

Formatting Merge Fields

When creating a merge document there may be times when the information brought in by the data source is not formatted in the way you wish it to be presented in your final document.

One of the most common situations is when your data source contains fields with dates. In your data source these are written with the format, 16/01/2005, but you may wish to use a longer format 16 January 2005. You could change the format of the field in your data source. However this may not be practical or possible. Using switches can allow you to change the format of mail merge field within the Word document. The following guide provides an introduction to the most commonly used Word switches.

What are Switches?

Switches are instructions that modify the format of information in a field. There are three general switches that can be used with fields.

1. **Format (*)** – used to specify number formats, capitalization and character formatting.
2. **Numeric (\#)** – used when displaying numbers, includes setting the number of decimal places and using currency symbols
3. **Date –Time (\@)** – used to set the format of date and time fields

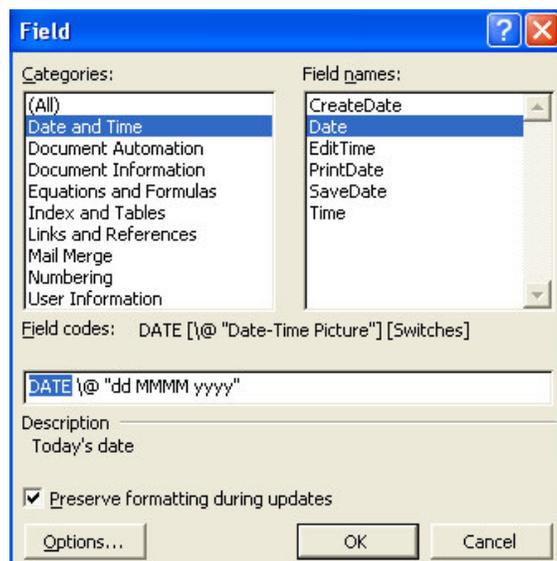
Formatting dates

Dates can be formatted using the Date – Time switch in Word.

In this example, Deadline is a merge field that will enter the date into the merged letter. Without using a switch to format this field, the date may appear as 16/01/2005. You may wish to represent this field as 16 January 2005.

Here's how you would modify this merge field's format:

1. Choose **Field** from the **Insert** menu. Choose **Date and Time**.



2. Enter the following in the box:

\@ “dd MMMM yyyy”

Click on **OK**.

3. Show the coded information for the field, pressing Alt-f9.

The word field will display as follows:

{ = \@ “dd MMMM yyyy” *MERGEFORMAT }

\@ “dd MMMM yyyy” gives the format 16 January 2005
\@ “dd/MM/yyyy” gives the format 16/01/2005

1. Enter the Deadline merge field before the switch by typing MERGEFIELD Deadline.

The word field should now display as follows:

{ MERGEFIELD Deadline \@ “dd MMMM yyyy” * MERGEFORMAT }

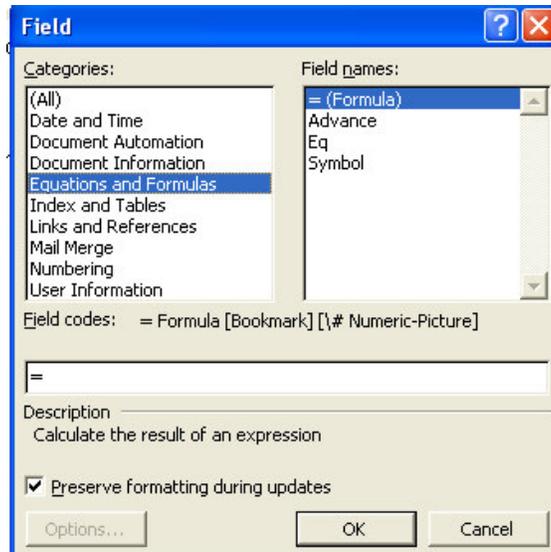
Formatting numbers

Numbers can be formatted using the Numeric switch in Word. Currency values can be changed so that the correct number of decimal places is always displayed in the merged document.

In this example, Fee_Due is a merge field that will enter the Fee to be paid. Without using a switch to format this field, it may appear as £ 666. You want to represent this field as £ 666.00.

Here's how you would modify this merge field's format:

1. Choose **Field** from the **Insert** menu. Choose **Equations and Formulas**.



2. Enter the following in the box:

`\# £###.00`

Click on **OK**.

