

# Perform a mail merge

## Overview of the mail merge process Page 1 of 6

**Mail merge** is the process of combining a list of data (usually names and addresses) with a master document containing placeholders for that data so that there's a separate copy of it for every item on the data list. Mail merge is **everywhere**. Virtually every company in operation today uses some form of mail merge for communicating with their customers.

Here are just a few examples of the ways companies use mail merge:

- Utility companies create customer invoices with each customer's name, address, and amount due.
- Medical offices create reminder postcards for appointments.
- Nonprofits generate thank-you letters for participation in charity events.

Publisher 2003's mail merge feature is called Mail and Catalog Merge. Why the catalog? It's a tip-of-the-hat to the fact that mail merge can also be used to create catalogs. A **catalog** is like a mail merge except the records run consecutively on the same page, rather than each one being a separate page. For example, when you print mail-merged postcards, you print one postcard per recipient, right? But let's say you're a merchant producing a catalog. You don't want each item on a separate page; you want to run them as tightly together on the same page as possible. That's a catalog merge. This lesson does not cover catalog merges, but feel free to experiment with them on your own.

Here are some key vocabulary terms you need to know for a mail merge:

- **Record:** A single entry in your data table. For example, in a data table containing people's names and addresses, the full set of data for a single person is a record. Records are typically represented by rows in a data table.
- **Field:** A single type of data stored in the data table. For example, First Name would be a field and City would be another.
- **Field code:** A code you insert in a publication to indicate the spot where a field should go.
- **Main document:** The publication containing the field codes.
- **Data source:** The file containing the data to be merged into the main document (for example, the address list). The data source can be an external file created in some other program (such as Microsoft Word, Excel, or Access), a contact list from Microsoft Outlook, or an address list you create from within Publisher.

If you decide to create a Publisher address list, it's saved as an Access file (.mdb format). You can reuse it in other publications, and you can open it in Access if you have it installed on your computer.

## Create a data file Page 2 of 6

Let's start with an easy way to create a data source for a mail merge: within Publisher itself. Publisher's address list capability offers an easy way to create a database of names and addresses without having to rely on an external program. You can create multiple address lists in Publisher, and open the one you need for each project.

### WARNING

You cannot use a Publisher address list for a catalog merge; catalog merges must use external data

sources only.

Follow these steps to create a new address list:

1. Select **Tools > Mail and Catalog Merge > Create Address List**. The New Address List dialog box appears, ready for your input.
2. Fill in the form shown in Figure 5-1, and then click **New Entry**.

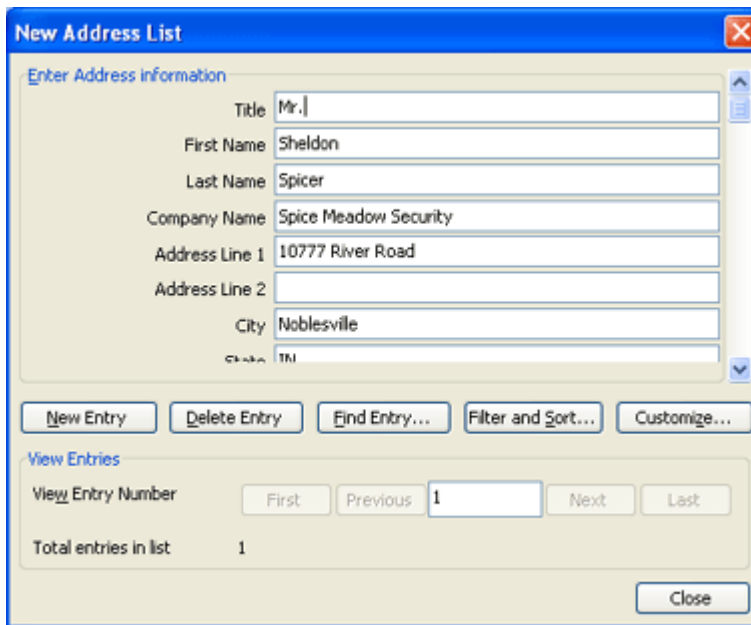


Figure 5-1: Enter contact information for a new address list.

3. Fill it in again for the next person, and so on until you have entered all the people for that list.
4. Click **Close**. The **Save Address List** dialog box appears.
5. Type a name for the file, and then click **Save**.

### WARNING

If you don't save it (that is, if you click Cancel), all the entries you typed will be lost.

