



## Mail Merge

Property Management Solutions for Over 30 Years

### Overview

It is possible to create a merge file in Microsoft Word or Open Office and export information from the Owner, Tenant and Vendor Letters function in PROMAS to fill in that merge document. When you set this up for the first time, you must:

- [A. Create a letter in PROMAS](#) with the fields you want to export,
- [B. Create the letter in Word](#) or Open Office,
- [C. Execute the mail merge](#) in PROMAS,
- [D. Create the Data Source](#) in Word or Open Office,
- [E. Enter the merge fields](#) in the 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. There are instructions based on Microsoft Word 2010 or 365 and instruction for Open Office (beginning on page 8). If you are using another version of Word the procedure may differ slightly.

If you do not have an understanding of Microsoft Mail Merge, in Word, type "Mail Merge" into the Microsoft Assistant or Microsoft Office Word Help. Read the Help to get a basic understanding of how it works. This is also true for Open Office - their Help contains instructions on the mail merge process. They both have very detailed instructions for using mail merge.

In the example below, we will walk through creating a master merge letter in PROMAS that can be used for all your mail merge letters in Microsoft Word. If you want the merge to insert owner, property, unit and/or tenant information in the same document, you must use the Mailings, Tenant Letters function in PROMAS.

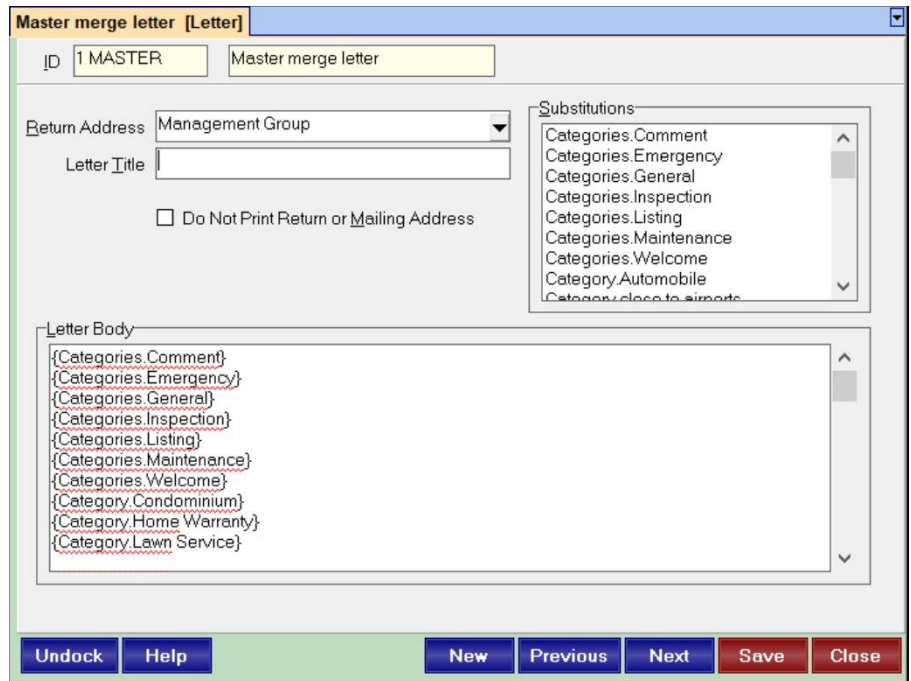
**Cloud Users:** The letter you create for the mail merge can be created in Open Office or in Microsoft Word but you must use save the letter as a \*.ODT file, not a \*.DOC file. Note in Step B that you must copy the \*.ODT document that you create to the cloud so you can choose it in Step C. And after Step D you must copy the \*.AML and the \*.CSV files from the cloud to your local machine to execute the Mail Merge in Word or Open Office. See our Help document [#902 Copy Files from the Cloud](#) for help in copying files to and from the cloud.

## FIRST TIME

### A. Create Master Merge Letter

1. In <<Mailings, Edit Letters>>, create a master letter with all the text substitutions available. The letter does not need to have formatting. It is simply identifying the fields for export.

