSmall.jpg  You can, of course, apply this principle outside addresses. For example, suppose you want to output a line like:  **Subject:** <<Subject>>  when the database field <<subject>> is not blank, but suppress the line completely when it is blank. To achieve this, tick the “Suppress Blank Lines in Addresses” field in the Mail Merge dialog, and use the field:  **{** IF **{** MERGEFIELD Subject **}** = "" "" "Subject: " **}{** MERGEFIELD Subject **}** |

|  |  |
| --- | --- |
| **3.** | **Displaying gender-specific information in a letter**  You may have a mail merge letter which ends: “Please feel free to ring «AccountMgr» if you have any queries. [He or She] will be glad to do anything [he or she] can to help.”  This is simple. In your Data Source, create a column called “AcctMgrGender”. Fill it in with “M” or “F” against every row. Then at its simplest, you could use:  **{** IF **{** MERGEFIELD AcctMgrGender **}** = "M" "He" "She" **}**  and  **{** IF **{** MERGEFIELD AcctMgrGender **}** = "M" "he" "she" **}**  respectively. However that would display “He” and “he” against any records where the “AcctMgrGender” field was blank – dangerous! One way of testing for this would be to use [**Mail Merge Query Options**](http://word.mvps.org/faqs/mailmerge/MMergeQueryOptions.htm) to display all records for which the field was blank; another would be to sort the Data Source on the “AcctMgrGender” field. But you could have an additional safeguard by using a field like the following:  **{** IF **{** MERGEFIELD AcctMgrGender **}** = "M" "he" **{** IF **{** MERGEFIELD AcctMgrGender **}** = "F" "she" "WARNING! YOU FORGOT TO PUT THIS PERSON'S GENDER IN THE DATA SOURCE!!" **}** **}** |
| **4.** | **Inserting different text, depending on various mail merge field conditions, in a document such as an offer letter or contract**  The same principle can be taken to fairly high levels of sophistication. For example, consider that you have a recruitment spreadsheet in which one of the columns flags when an offer letter needs to be sent. You can use [**Mail Merge Query Options**](http://word.mvps.org/faqs/mailmerge/MMergeQueryOptions.htm) to create a mailshot to all those people to whom an offer letter needs to be sent. All sorts of details in the offer letter will, of course, vary, depending on information in the Excel spreadsheet.  Here is a relatively simple example that you can extrapolate from to create a sophisticated offer letter template.  We are now pleased to confirm our offer for the position of **{** MERGEFIELD JobTitle **}** **{** IF**{** MERGEFIELD StartDate **}** = "" ". Please advise us of your earliest start date" ", with effect from " **}{** MERGEFIELD StartDate **}**.  Which will end up **either** reading something like this:   |  |  | | --- | --- | |  | We are now pleased to confirm our offer for the position of General Dogsbody. Please advise us of your earliest start date. |   ... **or** something like this:   |  |  | | --- | --- | |  | We are now pleased to confirm our offer for the position of General Dogsbody, with effect from 1 January 2001. | |

|  |  |
| --- | --- |
| **5.** | **Inserting files at certain points in a document,  depending on various conditions**  You can combine IF fields MERGE fields and INCLUDETEXT fields into a single nested field to insert one of two (or more) files, depending on a flag you set in your Data Source, as follows:  **{** IF **{** MERGEFIELD ReportType **}** = "PDD" **{** INCLUDETEXT I:\\Boilerplates\\PDD1.doc **}** **{**INCLUDETEXT I:\\Boilerplates\\Std1.doc **}** **}**  To insert part, but not all, of a file, you can mark with a bookmark the section of the file which you want to insert, then use a field like:  **{** IF **{** MERGEFIELD ReportType **}** = "PDD" **{** INCLUDETEXT I:\\Boilerplates\\PDD1.doc MyBookmarkName **}** **{** INCLUDETEXT I:\\Boilerplates\\Std1.doc AnotherBookmarkName**}}** |
| **6.** | **Using (or not using) the MergeFormat switch**  To quote from Help, the MERGEFORMAT  switch applies “the formatting of the previous result to the new result. For example, if you select the name displayed by the field:  **{** AUTHOR \\* MERGEFORMAT **}**  and apply bold formatting, Word retains the bold formatting when the field is updated when the author name changes.”  This may or may not the effect you want. If it *is*, just add the switch at the end of all relevant fields, e.g.:  **{** IF **{** MERGEFIELD Gender **}** = "Male" "Him" "Her" \\* MERGEFORMAT **}**  By default, this switch is added automatically if you insert your fields using the**Insert+Field** menu. If you don't want it, you can de-select the “Preserve formatting during updates” checkbox; or you can display field codes (**Alt+F9**) and delete the switch manually. |