

PUBLISHER-PERSONALIZE PUBLICATIONS-MAIL MERGE

With Microsoft Publisher it is possible to personalize publications by creating a Mail Merge document. This process makes it possible to individually customize any publication, by inserting names and addresses to personalize an invitation to a party or some other event or by including birthdays in a publication. Before beginning the Mail Merge process, there are some terms that are important to know. These terms are listed in the table below.

Term	Definition
Mail Merge	This is the process of combining names and addresses (or other individual information) stored in a recipient list with standard, unchanging text in a main publication to produce customized documents.
Data Source	A file that contains names and addresses that is to be merged into a publication. In Publisher this list is called a Recipient List. It is easy to create this list using the Mail Merge feature.
Field	This is a single piece of information about a person, such as a name, address, or city.
Field Codes	Placeholder text that shows Publisher where to insert a particular item of information from the address list into the publication.
Entry	The specific information entered for each person for the entire collection of fields.
Main Publication	Any publication that has the variable information inserted from an address list. It is possible to turn any publication into a main publication whether it was created previously or is a new one.
Merge Codes	The names of the various fields of information that are placed in the mailing list. Publisher automatically sets up merge codes, such as First Name, Last Name, and so on.
Merge	The process of combining the Main Publication with the Field Codes from the Address List. A new publication is created for each entry in the Address List.
Standard Text	Anything, such as text, tables, or pictures, that is to be printed on every copy of the publication.
Variable Information	The specific information that is to change in each copy of the publication.
Publisher Recipient List	A data source that is created in Publisher. It contains the variable information that is needed to personalize a publication.

Create a Publisher Mail Merge

Mail Merge or Email Merge is used to add mailing addresses or personalized information to a publication. It is made up of three parts:

- ✓ **Recipient List** - This is the list that contains personalized information about each person.
- ✓ **Publication with Merge Fields** - These fields are used to insert the variable information from the recipient list into the publication.
- ✓ **Merged Publication** - This is the finished product after the recipient list and publication have been combined to insert the variable information.

Start the Mail Merge or Email Merge Process

When creating a Mail Merge, a task pane will display that processes through the steps for setting up the recipient list and the main document. The steps below explain how to start the merge.

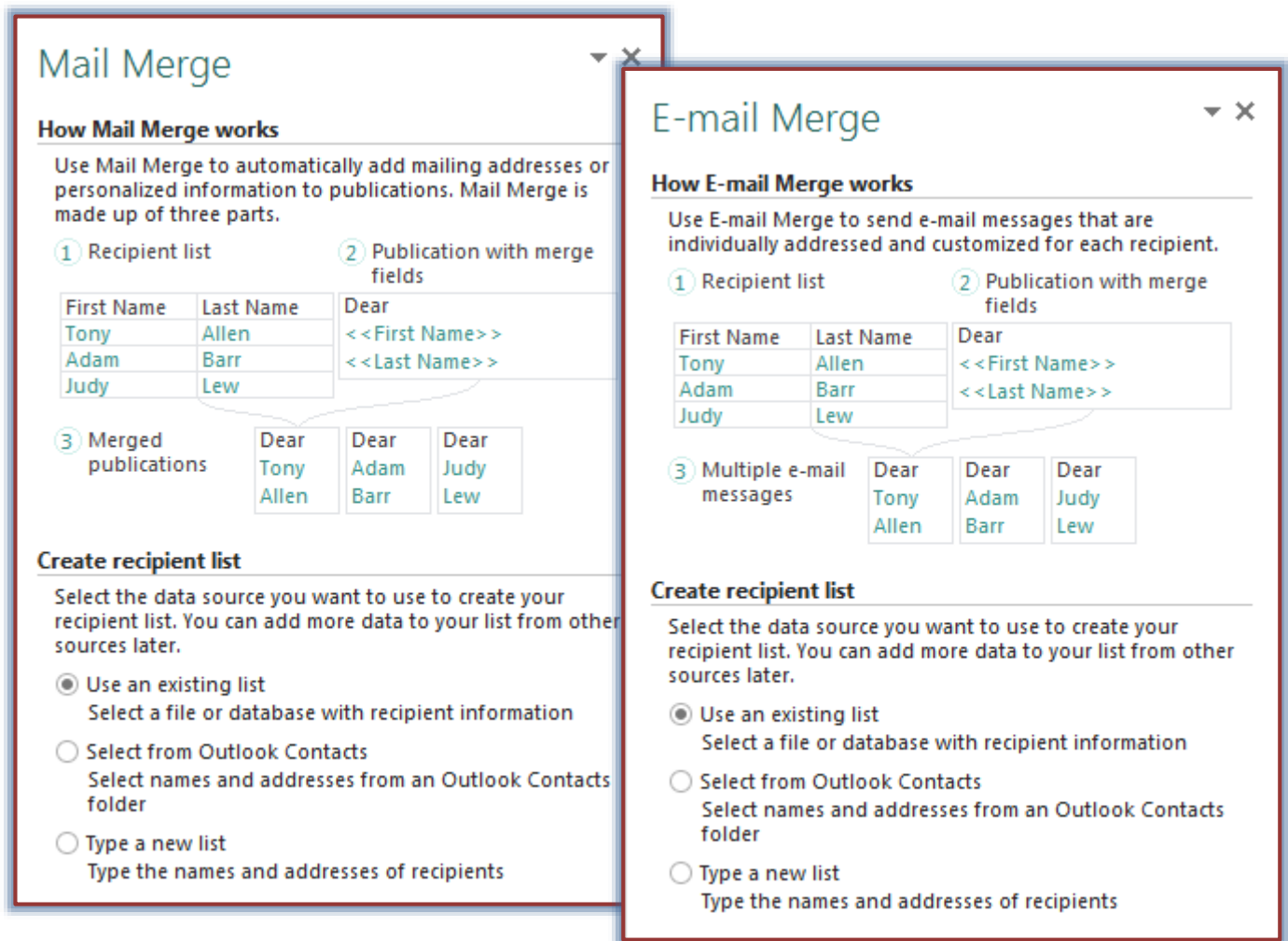
✚ Click the **Mailings Tab**.

