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 Mail Merge** document on the **Publisher 2007** page of the **Training Web Site**.