Microsoft Publisher
Mail Merge and Creating Fancy Emails

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Publisher - Mail Merge and Creating Fancy Emails
1.0 Hour

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Tips on E-mail Marketing from Microsoft Office

https://support.microsoft.com/en-us/office/tips-on-e-mail-marketing-86faf118-b883-416f-b67d-7596412ab882

Marketing through e-mail has many benefits:

- It costs little.
- It is instantaneous.
- It is interactive.
- It spreads your message to many customers at once.
- It doesn't wait for customers to visit but pushes your message to them.

E-mail marketing makes it easy to establish a regularly scheduled communications program that builds your brand and your business.

E-mail marketing has its disadvantages, too. Deluged with e-mail, customers can filter your messages out of their e-mail inboxes and delete them without ever reading them. Worse, they can mistake your e-mail messages for spam, especially if they get too many irrelevant messages. Worst of all, customers may decide that your message is spam if the content doesn't match what they thought they would receive. Then they may remove themselves from your mailing list and think ill of your business.

Components of successful e-mail marketing

What do you need to do to succeed in e-mail marketing?

- Keep it legal.
- Make the content relevant and brief.
- Offer a clear call to action.
- Make the message personal.
- Be consistent.
- Format the message carefully.
- Test the message before you send it.

The key to successful e-mail marketing, as with all other marketing, is to make sure that the right people are on your recipient list, set expectations about what they will receive from you, and deliver what you promise.

Make the content relevant and brief

Expect that most of your customers and potential customers have time and interest for reading only what pertains to them, as long as it gets to the point quickly. The more you target each e-mail message to individual recipients' interests, the more likely they are to open, read, and respond to your messages. The E-Mail Merge features in Microsoft Office Publisher 2007 can help you to efficiently direct the content at each recipient's interests.

The types of content that work well in e-mail marketing include:

- Weekly specials, discounts, and other promotional offers
- Event and seminar invitations
- Product information updates
- Informational newsletters

Effective e-mail marketing messages include the following elements (most of which are also required by the CAN-SPAM Act):

- **A clear, concise subject line**   Although you want recipients to open the e-mail message, play no tricks and use no gimmicks. Just promise a real benefit or value that you can deliver. The CAN-SPAM Act requires that the subject line accurately represents the content of the message.

Also, keep the subject line under 50 characters so that it is not truncated in the recipient's inbox, and avoid punctuation unless you are asking a question — it wastes precious space. Above all, avoid using exclamation marks. They are a good tip-off that the message is strictly promotional.

- **Notification that your e-mail message is an advertisement or solicitation**   The CAN-SPAM Act requires that this notice be clear and conspicuous and that you provide a way for recipients to remove themselves from the mailing list — a method for opting out.

- **A valid return address**   The CAN-SPAM Act requires that you provide a street address. It is a good idea to provide a phone number as well. After all, you want the recipients to contact you.

- **An opt-out option**   The CAN-SPAM Act requires that you provide a return e-mail address or another Web-based response mechanism that allows recipients to ask you not to send future e-mail messages to that e-mail address. You must honor the requests within 10 business days of receiving the opt-out request and for at least 30 days after the e-mail message was sent. Nor can you help anyone else send e-mail to the address of someone who has opted out.

Offer a clear call to action

Make clear in the first paragraph what action the recipients can take. Don't make them scroll through the message to find it, but restate it at the end as well in case they decide to read the entire message before they act.

Some options for a call to action include the following:

- Click a link for more information.
- Register to receive a special offer.
- Visit a Web page to qualify (and make that page relevant to the specific offer).
- Download a newsletter, game, screen saver, coupon, or white paper.
- Make a phone call.

Make the message personal

The more personal the tone, or voice, the better — write your message as though it is from a human being rather than an impersonal institution. People want to build relationships with other people, not with a company.

Add to the personal touch by providing a little something extra, such as information that is related to your customers' interests in your business. For example, a restaurant might include wine reviews or recipes as part of a regular e-mail communication. When customers try these wines or recipes at home, the restaurant builds the perception of its expertise and enriches the relationship between customer and business. Education, reasoned opinions, principled stands, or humor make your business seem more helpful and human — but recognize the risks that they carry, too. Make sure that you know your audience well and how they are likely to react.

Be consistent

When you send a series of e-mail messages, strive to be consistent in your messaging, in the layout, and in the timing of the mailing. This consistency supports the perception that your business is reliable, organized, and well-established.

Send a series of e-mail messages at the same time each day, week, and month. If your messages are directed at other businesses (or people at their work), send them so that they can be read during the work week but not on Monday morning (don't send your messages between Friday noon and Monday noon). If your messages are directed at consumers at home, send them so that customers will see your messages on the weekend.

If mailings aren't frequent enough, customers will forget your business. Start by testing a schedule of weekly e-mailings and go from there. But if you have any doubt, it is better to send too seldom than too often.

Format the message carefully

If you create an e-mail message from a print publication, it may be too wide and force the recipient to scroll horizontally. Also, the more that recipients must scroll vertically, the less likely it is that they will see all of your message. Even if you choose a publication that is designed for e-mail messages, preview the message to verify the layout and size so that you can make any necessary changes to text, graphics, and layout before sending.

How do I change the page size?

1. On the **Page Design** tab, click the dialog box launcher next to **Paragraph**.
2. Under **Layout**, select **Email**.
3. Under **Page**, change the measurements for **Width** and **Height**.

Some of the fonts that you use in a printed publication may not be easy to read online. Consider using a Web font or font scheme that is designed for screen readability, especially for users who may have screens of different sizes and resolutions.

Consider also the e-mail capabilities of your audience. If they are on broadband or corporate networks, they don't have to wait long to download graphic-rich files. Because an e-mail message with a lot of graphics and color formatting will require a fairly large file size, it may take recipients with slower connections a long time to download or open the message. These recipients are much more likely to decide that your message is not worth the wait.

Test the message before you send it

Before you send e-mail to a large list of recipients, make sure that you test the e-mail message, its contents, and any mechanisms that you set up for tracking and responding, including hyperlinks in the body of the message. Start by previewing the message. Because some problems may not appear in the browser preview, send your message to yourself to verify the size of the file and the final formatting. It is best to ask several others to test the message and give you their feedback. You learn the most about what you may have overlooked if you can observe impartial testers while they open, read, and respond to the message.
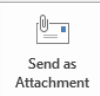
Use Publisher to Create and Send Email Newsletters

https://support.microsoft.com/en-us/office/use-publisher-to-create-and-send-email-newsletters-6588baa3-aeaa-407f-b43a-1dc3529f6152

You can use Publisher to create and send an email newsletters. How you set up your mail delivery depends on your audience and how you want the format to appear.
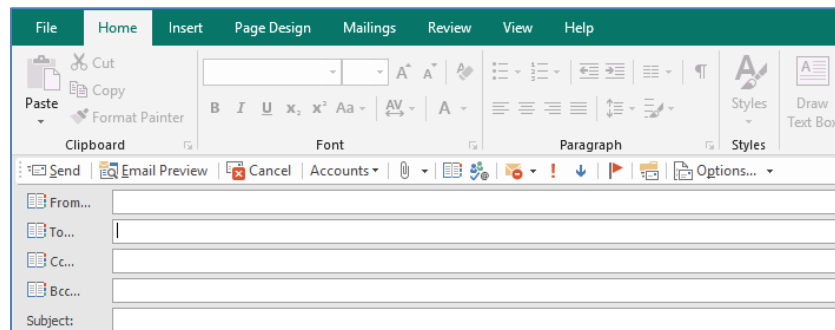
Send your newsletter as an email attachment

When you want recipients to read the content of your publication in its original format, send your publication as an attachment. This way you won't need to use an email template; you can use an existing customized newsletter template to create the newsletter.

The best option is to send it as a PDF. When you send your publication as an email attachment, you don't need to preview its appearance in a browser, because email recipients will open and view the publication in the correct program.

1. To send the message, click **File** > **Share** > **E-mail** and choose one of the following:

   - **Send as Attachment**
     Important: When you send a Publisher publication as an email attachment, the recipient must have Publisher installed to view the publication.

