Crabby gets personal with E-mail Merge in Publisher

Print

Crabby Office Lady

Does the notion of "staying in touch" with your customers amount to posting a "We'd love to hear from you" link on your business Web site? If so, dear reader, that's just not enough. Step out of that warm, cozy den of yours with two things: an e-mail newsletter and E-mail Merge. Both are beautifully matched in Publisher 2007.

I don't know about you, but where I live it's been a long, VERY COLD winter (yes, all six weeks of it). "How cold is it," you ask? So cold that my dog's paws stick to the pavement when we go out (and he looks at me with such confusion, even a hint of betrayal — as if I controlled the weather). So cold that the snow-people (and other barely recognizable snow formations) that sprang to life all over our neighborhood during the *first* big snow storm in November are still fully formed and standing guard at their respective houses. So cold that this whole global warming thing seems like a welcome — if only temporary — respite. (And you dyed-in-the-wool environmentalists need not bother to send me your vilified remarks. I was only KIDDING.)

Hence, on this venerable day, this second day of February, when Punxsutawney Phil, the perennial weather-forecasting groundhog, pops his little brown head out of his burrow, let's hope he does NOT see his shadow, thereby forecasting that spring will arrive early this year. If he does, there will be six more weeks of this glacial freeze.

I don't know about you, but I've always found this whole shadow issue a bit turned around. It seems to me that if Phil *does* see his shadow, the sun must be out, indicating that spring is arriving. But it's just the opposite: If he sees his shadow, it means more winter. This just doesn't make sense. But then again, what do I know. I am neither a meteorologist, nor do I play one on the Web...

And Groundhog's Day has to do with what...?

If I'm reading my editor's mind, he is wondering what all this talk of Groundhog's Day is about. If you must know, I am simply using it as an example to get to the real meat of this column. You'll understand in a second. Because I spent so much time pondering the doings of Punxsutawney Phil and his forecasting prowess, I figured that there must be an entire group of people who must take this holiday quite seriously, particularly you good folks in Punxsutawney, PA. If the film of the same name is any indication, there are parties to be thrown...and newsletters (possibly invitations) to be sent out. And that, my wintery weather friends, is where Publisher, particularly Publisher 2007, comes in.

The urge to merge....winter into spring!

Something new has rolled down from the snow-covered hills: the ability to do an e-mail merge in Publisher 2007. No, this feature was NOT available in previous versions of Publisher. But boy, did you ask for it. And so, once again, ask and ye shall receive.

Now, perhaps sending out an e-mail newsletter or invitation for a Groundhog Day celebration isn't high on your list. But maybe it's a regularly scheduled e-mail newsletter to your company employees, your customers, your vendors, or your personal contacts. Maybe it's an update for different recipients each month, or for specific clients with specific needs. Everyone wants to feel special, right? No one wants to feel like they're just a small part of the masses (unless they're in a mosh pit, of course).

Now there's a way to create one e-mail newsletter for many people, make it appear personal, and use a familiar mail merge tool to get it out the door.

Before Publisher 2007, you set up mailing addresses by hand. But now, with the new **E-mail Merge** feature in Publisher 2007, it's easy-as-pie. The task pane (which shows up on the left side) walks you through the process. You can combine lists, get rid of outdated items or duplicates, and even personalize your letter by dragging names and other information right from the task pane to the newsletter.

Step 1: Create your newsletter

Here are the basics of how to get going. If you want specific instructions, take a look at the resources in the **See also** box (located in the top right corner of this column).

First, create your newsletter, either from an existing one you already created yourself or from one of our thousands of customizable design templates. You can also choose from more than 70 designer-created color schemes or create one of your own. (If you're using Pantone colors — I wish my stiletto heels came in these colors — choose them within Office Publisher 2007.) If you need to create a company logo or brand, you can do that, too.

Step 2: Gather ye your names, e-mail addresses, and other information from a data source

After you've created your newsletter (customizable things like hyperlinks, coupons, and so on), it's time to merge.

