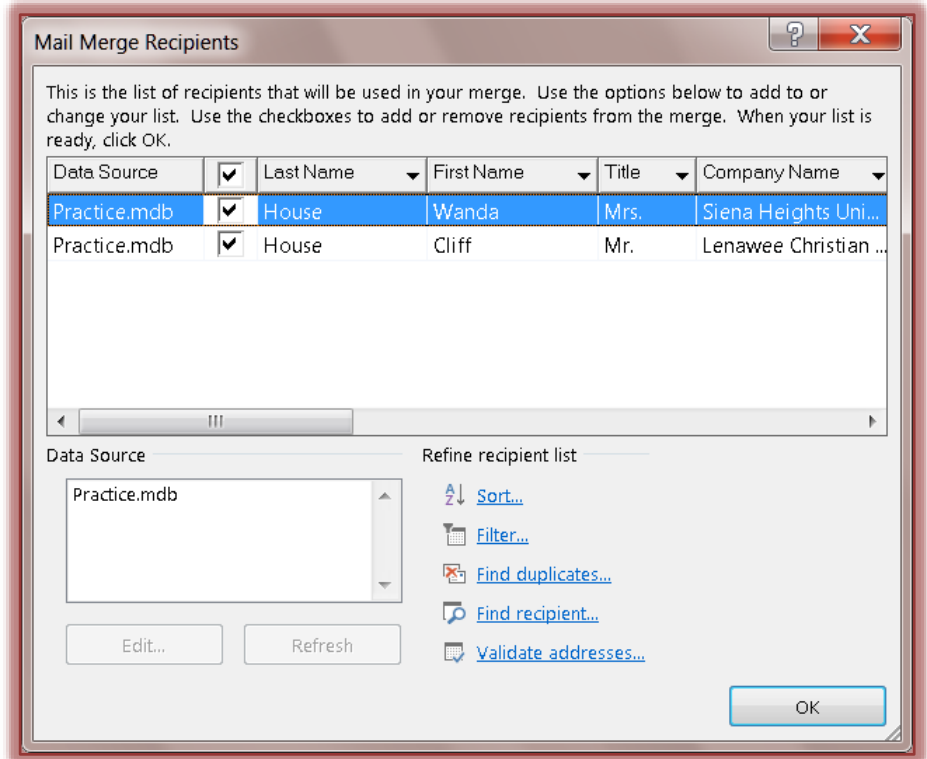
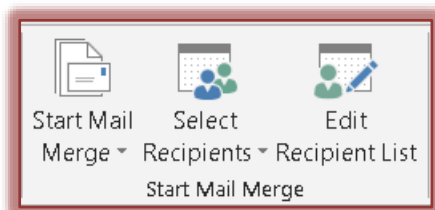


## FILTER AND SORT RECORDS

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).

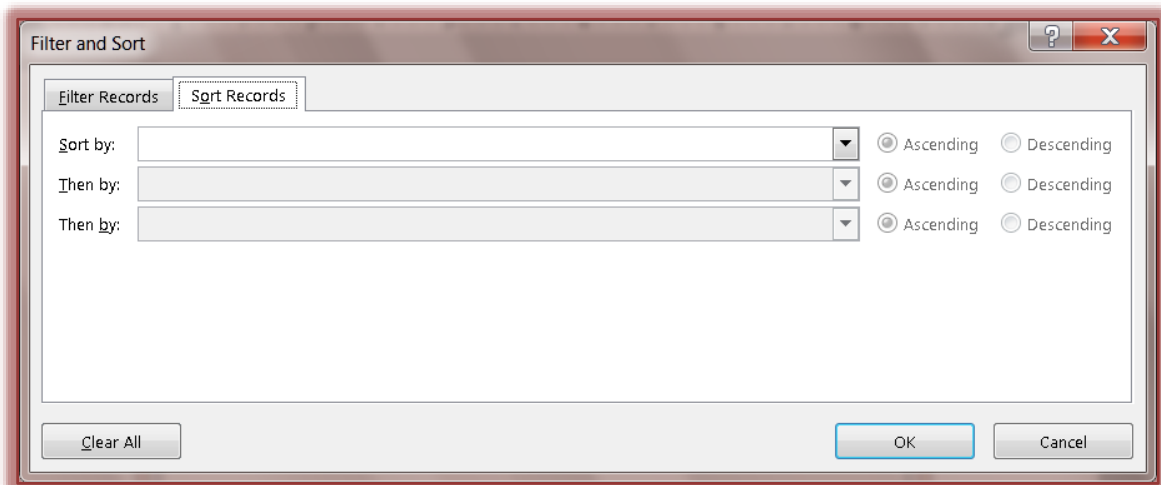


🖱️ The **Mail Merge Recipients** dialog box will appear (see illustration above).

### SORT A RECORD

🖱️ Click the **Sort** link.

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

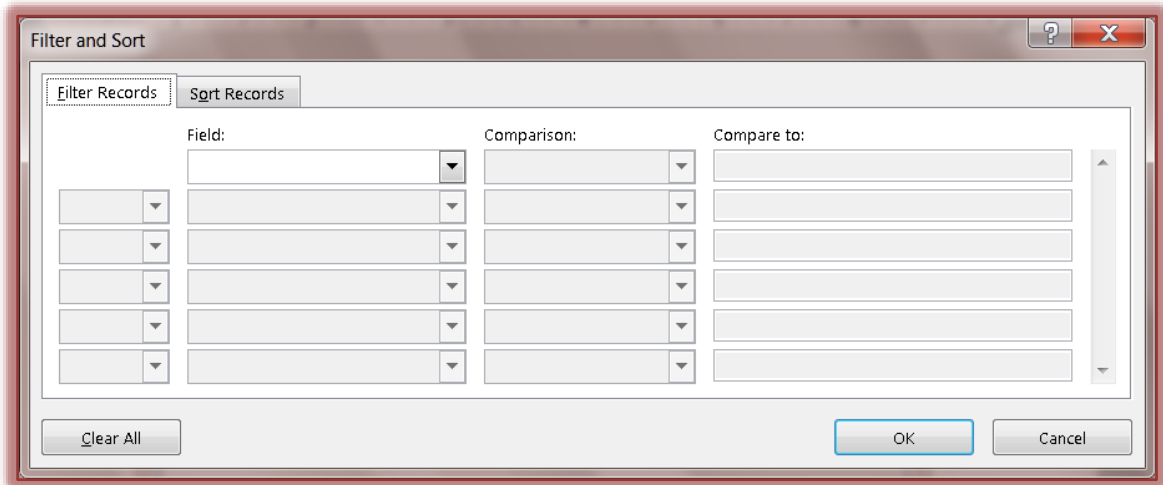


🖱️ Click the drop-down arrow for the **Sort by** box.





- ☞ 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.