Publisher saves data files by default in the My Data Sources folder, which is a subfolder in My Documents. You can save them anywhere you like, however.

You can create the address list before running the Mail and Catalog Merge Wizard, and there's an opportunity in the Wizard to create it on-the-spot. However, in this lesson, you create the address list beforehand.

### Edit an address list

To reopen a saved address list, select **Tools > Mail and Catalog Merge > Edit Address List**. Select the address list you want, and then click **Open** so you can resume data entry.

### Move among records

To move among records in the address list, click the First, Previous, Next, or Last buttons at the bottom of the dialog box, shown in Figure 5-1. Alternatively, click **Find Entry** to open a dialog box in which you can enter a search term, such as a name.

### Delete a record

To delete a record, display that record and click **Delete Entry**. It's deleted immediately (no confirmation warning).

## Create the main document Page 3 of 6

In this section, you create the main document, which serves as the basis for the merge. This can be any publication type you like, but it works best with types that have placeholders for mailing addresses (postcards, labels, newsletters, brochures, and so on). The following example uses postcards because they're easy.

This example shows how to do a mail merge manually -- that is, without the Mail Merge Wizard. Later in the lesson, you'll use the Wizard, but for now you need to see how things happen "behind the scenes," because it makes for better learning.

1. Start a new publication based on one of the Postcards templates (Arrows Informational, for example).
2. Display page 2, where the address placeholders are, and delete the placeholder address text (but leave the empty text box).
3. Select **Tools > Mail and Catalog Merge > Open Data Source**. Select the data file you created in the preceding sections, and then click **Open**.

Your data file may've been open from the previous section, but now you know how to open it.

4. Select **Tools > Mail and Catalog Merge > Insert Field**. The Mail and Catalog Merge task pane appears.

If you look closely, you'll notice that it opens to Step 3 of 5 of the Wizard, but ignore that at the moment.

5. Click in the empty text box, and then click **First Name** on the list of fields in the task pane. The field appears in the text box.
6. Press the spacebar once, and then click **Last Name** on the list of fields.
7. Press **Enter** to start a new line, and then click **Company Name** on the list of fields.
8. Continue creating a mailing address block by inserting fields from the list. The finished block should resemble Figure 5-2. (Don't forget spaces and punctuation between items.)

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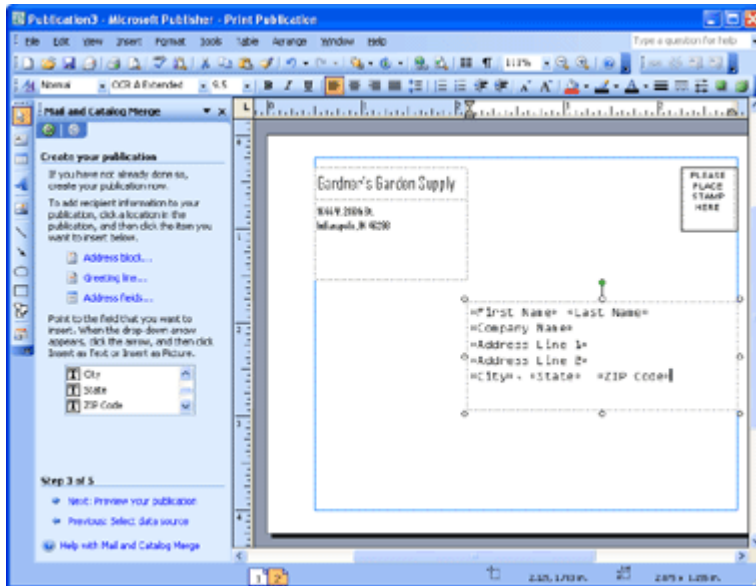


Figure 5-2: Insert mail merge fields.

[Enlarge image](#)

9. Select **Tools > Mail and Catalog Merge > Show Merge Results**. (Or, since you happen to have the task pane open, click **Next: Preview your publication**.) The postcard shows your first record in the address area on the postcard.
10. In the task pane, click the **>>** and **<<** buttons to move between records, examining each one to make sure nothing is amiss (for example, to make sure you did not omit any needed information for a record). Correct any information as needed.
11. (Optional) Print the publication, or use Print Preview to simulate printing, so you can check your work.
12. Save your work.

The resulting saved publication contains the merge fields and a link to the original data file. If the data file changes, the next time you open this publication, the records will change because they're linked from that original file.

