Excel data does not retain its formatting in mail merge operations in Word

SYMPTOMS

If you perform a mail merge in Microsoft Word and you use a Microsoft Excel worksheet as the data source for the recipient list, some of the numeric data may not retain its formatting when it is merged.

This behavior applies to formatted percentages, currency values, and postal codes, as shown in the following table:

Format	In Excel data	In Word MergeField
Percentage	50%	.5
Currency	$12.50	12.5
Postal Code	07865	7895

CAUSE

This behavior occurs because the data in the recipient list in Word appears in the native format in which Excel stores it, without the formatting that is applied to the worksheet cells that hold the data.

RESOLUTION

To resolve this behavior, use one of the following methods.

Method 1

Use Dynamic Data Exchange (DDE) to connect to the Excel worksheet that contains the data that you want to use. To do this, follow these steps:

1. Start Word, and then open a new blank document.
2. On the **Tools** menu, click **Options**, and then click the **General tab**.
3. Click to select the **Confirm conversion at Open** check box, and then click **OK**.
4. On the **Tools** menu, point to **Letters and Mailings**, and then click **Mail Merge Wizard**.
5. In the Mail Merge task pane, select the type of document that you want to work on, and then click **Next**.
6. Under Select starting document, select the starting document that you want to use, and then click **Next**.
7. Under Select recipients, click **Use an existing list**, and then click **Browse**.
8. In the Select Data Source dialog box, locate the folder that contains the Excel workbook that you want to use as your data source, select the workbook, and then click **Open**.
9. In the Confirm Data Source dialog box, click **MS Excel Worksheets via DDE (*.xls)**, and then click **OK**.

10. In the Microsoft Excel dialog box, under Named or cell range, select the cell range or worksheet that contains the data that you want to use, and then click **OK**.

   NOTE: Your data now appears in the Mail Merge Recipients dialog box with the same formatting that appears in the Excel worksheet.

Method 2

Format the Excel field that contains the ZIP Code/Postal Code as text. To do this, follow these steps:

1. In Excel, select the column that contains the ZIP Code/Postal Code field.
2. On the **Format** menu, click **Cells**.
3. Click the **Number tab**.
4. Under **Category**, click **Text**, and then click **OK**.
5. **Save** the data source. Then, continue with the mail merge operation in Word.

Date, Phone Number, and Currency fields are merged incorrectly when you use an Access or Excel data source in Word 2002 or Word 2003

SYMPTOMS

When you perform a mail merge in Microsoft Word by using OLEDB with a Microsoft Access or Microsoft Excel data source, the merge results for the Date, Phone Number, and Currency fields are incorrect. For example:

The Date field is displayed in the following format:

> 1995-10-22 00:00:00

The Phone Number field from an Access data source is displayed in the following format:

> -7081234567.00

The Currency field is displayed in the following format:

> 12.00

-or-

> 12000

CAUSE

This behavior occurs because the data is displayed in its native, stored format in Access or Excel. To format merged data, you must format the merge fields in the main document. If you format the data in the data source, the formatting is not retained when you merge the data into the main document.

WORKAROUND

To work around this problem, use one of the following methods.

In Microsoft Word

Use a switch to format the results of the MERGEFIELD. To do this, use one of the following methods.

Note To view the field codes in Microsoft Word, press ALT+F9.

Method 1: Use the Numeric Picture Switch

Include a numeric picture switch (\#) similar to one of the following examples:

In a currency field, use a Numeric Picture switch similar to:

> {MERGEFIELD number \# $####,0.0}

Note The {MERGEFIELD number \# $####,0.0} string works for Microsoft SQL Server 6 as well.

In a telephone field, use a Numeric Picture switch similar to:

{MERGEFIELD phone \# ###'-'###'-'####}

Note The hyphen inside the mergefield is in single quotation marks.

Method 2: Use the Date-Time Picture Switch
Include a date-time picture switch (\@) in the Date field, so that the Date field looks like this:

{MERGEFIELD date \@ "MMMM d, yyyy"}

Note The picture switch is case-sensitive. Additionally, you must use quotation marks around the picture string.

In Microsoft Access
Create a query in Microsoft Access, and use the query in your Word mail merge. In the Microsoft Access query, use the FORMAT() function to format the data to be merged in Microsoft Word.