

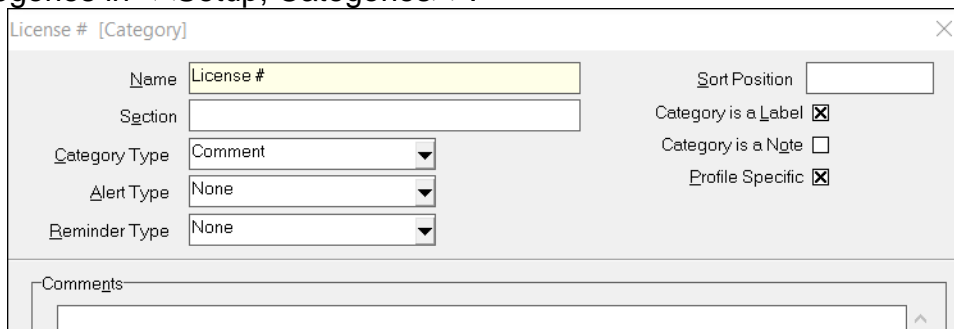
## Overview

It is possible to create a merge file in Microsoft Word and export information from the Member, Vendor and Notice Letters function in PROMAS to fill in that merge document. When you set this up for the first time, you must create a letter in PROMAS with the fields you want to export, create the letter in Word, Execute the mail merge in PROMAS, create the Data Source in Word, enter the merge fields in the Word document and save. You are then ready to merge the data.

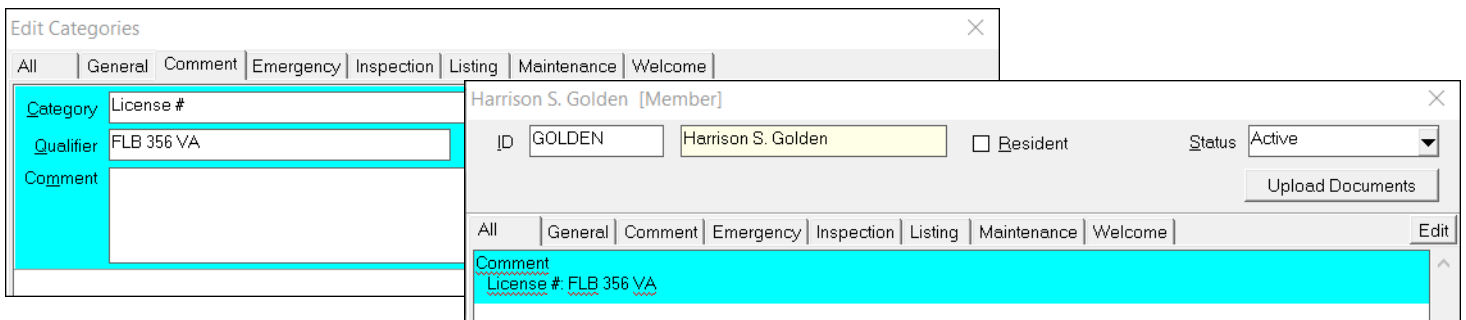
After the first time, the process is easier because you don't have to create all the files, only the export document in PROMAS. Step by step instructions follow. These instructions are based on Microsoft Word 2003. If you are using another version of Word the procedure may differ slightly.