✚ Click the **Mail Merge** or **Email Merge** button (see illustration below).



✚ Click the **Step by Step Mail Merge** or **Step by Step Email Merge** option.

✚ The **Mail Merge** or **Email Mail Merge Task Pane** will display (see illustrations below).



The image shows two side-by-side screenshots of the Mail Merge and E-mail Merge task panes. The left pane is titled 'Mail Merge' and the right pane is titled 'E-mail Merge'. Both panes show a 'How Mail Merge works' or 'How E-mail Merge works' section, a table of recipient information, and a 'Create recipient list' section with three radio button options.

Mail Merge Task Pane:

How Mail Merge works

Use Mail Merge to automatically add mailing addresses or personalized information to publications. Mail Merge is made up of three parts.

- 1 Recipient list
- 2 Publication with merge fields
- 3 Merged publications

First Name	Last Name	Dear
Tony	Allen	<<First Name>>
Adam	Barr	<<Last Name>>
Judy	Lew	

Dear Tony
Dear Adam
Dear Judy
Allen Barr Lew

Create recipient list

Select the data source you want to use to create your recipient list. You can add more data to your list from other sources later.

- Use an existing list
Select a file or database with recipient information
- Select from Outlook Contacts
Select names and addresses from an Outlook Contacts folder
- Type a new list
Type the names and addresses of recipients

E-mail Merge Task Pane:

How E-mail Merge works

Use E-mail Merge to send e-mail messages that are individually addressed and customized for each recipient.

- 1 Recipient list
- 2 Publication with merge fields
- 3 Multiple e-mail messages

First Name	Last Name	Dear
Tony	Allen	<<First Name>>
Adam	Barr	<<Last Name>>
Judy	Lew	

Dear Tony
Dear Adam
Dear Judy
Allen Barr Lew

Create recipient list

Select the data source you want to use to create your recipient list. You can add more data to your list from other sources later.

- Use an existing list
Select a file or database with recipient information
- Select from Outlook Contacts
Select names and addresses from an Outlook Contacts folder
- Type a new list
Type the names and addresses of recipients

✚ In the first Task Pane, choose from one of the three options.

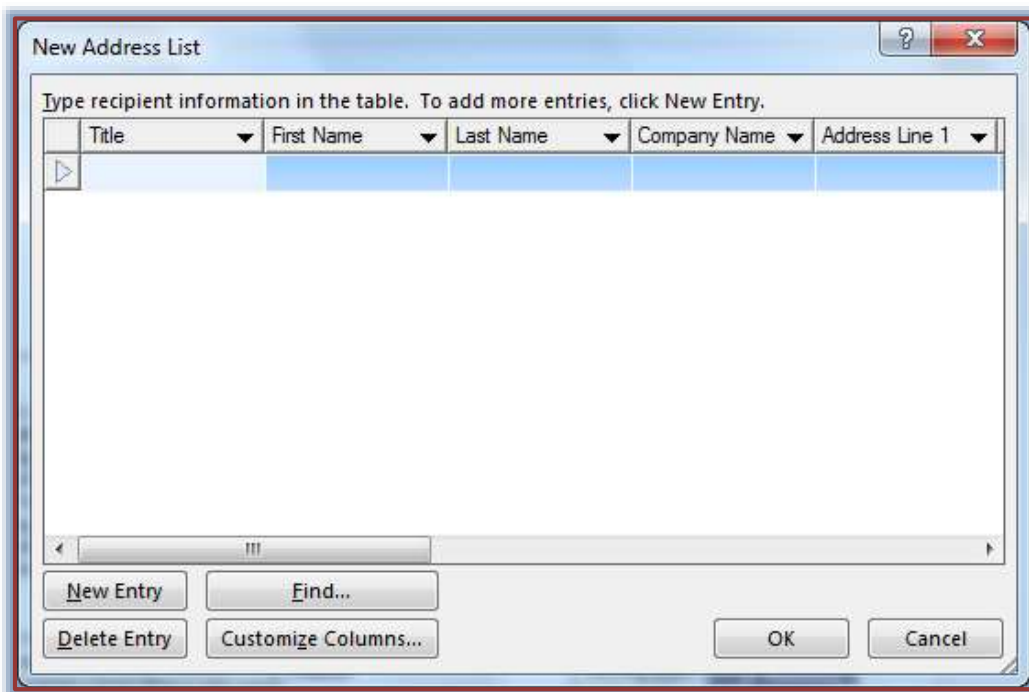
✚ **Use an Existing List** – Use this option to select a file or database, such as an Access database or an Excel database, which contains recipient information. When this option is selected, the **Select Data Source** window will open. In this window, select the data source that is to be used.

