FILTER AND SORT 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.
- In the Start Mail Merge Group, click the Edit Recipient List button (see illustration below).

- The Mail Merge Recipients dialog box will appear (see illustration above).

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.

**Filter a Record**

- Click the **Filter** link.

- The **Filter and Sort** dialog box will appear with the **Filter** tab selected (see illustration below).

- 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. The options are:
  - **Equal to** – The records that display as a result of the **Filter** will be equal to the value inserted in the **Compare to** box.
  - **Not Equal to** – The records that appear as a result of the **Filter** will not equal the value specified in the **Compare to** box. All values except the one in the box will appear when the Filter is applied.
  - **Less Than** – The records that display as a result of the **Filter** will be less than the amount specified in the **Compare to** box.
  - **Greater Than** – The records that display as a result of the **Filter** will be more than the amount specified in the **Compare to** box.
  - **Less Than or Equal** – The records that display as a result of the **Filter** will be less than or will equal the value specified in the **Compare to** box.
  - **Greater Than or Equal** – The records that display as a result of the **Filter** will be more than or will equal the value specified in the **Compare to** box.

- 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 one of the options.
**And** – The records that display as a result of the Filter must meet the criteria specified in both of the **Compare to** boxes.

**Or** – The records that display as a result of the Filter must meet one of the criteria specified in the **Compare to** boxes.

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.