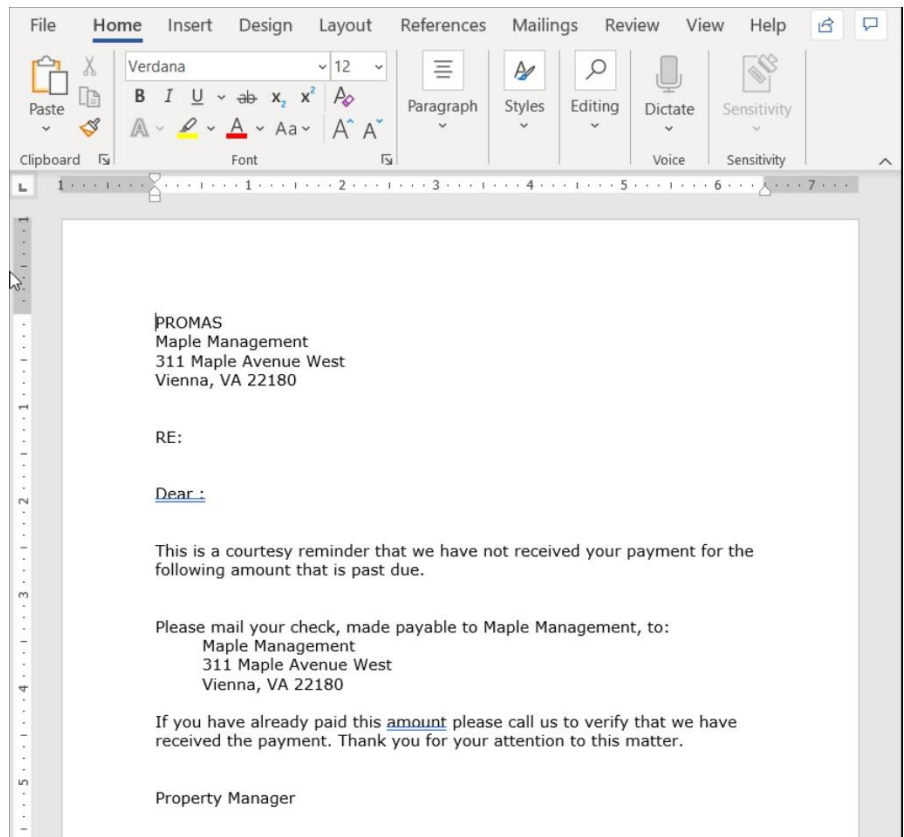
Double click each text substitution until they are all selected.

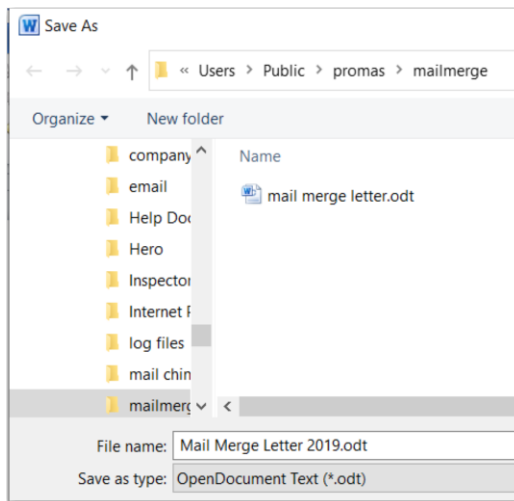


### B. Create letter in Word

2. 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. Note where it is being saved so you can find it in Step 6. It must be saved as a \*.doc file, not a \*.docx.

**Cloud users:** The letter must be saved as an \*.ODT. file. It will be created on your local machine with Open Office or Word. Then copy that \*.odt file to the cloud so it will be available in Step 3.



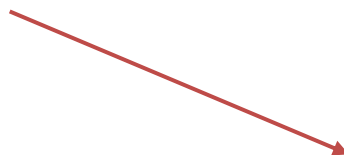


### C. Execute Mail Merge in Promas

3. In PROMAS, <<Mailings, (Owner, Tenant, Vendor) Letters>>, select the Master letter you just created in PROMAS in Step 1. Enter any selection criteria in the Restrict to or Limit to Category fields.

4. Compile letters. You are now on a Send Letters screen. You can further limit the list by marking or unmarking the Skip checkbox.

Click <Select Document>.



Word Document

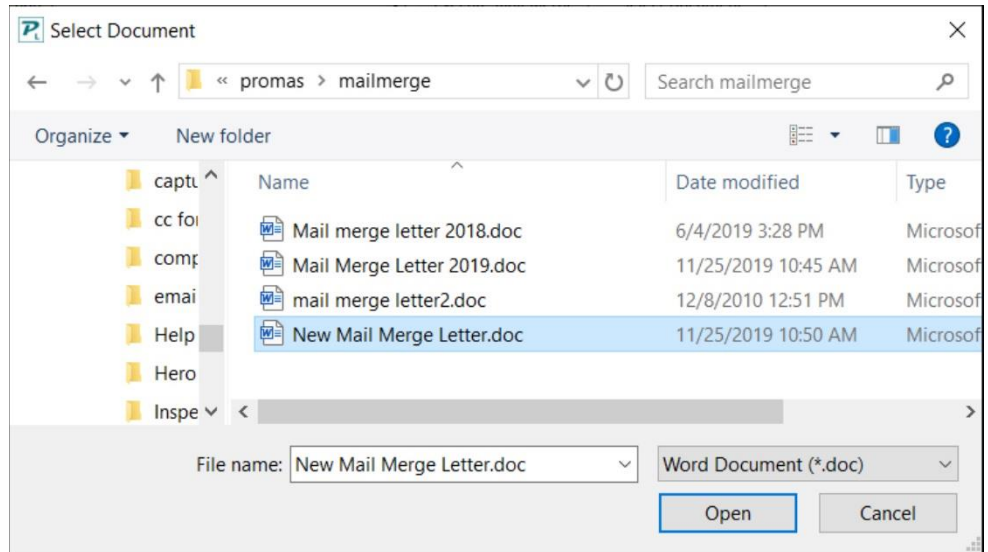
Mail Merge Action Edit Document Execute Mail Merge Select Document

