

PERSONALIZING 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. The information in this section will explain how to create a personalized 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.

Creating a Publisher Mail Merge

Mail 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.

Starting the Mail Merge Process

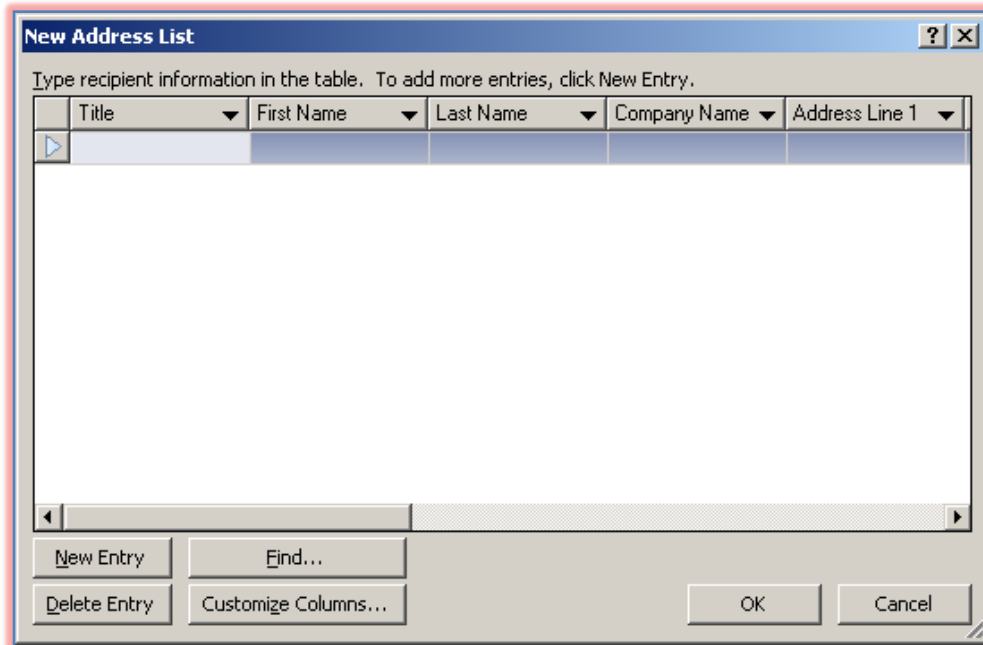
When creating a Mail Merge, a task pane will display that processes through the steps for setting up the recipient list and the main document. The steps below explain how to start the merge.

- ❖ 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.

Step 1: Creating a Recipient List/Data Source

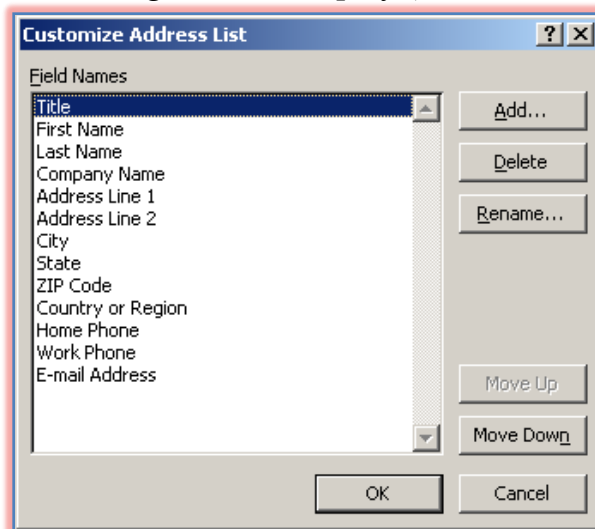
The first step in working with merges is to create the Recipient List or to use a list that has already been created. The Recipient List contains the variable information that is to be inserted into a publication. To create the Recipient List:

- ❖ 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**.

