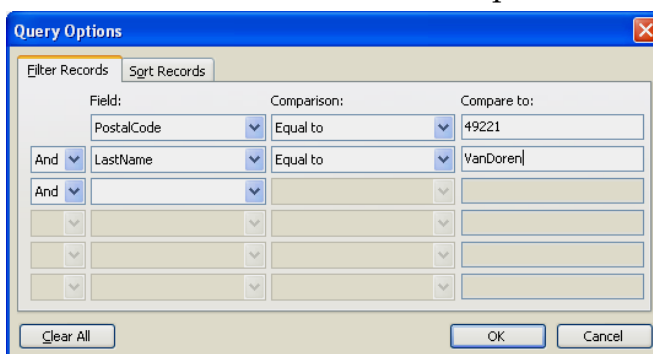


FILTERING AND SORTING RECORDS

There are two different ways to filter and sort records in a Recipient List. The first is while you are in the **New Address List** dialog box and the other is when you are in the **Mail Merge Recipients** dialog box. It is possible to filter by up to five criteria and to sort by three different criteria. When using either one of these options, the **Filter and Sort** dialog box will be used. To filter records:

- ❖ Click **Edit Recipient List** in the **Mail Merge Select Recipients Task Pane**.
- ❖ Click the **Mail Merge Recipients** button on the **Mail Merge Toolbar**.
- ❖ Click one of the drop-down arrows next to a field name in the **Mail Merge Recipients** dialog box.
- ❖ Click the **Advanced** option.
- ❖ The **Filter and Sort** dialog box will open.
- ❖ **To Filter a record:**
 - Click the **Filter Records** tab.
 - Click the drop-down arrow for the **Field** box.
 - Select the field that is to be filtered from the list that appears.
 - Click the drop-down arrow for the **Comparison** box and choose one of the options, such as Equal to.
 - In the **Compare to** box, input the information that you are searching for.
 - To add another filter condition, click the first drop-down arrow in the second row and choose either And or Or.
 - Specify the information for the second option in the boxes under **Field**, **Comparison**, and **Compare to** as you did for the first one.
 - Continue this until all the filtering criteria have been specified.
 - To remove all the filtering options, click the **Clear All** button.
 - When all the filtering options have been selected, click **OK** to filter the records.



- ❖ **To Sort a record:**
 - Click the **Sort Record** tab.
 - Click the drop-down arrow for the **Sort by** box.
 - Choose a field from the list.
 - Click either the **Ascending** or **Descending** option button.
 - **Ascending** - This option is used to sort the records in A-Z, 1-100 order.
 - **Descending** - To sort the records in Z-A, 100-1 order, choose this option.
 - To sort by more than one criterion, click the **Then by** drop-down arrow and complete the same procedure as described above for the **Sort by** option.
 - To clear all the Sort options, click the **Clear All** button.
 - To finishing the sort procedure, click the **OK** button.