   - **Send as PDF**

   - **Send as XPS**

2. In the message header, add email addresses for the recipients.

3. In the **Subject** box, add a title for your email.

4. On the toolbar above the message header, choose any other options that you want.

5. Preview email and send.

Create and send your newsletter as an email message

Publisher includes many attractive, high-impact email newsletter designs that you can send as messages.

Create the Newsletter

1. In the list of template types in Publisher, select the **E-mail** category.

2. In the list of designs, scroll down to find the **Newsletter** category, and select the newsletter template you want to use.

   Note: Under **Customize**, you can adjust the color scheme and font scheme and insert your business information before you create the publication.

3. Click **Create**.

4. In your email publication, replace the text and pictures in the publication with your own content.

5. Save the email newsletter.

Now that you're finished creating your newsletter, you can send it as email.

Preview and send the newsletter

1. To preview your newsletter, click **File** > **Share** > **Email Preview** > **Email Preview**.

2. To send the message, click **File** > **Share** > **Email** > **Send Current Page**.

3. In the message header, add email addresses for the recipients.

4. In the **Subject** box, add a title for your email.

5. On the toolbar above the message header, choose any other options that you want.

Create a mail or e-mail merge in Publisher
https://support.microsoft.com/en-us/office/create-a-mail-or-e-mail-merge-in-publisher-5580f297-0ba3-4494-9a52-85953f613851

You can use mail or email merge when you want to create a large number of documents that are mostly identical but include some unique information. For example, you can use mail merge to create individually customized publications with personalized notes or unique addresses and salutations. You also can use mail merge to create a product announcement that you want to customize before sending to specific people. The text of the publication is always the same, but the name and address are different for each recipient.

Choose Mail Merge or Email Merge

The first thing to do is choose if you are creating a mail merge for printing or an email merge for online distribution.

- Click the **Mailings** tab and choose either **Mail Merge** or **E-Mail Merge**.

Create or connect to the recipient list

To perform a mail merge, you'll need to open a new or existing publication and then connect to a data source (a file containing the unique information that you want to include). A data file may contain a list of names and addresses, product data, or pictures. The data file can be in a variety of formats, including:

- Outlook Contacts list
- Excel worksheets
- Word tables
- Access database tables
- Text files in which tabs or commas separate the columns, and paragraphs separate the rows

You can connect to an existing list or data source, or you can create a new recipient list. If you want to use only certain entries in your list, you can filter your list by a specific criterion. You can also sort the items in alphabetical order.

Note: If you want to merge pictures into your publication pages, your data source must include either file names or paths for the picture files that you want to merge. Don't include the actual pictures or images in your data source.
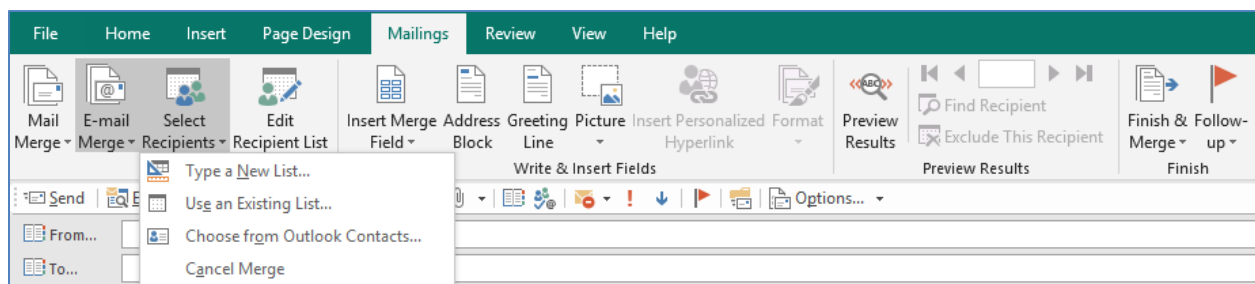
Use an existing list

1. Click **Mailings** > **Select Recipients** > **Use Existing List**.

   By default, Publisher stores data sources in the **My Data Sources** folder. You may need to browse to locate your data source.

2. In the **Select Data Source** dialog box, click the data source that you want, and click **Open**.

   Depending on the type of data source that you select, other dialog boxes may appear requesting specific information. For example, if your data source is an Excel workbook with info on multiple worksheets, you'll need to select the worksheet containing the info you want.

Select from Outlook Contacts

1. Click **Mailings** > **Select Recipients** > **Select from Outlook Contacts**.

   If you're prompted to choose a mail profile, click the profile that you want, and then click **OK**.

2. In the **Select Contacts** dialog box, click the contact list that you want, and then click **OK**.

   All of the contacts in the folder appear in the **Mail Merge Recipients** dialog box, where you can filter and sort the list of recipients to include in the merge.

Type a new list

If you don't have an existing list to connect to, you can create a new list.

1. Click **Mailings** > **Select Recipients** > **Type New List**.

2. In the **New Address List** dialog box, type the info for the first entry in the fields relevant for your mailing.

   Note: To change the default columns, click **Customize Columns** and add, delete, rename, and reorder the columns in the list.

3. When you've finished entering info for the first entry, click **New Entry**.

4. Repeat step 2 and step 3 until you have finished adding entries, and then click **OK**.

5. In the **Save Address List** dialog box, type a name for the address list in the **File name** box, and save it.

   Note: By default, Publisher saves address lists in the **My Data Sources** folder. Try to keep the address list here because this is also the default folder where Publisher looks for data sources.

All of the contacts in your new list appear in the **Mail Merge Recipients** dialog box, where you can filter and sort the list of recipients to include in the merge.
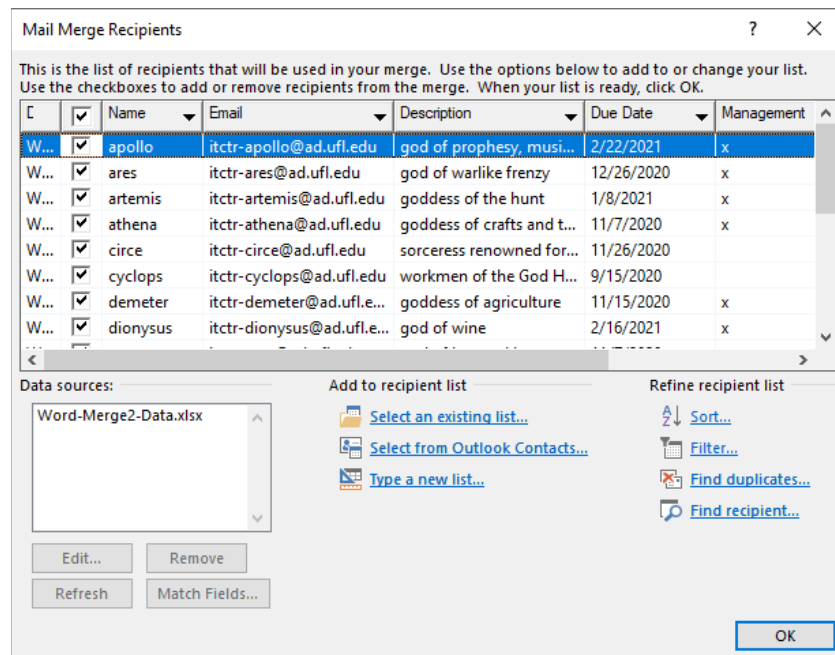
Select Recipients
In the **Mail Merge Recipients** dialog box, you can select the recipients that you want to include in the merge. Select the check boxes next to the recipients that you want to include, and clear the check boxes next to the recipients that you want to exclude.

If you want to use only certain entries in your list, you can filter your list by a specific field or criterion. After you filter the list, you can use the check boxes to include and exclude records.

If you want to see items in alphabetical order, you can sort the items in your list.

Prepare your publication
A mail merge creates many documents from a single template using placeholder info and unique information that is added to the placeholder info on each document. After getting the recipient list together, you can get the main template ready.