Profile Search	Date	Addressee	Letter	
Dashboard	11/25/2019	ROSEMAN: Rita Roseman	1 MASTER: Master merge letter	<input type="checkbox"/> Skip
Internet Publishing				
Profiles				
AP				
AR				
GL				
Maintenance				
Reports				
Mailings				

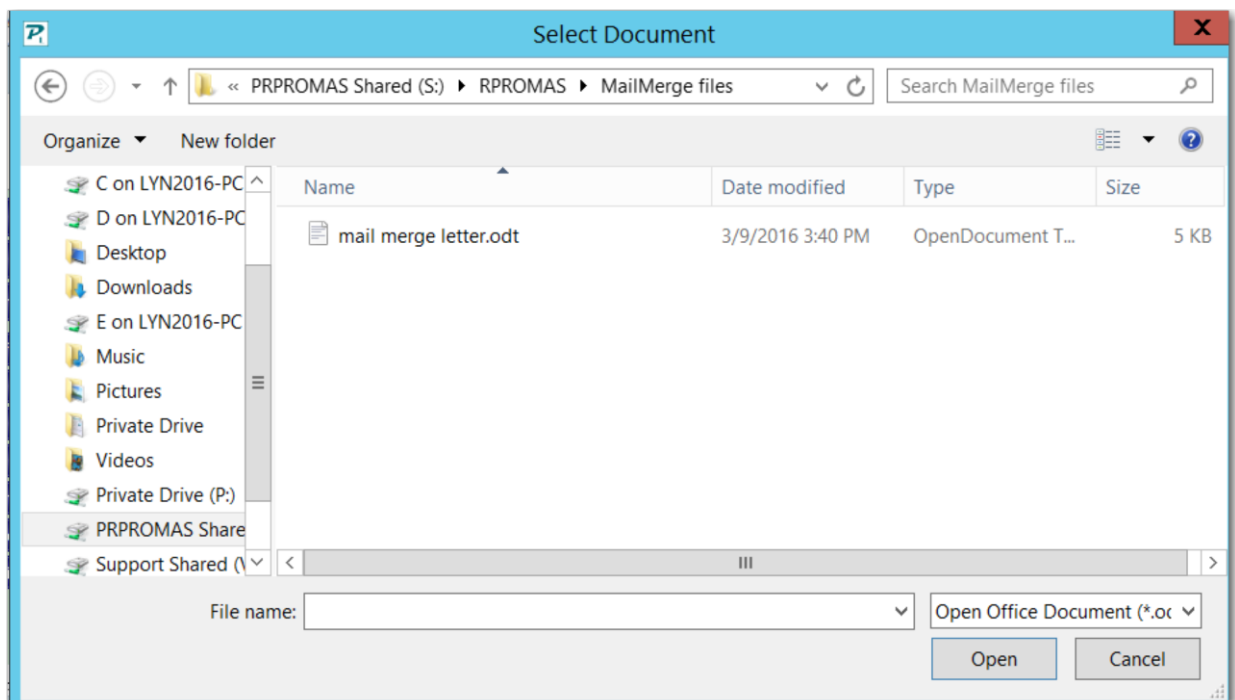
Help Run Letters Report Skip All Cancel

All Letters / Selected Letters / Skipped Letters /

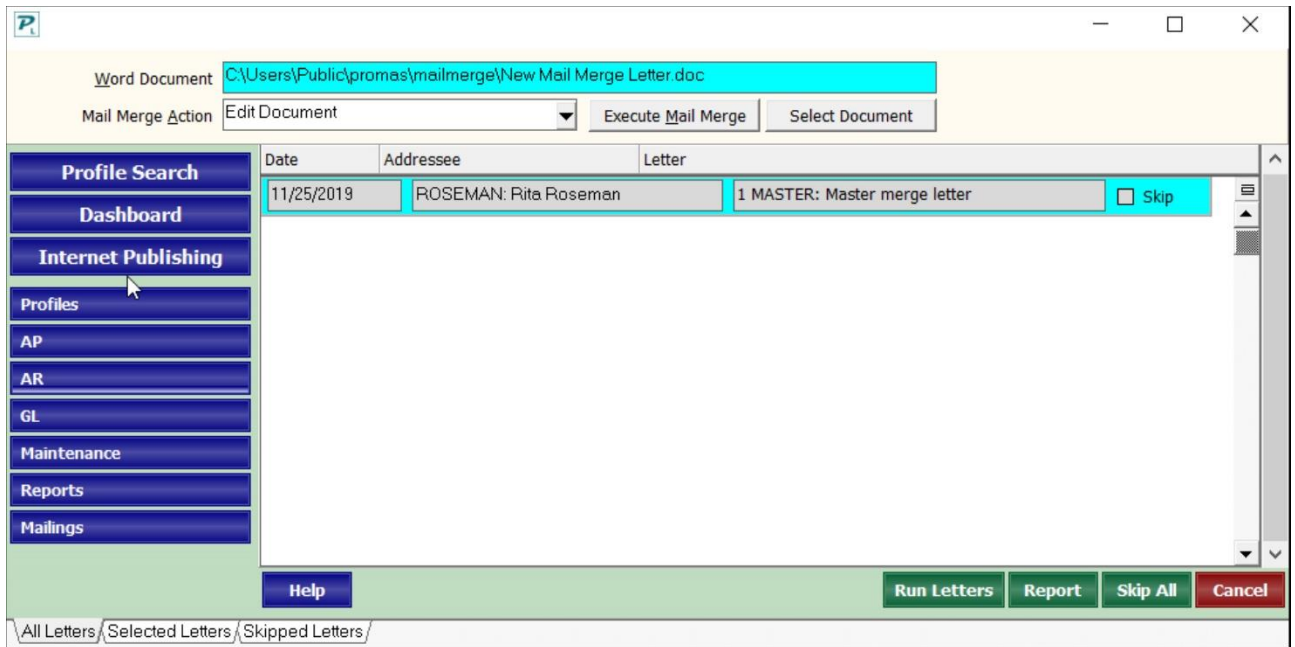
5. An Open Word Document screen will display.
6. Choose the letter you created in Word in step 2 by highlighting and clicking <Open>.



**Cloud users** note that this file will be on your cloud drive.



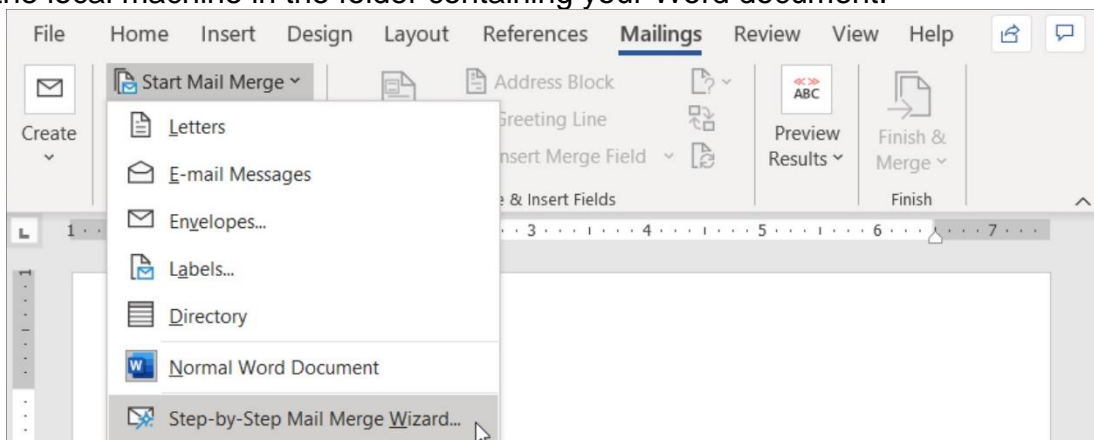
7. Click <Execute Mail Merge>. Word will come up with letter you selected in step 6.