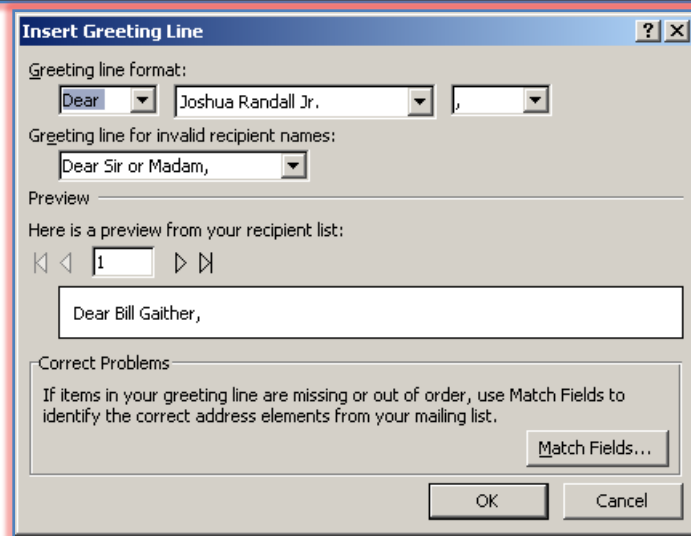
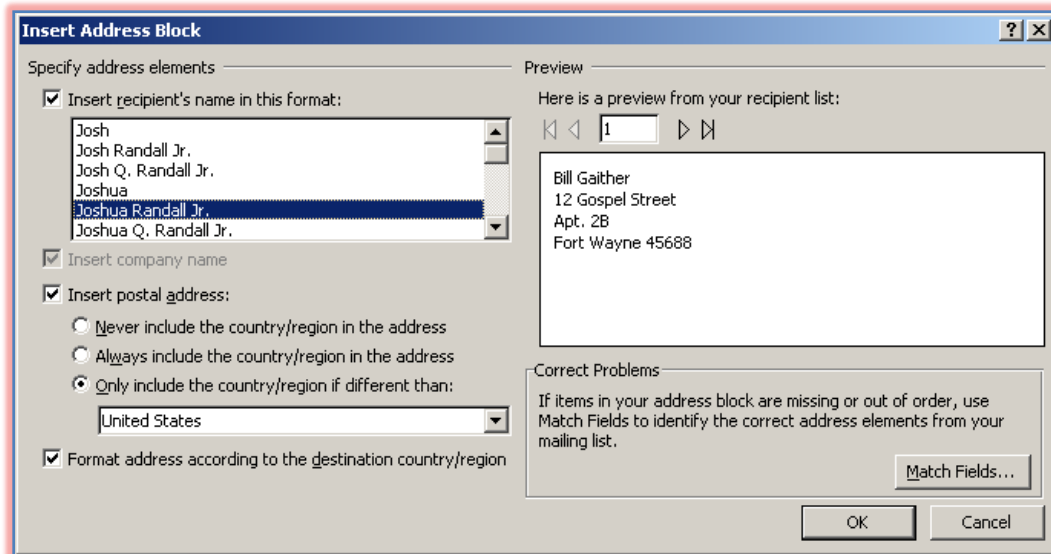
Entering Information into the List

- ❖ 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 on next page).
 - 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 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.
- ❖ 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.

Editing 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.