Add data fields to your publication
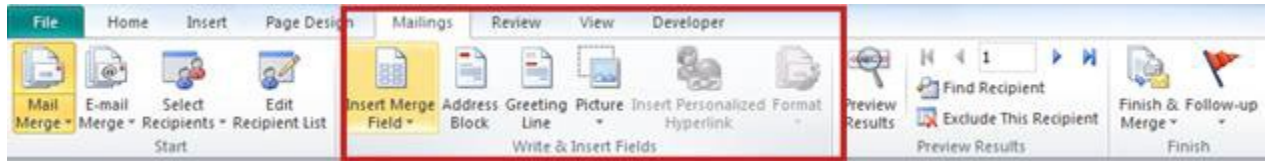
1. Insert a Text Box

2. In your mail merge publication, click inside the text box where you want to insert the data field.

3. Insert any of the following:

   - Address block with name, address, and other information:

   - Greeting line

   - Picture

     i. In the **Write & Insert Fields** group, click **Picture**, and then click **Insert Picture Field.**
     ii. In the **Insert Picture Field** dialog, select the picture field to insert.
     iii. **Note:** If you want to merge pictures into your publication pages, your data source must include either file names or paths for the picture files that you want to merge. Do not include the actual pictures or images in your data source.

   - Individual fields of information with **Insert Merge Field**. Click the field you want to include in the text box.

Preview recipient data in the data fields in your publication
You can review how your publication will appear with actual data in the merged fields.

To preview your publication, click **Preview Results**, and then do any of the following:

1. To preview entries in order, click the navigation buttons ⏮ ◀ ▶ ⏭ to see how each entry will appear in your merged publication.
   The information from the first record of your data source populates the merge fields. You cannot edit your data source entries on your publication pages, but you can format, move, or delete data fields there.

2. To find and preview a specific entry in your data source, click **Find a recipient**, and then enter the search criteria in the **Find Entry** dialog box.
   If you need to, you can make changes to your recipient list. Do any of the following:

   - To exclude a particular recipient from the merge, click **Exclude this recipient**.

   - To change the list of recipients, click **Edit recipient list**, and then make your changes in the **Mail Merge Recipients** dialog box.

After you complete your mail merge publication and insert all of the merge fields, **File** > click **Save As**, name your publication, and click **Save**.

Create the Merged Publication
To create the merged publication, click the **Finish & Merge** button and follow the directions below to print, preview, save it, add the merged pages to another publication, or send them in email.
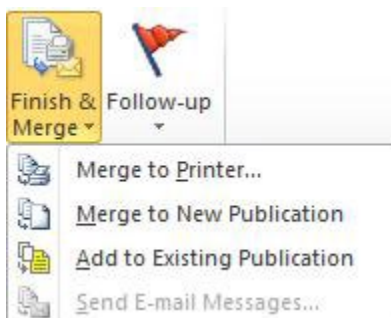
Print your merged publication

1. Click **Merge to Printer**.

2. In the **Print** space, select the options that you want, and then click **OK**.

Save the merged publication for later

If you want to edit your merged pages, save them for later use, or print them at a later time, you can collect and save all of your merged pages as a single new merged publication that contains the actual data instead of merge fields.

1. Click **Merge to New Publication**.

2. In your new publication, in the **Mail Merge** task pane, click **Save this publication**. Name your new publication, and click **Save**.

Send email messages

If you are creating an email merge the only option available under **Finish & Merge** will be **Send Email Message**.

1. Click **Send Email Message**.

2. In the **Merge to Email** dialog box, select the recipient field from the **To** drop-down list. In most cases this will be **Email Address**.

3. Under **Subject**, type the subject line. Under **Items to insert**, click any data fields that you want to insert in the subject line.

4. Click **Options** to specify any other options that you want, such as Cc or Bcc recipients or message attachments, and click **Send**.

Save the mail merge publication

If you also save the publication containing the merged fields, you can go back and edit the fields and create a new merged publication. To save your merged publication, do the following:
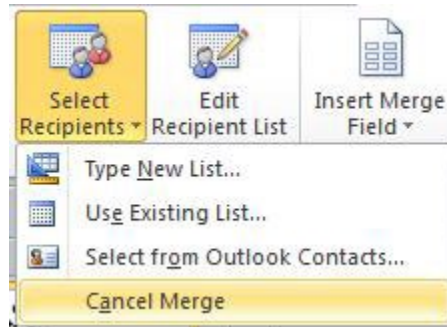
1. Click **File** > **Save**.

2. Give the publication a name, and click **Save**.

Cancel a merge
You can cancel a merge to disconnect a mail merge publication or a catalog merge template from its data source.

1. Click **Mailings** tab > **Select Recipients**, and then click **Cancel Merge**.

2. When asked if you want to cancel the merge, click **Yes**.

   Note: If you cancel a mail merge, fields other than Address Fields, Greeting Lines, and Address Blocks are converted to regular text.

Using the Design Checker in Publisher
https://support.microsoft.com/en-us/office/using-the-design-checker-in-publisher-090deb44-ba8f-4ae8-ac18-4a5bb8c70737

The Design Checker reviews your publication for a variety of design and layout problems. It identifies potential problems and provides options to fix them.

Important: Be sure to run the Design Checker before you publish a publication on a desktop printer, pack it to go to a commercial printer, send it in email, publish it to the web, or after you convert one type of publication to another type.

You can specify the types of problems that the Design Checker looks for in the **Design Checker Options** dialog box. For example, if you are preparing a publication for printing at a commercial printing service and you want to use more than two spot colors in your publication, open the **Design Checker Options** dialog box, click the **Checks** tab, and then clear the **More than two spot colors** option so that it will not check for more than two spot colors in your publication.

Design Checker task pane

When you open the **Design Checker** task pane, it dynamically updates the list of problems as they occur or as you fix them.

Run general design checks   Select this option to check for design problems, such as empty text boxes, that may adversely impact your publication.

Run commercial printing checks   Select this option to check for problems, such as pictures in RGB mode, that may adversely impact printing your publication at a commercial printing business.

Run web site checks Select this option to check for problems, such as pictures without alternative text, that may adversely impact your Web site publication.

Run e-mail checks (current page only) Select this option to check for problems, such as text that contains a hyphenation, which may cause gaps in the message when it is viewed in certain e-mail viewers.

Select an item to fix The **Design Checker** task pane lists problems in the publication. Each problem includes a description and located. Most problems occur on a specific page. However, some affect the entire publication. Click a problem to switch to the page and object with the problem. Click the arrow to the right of the problem to see other options such as how to fix the problem if an automatic fix is available, ignore the problem, or to get help with it.

Close Design Checker Click this button to stop the Design Checker and close the task pane. When you close the Design Checker, it won't run in the background until you start it again.

Design Checker Options Click this link to open the **Design Checker Options** dialog box, where you can set display options for the problems listed in the **Design Checker** task pane. You can also select a page range to check, or you can select specific checks.

Design Checker Options dialog box

Use the settings in the **Design Checker Options** dialog box to change how the **Design Checker** task pane displays problems in the publication and determines which problems to display.

General - Select options that affect how the **Design Checker** task pane displays the problems it finds, and then set which pages the Design Checker will check.

**Sort by** - Select one of the following options:

- **Page number** Sorts problems by the page number where they occur.
- **Description** Sorts problems alphabetically by their description. When problems are listed by description, you can see all problems of the same type grouped together.
- **Status** Sorts problems by status. The Design Checker will list problems by page number, starting with problems that have not been fixed, and then by problems that have been fixed.

    Note: To use this option, it's best to first clear the **Remove fixed items** check box.

Remove fixed items Select this option to remove problems from the list of items after they are fixed. The Design Checker updates the list automatically whenever you make a change.

Page Range Select a page range that you want the Design Checker to check.

- **All** Checks all pages in the publication.
- **Check master page(s)** Includes all master pages when you select **All** as the page range.
- **Current page(s)** Checks only the current page(s).
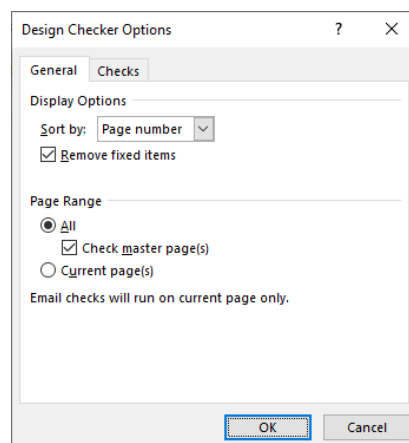
Checks - Select the check boxes for the checks that you want the Design Checker to run.

