

Advanced Mail Merge
Using If and Nested If Statements

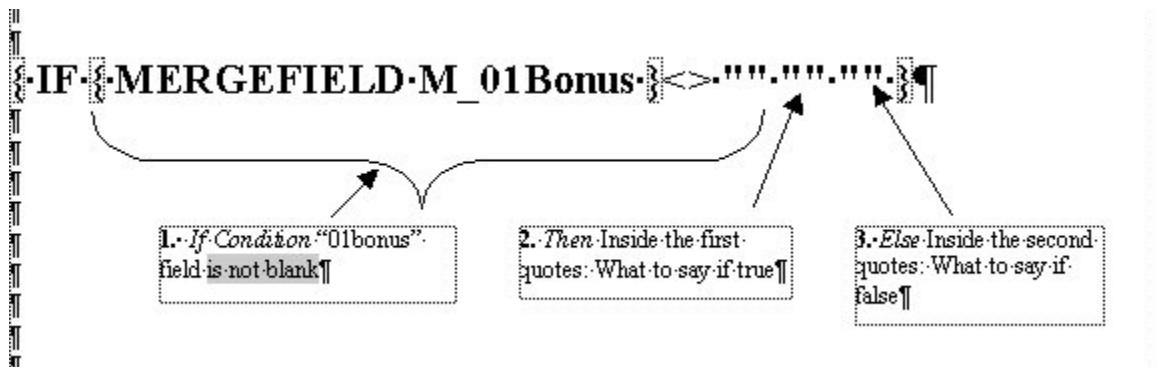
If Statements

An “If” statement allows you to customize your document, so that it says one things for certain people and another thing for others, based on criteria set by you.

Anatomy of an If Statement

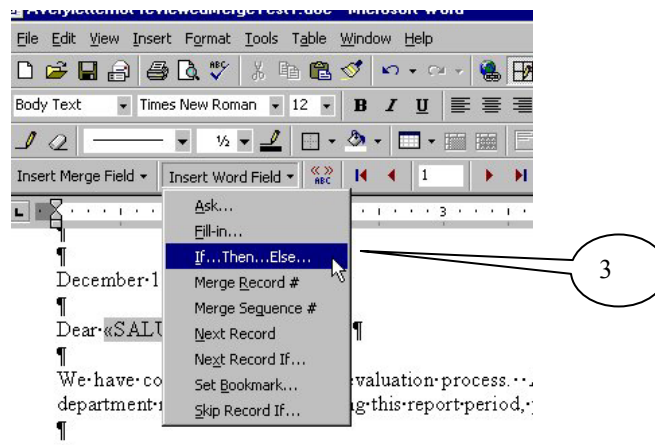
An If statement is usually portrayed as **If...Then...Else**, and consists of 3 parts:

1. Condition (If): A statement that Word can determine is true or false, such as a particular field in your data source being equal to, greater than or less than a particular value (For example: Last Name = Jones, Salary < \$5,000, or the Bonus field is ‘not blank’) In this example, we will use a bonus field that contains a dollar amount for people who are getting that bonus. For others, the field is blank.
2. What to do if the statement is true (Then): The user types in text that should appear in the document if the condition is true. For example, if the bonus field is not blank, then the document should say “You will be receiving a bonus for your exemplary work.”
3. What to do if the statement is false (Else): What does Word say if the bonus field is blank? The user can type in something else the document should say, or this part of the statement can be left blank, if the user wants to say nothing about bonuses to people who aren’t getting them.