### Save merge results

It's possible to save a copy of the publication with the merge results in it so that the current merge results will be "frozen in time" even if the data file changes later. To do this, continue the preceding steps in the following way:

1. In the task pane, click **Complete the Merge**.
2. In the task pane, click **Create New Publication**. A new publication is generated with a separate copy for each record. In the case of a postcard, where there was originally two pages, you'll have two pages for each record.
3. Save the new publication.

Now that you know "the hard way," use the Mail and Catalog Merge Wizard to accomplish the same tasks outlined in the preceding section. Then you can decide which you like better.

Follow these steps to try the Wizard:

1. Close any open publications. Save changes or not, as you wish.
2. Start a new publication based on a Postcard template.
3. Display page 2.
4. Select **Tools > Mail and Catalog Merge > Mail and Catalog Merge Wizard**. The task pane appears.
5. Leave **Mail Merge** selected, and then click **Next: Select data source**.
6. Leave **Use an existing list** selected, and then click the **Browse** hyperlink. Locate and select your data file (created earlier in this lesson), and then click **Open**. The Mail Merge Recipients dialog box shown in Figure 5-3 appears.

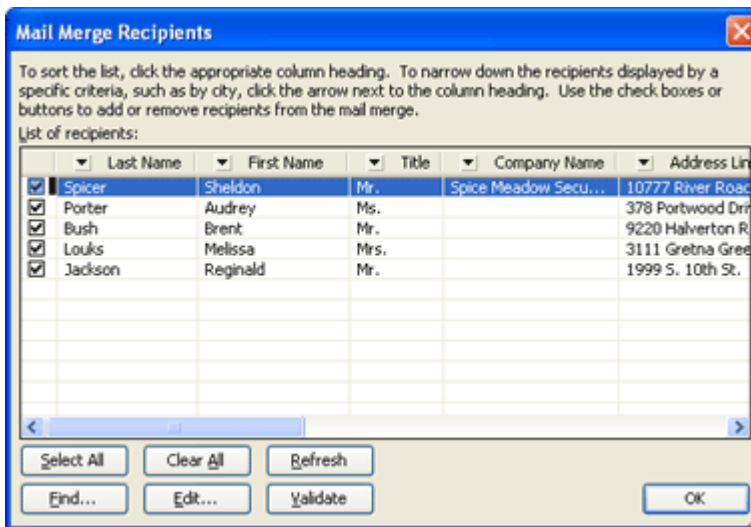


Figure 5-3: Mail Merge Recipients dialog box.

7. (Optional) To exclude any records from the selected data file, clear their checkboxes in the Mail Merge Recipients dialog box, and then click **OK**.
8. Click **Next: Create your publication**.
9. Delete the sample text in the address box on the postcard, and then position the insertion point inside the empty text box.
10. Here's an alternate way to insert the fields: Click **Address block**. The Insert Address Block dialog box appears.
11. Click **OK** to accept the default address block options. The code `<<AddressBlock>>` appears in the text box.
12. Click **Next: Preview your publication**. The full name and address appear in place of the AddressBlock code.
13. Click **Next: Complete the merge**.
14. Use the Print, Create new publication, or Add to existing publication links as desired.
15. Save your work (if desired).

Here's a summary of what you should've learned from that experiment:

- The Wizard process is basically the same as the manual process in what it does and how it does it; the Wizard simply provides shortcut links in the task pane.
- It's possible to exclude certain records from a data source.
- The `<<AddressBlock>>` code inserts a typically formatted address block so you don't have to input the individual fields.

Now let's get a little deeper into data file management. You saw in Figure 5-3 that you can exclude certain fields by unchecking their checkboxes in the Mail Merge Recipients dialog box. You can also use this same dialog box to filter and sort the records in that data source.

Follow these steps to try sorting and filtering the recipient list.

1. Start in the file you worked with in the preceding section, or create a new one and reopen the data source.
2. Select **Tools > Mail and Catalog Merge > Mail and Catalog Merge Wizard**, and then click **Next: Select data source**.
3. In the task pane, click **Edit recipient list**. The Mail Merge Recipients dialog box appears.
4. Click the down arrow next to one of the field names. A list of all the various entries in that field appears.
5. (Optional) To filter the list so that only entries containing certain data in that field are included, select that field entry from the menu shown in Figure 5-4. This is called **filter by selection**.