In the **Show** list, the following groups of checks are available:

- **All checks** Includes all the categories.
- **General checks** Includes checks relevant to creating publications and aren't specific to commercial, web or emailed publications.
- **Commercial printing checks** Includes checks relevant to the commercial printing process.
- **Web site checks** Includes checks relevant to creating web sites.
- **E-mail checks** Includes checks relevant to creating email messages.

General checks

Check	Action performed
Object encroaches nonprintable region	Warns you when an object is in the nonprintable region of most desktop printers.
Object partially off page	Warns you when an object won't fully print because it isn't completely on the page. If you're creating a bleed, this could be intentional, but it's usually not.
Object isn't visible	Looks for objects that can't be seen on a page (possibly because the object is covered by another object, or has blended into an object of the same color).
Object doesn't have a line or fill/Text box is empty	Looks for objects without opaque attributes. The object may be an AutoShape with no line or fill, or it may be a text box with no text.
Object has transparency	Looks for objects with a transparent color applied to them. Objects with transparent colors print unpredictably to PostScript and PCL printers. Tip: Saving to PDF or XPS or printing to an XPS enhanced printer is best when using transparent objects.
Page has space below top margin	Looks for pages where no object touches or is above the top margin.
Low-resolution picture	Looks for pictures with an effective resolution of less than 96 dots per inch (dpi). This check assumes you're printing to a high-resolution printer or imagesetter that requires high-resolution pictures for best printing results. An effective resolution of at least 96dpi is also recommended for PDF and XPS (because 96dpi is the most common monitor resolution).
Picture is missing	Looks for instances where a picture is a linked picture and the external linked file is missing or moved, which breaks the link.
Picture is modified	Looks for any linked picture that hasn't been updated after the picture on the hard drive or network was modified in an image-editing program.
Picture isn't scaled proportionally	Looks for pictures where one dimension has been resized more than the other.
Story with text in overflow area	Looks for any text box or AutoShape containing part of a story that isn't visible because it's in overflow.

Check	Action performed
Story on scratch area	Looks for instances of a linked text box or AutoShape containing part of a story on the scratch area.
Text has transparent colors	Looks for text with transparent colors applied. Text with transparent colors print unpredictably to PostScript and PCL printers. Tip: Saving to PDF or XPS, or printing to an XPS enhanced printer is best when transparent objects are used.
Text has transparent effects	Looks for text with transparent effects applied. Text with transparent effects print unpredictably to PostScript and PCL printers. Tip: Saving to PDF or XPS, or printing to an XPS enhanced printer is best when transparent objects are used.

Commercial printing checks

Check	Action performed
More than two spot colors	Looks for the use of more than two spot colors in a publication is set up to print spot-color or process-color and spot-color.
Unused spot colors	Looks for instances where you've added a spot-color ink to your ink list, but it hasn't been used in the publication. This check runs if you've set up your publication's Color Model to spot-colors or to process-color plus spot-color.
Publication is in RGB mode	Looks for instances where your publication is set to print in RGB colors but other options indicate that you plan to print the publication through a commercial printing service.
Object has transparency	Looks for objects with a transparent color applied to them. Objects with transparent colors print unpredictably to PostScript and PCL printers. Tip: Saving to PDF or XPS, or printing to an XPS enhanced printer is best when transparent objects are used.
Low-resolution picture	Looks for pictures with an effective resolution of less than 96 dots per inch (dpi). This check assumes you're printing to a high-resolution printer or imagesetter that requires high-resolution pictures for best printing results.
Picture is missing	Looks for instances where a picture is a linked picture and the external linked file is missing or moved, which breaks the link.
Story with text in overflow area	Looks for any text box or AutoShape containing part of a story that isn't visible because it's in overflow.
Story on scratch area	Looks for instances where a linked text box or AutoShape containing part of a story is on the scratch area.
Text has transparent colors	Looks for text with transparent colors applied. Text with transparent colors print unpredictably to PostScript and PCL printers. Tip: Saving to PDF or XPS, or printing to an XPS enhanced printer is best when transparent objects are used.

Check	Action performed
Text has transparent effects	Looks for text with transparent effects applied. Text with transparent effects print unpredictably to PostScript and PCL printers. Tip: Saving to PDF or XPS, or printing to an XPS enhanced printer is best when transparent objects are used.

Website checks

Check	Action performed
Picture doesn't have alternative text	Looks for pictures without alternative text.
Page can't be reached from first page	Looks for pages that can't be reached by any combination of links that begins from a link on the first or home page of the website.
Page doesn't have links	Looks for pages that don't have a link to leave the page.

Email checks

Check	Action performed
Object with text is partially off the page	Looks for any object containing text partially off a publication page.
HTML fragment is partially off the page	Looks for any HTML code fragment partially off the page.
Object is overlapping text	Looks for any object on top of a text box.
Object with text is rotated	Looks for any object containing text and has been rotated.
Shape with text has a hyperlink on the shape	Looks for any shape with a hyperlink on top of it.
Text is vertical	Looks for any text box that containing vertically rotated text.
Text is too big to fit in the frame	Looks for any text box with text that's too big.
Text is in a non-web-ready font	Looks for text not formatted in a web-safe font.
Text is in a diagonal table cell	Looks for text located in a diagonal table cell.
Table borders are less than .75pt	Looks for instances of a table with borders less than .75 point thick.
Text has hyphenation	Looks for any hyphens in the text.
Text box with borders has zero margins	Looks for any text box with a margin set to zero.
Hyperlink links to another page in this document	Looks for instances of a hyperlink on one Web page that links to another page in the same publication.

If you have downloaded the class files, please remove them from the ZIP file so we can use them for the exercises.

Exercise 1 – Flyer to Email

Update Personal Information

1. Open Publisher

2. Create a new blank 8.5 x 11

3. Open the File menu
   - Choose Info
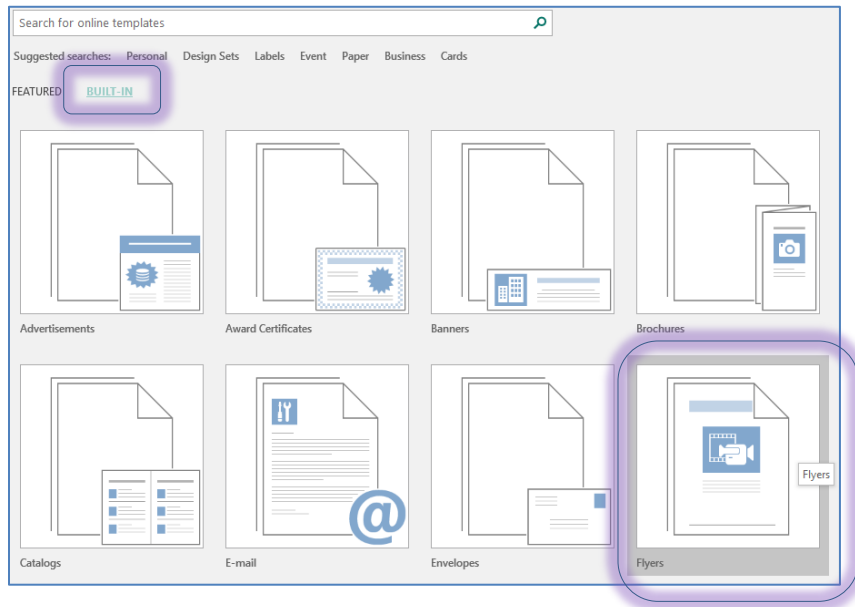   - Click the Edit Business information button
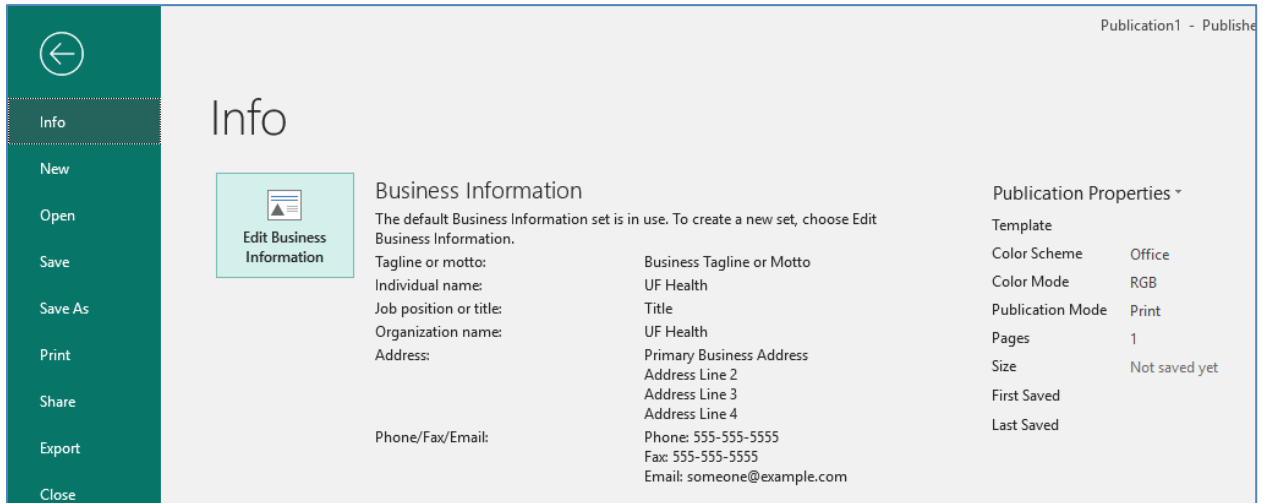
4. Customize the form, not all options have to completed.