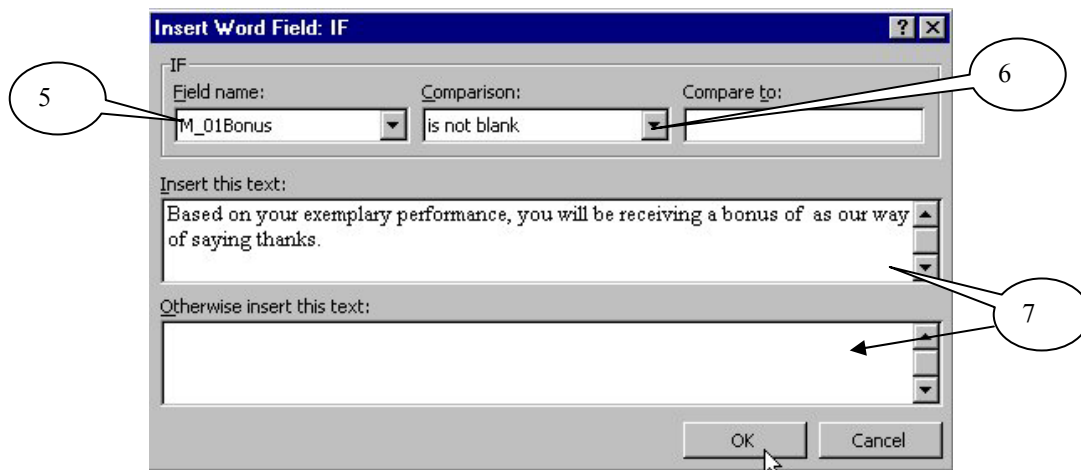


Creating an If Statement in a Mail Merge:

1. Create your merge form letter and insert the merge fields as you normally would.
2. Place your flashing insertion point in the location where you wish the “if” statement to appear.
3. On the Mail Merge Toolbar, next to the Insert Merge Field button, you will see an “Insert Word Field” button. Click that button, and from the list that appears, select If...Then...Else.



4. In the *Insert Word Field: If* window, you can begin to create the “if” statement, by setting up the “condition”.
5. In the field name area, select the field name that will be used in your condition from the drop-down list. (In this example, the field is M_01Bonus).
6. Select the comparison from the drop-down list (in this example, the condition is that the 01Bonus field is not blank).
7. Type in the text that should be returned if the condition is true and the text that should be returned if the condition is false and click OK.



If your scenario is straightforward, that will complete your if statement. However, your if statement may need to be more complex than this window can handle. For example, you may wish to include a merge field to report how much the bonus is going to be. In this case, you can click OK before you type in the text, and enter those things directly into the code of the if Statement.

Displaying the code

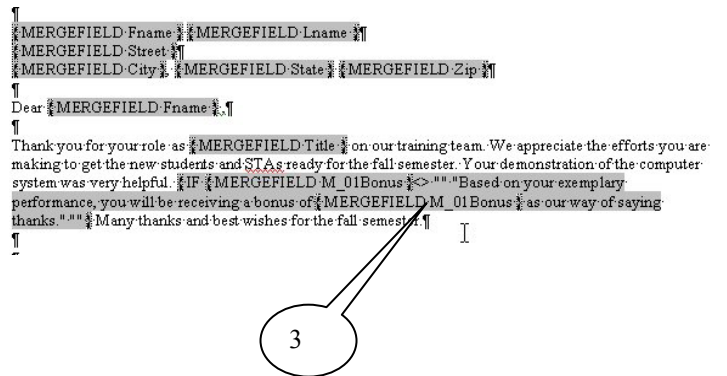
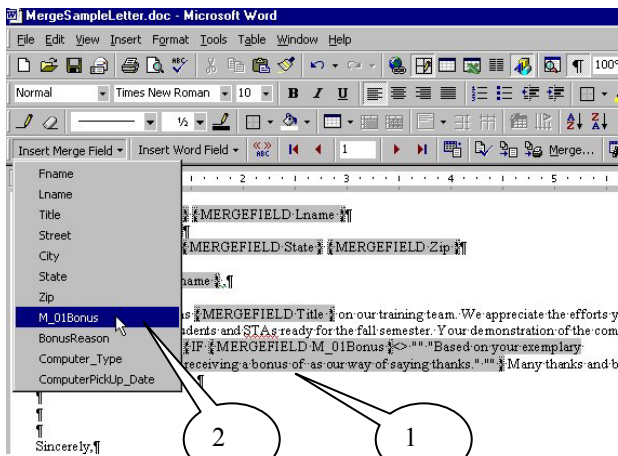
Once you say okay at the Insert Word Field window, you will be returned to your document. At this point, the If statement will not be visible to you. Press Alt+F9 on your keyboard to display the code. Once you can see it, you can edit it further. Press Alt+F9 again to hide the code.

Adding a Merge Field to An If Statement

You may wish to customize your If statement by adding a merge field. In this example, for the individuals who are receiving a bonus, we can tell them how much the bonus is by adding that merge field. Because it is inside an if statement, only those who have data in the bonus field will see this info at all.

```
{ IF { MERGEFIELD M_01Bonus } <> "" . "Based on your exemplary performance, you will be receiving a bonus of " & MERGEFIELD M_01Bonus & " as our way of saying thanks." . "" }
```

1. Place your flashing cursor in the location you wish to add a merge field (just after “you will be receiving a bonus of...”).
2. From the merge toolbar, select the “Insert Merge Field” button, and select the field you want from the list (01Bonus).
3. The merge field is now incorporated into your “if” statement.

