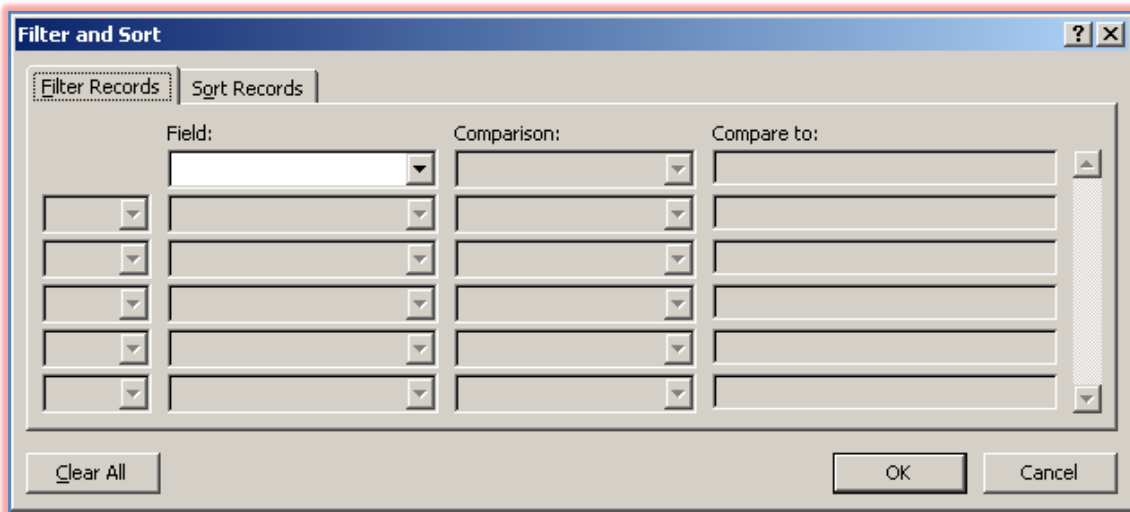


## Applying a Filter to a Merge

A filter is used to merge only certain entries from a Recipient List that meet specific criteria. For example, it is possible to choose only those entries where the State is equal to Michigan. Publisher allows for the creation of up to three filter criteria for a Data Source and to choose whether the entry must meet one, two, or all three criteria to be included. A filter **does not** delete entries from the data source; it just hides them from view. To filter an Address List, complete these steps:

- ❖ Open a merged publication.
- ❖ Click **Tools** on the **Menu Bar**.
- ❖ Move the mouse pointer over **Mailings and Catalogs**.
- ❖ Do one of the following:
  - Click **Edit Recipient List**.
  - Click **Mail Merge** and then in the **Task Pane**, click **Edit Recipient List**.
- ❖ The **Mail Merge Recipients** dialog box will display.
- ❖ Click the **Filter** button.
- ❖ The **Filter and Sort** dialog box will display with the **Filter** tab selected (see illustration below).



- ❖ In the **Field** box, click the drop-down arrow and select a field name. This box displays all the fields in the **Data Source**.
- ❖ Click the **Comparison** drop-down arrow and select a phrase. The choices in this option are:
  - **Equal to** - Matches the value in the **Compare to** box.
  - **Not equal to** - Does not match the value in the **Compare to** box.
  - **Less than** - Is less than the value in the **Compare to** box.
  - **Greater than** - Is greater than the value in the **Compare to** box.
  - **Less than or equal** - The amount in the **Compare to** box is either less than or equal to the amount specified.
  - **Greater than or equal** - The amount in the **Compare to** box is either greater than or equal to the amount specified.
- ❖ In the **Compare to** box, type the text or numbers that are to compare with the contents in the **Field** box.
- ❖ To apply more than one filter, click one of the following options:
  - **And** - All the entries must meet both of the specified criteria.
  - **Or** - One of the entries must meet the specified criteria.
- ❖ When all the criteria have been specified, click the **OK** button.

- When the publication is printed only the entries that meet the criteria of the filters will be printed.
- When **Show Merge Results** on the **Mail Merge** menu is selected, only those records meeting the specified criteria in the filter will be displayed.
- ❖ To remove the filter, click the **Clear All** button.