
Creating Mail Merge Documents

Starting the Mail Merge Process

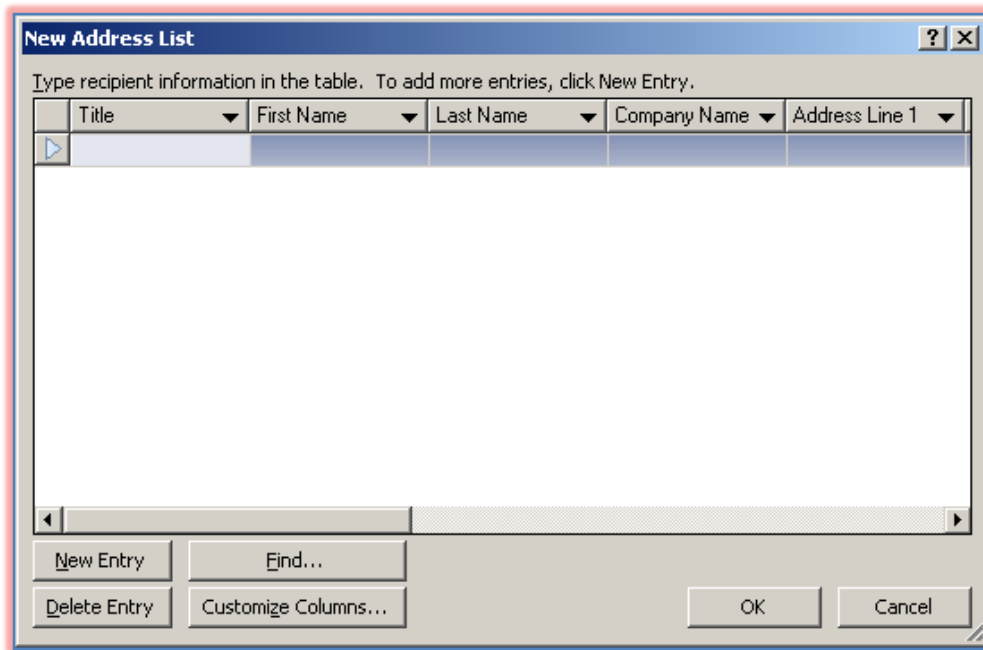
When creating a Mail Merge, a task pane will display that processes through the steps for setting up the recipient list and the main document. The steps below explain how to start the merge.

- ❖ Choose **Tools** on the **Menu Bar**.
- ❖ Move the mouse pointer over **Mailings and Catalogs**.
- ❖ Click **Mail Merge**.
- ❖ The **Mail Merge Task Pane** will display.
- ❖ In the first Task Pane, choose from one of the three options.
- ❖ Once one of the options above has been selected, click **Next: Create or connect to a recipient list**.
 - **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 the 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.
- ❖ What appears next will depend on which of the options is chosen.
- ❖ To find information on creating a Recipient List, please see the document on **Creating a Recipient List/Data Source** on the **Publisher 2007** page of the **Training Web Site**.

Step 1: Creating a Recipient List/Data Source

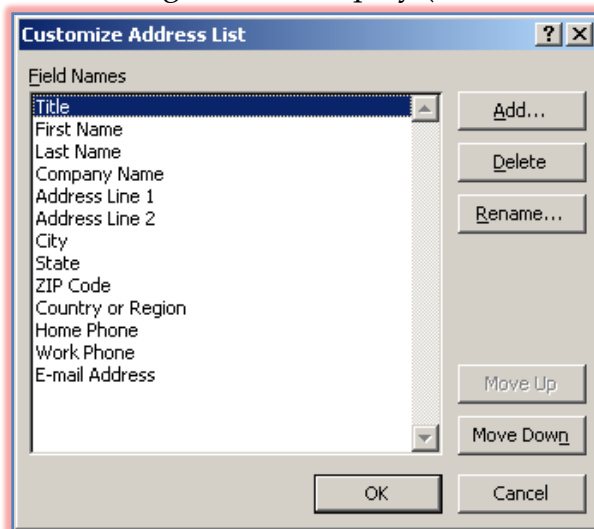
The first step in working with merges is to create the Recipient List or to use a list that has already been created. The Recipient List contains the variable information that is to be inserted into a publication. To create the Recipient List:

- ❖ Complete the steps in the **Starting the Mail Merge** section to open the **Mail Merge Task Pane**.
- ❖ 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 on next page).
- ❖ 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.