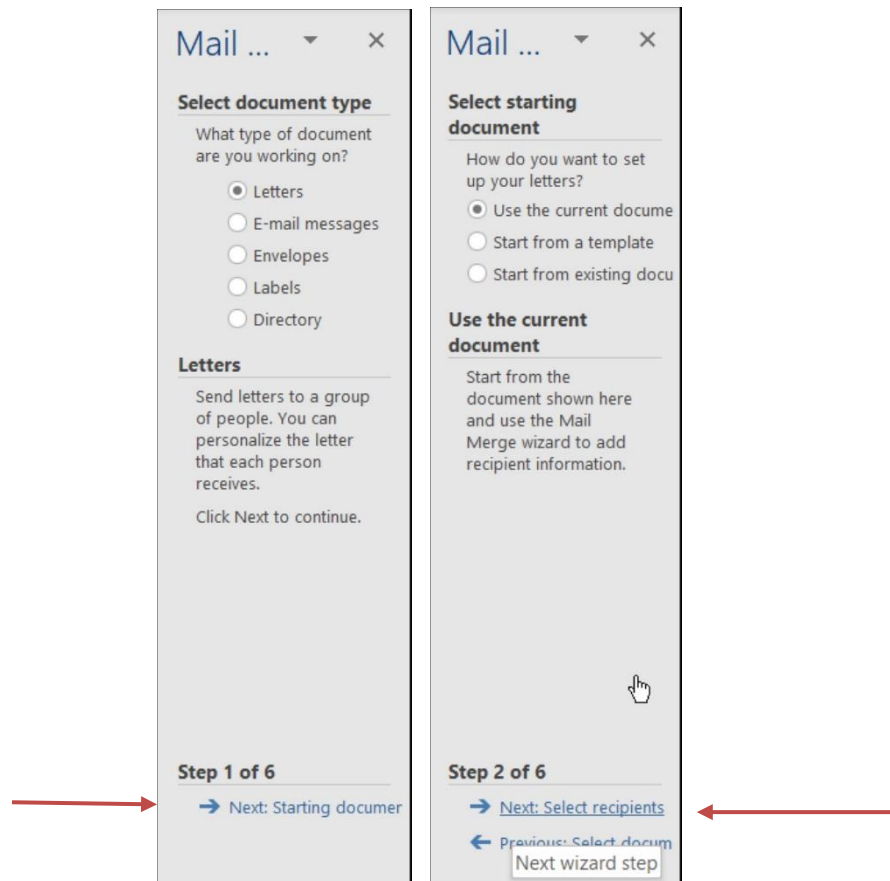
#### D. Create Data Source in Word

8. In Word, click on Mailings, Start Mail Merge, Step by Step (2010 / 365).

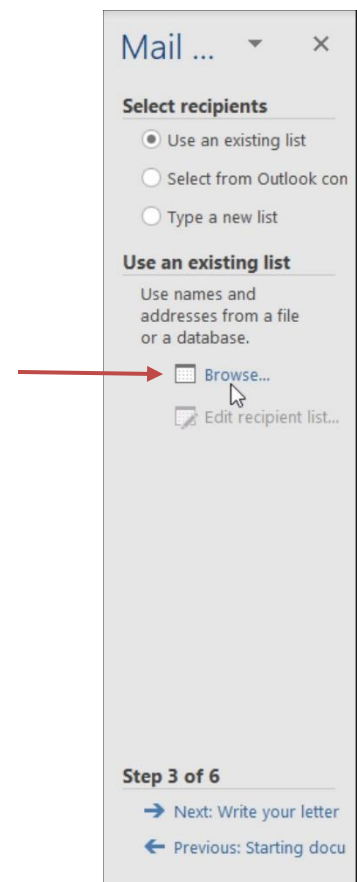
**Cloud users** note that you will have to copy the \*.AML and the \*.CSV files from the cloud drive to the local machine in the folder containing your Word document.



9. Under Step 1 of 6, click on Next: Starting Document, Use Current Document. Under Step 2 of 6 click Next: Select Recipients.