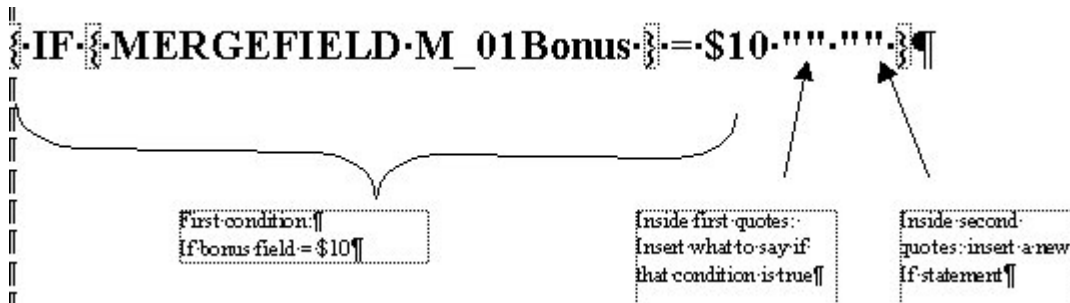


Nested If Statements

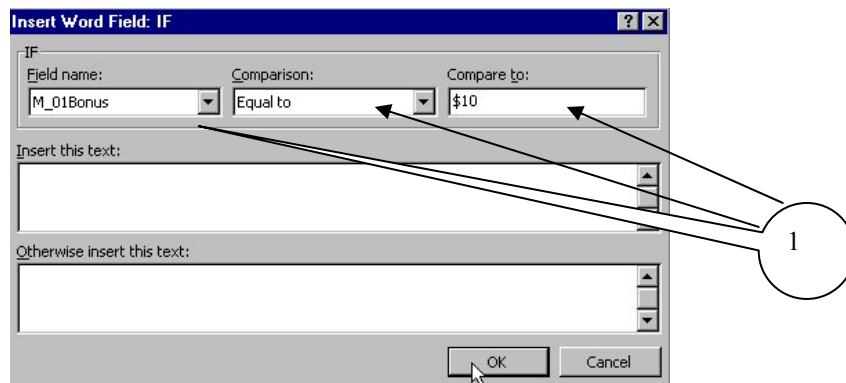
“If” statements are the perfect way to customize your mailings, as long as your scenario only has two possible outcomes: if there is data in the bonus field, say “A”, otherwise, say “B”.

Suppose you want to customize this further. If the bonus field is equal to \$10, say “A”; if the bonus field is equal to \$12, say “B”; if it is equal to \$15, say “C”; otherwise, say “D”. Then you need a “nested if” statement.

Anatomy of a Nested If:

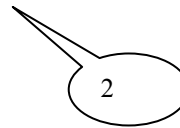


1. Create the first level of the nested if, the same way we started an “if”. Put in the first condition, but leave the text fields blank. Click OK.

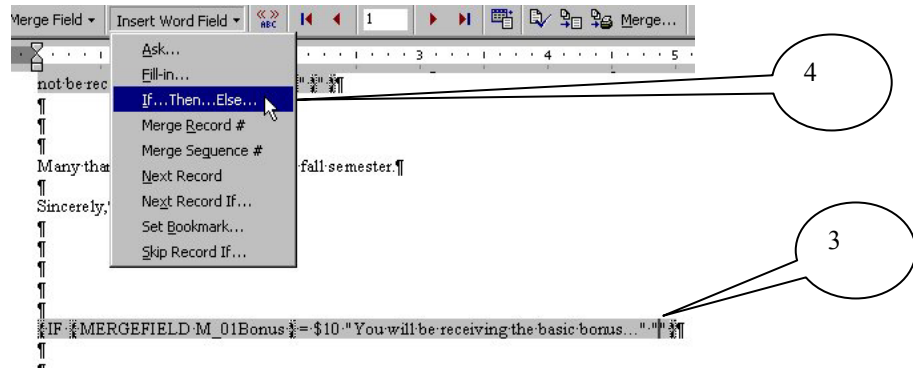


2. Inside the field code, insert the text for that scenario inside the first set of quotes (“you are receiving the basic bonus for good effort.”)

