

Mail Merge: Using Ask Fields

Sometimes you need to run a mail merge and include information that isn't included in your data source. You don't want to go to the bother of adding new fields to your data source and entering the information for each record, so it would be convenient to enter the data at the time of the merge. There may be a reason that you can't or don't want to include the information in the body of the merge document itself. Perhaps it is different for each addressee, or changes each time you run the merge. There are two easy ways to do this... If the piece of information is to be entered only once in each document you should use a **Fill-in Field**. If the information is going to be repeated several times in each document, use an **Ask Field**.

About Ask Fields

An **Ask** field is a field you place in a mail merge document when you want to add some information that isn't contained in your data source. Ask fields are used in conjunction with Bookmarks.

You place the Ask field near the beginning of your merge document. When you perform the merge the Ask field prompts you to enter some text that it then inserts into each merged letter in the place (or places) where you have created Bookmarks.

Preparing the Merge Document

Start by creating your mail merge document in the normal way but leaving a space where you want to insert the information. In this example I'm using a data source that contains client names and addresses. I am going to invite them to an open evening. This is a regular event, so I don't want to keep its date in the data source, nor do I want to include it in the text of my merge document as I would have to edit it each time I send out invitations. I also want to repeat the information a number of times in the letter.

«Company»
«Address_1»
«Address_2»
«Town»
«County»
«Postcode»

16 October 1998

Dear Customer

We will be holding an open evening on | and cordially invite you have the opportunity to view samples of our products and service on hand to answer your questions.

If you are unable to attend on | please let me know and I will be notified of any future events.

Yours sincerely

These are merge fields inserted in the usual way. They will display data from my data source.

I have placed my cursor in where I want to create a bookmark. The text will be inserted here during the merge

TIP: Remember to type two spaces when you leave a space for your bookmark. This ensures that your inserted text has a space both before and after it in the finished document

Fig. 1 Preparing the merge document

Step 1: Inserting the Bookmarks

Place your cursor (point and click) in the space where you want to insert the information in the document. In my example (Fig. 1) I am inserting some information in the middle of a sentence. You are going to create a kind of field called a *bookmark*. Word will use this bookmark as an indication of where it should insert the new information.

There are two stages to creating a bookmark. First press **Ctrl+F9** to insert a pair of field characters (curly brackets) at the location of the cursor (Fig. 2).

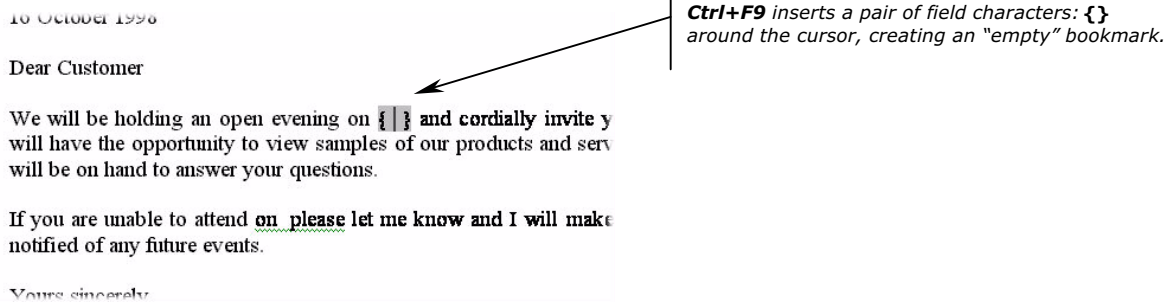


Fig. 2 Inserting the field characters

Now type a name for your bookmark so that it appears between the field characters. Use this method to create as many bookmarks as you need, giving each the same name (Fig. 3).