- ✦ **Select from Outlook Contacts** – This option is used when the recipient information is taken from the Contacts list in Outlook. When this option is selected, the **Select Profile** dialog box will display. In this dialog box, select the profile that contains the Contact information for the data source.
- ✦ **Type a New List** – With this option it is necessary to specify the fields for the recipient list and then input the information. When this option is chosen, the **New Address List** dialog box will open. In this dialog box, it is possible to specify the field names and to enter the information into the data source.
- † Once one of the options above has been selected, click **Next: Create or connect to a recipient list**.
- † What appears next will depend on which of the options is chosen.

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:

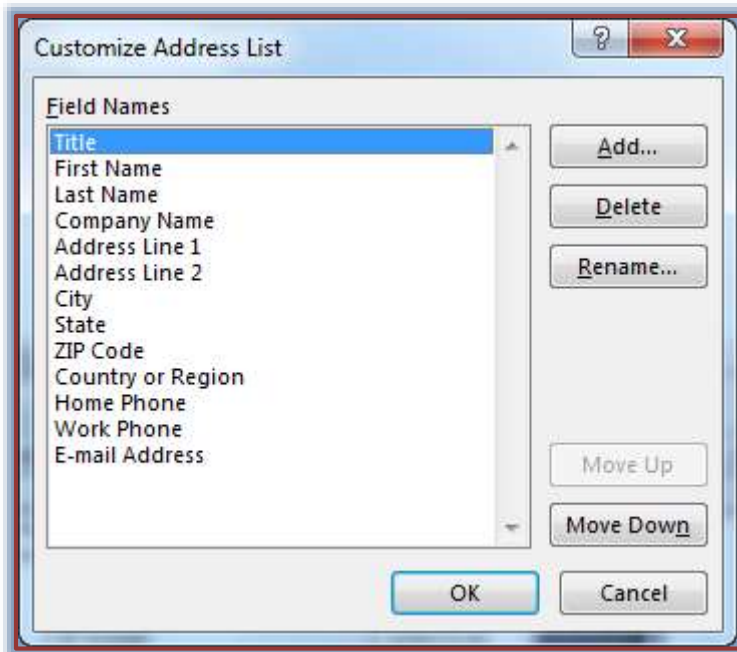
- † In the first task pane, click the **Type a New List** option button.
- † Click the **Next: Create or connect to a recipient list** link.
- † The **New Address List** dialog box will display (see illustration below).



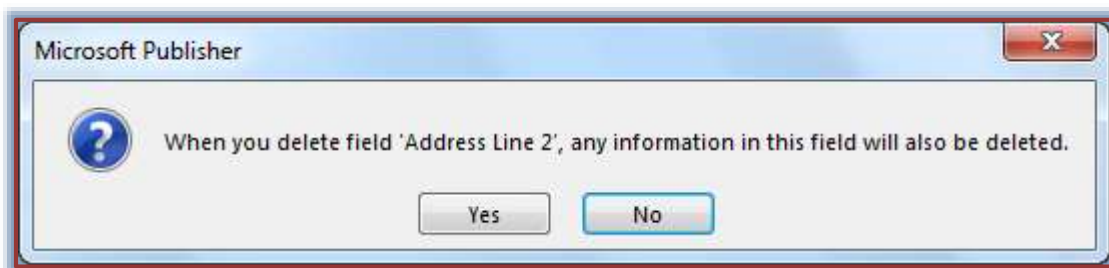
- † To use the fields specified by the program, just start inputting information into the recipient list.
- † Click in the first field, **Title**.
- † Input pertinent information for that field.
 - ✦ The **Tab** key may be used to move from field to field.
 - ✦ If the **Tab** key is pressed at the end 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.

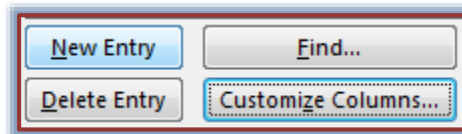
- The **Rename Field** dialog box will display (see illustration below).



- 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.

Step 2: Prepare Your Publication

The publication for the Mail Merge or Email Merge can be created during the merge process or a document that has already been created can be used.

- † Click **Next: Prepare your Publication**.
- † The **Prepare your Publication Task Pane** will display (see illustrations on next page).
- † Create a **Text Box** in the publication. This is where the information from the **Recipient List** is to be inserted.

E-mail Merge

Prepare your publication

To add recipient information to your publication, drag an item below to a location on the page.

Title

First Name

Last Name

Company Name

Address Line 1

City

State

ZIP Code

Country or Region


Home Phone


Work Phone

E-mail Address





Preview recipient:

⏪ < 1 > ⏩

 Find a recipient...

 Edit recipient list...


More items

-  Insert personalized hyperlink...
-  Picture field...
-  Greeting line...
-  Address fields...

Step 2 of 3

→ Next: Create merged publications

← Previous: Create recipient list

 Help with E-mail Merge

Mail Merge

Prepare your publication

To add recipient information to your publication, drag an item below to a location on the page.

Title

First Name

Last Name

Company Name

Address Line 1

City

State

ZIP Code

Country or Region


Home Phone


Work Phone

E-mail Address





Preview recipient:

⏪ < 1 > ⏩

 Find a recipient...

 Edit recipient list...


More items

-  Picture field...
-  Address block...
-  Greeting line...
-  Address fields...

