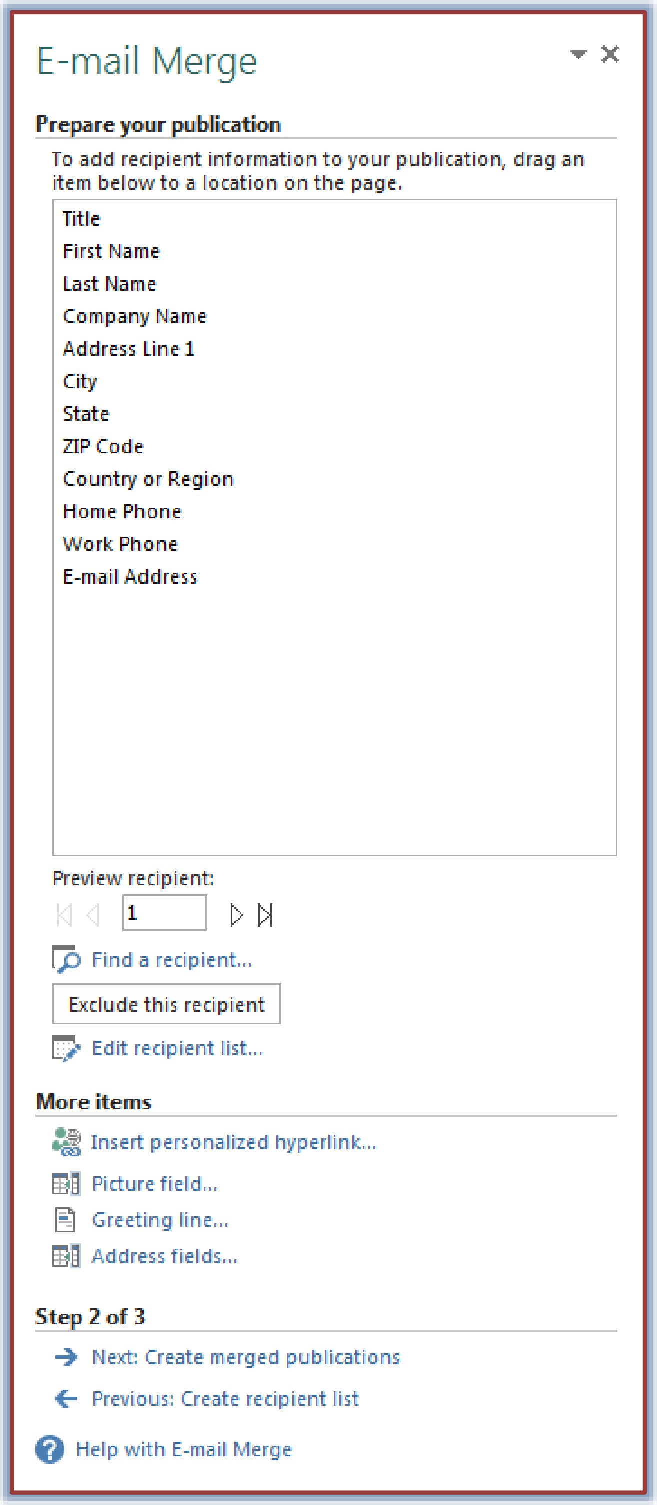
Publisher-Mail Merge-Prepare Your Publication

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 below).



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...

Exclude this recipient

Edit recipient list...