Customizing 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.
 - Input the name for the field, and then select one of the options.
 - 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.
 - A message will appear asking if you are sure you want to delete the field and that all information will be deleted from the field.
 - 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.
 - Input a new name for the field in the 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 Address List
- **Move Down** - Click this button to move a field to a different location in the Address List
- ❖ When all the changes have been made, click **OK**.

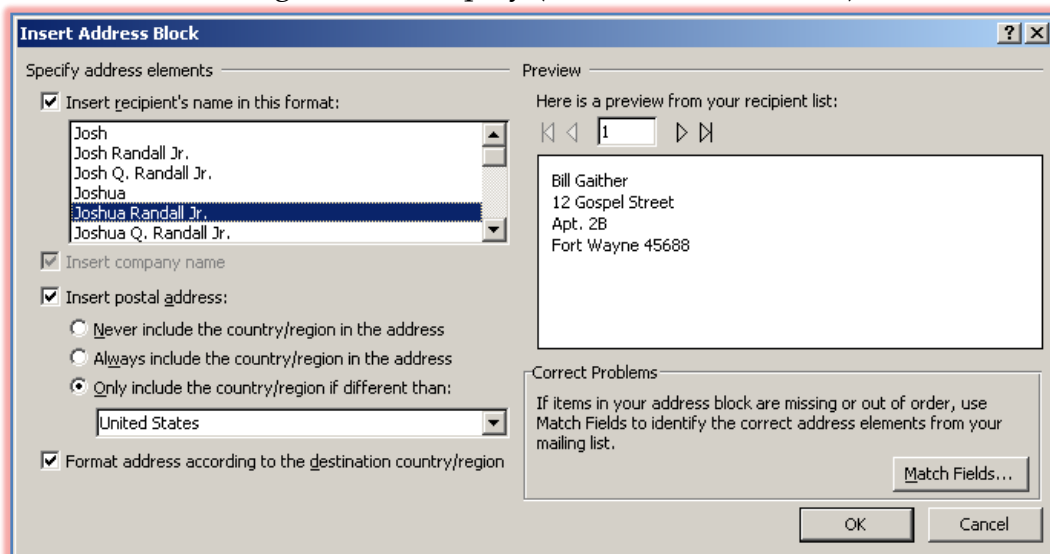
Entering Information into the List

- ❖ Under **Enter Address 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.
- ❖ Click the **Save** button.
- ❖ The **Prepare your publication** step in the Mail Merge process will display.

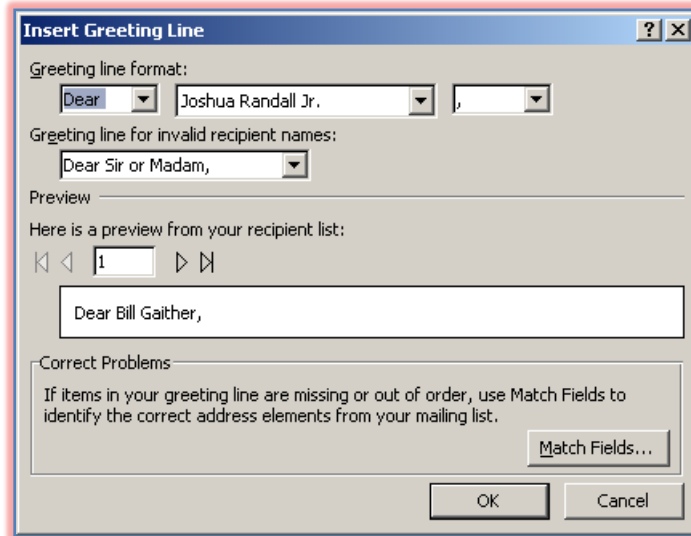
Step 2: Prepare Your Publication

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

- ❖ 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.
- ❖ To insert the name and address of the recipient directly into the publication, click the **Address Block** link.
- The **Address Block** dialog box will display (see illustration below).



- Make the necessary selections in the dialog box.
- An illustration of what will appear in the document is shown in the **Preview** box.
- If some of the fields are missing from the illustration, click the **Match Fields** button.
- Use the list on the right to match the fields with the list on the left.
- Click **OK** twice to exit both of the dialog boxes.
- ❖ 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.
- ❖ Click **Next: Create Merged Publication**.

Step 3: Create Merge Publication

- ❖ 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 **Prepare this publication for follow-up** link, if desired.