

Publisher-Create, Customize, and Enter Records in Recipient List

Step 1: Create a Recipient List/Data Source

The first step in working with merges is to create the Recipient List or to use a list that has already been created. The Recipient List contains the variable information that is to be inserted into a publication. To create the Recipient List:

- ✦ In the first task pane, click the **Type a New List** option button.
- ✦ Click the **Next: Create or connect to a recipient list** link.
- ✦ The **New Address List** dialog box will display (see illustration below).

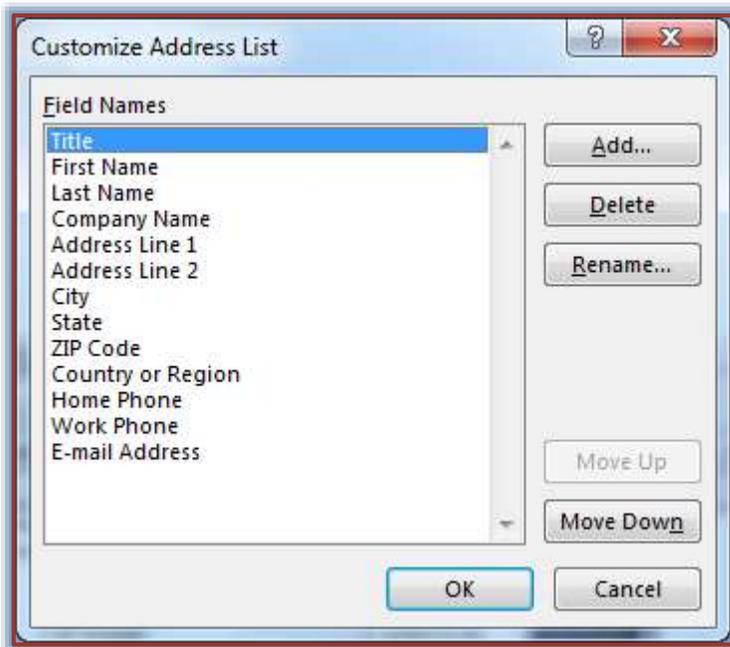


- ✦ To use the fields specified by the program, just start inputting information into the recipient list.
- ✦ Click in the first field, **Title**.
- ✦ Input pertinent information for that field.
 - ✦ The **Tab** key may be used to move from field to field.
 - ✦ If the **Tab** key is pressed at the end of an entry, a new record will be added.
 - ✦ Information does not have to be input into every field.
 - ✦ Some records may not have information for each field.
- ✦ To add an entry, click the **New Entry** button.

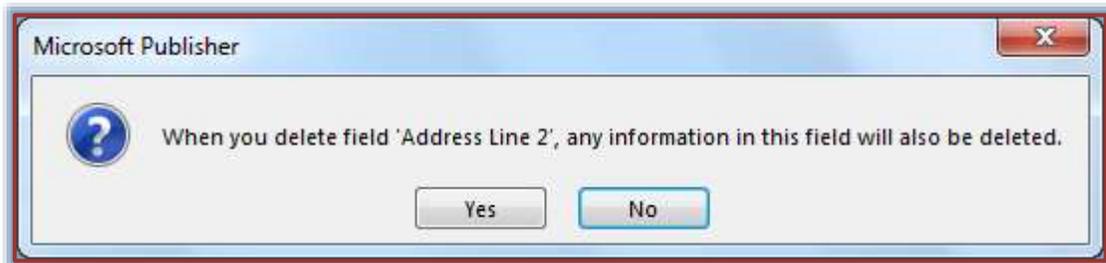
Customize the Data Source

- ✦ Click the **Customize Columns** button.
- ✦ The **Customize Address List** dialog box will display (see illustration below).
- ✦ Choose one of the options available in the **Customize Address List** dialog box.
 - ✦ **Add** - This option is used to add a new field to the Recipient List.
 - Move to the field above which the new field is to be entered.
 - Click the **Add** button.
 - The **Add Field** dialog box will display (see illustration above).

- Input the name for the field.
- Click **OK** to add the field to the list.
- The new name will appear below the selected field.



- ✦ **Delete** - To delete a field from the Address List use this option.
 - Click the field that is to be deleted.
 - Click the **Delete** button.
 - The message shown in the illustration below will appear.



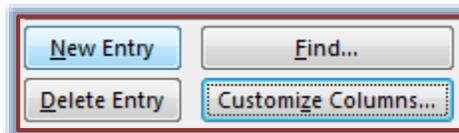
- Choose **Yes** to delete the field.
- Choose **No** to leave the field in the list.
- ✦ **Rename** - Use this option to change the name of the field.
 - Select the field that is to be renamed.
 - Click the **Rename** button.
 - The **Rename Field** dialog box will display (see illustration below).
 - Input a new name for the field in the **To** text box.
 - Click **OK** to accept the new name.
 - Click **Cancel** to leave the original field name.
- ✦ **Move Up** - Click this button to move a field to a different location in the Recipient List.
- ✦ **Move Down** - Click this button to move a field to a different location in the Recipient List.



✚ When all the changes have been made, click **OK**.

Enter Information into the List

- ✚ Under **Type Recipient Information**, input the information for the first entry.
 - ✦ When entering data into the **Recipient List** don't press the spacebar at the beginning or end of an entry.
 - ✦ If extra spaces are entered, extra spaces will appear in the document between the data and the next word or punctuation, leaving ugly gaps.
 - ✦ Instead of adding spaces in the **Recipient List**, insert the needed spaces into the **Main Publication**.
- ✚ When all the information has been added for the first entry, click the **New Entry** button.



- ✚ Continue this process until all the records have been completed.
- ✚ When all the entries have been completed, click the **Close** button.
- ✚ The **Save As** dialog box will appear.
- ✚ In the **Save As** dialog box, input a name for the **Recipient List** in the **File Name** box.
- ✚ Select a location for the **Recipient List**. The default folder is **My Data Sources**.
- ✚ Click the **Save** button.
- ✚ Once the list is saved, the **Mail Merge Recipients** window will appear. The option in this window will be explained later in this document.