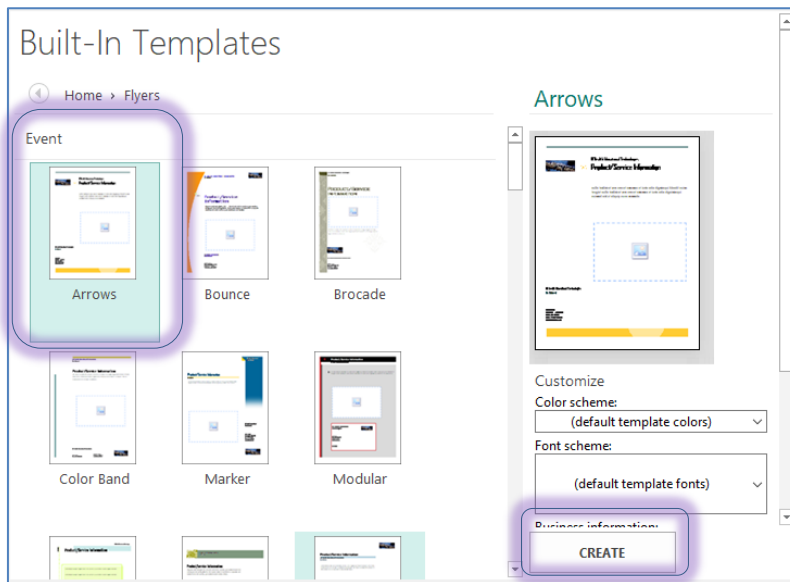5. Click OK to view the results.

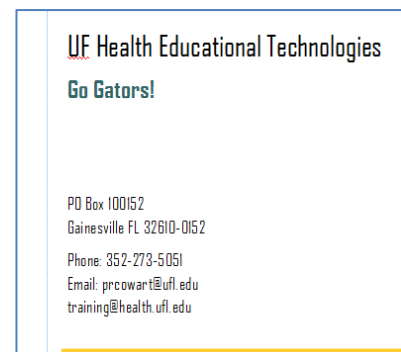6. Click on Update Publication.
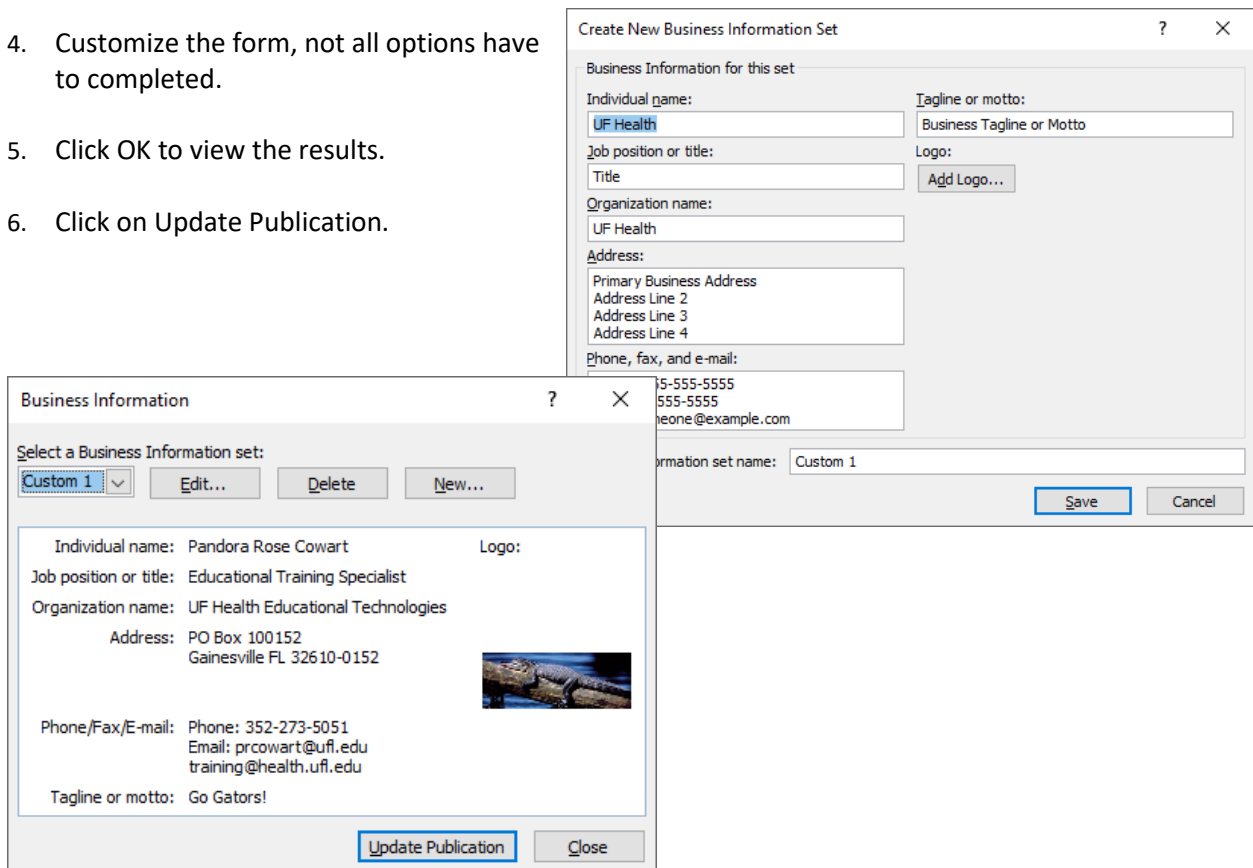
Create Flyer