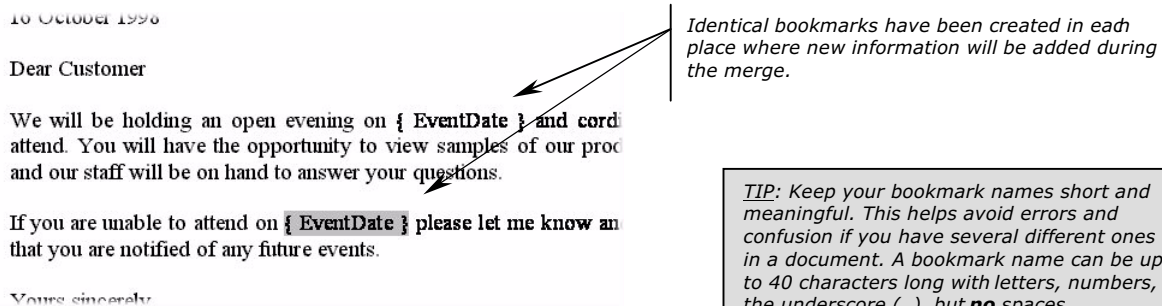


Fig. 3 Naming the bookmarks

*TIP: Keep your bookmark names short and meaningful. This helps avoid errors and confusion if you have several different ones in a document. A bookmark name can be up to 40 characters long with letters, numbers, the underscore (_), but **no** spaces.*

Step 2: Inserting the Ask Field

Now you are ready to insert the **Ask Field**. When Word encounters the Ask field during the merge it prompts the user for some information that is then inserted into the document at one or more points denoted by the bookmarks you have just created. The location of the Ask field itself is not important (you will not see it in the finished document) but it should be placed before the first of the bookmarks to which it refers.

The Ask field will be inserted wherever your cursor is located. In this example I placed my cursor in the empty line under the text "Dear Customer" near the beginning of my document.

From the Mail Merge toolbar choose **Insert Word Field > Ask...** to open the Insert Word Field: Ask Field dialog box (Fig. 4).

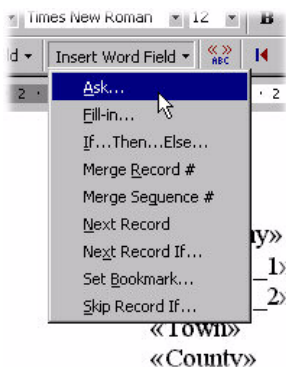


Fig. 4 Opening the Ask field dialog box

*TIP: You could have gone to the main menus and chosen **Insert >Field** and chosen **Ask** from the **Mail Merge** category. Doing it from the Mail Merge toolbar is easier because you get a dialog box to help you define the field.*

The dialog box has four sections (Fig. 5)...

The **Bookmark:** box. Type the name of the bookmark(s) here.

The **Prompt:** box allows you to type a message that will appear when the merge runs. In my example I typed the words "Enter the date of the next open evening".

The **Default Bookmark Text:** box lets you specify some text that will be inserted automatically if the user doesn't type anything else. I have added the words "the last Friday of this month".

The **Ask once** check box gives you the choice of inserting the same text into all the documents at one go. The user is prompted for some text when the merge starts and that text is used for all the documents. That is what I want to do so I have ticked the box.

*TIP: If you want to make a different entry for each merged document you will need to add an additional instruction to the Ask field. Refer to the notes on Fill-in fields to find out how to do this (see: **Modify the Fill-in Field**).*