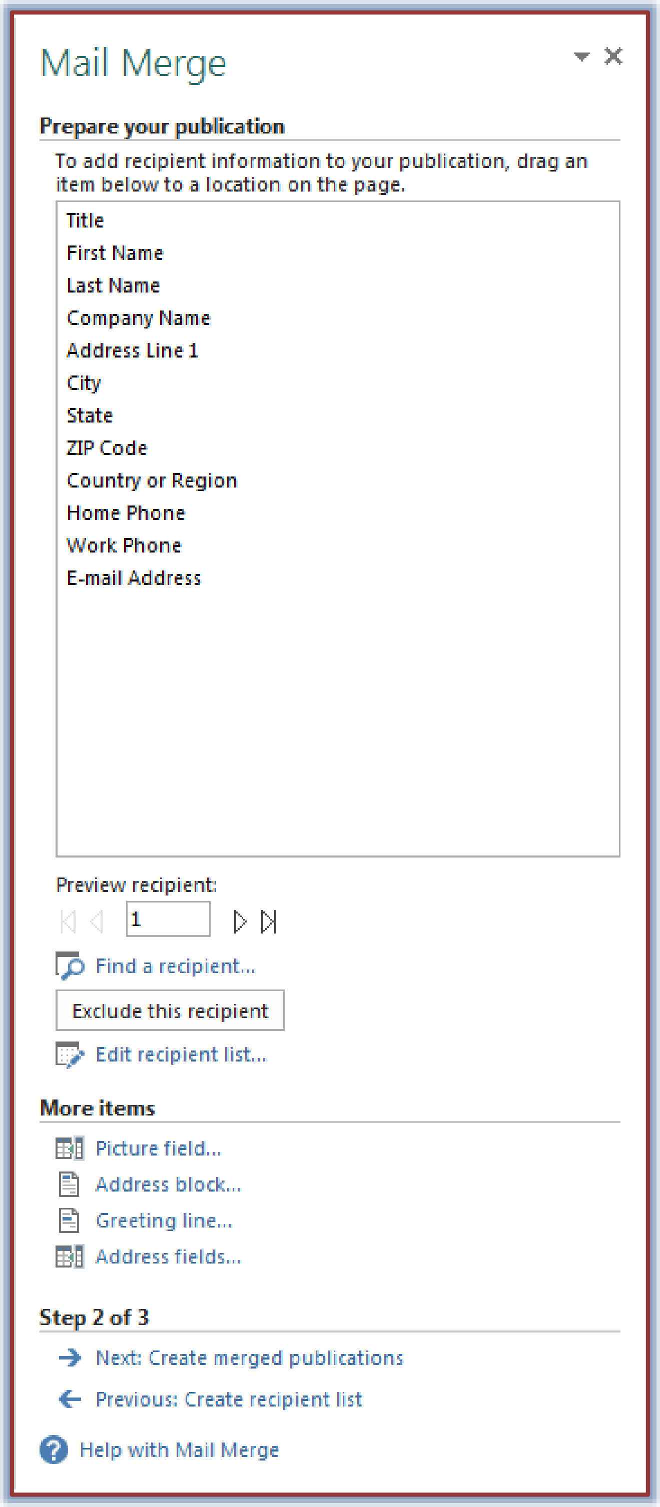
More items

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...

Exclude this recipient

Edit recipient list...

More items

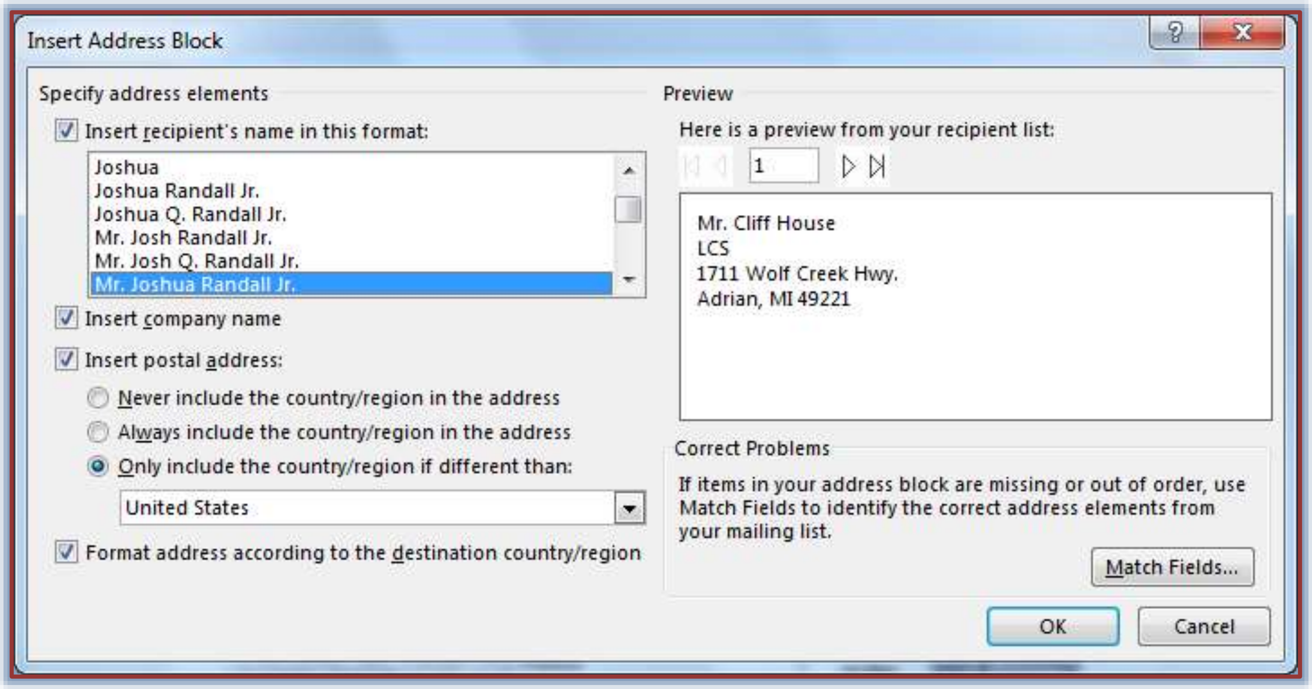
Picture field...
Address block...
Greeting line...
Address fields...