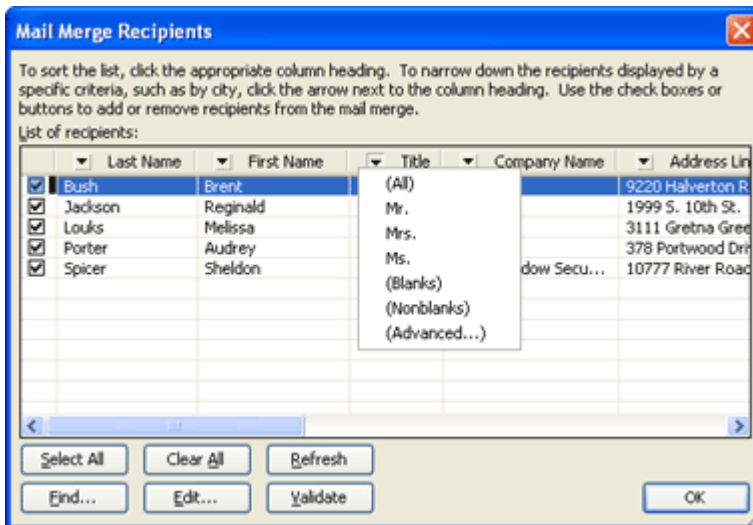


Figure 5-4: Filter the recipient list by selection.

6. To sort the merge results by a certain field, click that field column (but not the arrow next to the name).
7. Now let's look at some more advanced options. Click the arrow next to any field name and select **Advanced** from its menu. The Filter and Sort dialog box appears.
8. Open the Field drop-down list, select a field, and then enter a comparison operator for it. For example, Figure 5-5 specifies that the title should be equal to "Mr."

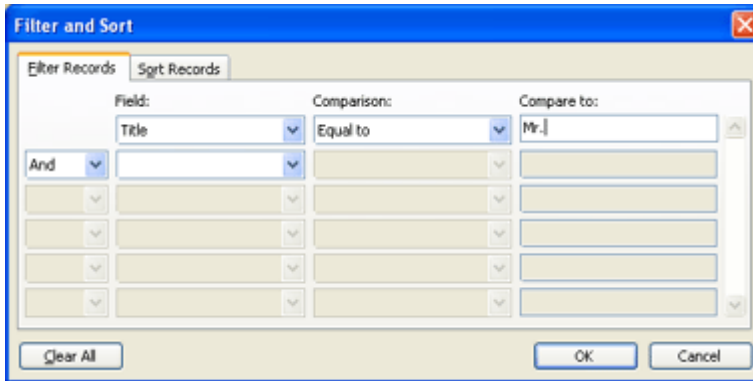


Figure 5-5: Filter and Sort dialog box.

9. Enter additional criteria if desired.
10. Click the **Sort Records** tab, and then open the **Sort by** drop-down list and select the primary sort field.
11. (Optional) To enter additional sort fields (which will serve as tie-breakers if two entries have the same value in the first sort field), enter them in the **Then by** boxes, as shown in Figure 5-6.

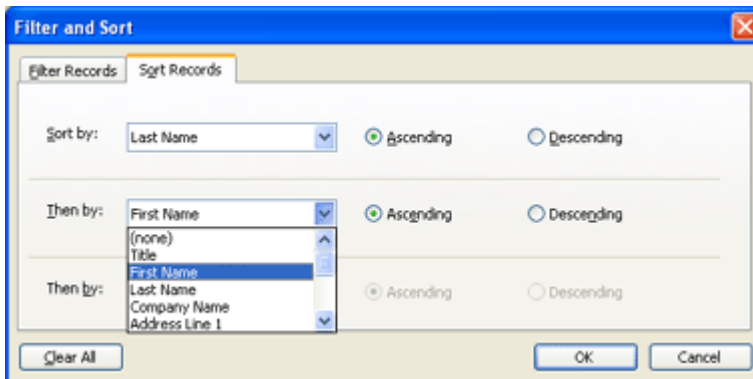


Figure 5-6: Create advanced sorts.

12. Click **OK** to return to the Mail Merge Recipients dialog box.
13. Click **OK** to close the dialog box and return to the publication.
14. Complete the merge normally.

## Working with other data sources Page 6 of 6

Many people have existing data sources they would like to use for a mail merge in Publisher, so let's look at an example of that. If you do not have some of the applications used in the following sections, simply skip them.