## FIRST TIME

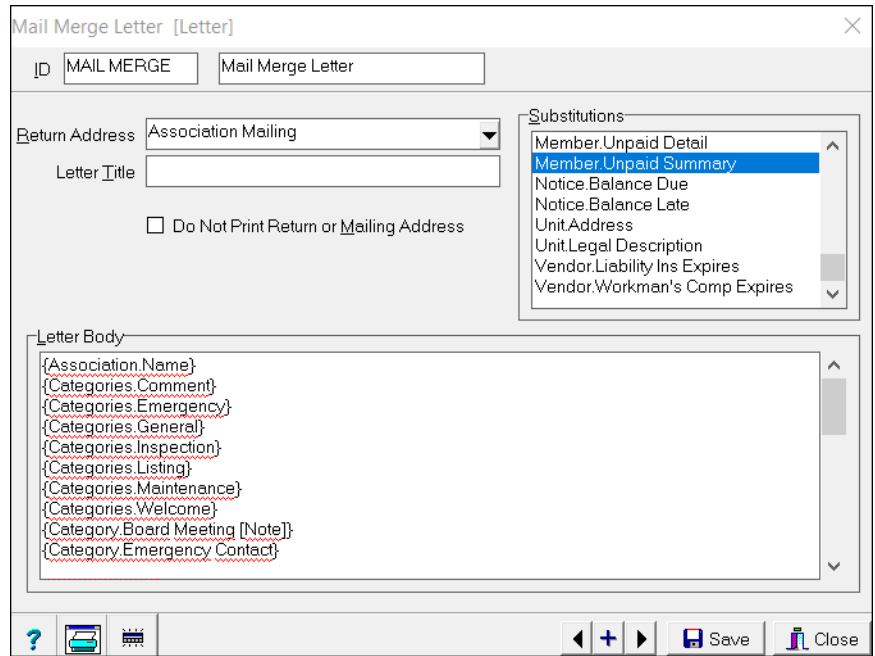
1. Enter categories in <<Setup, Categories>>.



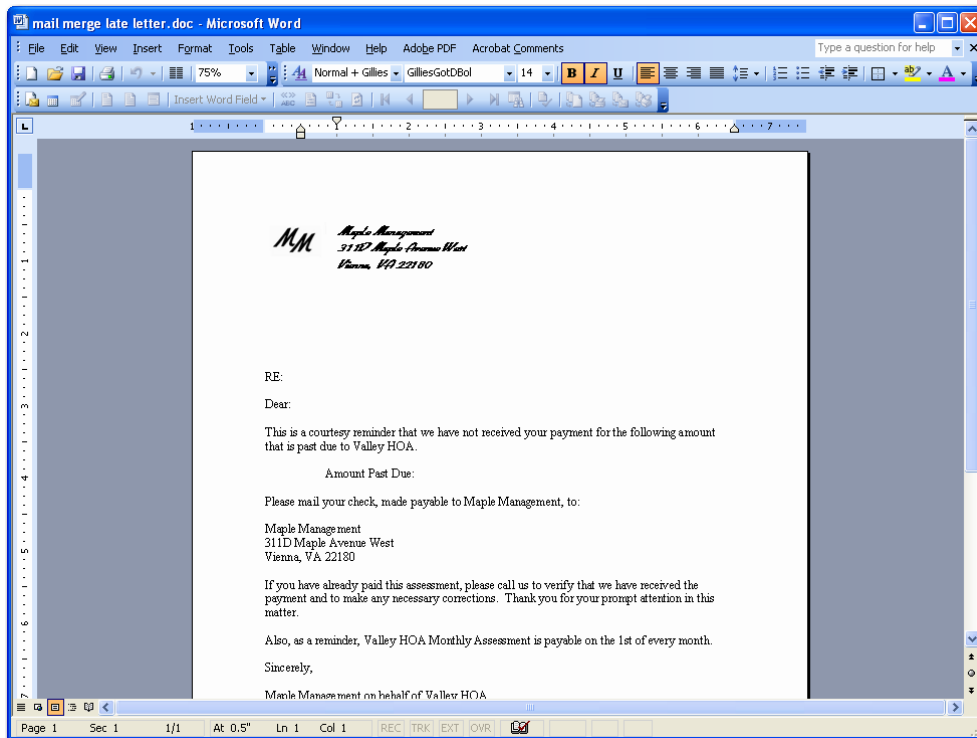
2. In the appropriate profile, select the pertinent categories. Enter specifics for the unit in the Qualifier or Comment field.



- In <<Mailings, Edit Letters>>, create a letter with the text substitutions you want to use. The letter does not need to have formatting. It is simply identifying the fields for export.



- In **Word**, create the letter you want to use, without text substitutions or merge fields. This file should have the formatting you want in your finished product.



- In **PROMAS**, go to <<Mailings, (Owner, Tenant, Vendor) Letters>>, select letter you just created in PROMAS in step 3. Enter any selection criteria.