Step 2 of 3

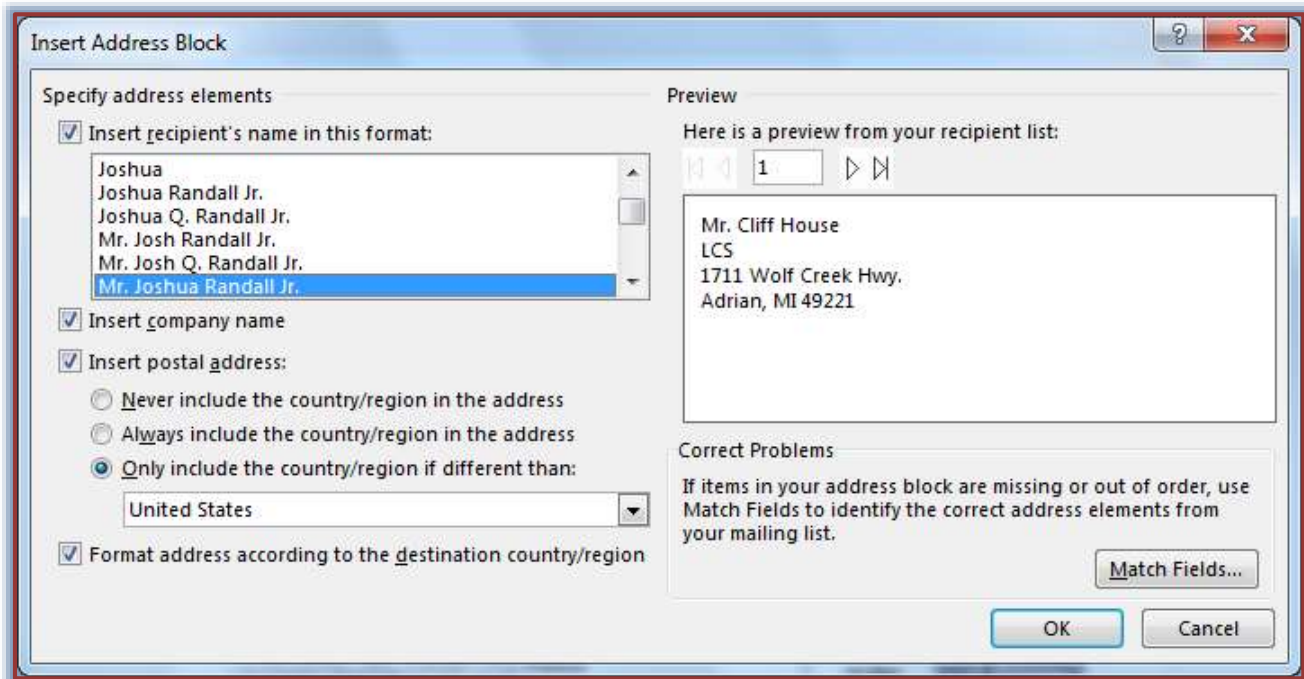
→ Next: Create merged publications

← Previous: Create recipient list

 Help with Mail Merge

- ✚ In the **Field List** click and drag the fields into the text box.
 - ✚ Spacing needs to be added before and after the fields just the same as if you were inputting each name individually.
 - ✚ A hard return needs to be inserted each time a new line is created.
- ✚ To scroll through the list of recipients, click the arrows under **Preview Recipient**.
- ✚ To locate a particular recipient, click the **Find a Recipient** link.
- ✚ To exclude a recipient from the results of the **Mail Merge**, click **Exclude this Recipient**.

- ✦ To make changes to the **Recipient List**, click the **Edit Recipient List** link.
- ✦ In the **Mail Merge Task Pane**, click the **Address Block** to insert a formatted address.
- ✦ The **Address Block** dialog box will display (see illustration below). This feature is not available in the **Email Merge Task Pane**.



- ✦ Make the desired selections from this dialog box.
- ✦ To match the fields, click the **Match Fields** button.
- ✦ Click the **Greeting Line** link to insert a greeting line into the publication.
- ✦ The **Insert Greeting Line** dialog box will display (see illustration below).
- ✦ Make the desired selections from this dialog box.
- ✦ To match the fields, click the **Match Fields** button.



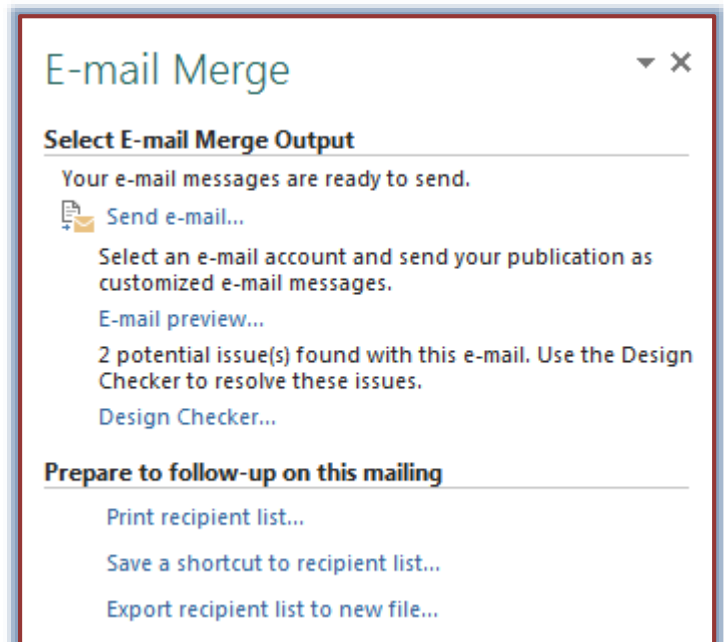
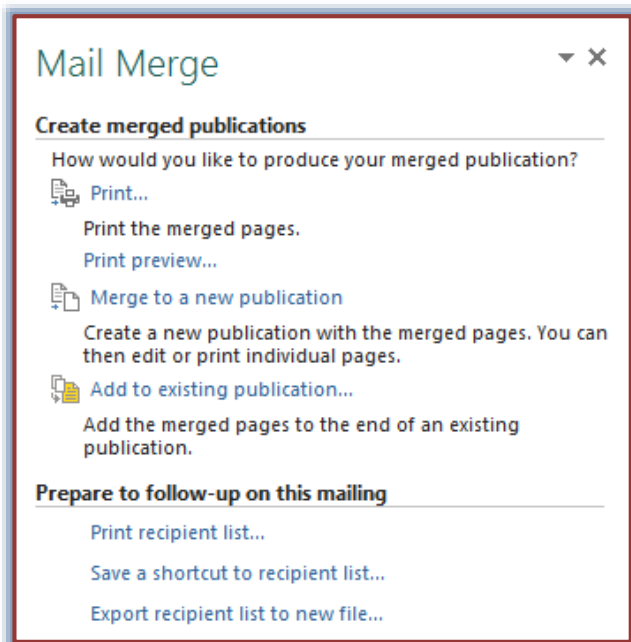
- † To display a list of all the fields in the recipient list, click the **Address Fields** link.
 - ✦ The **Insert Address Field** dialog box will display.
 - ✦ This list can be used to insert individual fields into the publication.
 - ✦ Click the name of the field and then click **Insert**.
- † Click the **Close** button to close the **Insert Address Fields** dialog box.