3. Show the coded information for the field, pressing Alt-f9.

The word field will display as follows:

`{ = \# £###.00 *MERGEFORMAT }`

4. Enter the Fee_Due merge field before the switch by typing MERGEFIELD Fee_Due.

The word field should now display as follows:

`{ MERGEFIELD Fee_Due \# £###.00 *MERGEFORMAT }`

| Item | Description |
|---------------------------|--|
| 0 (zero) | Represents a numeric place. If the result does not include a digit in that place, Word displays a zero. Example: <code>{ = 4 + 5 \# 00.00 }</code> displays "09.00" |
| # | Represents a numeric place. If the result does not include a digit in that place, Word displays a space. Example: <code>{ = 9 + 6 \# \$### }</code> displays "\$ 15" |
| . (decimal point) | Determines the decimal point position |
| , (digit grouping symbol) | Separates a series of three digits <code>{ = NetProfit \# £#,###,### }</code> displays "£2,546,800". |

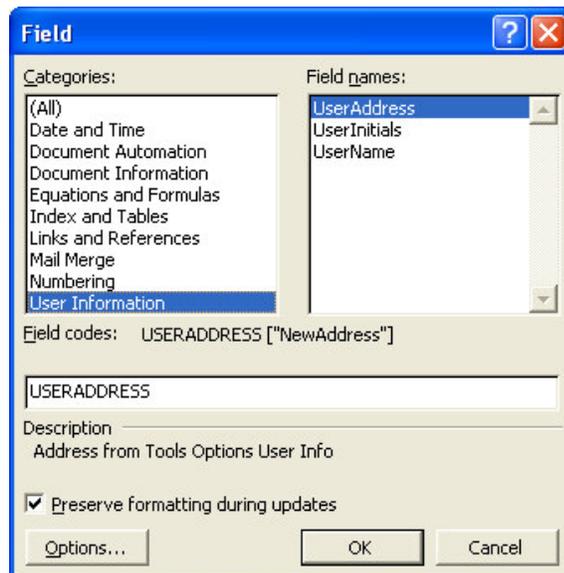
Changing the case of the mail merge field

The case of a data within a merge field can be changed using the Format switch in Word.

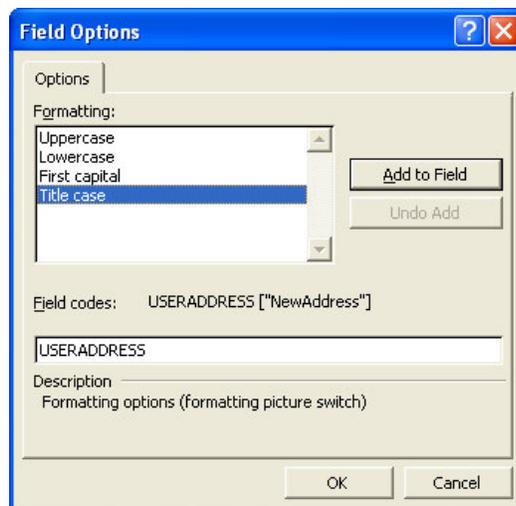
In this example, Manager is a merge field that displays the manager's name in capitals. You wish to display the contents of the field as Mr John Smith, instead of MR JOHN SMITH.

Here's is how you word make this change using a Word switch:

1. Choose **Field** from the **Insert** menu. Choose **User Information**



2. Click on Options.. and choose the Title Case option



3. Click on **Add to Field**. Click on **OK**.
4. Show the coded information for the field, by pressing Alt-f9.

The word field will display as follows:

{ USERADDRESS * Caps * MERGEFORMAT }

5. Enter the Manager merge field before the switch by typing MERGEFIELD Manager.

The word field should now display as follows:

{ MERGEFIELD Manager * Caps * MERGEFORMAT }

Shortcut keys that are helpful when working with merge fields

| Windows Keys | Action |
|--------------------|--|
| F9 | Update / Refresh a selected field |
| Shift – f9 | Display/ Hide field code (selected field) |
| Alt – f9 | Display / Hide All field codes (all fields in a document) |
| Ctrl – f9 | Create an Empty field (Insert { } braces) |
| Ctrl-Shift-f9 | Turn field into text (Delete all field coding and replace with the field result) |
| f11 | Go to Next Field |
| Shift-f11 | Go to Previous Field |
| Ctrl – f11 | Lock field 9 (Prevents manual or automatic updates) |
| Ctrl – Shift – f11 | Unlock Field (To allow updating) |
| Alt-Shift-D | Insert a Date Field |