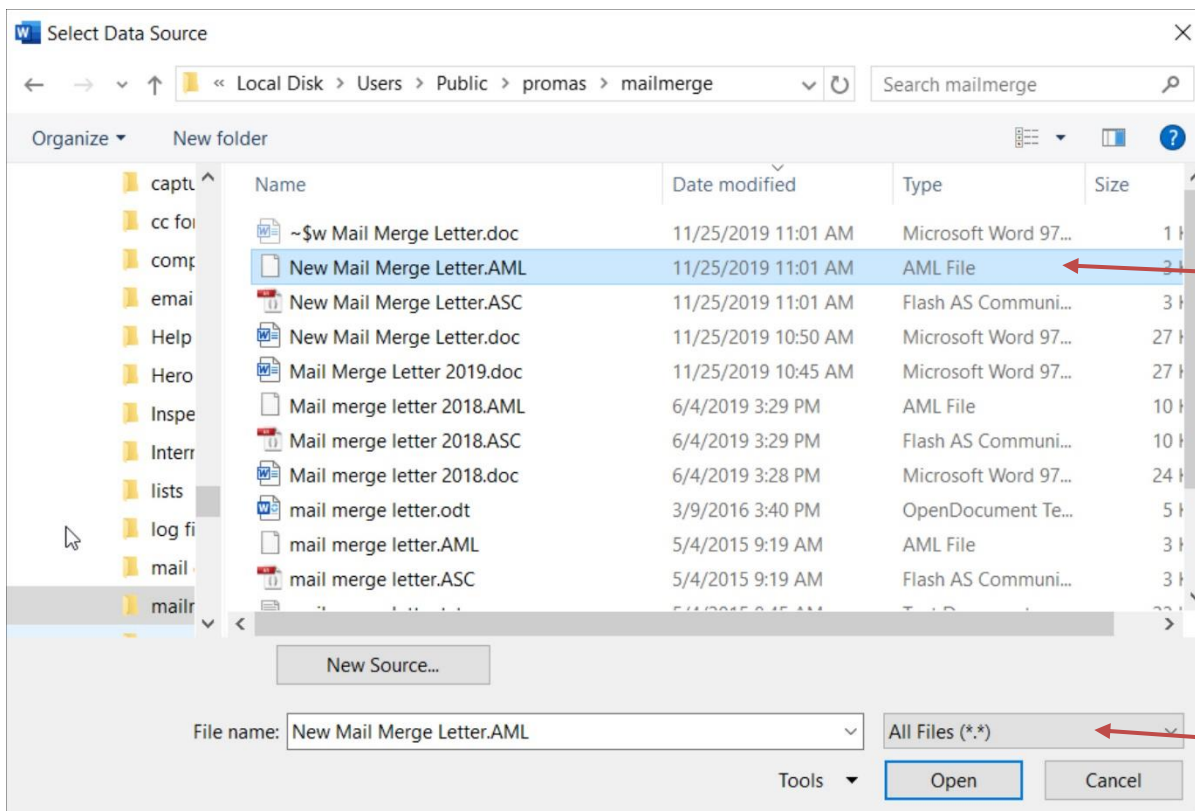


10. Under Use an Existing List click Browse.





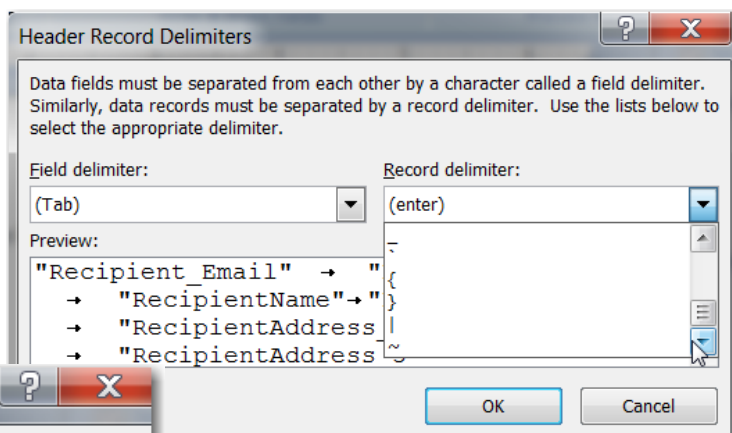
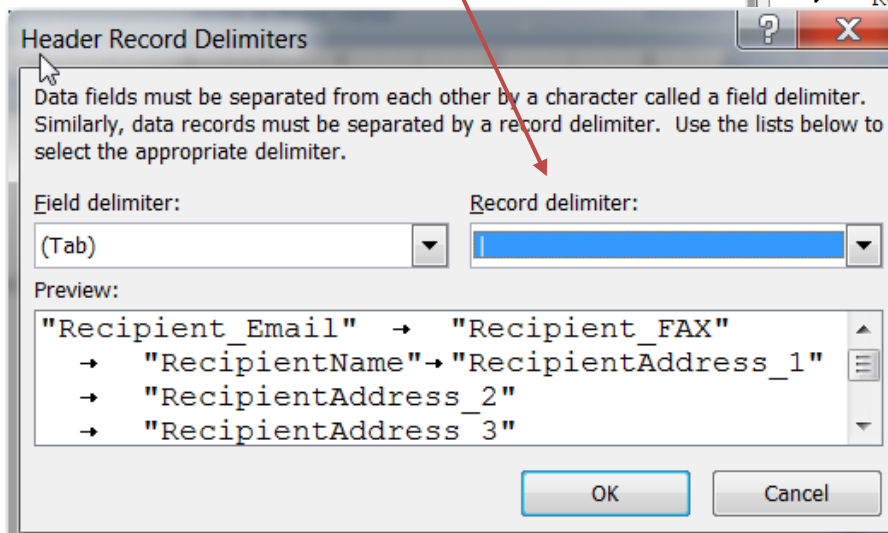
You will be on the Select Data Source screen. Find the folder containing your letter. Change Files of Type