Member Letters

Letter: MAIL MERGE: Mail Merge Letter

Letter Date: 8/20/2018

Mailing Group: All Members

Restrict to: [Empty]

Limit to Member Status: [Empty]

Limit to Member Type: [Empty]

Limit to Category: [Empty]

Move In: [Empty] to [Empty]

Move Out: [Empty] to [Empty]

Limit to Balance: [Empty] [Empty] \$0.00

Active:  No Posting:  Inactive:

Member: Member

Buttons: ? [Print] [Mail] [Compile] [Cancel]

- Click **Compile**. You are now on a **Send Letters** screen.

Send Letters

Word Document: [Cyan Highlighted]

Mail Merge Action: Edit Document

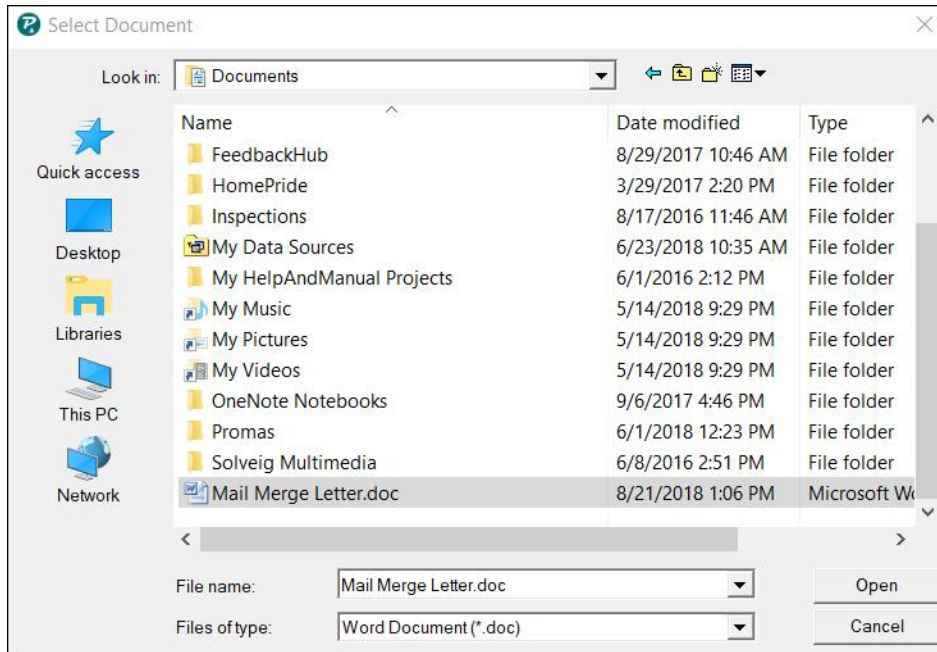
Execute Mail Merge Select Document

Date	Addressee	Letter	
8/20/2018	BRUNO: Joseph P. Bruno	MAIL MERGE: Mail Merge Letter	<input type="checkbox"/> Skip
8/20/2018	CHEEK: Carl Cheek	MAIL MERGE: Mail Merge Letter	<input type="checkbox"/> Skip
8/20/2018	CLAYTON: Fred Clayton	MAIL MERGE: Mail Merge Letter	<input type="checkbox"/> Skip
8/20/2018	FISCELLA: David and Judy Fiscella	MAIL MERGE: Mail Merge Letter	<input type="checkbox"/> Skip
8/20/2018	GOLDEN: Harrison S. Golden	MAIL MERGE: Mail Merge Letter	<input type="checkbox"/> Skip