Step 2 of 3

Next: Create merged publications
Previous: Create recipient list

Help with Mail Merge

- Create a **Text Box** in the publication. This is where the information from the **Recipient List** is to be inserted.
- 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**.



Specify address elements

☑ Insert recipient's name in this format:

Joshua
Joshua Randall Jr.
Joshua Q. Randall Jr.
Mr. Josh Randall Jr.
Mr. Josh Q. Randall Jr.
Mr. Joshua Randall Jr.

☑ Insert company name

☑ Insert postal address:

○ Never include the country/region in the address
○ Always include the country/region in the address
● Only include the country/region if different than:

United States

☑ Format address according to the destination country/region

Preview

Here is a preview from your recipient list:

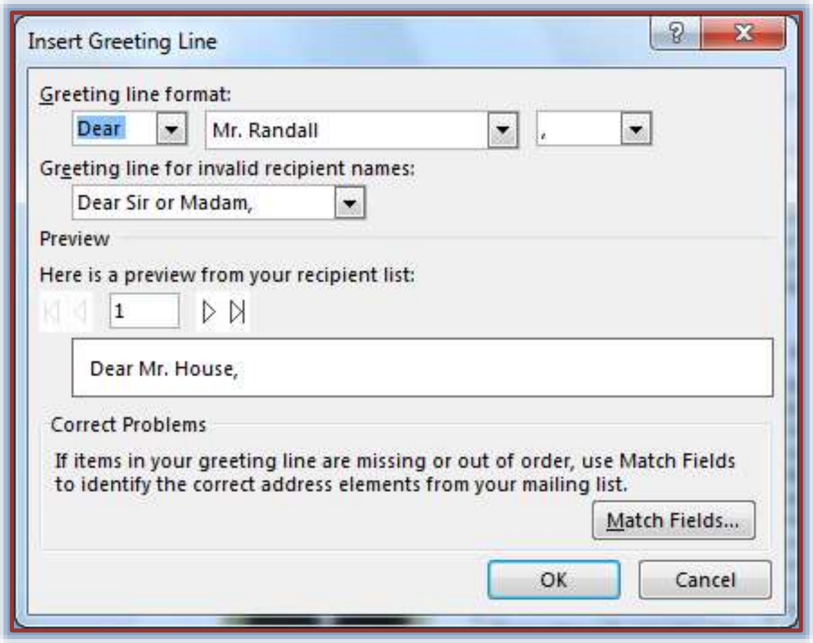
1

Mr. Cliff House
LCS
1711 Wolf Creek Hwy.
Adrian, MI 49221

Correct Problems

If items in your address block are missing or out of order, use Match Fields to identify the correct address elements from your mailing list.

  - 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 on next page).
  - 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.


Insert Greeting Line
?
X

Greeting line format:
Dear
Mr. Randall
,

Greeting line for invalid recipient names:
Dear Sir or Madam,

Preview

Here is a preview from your recipient list:
1

Dear Mr. House,

Correct Problems

If items in your greeting line are missing or out of order, use Match Fields to identify the correct address elements from your mailing list.

Match Fields...
OK
Cancel