to "All Files" and select the \*.AML file created in Step 9 and click <Open>. If you instead choose the \*.ASC file you can skip step 11.



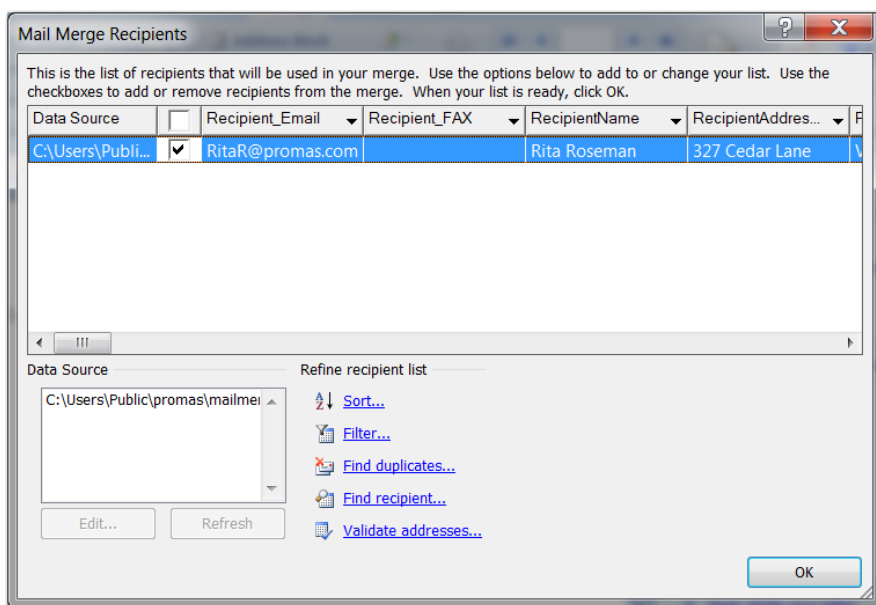
**Cloud users** note that you will choose the \*.AML file or the \*.CSV file and skip step 11.