1. From the File Menu choose New

2. Click on the "Built In" option

3. Choose Flyers

4. Click on a Flyer, I chose Event Arrows

5. In the right pane, click Create

6. Your personal information should populate the flyer.

Modify the flyer

1. Click in the picture placeholder

2. Search for an online picture
   - Check Creative Commons

3. Choose an image and click Insert

4. If desired, insert another image
   - Remember to search for "Transparent" if you want to overlap the images.

5. Modify the text
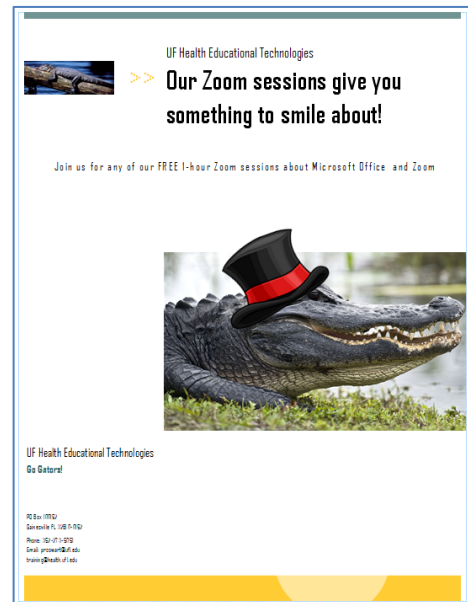
Prepare for Emailing

1. From the File menu, choose Share

2. Choose Email

3. Choose Send Current Page
   - This may take a minute or three. It does help if Outlook is open.
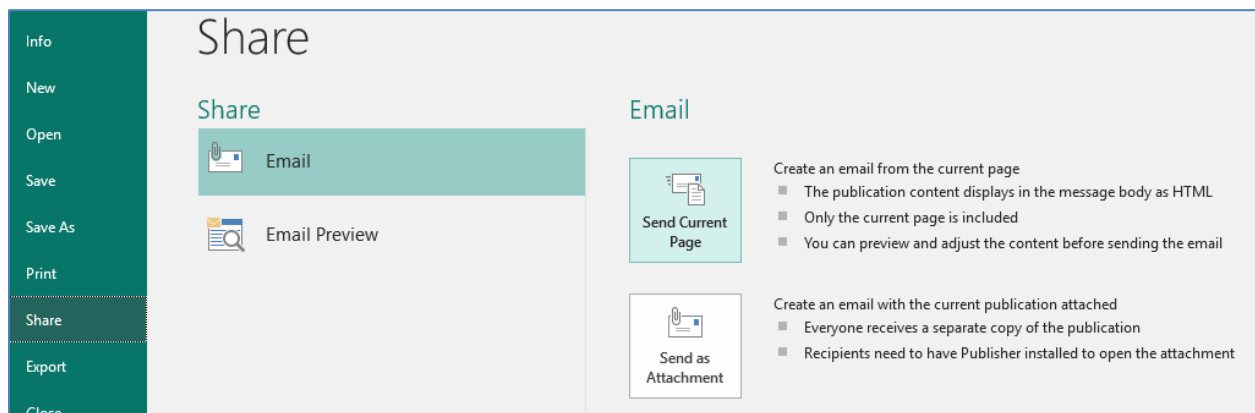
4. This will open a Mailing section at the top of your window
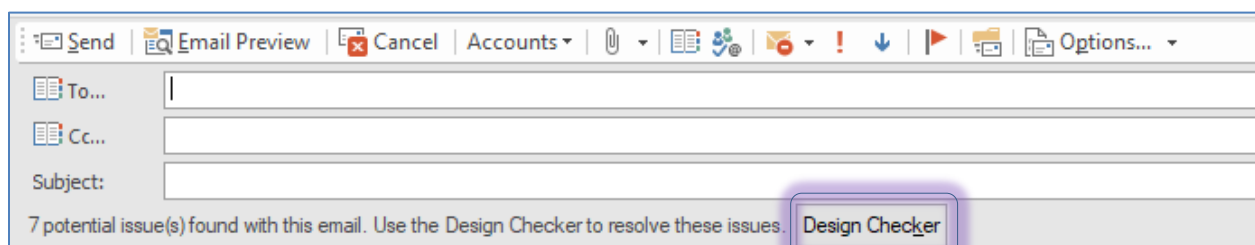
5. If there are issues, click on the Design Checker button

6. Go through the errors listed in the Design Checker.
   - If you click on the drop-down list you have options:
     – Go to this item
     – Never run this check again
     – Explain
   - Click **Explain** to see a more detailed description of the issues.

7. For the error that's showing:
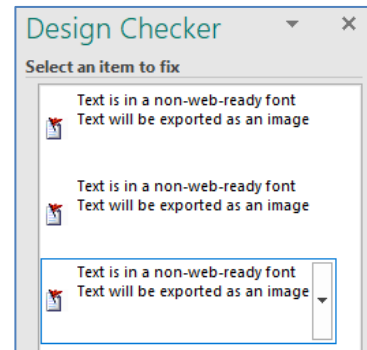
   Text is in a non-Web-ready font
   The text in your publication uses a font that is not web-ready. When you send this publication in e-mail, Publisher converts the text to an image. The image quality will be low for people who can see, and tools such as screen readers will not be able to read it at all.

   - You will need to select the text in each text box and make it a Web-Ready font
   - Web-ready fonts:

– Arial	– Impact	– Verdana
– Arial Black	– Georgia	– Symbol
– Comic Sans MS	– Times New Roman	– Wingdings
– Courier New	– Trebuchet MS	– Webdings

   - If you don't change it, the textbox will most likely become an image when you send the email

   - You can reset all the fonts in the document by changing the FONTS on the Page Design tab

Send the Email

1. Type your email into the **To**: box

2. Type a Subject line

3. If you'd like, click on the Preview option to see the email on a webpage. Close to return to Publisher

4. Click the Send button
   - If needed, open Outlook

5. View the email

6. Return to Publisher

7. Make adjustments as needed

8. Repeat emailing yourself, as needed

9. When you're ready to share, you can place all the recipients in the To, CC, or BCC boxes.
   – BCC can be found on the options menu on the mailing toolbar
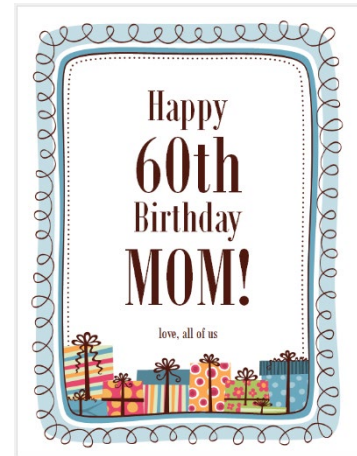
10. Close and Save the file
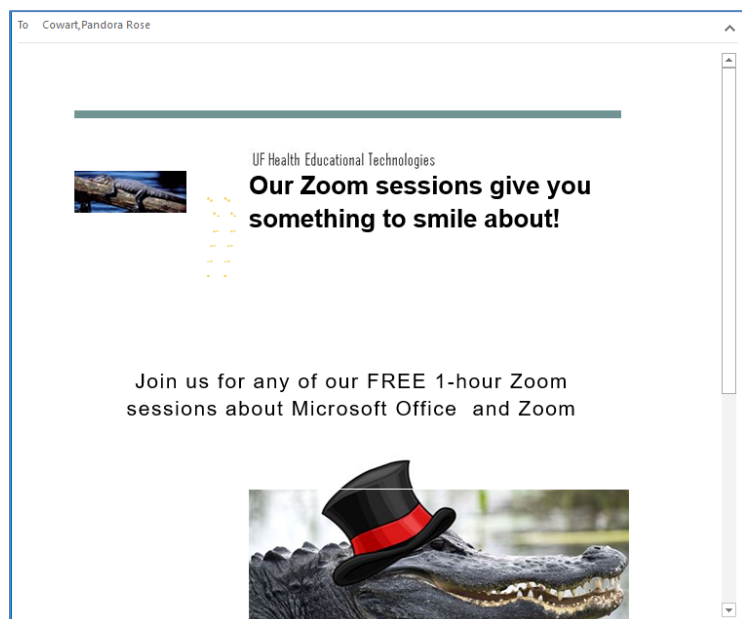
If you have downloaded the class files, please remove them from the ZIP file so we can use them for the exercises.