Step 3: Create Merge Publication

- † Click **Next: Create Merged Publications**.

Mail Merge

- † Click the **Print** link to send the merged publication directly to the printer.
- † Click the **Print Preview** link to preview the merge before sending it to the printer.
- † Click the **Merge to a new publication** link to view all the pages before they are printed.
- † To add the merged publication to the end of another publication, click the **Add to existing publication** link.
- † Choose one of the options under the **Prepare to follow-up on this mailing** section, if desired.



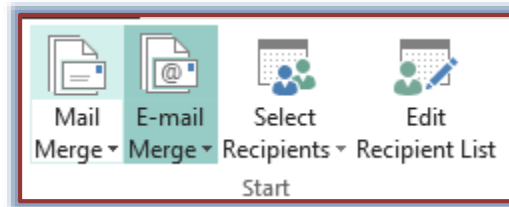
Email Merge

- † Click the **Send Email** link to select an email account and send the merge to the recipients.
- † Click the **Email Preview** option to view the messages before sending them.
- † Click the **Design Checker** link to check for possible issues with the publication.
- † Choose one of the options under the **Prepare to follow-up on this mailing** section, if desired.

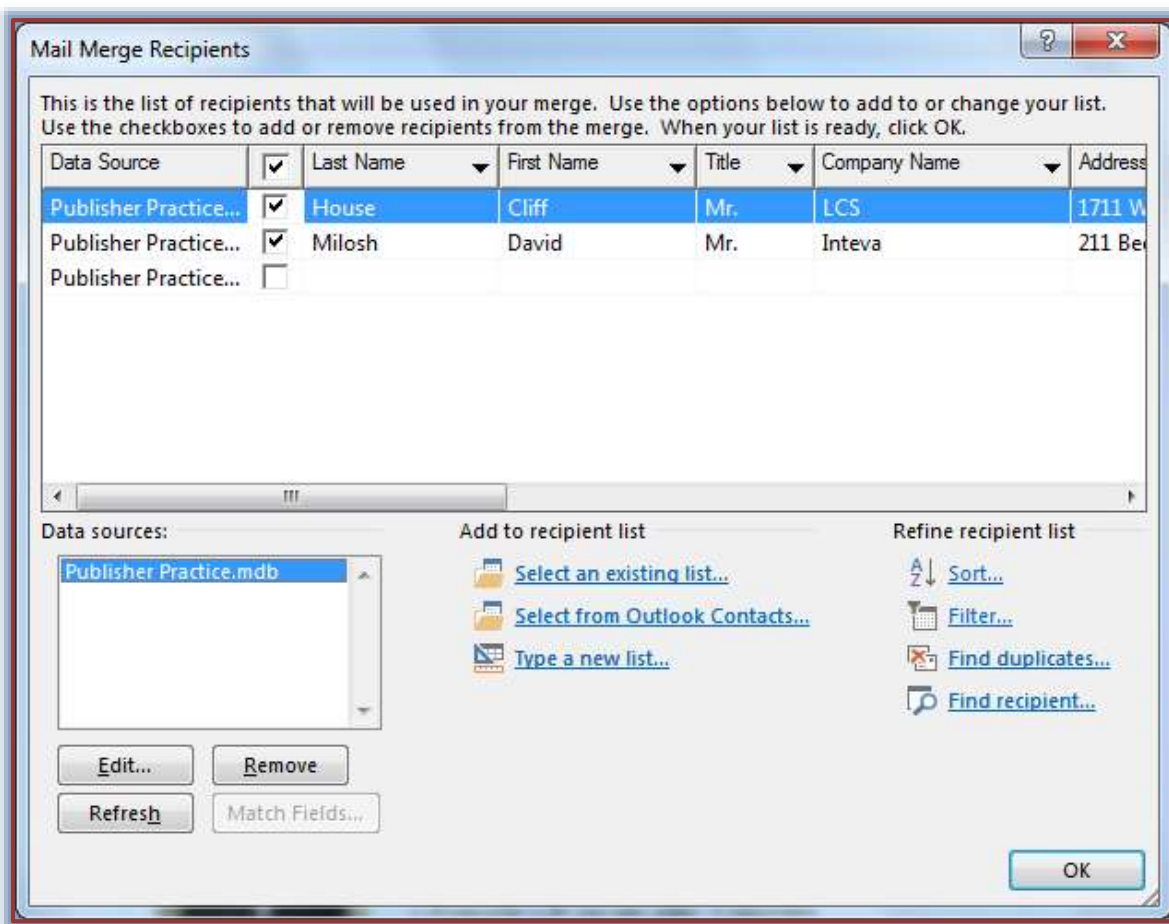
Edit the List

At times it becomes necessary to make changes to the Recipient List because of changes in a person's address, telephone number, etc. Also, it may become necessary for additional names to be added to the list or for names to be removed from the list. Complete the steps below to edit the Address List.

