

Mail Merge-If Then Else Rule: Choose Different Letters Based on a Field's Contents

Using the If... Then...Else... Field

If you edit the field directly (by right-clicking it in the document, choosing Toggle Field Codes, and then entering text and field codes within the field brackets that appear), you can gain even more control of your If...Then...Else... field.

For example, you can insert an { INCLUDETEXT } field as either the Then or Else value, and the { INCLUDETEXT } field can retrieve a large block of text from the source document you choose. In fact, the source document that { INCLUDETEXT } brings into your merge document can even have its own merge fields, as long as they access the same data source.

This technique makes it convenient to create mail merges that send two entirely different letters to two categories of recipients – for example, those who are on time with their payments and those who are late.

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Using the Set Bookmark Field

The Set Bookmark field (which actually inserts a field simply called Set) sets the contents of a bookmark, much as you've already see Ask do. But there's one big difference: The user isn't prompted for the contents of these bookmarks during the mail merge. Rather, you set the contents of the bookmark ahead of time. You can then include the bookmark in another field, such as an If...Then...Else... field.

To create a { SET } field in your main document, click the Insert Word Field button and choose Set Bookmark. The Insert Word Field: Set dialog box opens.

In the Bookmark text box, type the name you want to give to the bookmark. In the Value text box, type the text you want the bookmark to represent. To print the information, you must insert a Ref or Bookmark field in the document or include the bookmark in an Ask or If...Then...Else... field.

How to Create a Bookmark

Select the text which the bookmark will refer to
Then click the Insert menu
Select Bookmark...
Type the bookmark name (no spaces)
Click Add



