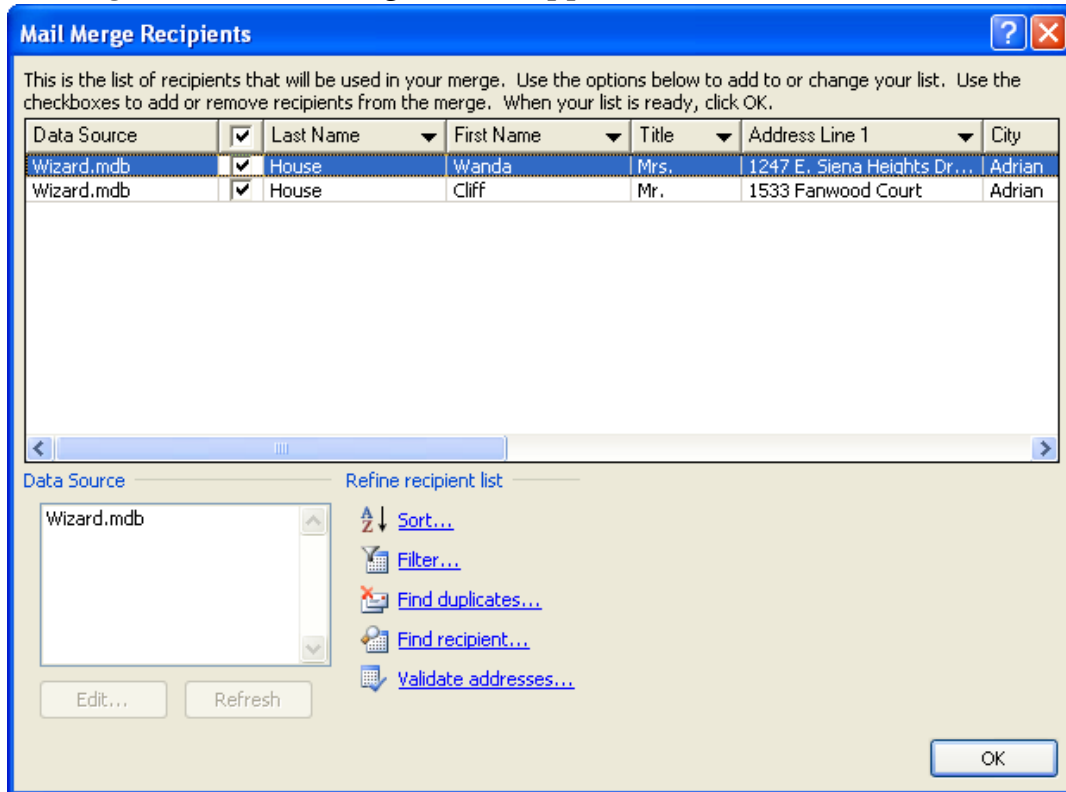


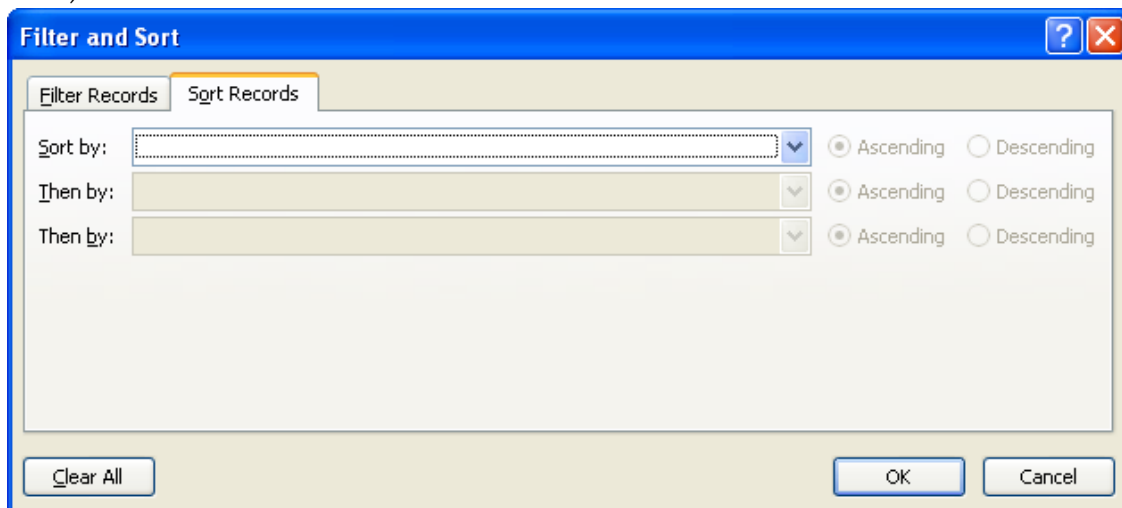
FILTERING AND SORTING RECORDS

Once a Recipient List has been created, it is possible to sort and/or filter the records. This is done through the **Mail Merge Recipients** dialog box. This dialog box can be accessed through the **Mailings Tab** by clicking the **Edit Recipient List** button in the **Start Mail Merge Group**

- ❖ Click the **Mailings Tab**.
- ❖ The **Mail Merge Recipients** dialog box will appear.



- ❖ **To Sort a record:**
 - Click the **Sort** link.
 - The **Filter and Sort** dialog box will display with the **Sort** tab selected (see illustration below).



- 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 finish the sort procedure, click the **OK** button.
- ❖ **To Filter a record:**
- Click the **Filter** link.
 - The **Filter and Sort** dialog box will appear with the **Filter** tab selected (see illustration below).

The screenshot shows a dialog box titled "Filter and Sort" with a blue header bar containing a help icon and a close button. Inside the dialog, there are two tabs: "Filter Records" (selected) and "Sort Records". Below the tabs is a table with three columns: "Field:", "Comparison:", and "Compare to:". The first row of the table has a drop-down arrow in the "Field:" column. Below the table are three buttons: "Clear All", "OK", and "Cancel".

- 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.