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Author: Nico J M Henn
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Introduction	1
Where to start	1
Alt + F9	1
Insert Fields	2
Formats	4
Date formats	4
Text formats	4
Numeric formats	4

Introduction

Mail merge is one of the underused functions in Microsoft Word. It allows one to connect to external data sources in order to **print or email** information to **distribution groups**. The external data sources are numerous and include electronic address books like Microsoft Outlook, structured lists in Microsoft Excel, Microsoft SQL databases, structured Rich Text lists or structured text files. Data can actually come from **any ODBC¹ data source**.

The data one encounters while using Mail Merge might not always be consistent for display purposes. This includes text fields that are captured in combinations of lower, upper, title and sentence case. Examples are where database maintenance personnel capture a contact's name as **UPPERCASE** and we want a letter to the contact to display their surname as **Titlecase**.

It also includes date fields that might not display as one would prefer. An example would be where a date shows as **01/01/2000**, but one would like to see it **displayed** as **1 January 2006**.

Where to start

Alt + F9

The first point to remember is that one would probably already have started a Mail Merge document. This document would then include various Mail Merge fields. Word normally does not show the 'code' behind these fields, but one can easily (and temporarily) display this code. To achieve this while in a Mail Merge document, press Alt + F9.

If you do not already have a Mail Merge document open, open such a document before following the next step, or skip to the section **Insert Fields**

Do it now

Ensure that you are in a Mail Merge document and press Alt + F9. This will 'reveal' the code and show something similar to:

```
{CREATEDATE \@ "dd/MM/yyyy" \* MERGEFORMAT }
```

Press Alt + F9 again to go back to normal view.

Tip: Alt + F9 is also handy to reveal code in headers and footers, which one can then copy and use in other sections in Microsoft Word.

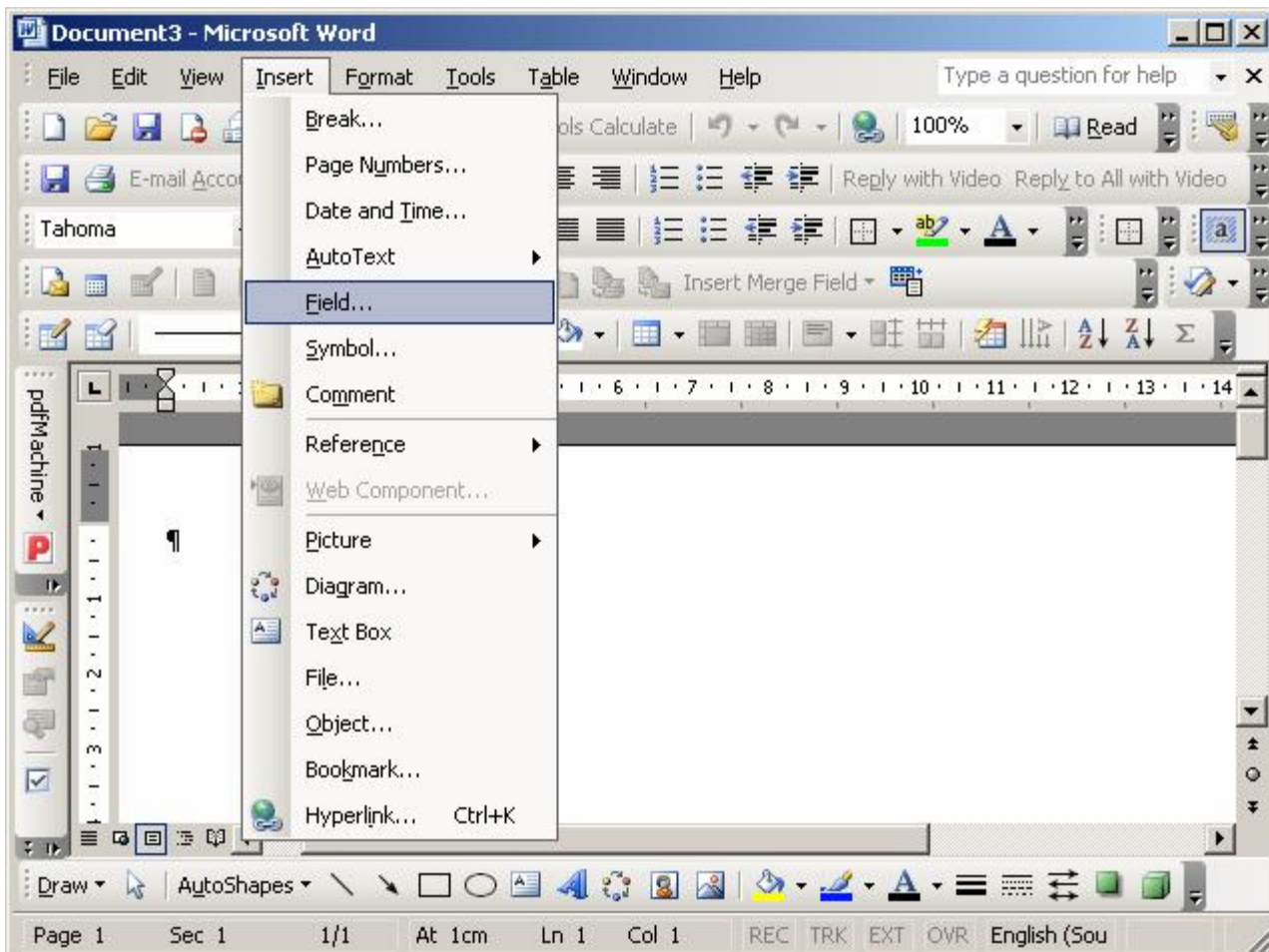
Insert Fields

Let us see what fields are available. The easiest way is often to look at what Microsoft provide as standard options.