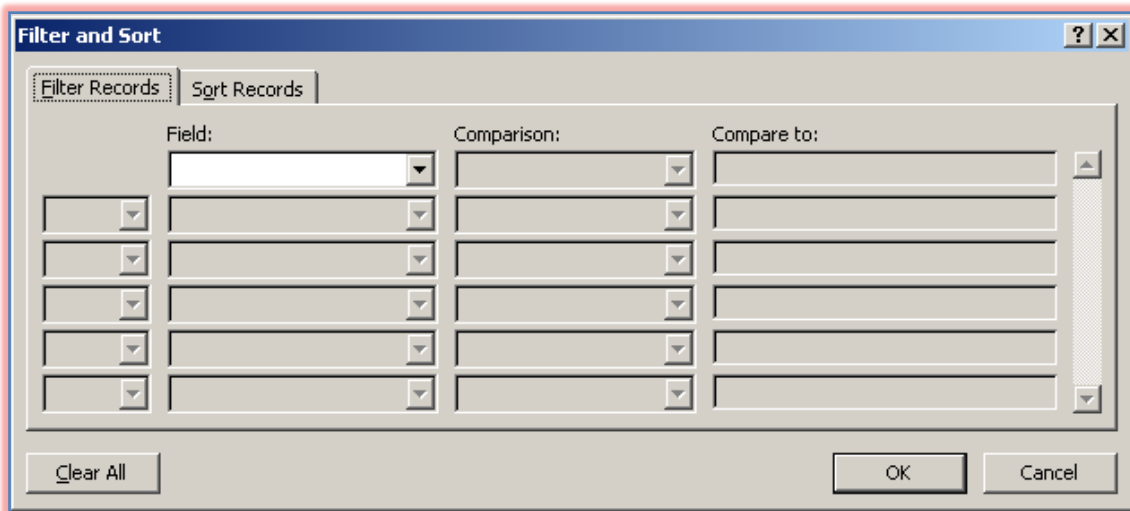
- ❖ Click **Tools** on the **Menu Bar**.

- ❖ Move the mouse pointer over **Mailings and Catalogs**.
- ❖ Click **Edit Address List** from the options that appear.
- ❖ 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.
- ❖ The **Mail Merge Recipients** list will appear.
- ❖ 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 **Close** button.

Applying a Filter to a Merge

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 three filter criteria for a Data Source and to choose whether the entry must meet one, two, or all three 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 **Tools** on the **Menu Bar**.
- ❖ Move the mouse pointer over **Mailings and Catalogs**.
- ❖ Do one of the following:
 - Click **Edit Recipient List**.
 - Click **Mail Merge** and then in the **Task Pane**, click **Edit Recipient List**.
- ❖ The **Mail Merge Recipients** dialog box will display.
- ❖ Click the **Filter** button.
- ❖ The **Filter and Sort** dialog box will display with the **Filter** tab selected (see illustration below).



- ❖ 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:

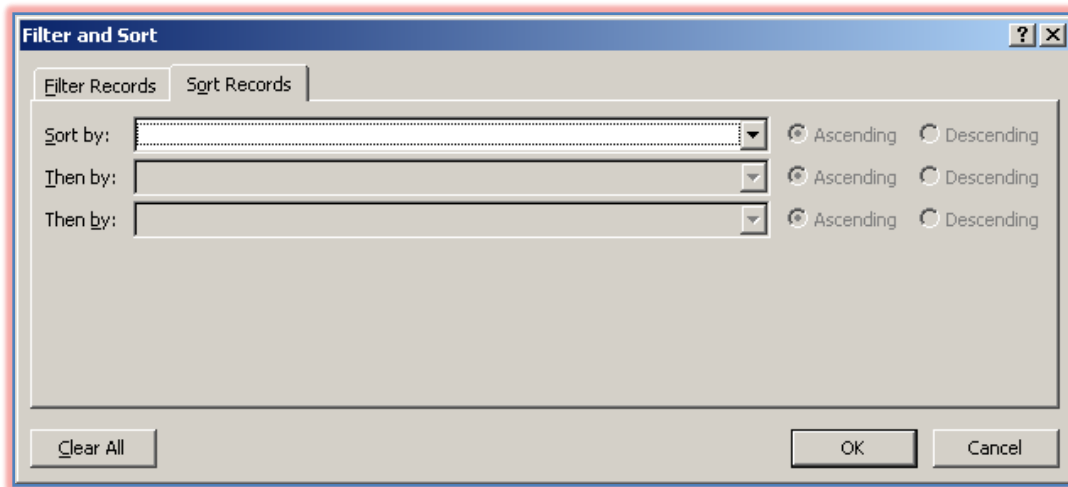
- **Equal to** – Matches the value in the **Compare to** box.
- **Not equal to** – Does not match the value in the **Compare to** box.
- **Less than** – Is less than the value in the **Compare to** box.
- **Greater than** – Is greater than the value in the **Compare to** box.
- **Less than or equal** – 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 **Show Merge Results** on the **Mail Merge** menu is selected, only those records meeting the specified criteria in the filter will be displayed.
- ❖ To remove the filter, click the **Clear All** button.

