
Start Mail Merge Process

Create a Publisher Mail Merge

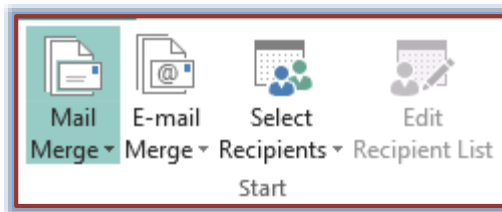
Mail Merge or Email Merge is used to add mailing addresses or personalized information to a publication. It is made up of three parts:

- ✓ **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 on next page).
- ✦ 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.

Mail Merge

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

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

- 3 Merged publications
- | | | |
|-------|------|------|
| Dear | Dear | Dear |
| Tony | Adam | 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

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

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

- 3 Multiple e-mail messages
- | | | |
|-------|------|------|
| Dear | Dear | Dear |
| Tony | Adam | 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