11. The Header Record Delimiters screen comes up. Use the drop down arrow in Record Delimiter field to choose |.

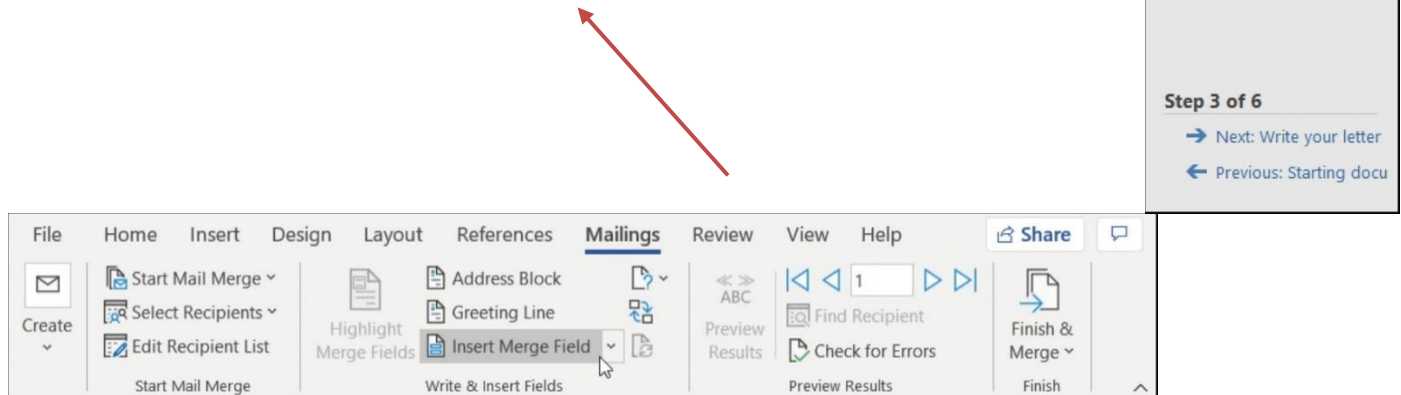


12. A Mail Merge Recipients list displays with the recipients based on your parameters. Click <OK>.



## E. Merge Fields

13. Under Step 3 of 6 click Next: Write your letter. Your merge fields will be available to insert where you want them. Use the Insert Mail Merge Field to enter your merge fields.



PROMAS  
Maple Management  
311 Maple Avenue West  
Vienna, VA 22180

RE: «Unit\_Street\_Address»

Dear «Tenant\_Formal\_Salutation»:

This is a courtesy reminder that we have not received your payment for the following amount that is past due.

«Tenant\_Unpaid\_Charges»

Please mail your check, made payable to Maple Management, to:  
Maple Management  
311 Maple Avenue West  
Vienna, VA 22180

If you have already paid this amount please call us to verify that we have received the payment. Thank you for your attention to this matter.

Property Manager

The screenshot shows the Microsoft Word interface with the 'Mailings' tab selected. The ribbon contains the following groups and options:

- Create:** Start Mail Merge (dropdown), Select Recipients (dropdown), Edit Recipient List.
- Write & Insert Fields:** Address Block, Greeting Line, Insert Merge Field (dropdown), Highlight Merge Fields.
- Preview Results:** Preview Results, Find Recipient, Check for Errors.
- Finish:** Finish & Merge (dropdown).

The document content is the same as in the previous block. On the right side, the 'Write your letter' task pane is open, providing instructions on how to add recipient information. At the bottom right of the task pane, the 'Next wizard step' button is highlighted with a red arrow.