### Working with Outlook as a data source

You can use your contacts list in Outlook for a merge if desired. The easiest way to do this is to go through the Wizard:

1. Start the publication normally.
2. Select **Tools > Mail and Catalog Merge > Mail and Catalog Merge Wizard**.
3. In the Step 2 of 5 portion of the wizard, choose **Select from Outlook contacts**.
4. If you've already set up this publication to use some other data source, click **Choose Contacts Folder**, go through the warnings that appear, and then select your Outlook folder.
5. The Mail Merge Recipients dialog box appears; complete the merge normally. (You'll probably

want to exclude some of the records.)

### Working with Excel as a data source

To use an Excel workbook as a data source, you must first prepare the data in Excel. It has to be set up a certain way, or Publisher cannot use it.

For example, follow these steps to create a usable data file in Excel:

1. Open Excel. A new workbook opens automatically.
2. In the first row, starting with column A, enter the field names (for example, First, Last, Address, City, State, and ZIP).
3. In the rows immediately beneath the field names, enter your records. Do not leave any blank rows or columns.
4. Save your work, and then make a note of the file name and location where you saved it.
5. Close Excel, and go back to Publisher. (Reopen Publisher if you closed it.)
6. Create a new publication or open an existing one.
7. Select **Tools > Open Data Source**. If a warning appears, click **Yes** to bypass it.
8. In the Open Data Source dialog box, navigate to the location containing your Excel file.
9. Select the Excel file, and then click **Open**.
10. If the Select Table dialog box appears, click the desired sheet. If you don't know which to pick, select **Sheet1**, and then click **OK**.
11. The Mail Merge Recipients dialog box appears. Complete the merge normally.

### Creating a plain text data source

You can also create data sources as plain text. For simplicity, rather than doing a full address list, let's just do a data file with two fields in it: Name and Phone. Follow these steps:

1. Close Publisher, and then open **Notepad** (on the Accessories menu).
2. In Notepad, type **Name**, press **Tab**, and then type **Phone**.
3. Press **Enter** to start a new line, and then type a person's name, press **Tab**, and type a phone number.
4. Press **Enter** to start a new line, and then repeat Step 2. Do this at least eight times so that you have eight people and their phone numbers, each on a separate line. Don't forget to press the **Tab** key between each name and phone number. Figure 5-7 shows an example.

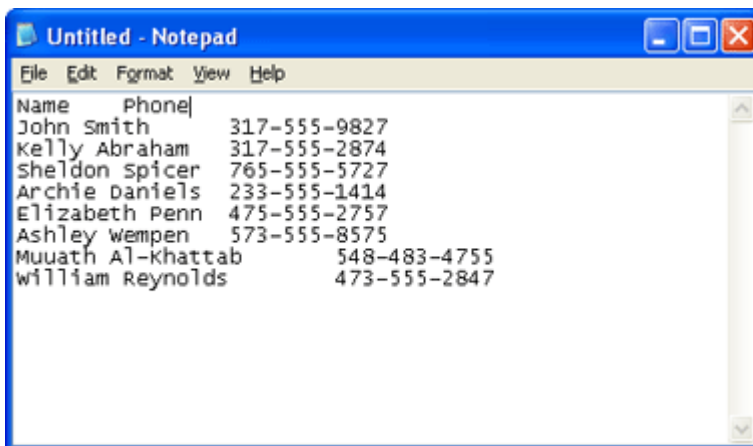


Figure 5-7: Notepad can be used to create a data file.

5. Save your work, and remember the file name and location.
6. Close Notepad.

Notice in Figure 5-7 that the last two lines don't line up with the others, and the headings at the top don't line up with the phone numbers either. That's okay. Those names were simply longer than the others, so that the tab stop was different. It won't make any difference to Publisher.

You can use this text file as a data source just like an Excel file, except for a small difference. Instead of asking you for a sheet name, Publisher asks you how the text file is delimited (separated). In our example, the correct choice would be **Tab**, because you pressed Tab between the names and phone numbers.

### **Moving on**

In this lesson, you learned how to do a mail merge in Publisher with a variety of data file types. You can use mail merge in any type of publication -- not just for mailing addresses, but for other types of data as well. Make sure you complete the assignment and take the quiz to check your understanding of the topic. In addition, visit the Message Board to see what your instructor and fellow classmates are up to.

In Lesson 6, you'll learn how to use Publisher to create Web sites -- no programming or HTML experience required!