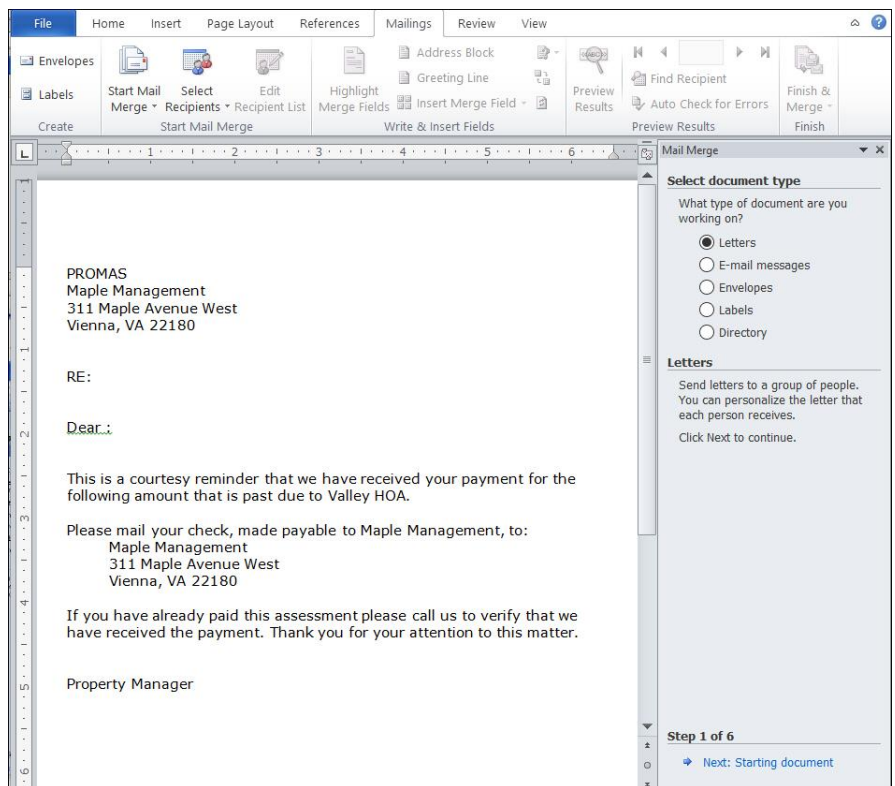
All Letters / Selected Letters / Skipped Letters /

Buttons: ? [Print] [Mail] [Compile] [Report] [Cancel]

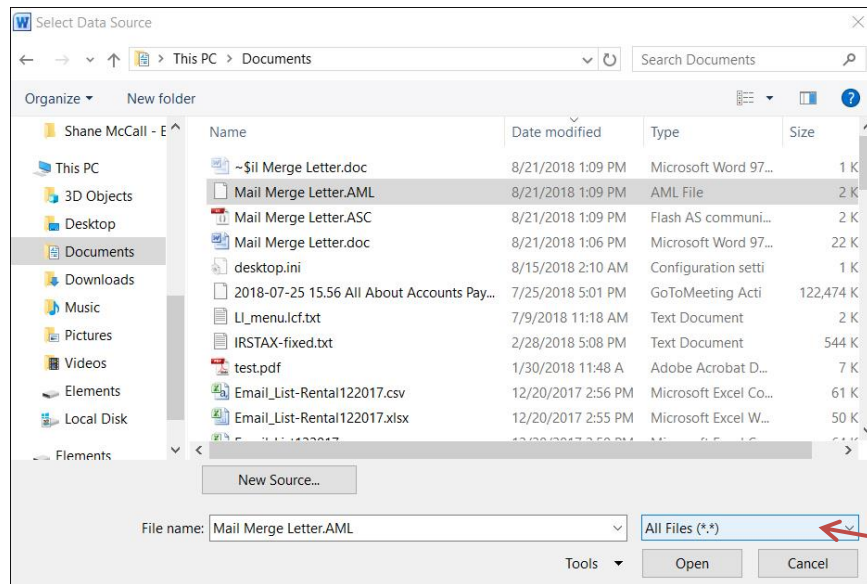
- Click <Select Document>. An Open Word Document screen will display.
- Choose the letter you created in Word in step 4.



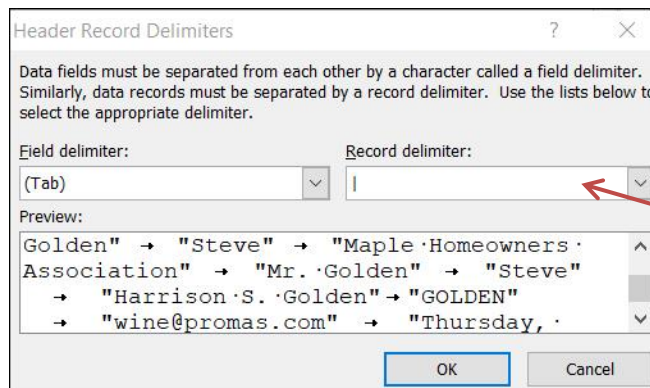
9. Click <Execute Mail Merge>. Word will come up with letter you selected in step 8.
10. In Word, click on Tools, Letters & Mailings, Mail Merge.
11. Click on
  - Next: Starting Document,
  - Use Current Document,
  - then Next: Select Recipients.



