November 2006

Make sure your data keeps its number formatting when you do a mail merge

by Kara Soos

Application(s): Microsoft Excel 2000/2002/2003/2004
Operating System(s): Macintosh, Microsoft Windows

In your June 2006 article "Take matters into your own hands when mail merge values don't translate correctly," your Word document still doesn't display your percentage values correctly, even when you use the technique in the article. I'd like to share a solution. If you multiply the merge field's general switch by 100, the percentage displays accurately. The error comes from the fact that Excel divides the number by 100, so multiplying by 100 when you use the general switch corrects the formatting issue.

Jean-Marie Lambert
Computer Scientist
Namur, Belgium

That's a great workaround, Jean-Marie. Let's step through your solution in more detail, and then we'll offer an alternative solution for users with Excel 2002 and 2003.

Modify the general switch for percentages

We showed you how to use a general switch in your mail merge Word document to set the number formatting for your imported Excel fields. However, our percentage results displayed incorrectly. Essentially, Word didn't place the decimal point in the correct position, so the percentages didn't translate the way they should. Here's how to modify the percentage value in our original article's example as Jean-Marie suggested.

> **Related article**
> Check out the original article, "Take matters into your own hands when mail merge values don't translate correctly," in the June 2006 issue. Online subscribers can access the full article at http://www.elijournals.com%2fpremier%2fshowArticle.asp?aid=21628.

To modify a merge field for a percentage:

1. Perform your mail merge as you usually would.

2. At the point in your mail merge when you're previewing the merged letters, press [Alt][F9] to display the MERGEFIELD codes.

3. Locate the percentage value's MERGEFIELD (in our case, the Change field).

4. Select the entire field text and press [Ctrl][F9] to insert another set of field brackets.

5. Add text to the MERGEFIELD code so it reads:

   ```
   { = 100 * { MERGEFIELD "Change" } \# >"0.00%" }
   ```

6. Press [Alt][F9] again to hide the MERGEFIELD codes and view the results.

> **Warning:** If you manually enter curly brackets to create an additional merge field, the technique won't work. You must press [Ctrl][F9].

As shown in **Figure A**, the Change field is correctly formatted as a percentage.

Figure A: *When you multiply your percentage value by 100, it always displays correctly.*

Dear {MERGEFIELD·"Salutation"}{MERGEFIELD·"Salesperson"}.¶
¶
As·the·primary·salesperson·for·item·number {MERGEFIELD·"Item_No"},·we·would·
like·to·inform·you·of·a {=·100·*·{MERGEFIELD·"Change"}\#·"0.00%"} change·in·the·
item's·price.·The·original·price·of {MERGEFIELD·"Price"·\#·"$0.00"} is·now {
MERGEFIELD·"New_Price"}.¶

> Before

Dear·Mr.·Henrik,¶
¶
As·the·primary·salesperson·for·item·number·2635,·we·would·like·to·inform·you·of·a·
1.62%·change·in·the·item's·price.·The·original·price·of·$23.58·is·now·$23.96.¶

> After
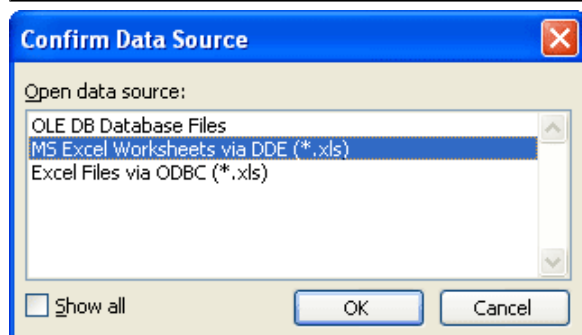
New setting for Excel 2002 and 2003

If you're using Excel 2002 or 2003, there's an even easier way to make sure that all of your Excel data keeps its number formatting when you perform a mail merge. Here's the trick.

To keep Excel number formatting when you do a mail merge:

1. Launch Word and choose Tools | Options from the menu bar to display the Options window.

2. Click on the General tab, if necessary.

3. Select the Confirm Conversion At Open check box and click OK.

4. Choose Tools | Letters And Mailings | Mail Merge from the menu bar to initiate your mail merge.

5. When you select the Excel worksheet you want to use as a data source, Word displays the Confirm Data Source dialog box; select the MS Excel Worksheets Via DDE option button, as shown in **Figure B**, and click OK.

Once you confirm your formatting selection, there's no need to perform a general switch because Word preserves the formatting you set in Excel.

Figure B: *You need to confirm the mail merge formatting, but it eliminates the need to edit your MERGEFIELD codes.*

Don't think switches are obsolete
This technique is a great way for Excel 2002 and 2003 users to quickly get the formatting they need in a mail merge. However, general switches can perform much more complicated tasks than just number formatting. For instance, you can modify your MERGEFIELD codes to involve IF functions that set up conditions for how the data displays. It's useful to know at least the basics so you can get the most out of your mail merges.