**Exercise 2 – Mail Merge with Pictures**

Create Flyer

1. From the **File** menu, choose **New**

2. Choose the **Milestone Birthday Poster**

3. Delete the "60th", and "love, all of us". Adjust the text boxes as necessary.

Link to Recipients File

1. From the **Mailings** tab, choose **Select Recipients**, **Use an Existing List…**

2. Find the data file **Publisher-MergeData.xlsx** and click **Open**

3. Click **OK** on the **Select Table** window

4. Click **OK** to the **Mail Merge Recipients** window
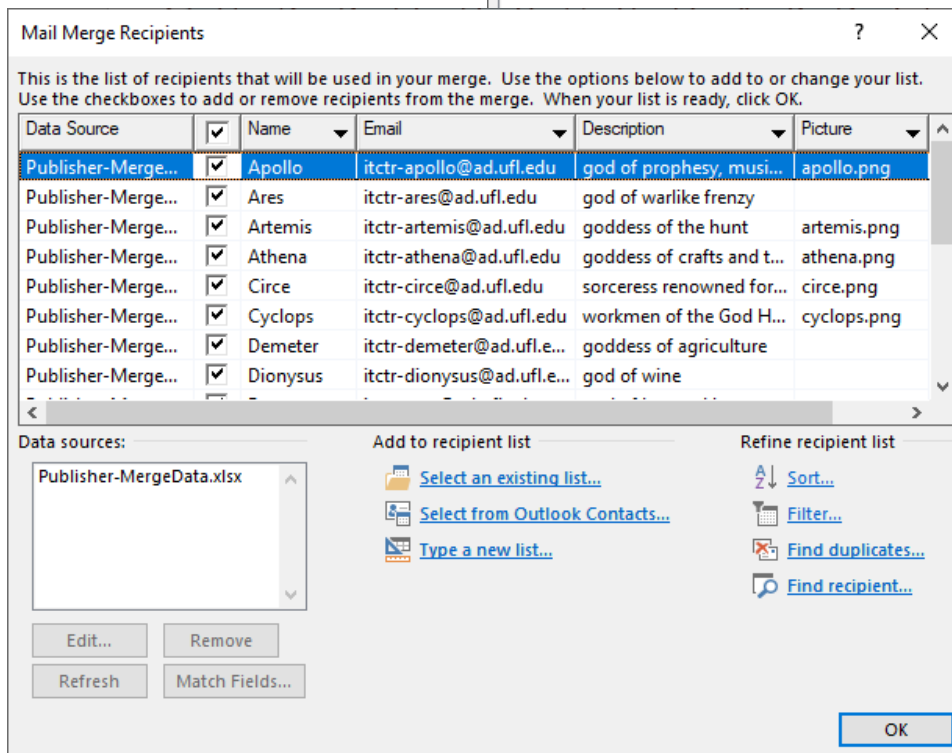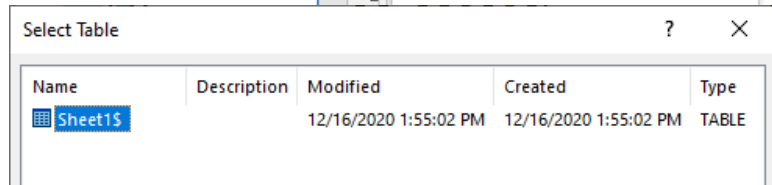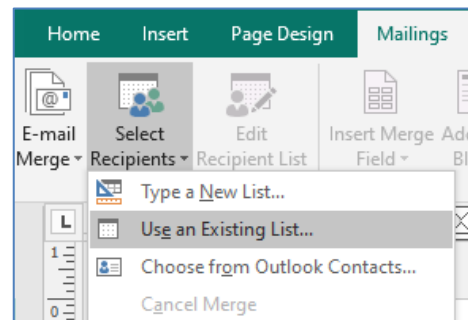
Use Merge Fields

1. Delete the word MOM, but not the text box
   - Leave the Exclamation point

2. From the **Mailings** tab, use the **Insert Merge Field** menu to insert the **NAME** field

3. Use the **Preview Results** button to toggle between the merge codes and the data

4. Use the Preview Results **Navigation Buttons** to preview other records (people)
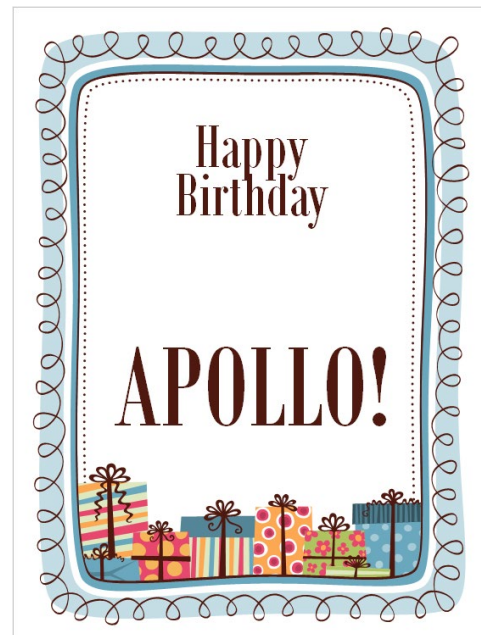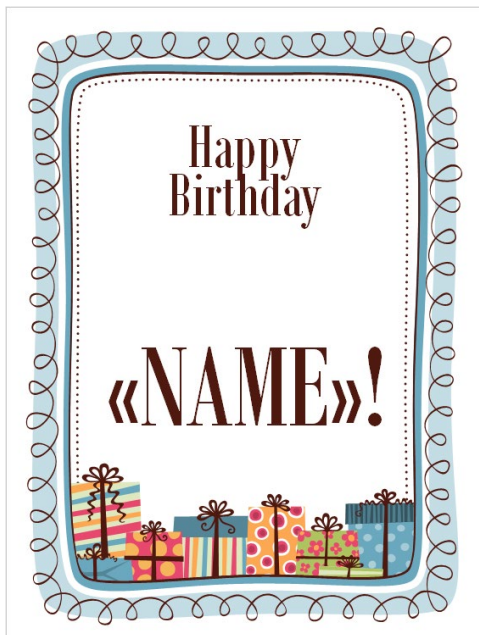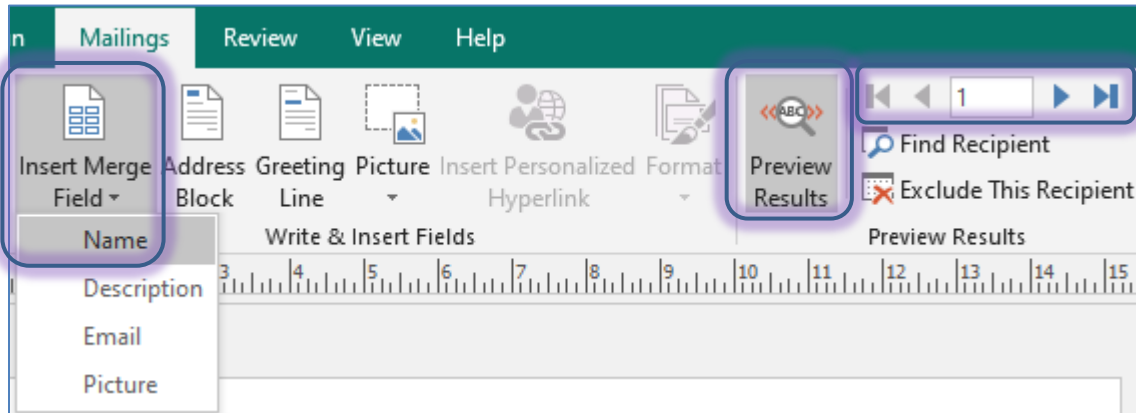
5. Move to Record 8 (use the navigation buttons) to see DIONYSUS! doesn't fit.

   - Select the text and resize so it fits

   - **~OR~** right-click on the text box and choose **Shrink Text on Overflow**
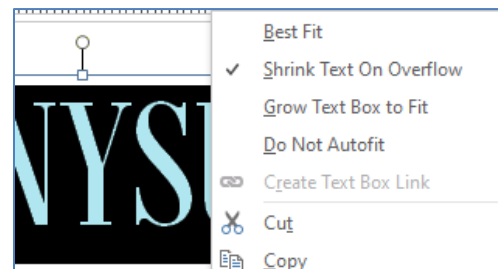
	A	B	C	D
1	Name	Description	Email	Picture
2	Apollo	god of prophesy, music and hea	itctr-apollo@ad.ufl.edu	apollo.png
3	Ares	god of warlike frenzy	itctr-ares@ad.ufl.edu	
4	Artemis	goddess of the hunt	itctr-artemis@ad.ufl.edu	artemis.png

Insert a Picture Field

1. Left Align the "Happy Birthday"

2. From the **Mailings** tab, choose **Picture**, choose **Insert Picture Field**

3. Click on the **Specify Folders** button to expand the window

4. Select the **Picture** field from the list

5. Choose the file path to find your pictures.
   - If your path is not listed, click the **Add...** button. Find the folder and click **Open**.