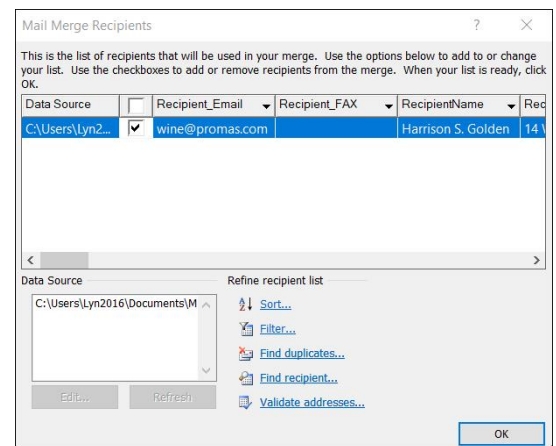
- Under Use an Existing List click Browse. You will be on the Select Data Source screen. Find the folder containing your letter. Change Files of Type to "All Files" and select the \*.AML file created in Step 9 and click <Open>.



- The Header Record Delimiters screen comes up. As record delimiter choose |.

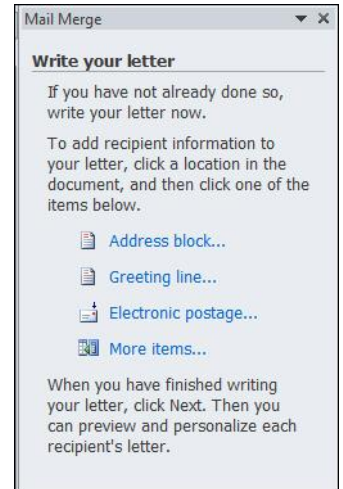
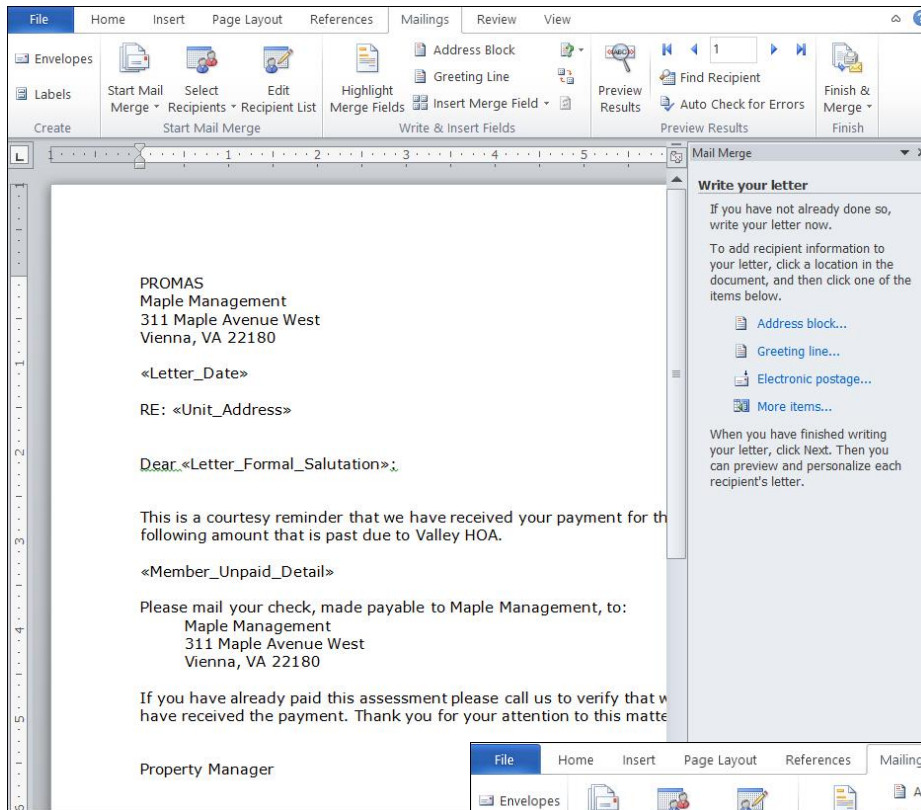


- A Mail Merge Recipients list displays with the recipients based on your parameters. Click <OK>.