Do it now

On an empty space in your Word Document, click on Insert | Field (**image 01**)

Image 01



The Field dialog box will appear (**image 02**). Ensure that '(All)' categories is selected and in Field Names, scroll down to CreateDate. Under Field Properties click on one of the date formats that suite your needs.

Tip: To see a preview of what Word will do, click on 'Field Codes'. You might see something like CREATEDATE \@ "dd/MM/yyyy". Click 'Hide Codes'.

Click OK.

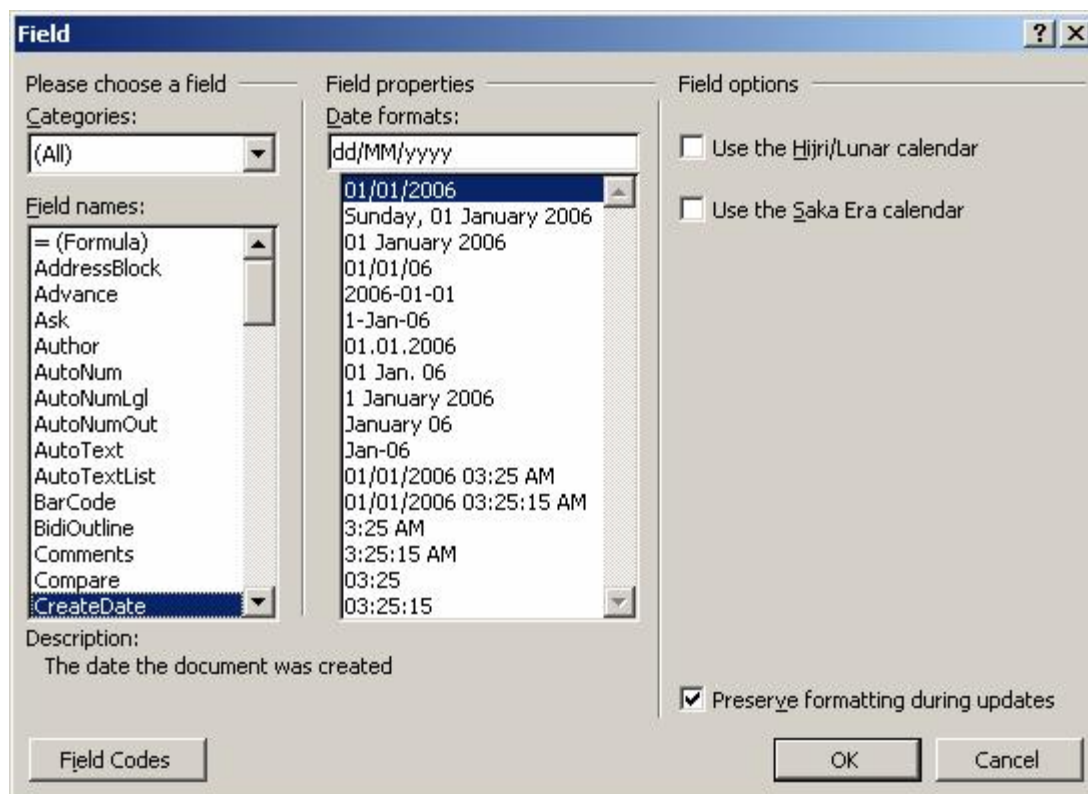
If you do not have 'reveal codes' switched on you will see a date similar to:

01/01/2006

If you have 'reveal codes' switched on (Alt + F9) you will see something similar to:

{CREATEDATE \@ "dd/MM/yyyy" * MERGEFORMAT }

Image 02



Note: The { and } are not the same as the ones on your keyboard. One can only create these characters by either using a Mail Merge Field, Inserting a Field as per **image 01** or by pressing Ctrl + F9.

Do it now

Press Ctrl + F9 in any empty space in your Word document. The left { and right } is created and you can type your own code.



Note: Did you see the \@? This is the start of a date formatting section after which we tell the system to format the date as double day, then a forward slash, then double month followed by another forward slash and then the year in the format century, year.

Formats

Date formats

Some common date formats are:

d	1
dd	01
ddd	Mon
dddd	Monday

M	1
MM	01
MMM	Jan
MMMM	January

yy	06
yyyy	2006

Tip: The formats above can also be used in Microsoft Excel.

Note: It is very important to use capital 'M's as per the example above. Microsoft Word does not change lowercase 'm' to uppercase and will display an incorrect date with the use of lowercase 'm'. Microsoft Excel will convert a lowercase 'm' to an uppercase 'M'.

Text formats

Handy text formats are:

* Upper * Lower * FirstCap * Caps

Numeric formats

Handy numeric formats are:

\# "#,##0"
\# "#,##0.00"
\# "0"
\# "0%"
\# "0.00%"
\# "R#,##0.00;(R#,##0.00);"-"

Tip: The formats above can also be used in Microsoft Excel. Microsoft Excel has even more formats available.

¹ For more information on ODBC access email nico.henn@iterate.co.za.

Document Change History

Date of Change	Changed By	Ver	Details/Summary of Change	Reviewed by	Date
2006-08-18	NJMH	1.01	First Draft		
2006-08-23	NJMH	1.02	Formatting changes		