6. Click **OK** to accept the settings

7. Move and resize the Placeholder into the space next to the "Happy Birthday" text
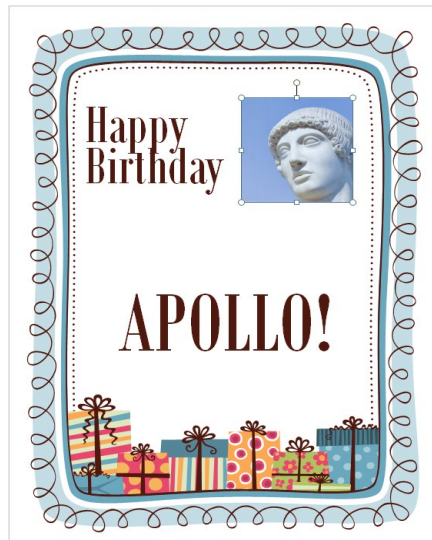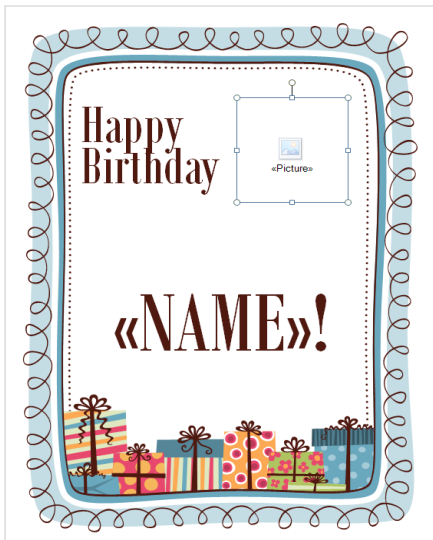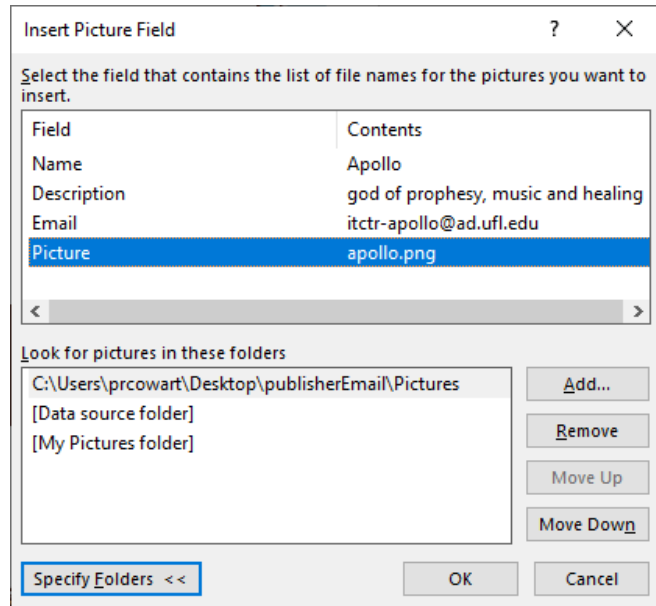
Merge!

1. Save the file as "Birthday"

2. Finish and Merge to see all 18 posters

Exercise 3 – Email Merge

Create a new publication

1. Open Publisher

2. From the **File** menu, choose **New**

3. Create a Blank 8.5" x 11" publication

Set up Mail Merge

1. From the **Mailings** tab, choose Email Merge (Email Merge)

2. From the **Mailings** tab, choose **Select Recipients**, **Use an Existing List…**

3. Find the data file **Publisher-MergeData.xlsx** and click **Open**

4. Click **OK** on the **Select Table** window

5. Click **OK** to the **Mail Merge Recipients** window
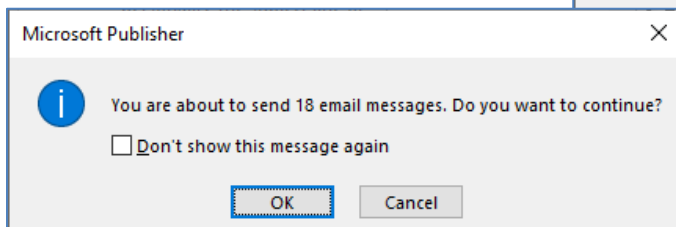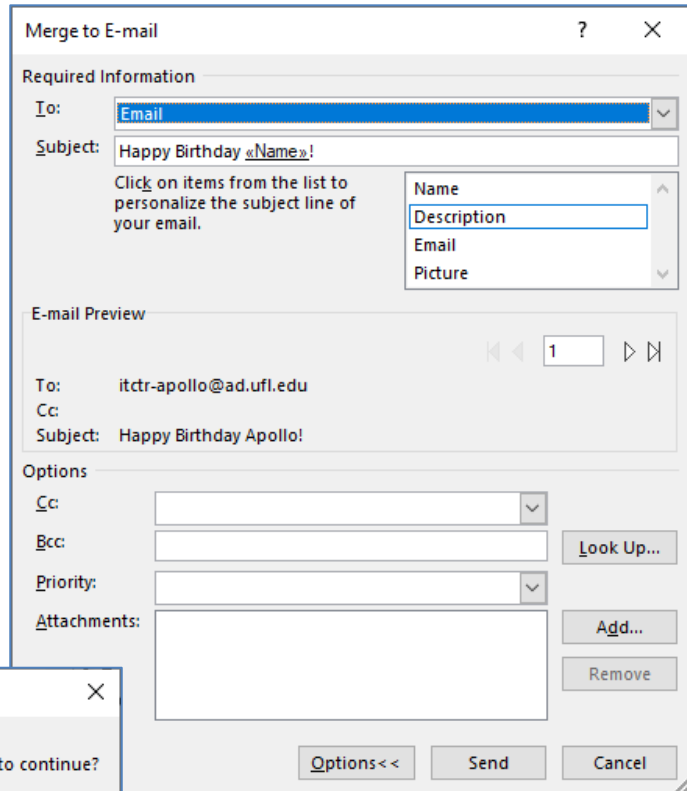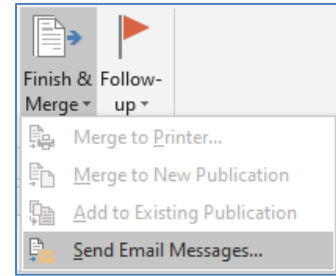
Add Birthday Message

1. From the **Home** tab, choose **Draw Text Box**

2. Place the text box on the page

3. Type "Happy Birthday" and Insert the **Name** field
   - Mailings tab, Insert Merge Field

4. Reformat, Keep your web fonts in mind (Page 20)

Add the Picture field

1. From the **Mailings** tab, choose **Picture**, choose **Insert Picture Field**

2. Click on the **Specify Folders** button to expand the window

3. Select the **Picture** field from the list

4. Choose the file path to find your pictures.
   - If your path is not listed, click the **Add…** button. Find the folder and click **Open**.

5. Click **OK** to accept the settings

6. Move and resize the Placeholder

7. Preview the results

Send the Email Messages

1. From the **Mailings** tab, choose **Finish and Merge**, choose **Send Email Messages…**

2. Type the **Subject** "Happy Birthday "

3. Choose the **Name** from the field list

4. Look at the preview to ensure the spacing is correct

5. Click on the **Options** button

   - You can choose a field from your dataset to CC, but not BCC

   - You can add multiple attachments to the email.

6. When you are ready click **Send**

   - Unlike Microsoft Word, you cannot send to just the current record, this is ALL or nothing.
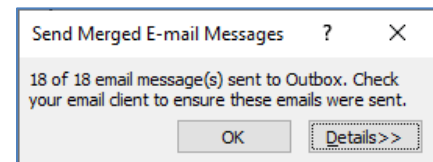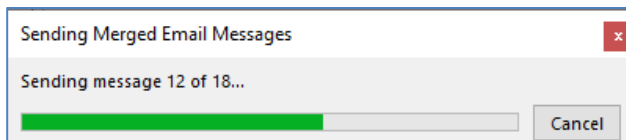
Check your Send Messages

1. Open Outlook and look in your **Sent Messages**. If you don't see them there, check the **Outbox**

◢ Date: Today	
ITCTR-ZEUS	Happy Birthday Zeus!
ITCTR-SOCRATES	Happy Birthday Socrates!
ITCTR-POSEIDON	Happy Birthday Poseidon!
ITCTR-PAN	Happy Birthday Pan!
ITCTR-IRIS	Happy Birthday Iris!
ITCTR-HESTIA	Happy Birthday Hestia!
ITCTR-HERMES	Happy Birthday Hermes!
ITCTR-HERA	Happy Birthday Hera!