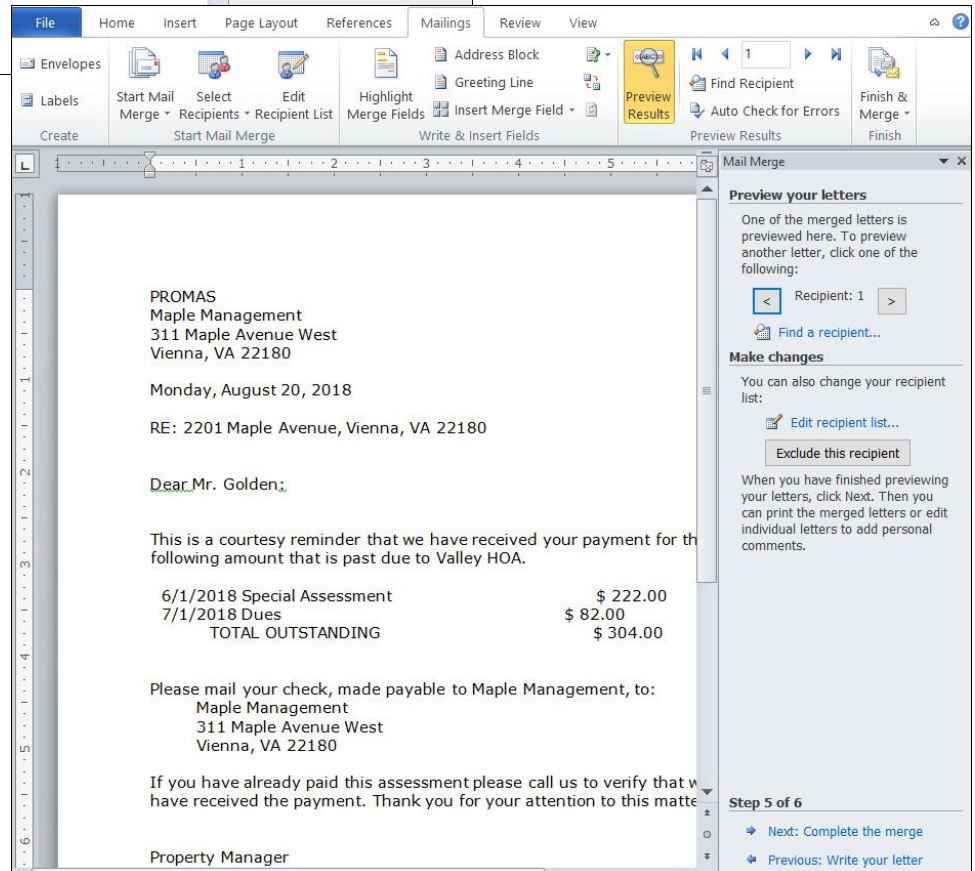


- Click Next: Write your letter. Your merge fields will be available to insert where you want them under More Items.



- Save your document. You are then ready to merge.

- Click Next: Preview your letters to perform the merge.



## EACH TIME

1. In <<Mailings, (Owner, Tenant, Vendor) Letters>>, select letter you want. Enter any selection criteria. Compile letters.
2. In the Mail Merge Action field choose Send to New Document.
3. Click <Execute Mail Merge>. An Open Word Document screen will display.
4. Choose the letter you created in step 4 and saved in step 1 6. Click <Open>.
5. Your letter will display without the merged information. If there is a warning message click <OK>.
6. Close the document by clicking <Close>. Click File and choose the document you just closed. A screen will display with a message. Click <Yes>.
7. Your letter will display without the merged information. If your mail merge toolbar is displayed you can click View Merged Data to merge the letter. Otherwise click on Mailings, Start Mail Merge.