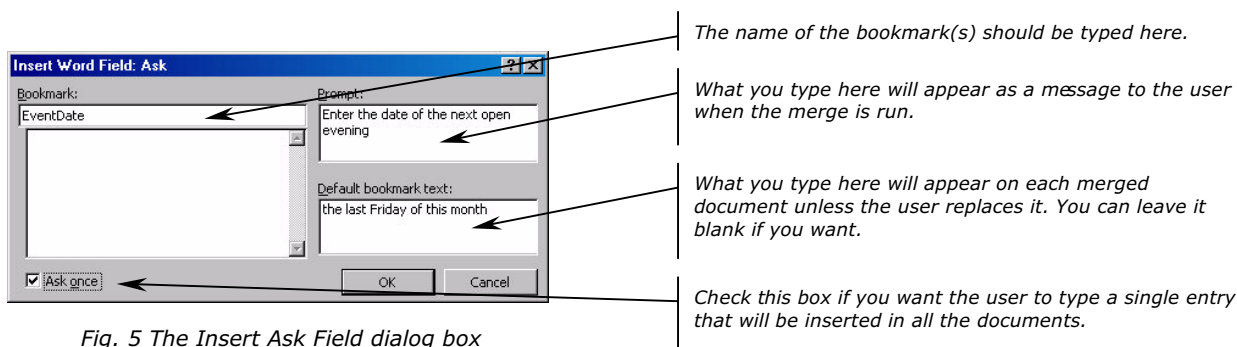


Fig. 5 The Insert Ask Field dialog box

When you finish completing the dialog box click **<OK>**. Word displays a sample of the Ask prompt as it will appear when the merge is run (Fig. 6).

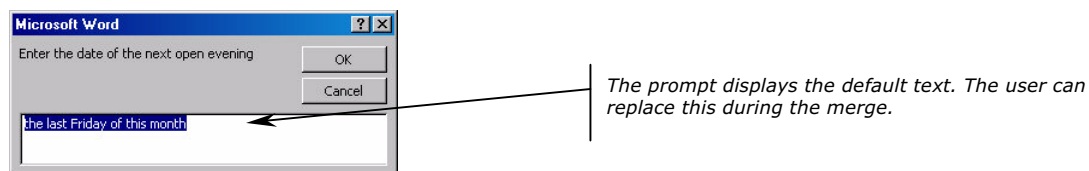


Fig. 6 The Ask prompt showing a default entry

Step 3: Checking Your Work

Use **Alt+F9** to display the document's field codes. This shows the instructions that Word uses during the merge (Fig. 7). You can check for any mistakes you may have made in the previous step and edit them directly from here. Simply change the text within the code itself. This is also useful if you run the merge at another time and you want to have different text for the prompt or the default entry. It saves you having to create the field again from scratch.

Use **Alt+F9** again to hide the field codes. You don't have to do this but Word remembers the command from document to document. If you leave it switched on you may be confused tomorrow when you see field codes where you were expecting to see something like a date or a page number. You can also access this command from **Tools >Options >View**.

Dear Customer

{ ASK EventDate "Enter the date of the next open evening" \d "the last Friday of this month" \o }

We will be holding an open evening on { EventDate } and cordially invite you to attend. You will have the opportunity to view samples of our products and services, and our staff will be on hand to answer your questions.

If you are unable to attend on { EventDate } please let me know and I will make sure that you are notified of any future events.

Alt+F9 displays the field codes so that you can see the prompt and the default text. Both appear in quotes.

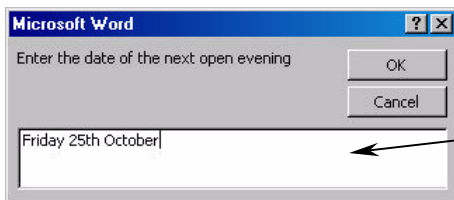
Fig. 7 Displaying the field codes

Step 4: Running the Merge

You are now ready to run the merge as normal. You can either return to the mail merge helper by choosing **Tools > Mail Merge** or you can click the appropriate button on the mail merge toolbar.

As the merge runs Word pauses when it comes to the Ask field and prompts you for some text. If you checked the **Ask once** option it will do this only once, and put the same text in all the merged documents.

When the dialog box appears type the desired entry (in this example the date of an event) into the text box and click **<OK>** (Fig. 8).



The user can type some text here, or accept the default text.

Fig. 8 The Ask prompt appears during the merge

*TIP: Save time! Instead of using the mouse to click the <OK> button press **Tab** then **Enter**. Tab moves the focus to the <OK> button and Enter presses it.*

If you chose the **Ask once** option the mail merge will continue without prompting you for additional information.

Your finished documents will now display a personalised entry in the appropriate place(s) (Fig. 9).

Dear Customer

We will be holding an open evening on Friday 25th October and cordially invite you to attend. You will have the opportunity to view samples of our products and services, and our staff will be on hand to answer your questions.

If you are unable to attend on Friday 25th October please let me know and I will make sure that you are notified of any future events.

Yours sincerely

The merge has been completed with the text you typed inserted at the points where you created bookmarks.

Fig. 9 The completed merge