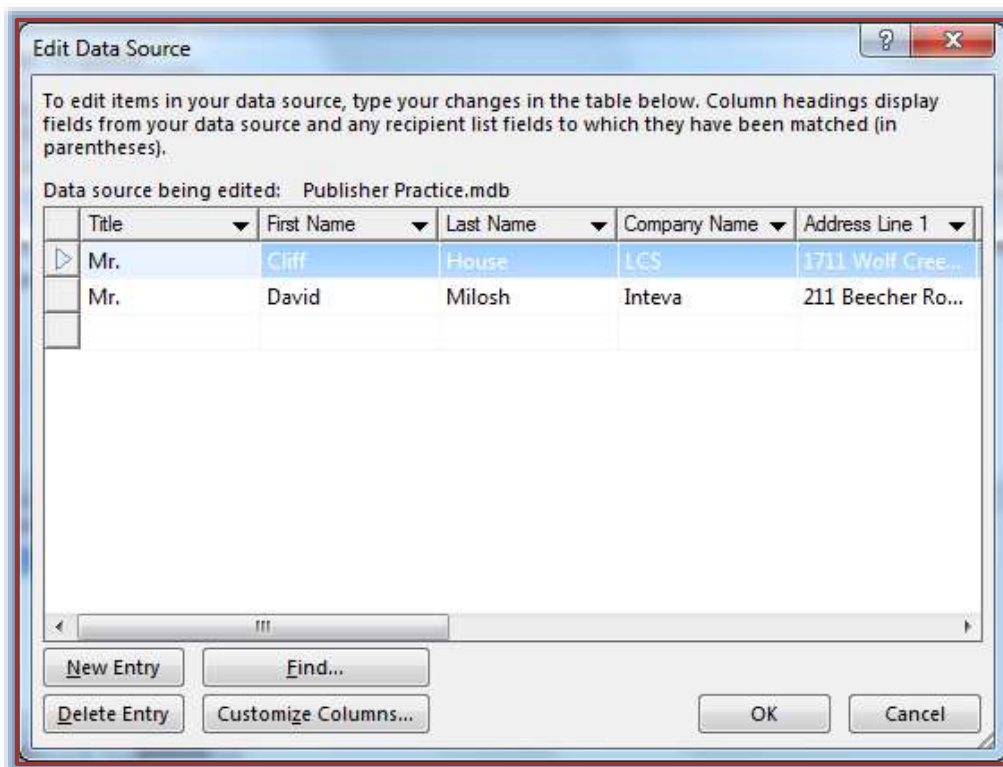
- † Click the **Mailings Tab**.
- † In the **Start Group**, click the **Edit Recipient List** button (see illustration on next page).



- ✦ If the merge publication has been closed, the **Open Address List** dialog box will open.
 - The **My Data Sources** folder will be displayed.
 - Click the **Look in** arrow to select the folder where the list is stored.
 - Click the list that is to be edited.
- ✦ If the merge publication is open, then the **Mail Merge Recipients** list will display.
- ✦ The **Mail Merge Recipients** list will appear (see illustration below).



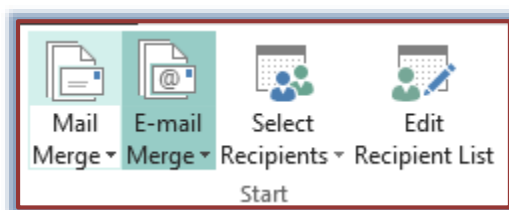
- ✦ Under **Data Sources**, click the data source that is to be edited.
- ✦ Click the **Edit** button to open the **Edit Data Source** window (see illustration on next page).
- ✦ To make changes to an entry:
 - ✦ Click in the field containing the information that is to be changed.
 - ✦ Select the text that is to be changed.
 - ✦ Type in any edits that need to be made.
 - ✦ Click away from the entry.
 - ✦ All changes will automatically be updated.
- ✦ When all the changes have been made, click the **OK** button.