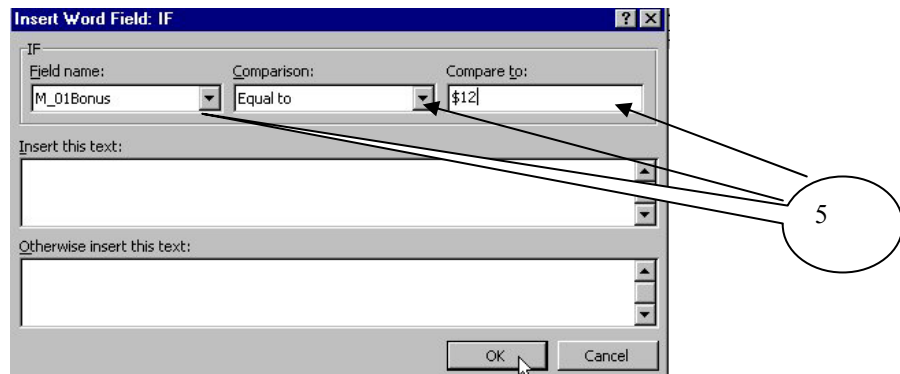
`{ IF { MERGEFIELD M_01Bonus } = $10 "You are receiving the basic bonus..." "" }`



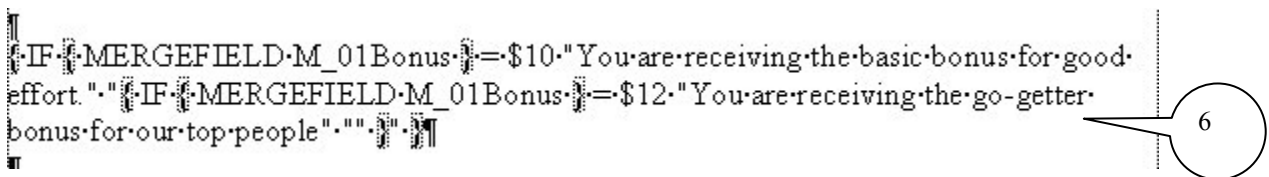
- Place your flashing cursor inside the next set of quotes.
- Use the "Insert Word Field" button to start a new If statement (select If...Then...Else).



- Set the next possible condition: (01Bonus = \$12), and click OK.



- Insert the text for that scenario into the next set of quotes (you are receiving the go-getter bonus for our top people).



- Continue in this fashion until you have covered all but one possible scenario. Use the last set of quotes to identify what to say if none of the scenarios you have spelled out (bonus = 10, 12 or 15) is true. Remember that the last set of quotes can be left blank if you wish to say nothing under those circumstances.
- Notice that there will be a number of closed quotes and closing brackets (to match total number of opening quotes and brackets) beyond your last statement. This is a place to do troubleshooting in your nested if. Be sure you have the right number of opening/closing brackets and quotes. Missing quotes can be typed in by hand, but missing brackets cannot. To add brackets, you must use the insert field menu or Ctrl+F9.

An example of a completed Nested If statement:

```
||
IF MERGEFIELD·M_01Bonus=$10 "You are receiving the basic bonus for good effort." IF
MERGEFIELD·M_01Bonus=$12 "You are receiving the go-getter bonus for our top people" IF
MERGEFIELD·M_01Bonus=$15 "You are receiving the all-star bonus for superlative work." "You will
not be receiving a bonus this year."
```

Testing and Proofing your If and Nested If Statements

Always test your merge to be sure it is producing the results you expected. Especially with nested if statements, typos and spacing are important and can cause unexpected results. At times, you will have to set the if statement up to insert paragraph marks so that the letters have a consistent look regardless of whether conditional text is included or not.

Printing the code for your if statements can be a great help in proof-reading and documenting your work. In order to get the code to print:

- Display your field codes by pressing Alt+F9.
- From the menu bar, select Tools, Options
- Select the Print tab
- Under the include with document section, place a check in the box for “field codes”, and click OK.
- Print the form letter.

The printing of field codes must be turned off again before you use the letter for your merge.

Tip: If you have used Alt+F9 to view codes, you may want to turn it off again before you leave Word. When you go to other Office programs that may use codes, you will be viewing them there too. This may cause confusing displays in your e-mail and other programs.