Sorting an Address 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:

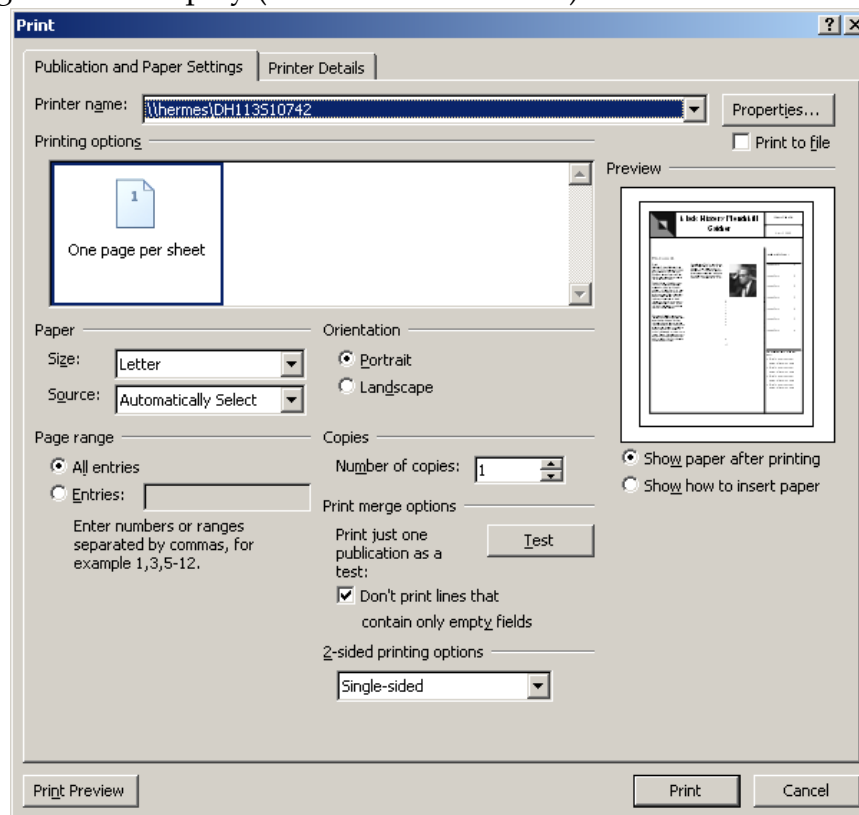
- ❖ Open a merged publication.
- ❖ Click **Tools** on the **Menu Bar**.
- ❖ Move the mouse pointer over **Mailings and Catalogs**.
- ❖ Do one of the following:
 - Click **Edit Recipient List**.
 - Click **Mail Merge** and then in the **Task Pane**, click **Edit Recipient List**.
- ❖ Click the **Sort** button.
- ❖ The **Mail Merge Recipients** dialog box will display with the **Sort** tab selected (see illustration on next page).
- ❖ 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.



Printing a Merge Publication

The final step in producing a merged publication is to print it. In order to print a merge publication quickly, click the **Print** button on the **Standard** toolbar. To choose **Print** options, it is necessary to access the **Print** dialog box. 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 **File** on the **Menu Bar**.
- ❖ Click the **Print Merge** option from the list of choices.
- ❖ The **Print** dialog box will display (see illustration below).



- ❖ To have blank lines print for empty fields in the **Recipient List**, click the check box to clear the **Don't Print Lines That Contain Only Empty Fields** to clear it.
- ❖ Under **Print Range**, click one of the following options:
 - **All entries** - Prints all the entries in the Recipient List
 - **Entries from ___ to ___** - Prints the range of entries specified in each of the boxes.
- ❖ Click **Test** to Print a test copy of the publication.
 - Prints a publication for the first entry in the Recipient List.
 - Prints the first two rows of labels.
- ❖ Click the **OK** button to accept the selected options and print the publication.