Filter the Recipient List

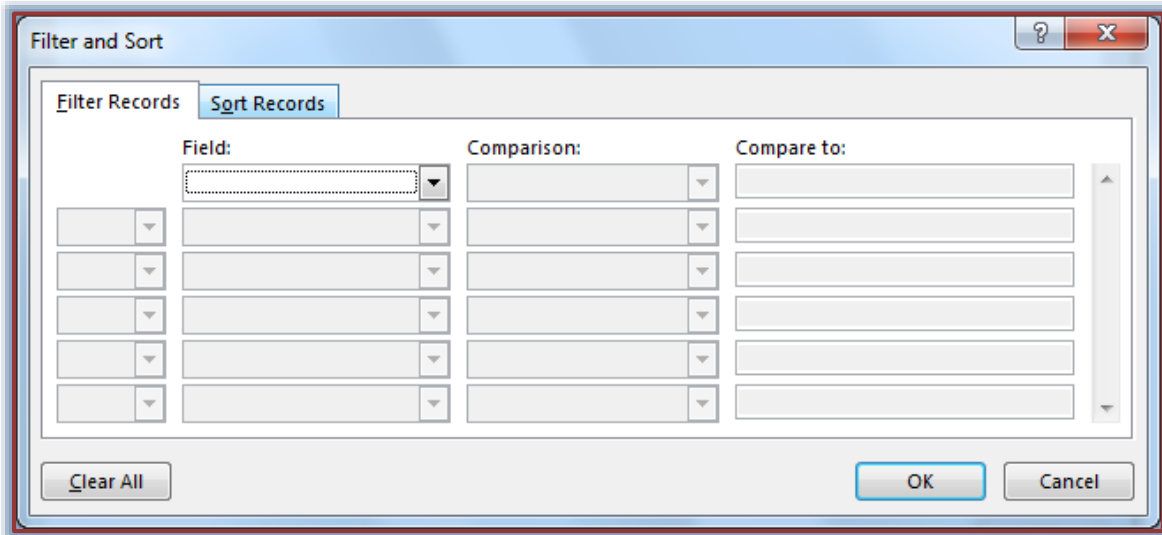
A filter is used to merge only certain entries from a Recipient List that meet specific criteria. For example, it is possible to choose only those entries where the State is equal to Michigan. Publisher allows for the creation of up to six filter criteria for a Data Source and to choose whether the entry must meet one, two, or all criteria to be included. A filter **does not** delete entries from the data source; it just hides them from view. To filter an Address List, complete these steps:

- ✦ Open a merged publication.
- ✦ Click the **Mailings Tab**.
- ✦ In the **Start Group**, click the **Edit Recipient List** button (see illustration below).



- ✦ The **Mail Merge Recipients** dialog box will display (see illustration on previous page).
- ✦ Click the **Filter** button.
- ✦ The **Filter and Sort** dialog box will display with the **Filter** tab selected (see illustration on next page).
- ✦ In the **Field** box, click the drop-down arrow and select a field name. This box displays all the fields in the **Data Source**.
- ✦ Click the **Comparison** drop-down arrow and select a phrase. The choices in this option are:
 - ✦ **Equal to** - Matches the value in the **Compare to** box.
 - ✦ **Not equal to** - Does not match the value in the **Compare to** box.
 - ✦ **Less than** - Is less than the value in the **Compare to** box.

- ✦ **Greater than** - Is greater than the value in the **Compare to** box.
- ✦ **Less than or equal** - The amount in the **Compare to** box is either less than or equal to the amount specified.
- ✦ **Greater than or equal** - The amount in the **Compare to** box is either greater than or equal to the amount specified.



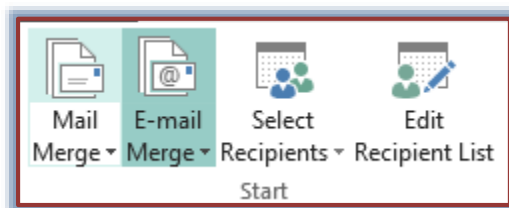
- ✦ In the **Compare to** box, type the text or numbers that are to compare with the contents in the **Field** box.
- ✦ To apply more than one filter, click one of the following options:
 - ✦ **And** - All the entries must meet both of the specified criteria.
 - ✦ **Or** - One of the entries must meet the specified criteria.
- ✦ When all the criteria have been specified, click the **OK** button.
 - ✦ When the publication is printed only the entries that meet the criteria of the filters will be printed.
 - ✦ When **Finish and Merge** on the **Mailings Ribbon** is selected, only those records meeting the specified criteria in the filter will be displayed.
- ✦ To remove the filter, click the **Clear All** button.

Sort a Recipient List

When a list is sorted, it changes the order of Address List entries in a merged document. It is possible to sort by up to three levels, such as by postal code, by last name, and then by first name.

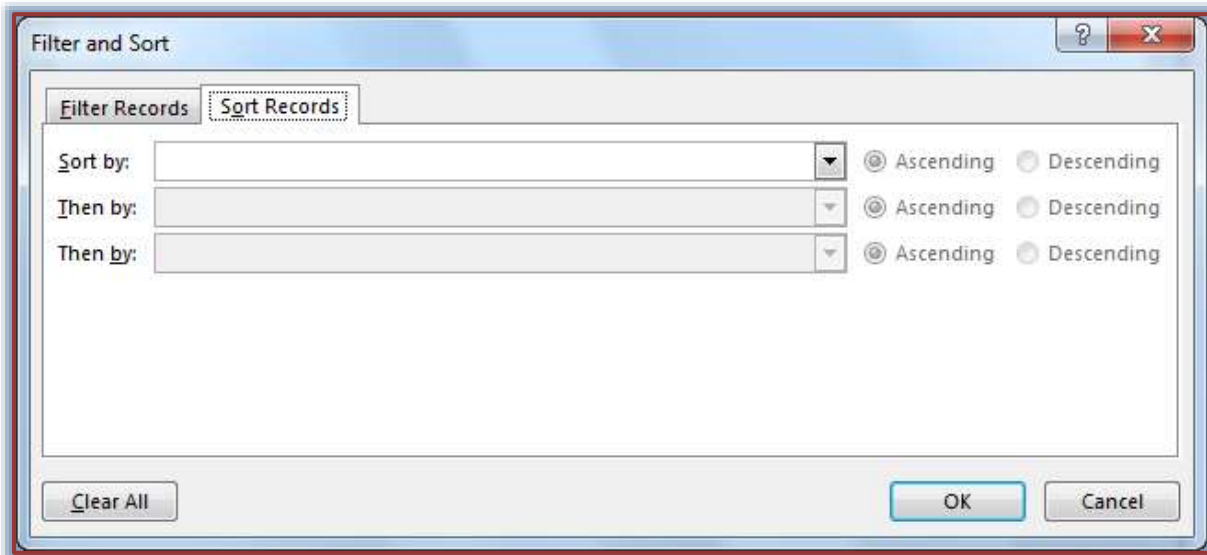
To sort an Address List:

- ✦ Open a merged publication.
- ✦ Click the **Mailings Tab**.
- ✦ In the **Start Group**, click the **Edit Recipient List** button (see illustration below).