Point to **Mailings and Catalogs** on the **Tools** menu, and then click **E-mail Merge**. This will open up that left task pane and let you choose from a range of options.
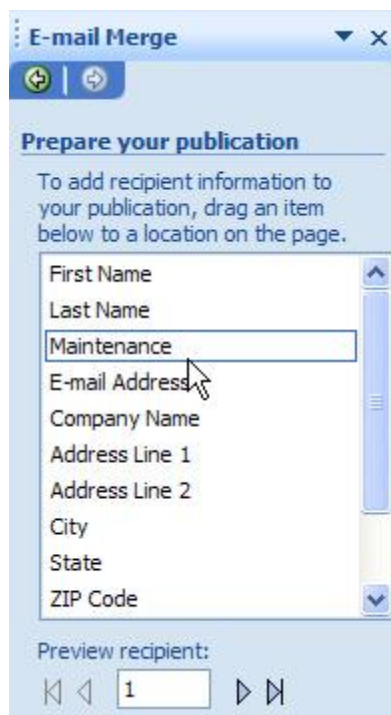
You can connect to data sources (a fancy name for "information") that can be in a bunch of different formats (such as an Outlook Contacts list, Excel spreadsheets, Word tables, and Access data tables). You can also create a new list that you want to connect to.

To learn how to create a new list to connect to, head up to the **See also** box in the top right corner of this column and click the **Create a data source for a mail merge** link. (But don't go do that now, I need you to see how cool this next part is.) If you created a data source in Publisher, your list of contacts will look something like this:

Edit Data Source

To edit items in your data source, type your changes in the table below. Column headings display fields from your data source and any recipient list fields to which they have been matched (in parentheses).

Data source being edited: test address list for Pub column.mdb

First Name	Last Name	Maintenance	E-mail Address	Company Name
Pia	Lund	Monthly	pia@contoso.com	Contoso
Judy	Lew	Summer only	judy@contoso.com	Contoso
Bob	Kelly	Season	bob@contoso.com	Contoso
Andrew	Ma	Monthly	andrew@contoso.com	Contoso

Step 3: Personalize!

Now we get to the fun part: personalizing your e-mail newsletter. First, figure out your data source; in other words, think about which fields you really need. Name? Obviously. E-mail address? Right. Phone number? Probably not. Special coupon? Most definitely. Personalized status statement? Right again. From that data source (and right from within Publisher) you can filter and sort criteria, revise the list of criteria, make sure there are no duplicates — whether you used one data source or more than one — create a special message for each recipient, and create a new recipient list by merging the lists that you are using.

And all of this is done within the **E-mail Merge** feature in Publisher 2007. When everything is the way you like it, Office Outlook will send out your e-mail newsletter, personalized the way you want.

In the examples above and below, the words underlined in blue are the fields that change with every recipient. If you use the **E-mail Merge** task pane, you can scroll through each copy so that you see what the newsletter will look like for each recipient. Above is what it looks like for Pia. Here is what it looks like for Andrew:

That, my friends, is about it. The wizard walks you through it. It isn't complicated, especially if you have your newsletter set to go. But the beauty of this new feature is that you can make your newsletter look personal — as if you customized it for each and every recipient. (Hey, if you won't tell, I won't.)

And again, the link **Create an e-mail merge** in the **See also** box (top right corner of this column) will give you more detailed instructions on how to do this. But take comfort, the wizard inside this feature of Publisher 2007 handles a lot of the complexity; you should have no trouble at all getting started on this. In fact, you'll wonder why we didn't think of this before...

If you're still a little bit confused, and if I've run through the steps rather too succinctly, I suggest you see what I've talked about in action:

Demo: Personalize newsletters with E-mail Merge in Publisher 2007

This demo is probably something you will want to refer back to the first time you try this out. I did when I was writing this column, and it was invaluable. (Thanks Krista and company.)

More information on newsletters themselves

As you know, I'm all about customizing, but sometimes it's nice to have a head start, also known as a template.

- Create, use, or change a template in Publisher
- Demo: Create a design scheme to brand your business publications
- Newsletter templates
- I can't find my Publisher templates

And remember, you can find a HUGE assortment of these types of documents available within Publisher 2007. On the **File** menu, click **New** and make your choice from the list on the left-hand side of the window.

Please, Phil...*please*

And so, if you're wondering if spring is coming soon...or if we have another full six weeks of winter, don't forget to visit the Official site of the Punxsutawney Groundhog Club. And if it turns out that Phil sees his shadow, and life hands you more snow, make snow cones. (And if life hands you the newsletter-making-and-sending duty, pull your newsletter together in Publisher 2007, make a data source, and impress everyone, from your boss to your clients.)

"Eventually, all things merge into one, and a river runs through it." — Norman Maclean (from *A River Runs Through It*)

About the author

Annik Stahl, the Crabby Office Lady columnist, takes all of your complaints, compliments, and knee-jerk reactions to heart. Therefore, she graciously asks that you let her know whether this column was useful to you — or not — by entering your feedback using the **Did this article help you?** feedback tool below. And remember: If you don't vote, you can't complain.