- ✦ The **Mail Merge Recipients** dialog box will display (see illustration on page 9).
- ✦ Click the **Sort** button.

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



- † In the **Sort by** arrow, select the field name that the **Recipient List** is to be sorted by.
- † Click either the **Ascending** or **Descending** radio button for the **Sort Order**.
- † To further define the **Sort**, choose a **Field Name** from the next line of the dialog box.
- † Repeat the steps for the last **Field Name** box, if desired.
- † When all the selections have been completed, click the **OK** button.
- † When the publication is printed or when **Show Merge Results** is chosen, the entries from the Data Source will be in the order specified.
- † To remove the sort, click the **Clear All** button.

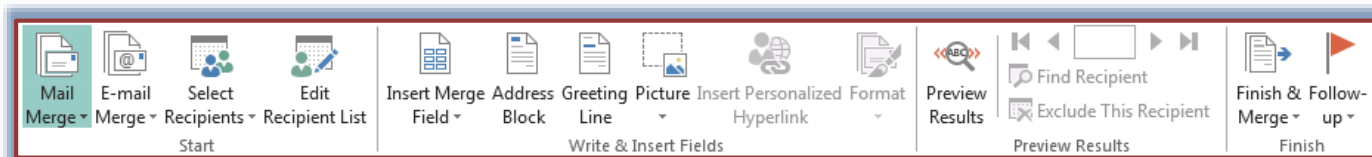
Print a Merge Publication

The final step in producing a merged publication is to print it. By default, any empty spaces or lines left by fields in the Recipient List that don't contain any information are closed up. It is always a good idea to print a test copy of the publication before printing it on the final paper. A test prints a publication for the first entry or the first two rows of labels. To print a merged publication:

- † Open the merged publication.
- † Click the **File Tab**.
- † Click the **Print** button on the left side of the window.
- † The **Print and Preview** window will display.
- † The options for printing the publication will appear in the middle frame.
- † A preview of the publication will appear in the right frame.
- † Select the options for printing the document such as which records to print.
- † Click the **Print** button to accept the selected options and print the publication.

Mailings Tab Ribbon

The Step-by-Step Wizard does not always have to be used to complete a merge. The Mailings ribbon can also be used to complete the merge process. Each individual tab on the ribbon is divided into groups. Under the Mailings Tab, each group is used to perform different steps in the mail merge process. Each group and button under this tab is described in the table below.



Group/Button	Description
Start Group	
Mail Merge	Select this button to create a form publication that can be used several times. This publication can be printed or sent as an email message. This button is also used to access the Step by Step Mail Merge Wizard. This wizard takes the user step-by-step through the mail merge process.
Email Merge	To create a form publication that will be sent to recipients as an email message, select this option. This button is also used to access the Step by Step Email Merge Wizard. This wizard takes the user step-by-step through the Email merge process.
Select Recipients	This button is used to select a list of recipients that was created earlier either in Excel or Access. It is also used when a new list of recipients needs to be created. The new list will be created using an Access database.
Edit Recipient List	Use this button to make changes to the list of recipients or to decide which recipients are to receive the letter.
Write & Insert Fields Group	
Insert Merge Field	To display a list of merge fields that can be inserted into a publication, click this button. Click on the field name to insert it into the document.
Address Block	Click this button to insert the address into a Merge document. A dialog box will appear where Address Block options can be specified.
Greeting Line	This button is used to insert the Salutation (Greeting Line) into a document. A dialog box will appear where Greeting Line options can be specified.
Picture	To add a picture field from the Recipient List to the merge publication, select this option.
Insert Personalized Hyperlink	Click this button to insert a personalized hyperlink into the publication.
Preview Results Group	
Preview Results	To preview each of the letters or email messages as they will appear when the Merge is complete, use this button.
First Record	This arrow button allows you to view the first record in the recipient list when you have moved through the records.

Group/Button	Description
Previous Record	To go to a record that you have already previewed, click this arrow button.
Go To Record	Use this box to specify a specific record that you would like to access. You must know the number of the record that you want to access.
Next Record	To move to the next record in the recipient list, click this arrow button.
Last Record	Click this arrow button to move to the last record in the recipient list.
Find Recipient	This button is used to access the search feature. Once in the Find Recipient dialog box you can search for a record in the recipient list.
Exclude this Recipient	When this button is selected, the current recipient in the list will be removed from the results of the merge. The recipient will not be removed from the Recipient List. Their record will just be excluded from the results of the merge.
Finish Group	
Finish & Merge	This button is used to complete the merge process. When the button is clicked four options are available; Merge to Printer , Merge to New Publication , Merge to Existing Publication , or Send Email Message .
Follow-up	Click this button to prepare to follow-up on the mailing. Three options are available when this button is selected; Print Recipient List , Prepare a Shortcut to a Recipient List , and Export Recipient List to a New File .