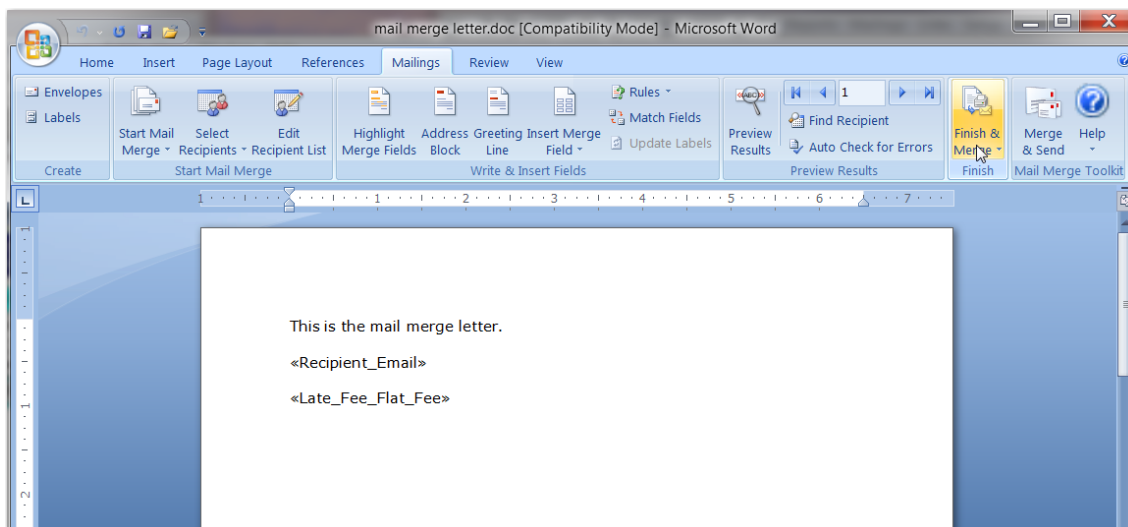
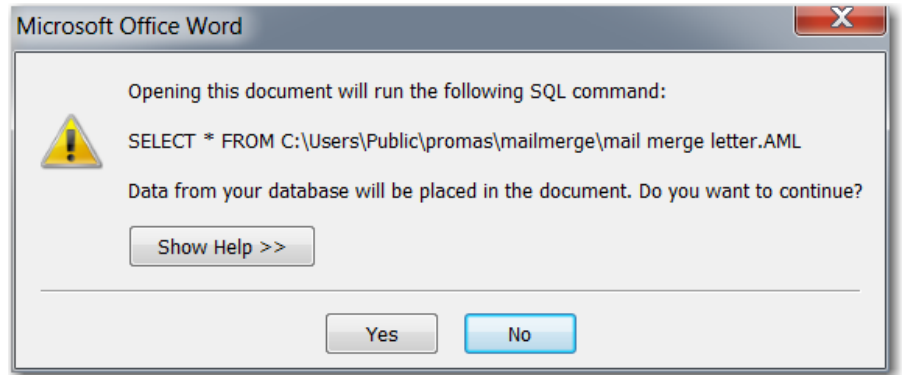
14. Save your document. You are then ready to merge.

The PROMAS Landlord Software Center • 703-255-1400 • [www.promas.com](http://www.promas.com)

15. Under Step 4 of 6 click Next: Preview your letters to perform the merge.

## EACH TIME

1. In <<Mailings, (Notice, Owner, Tenant, Vendor) Letters>>, select letter you want. Enter any selection criteria. Compile letters.
2. In the Mail Merge Action field choose Select Document. For Notice letters, in the Choose Merge Fields Source field choose Master Merge Letter.
3. Click <Execute Mail Merge>.
4. Your letter will display without the merged information.
5. Click <Close>. Click File and choose the document you just closed. A screen will display with a message. Click <Yes>.
6. 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. If the Toolbar does not display, click on Tools, Letters & Mailings, Mail Merge or Mailings, Finish and Merge.



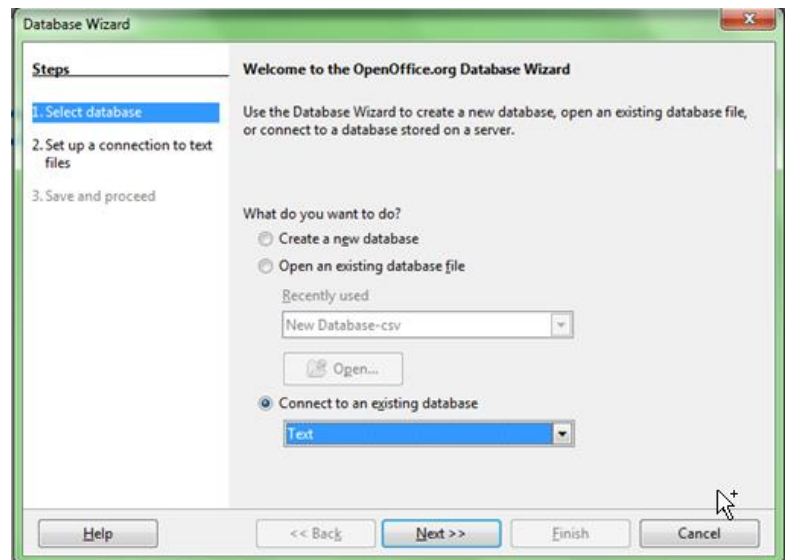
## Open Office

If you do not have an understanding of Open Office Mail Merge, in Open Office, please read their Help to get a basic understanding of how it works.

Because you must convert a file that PROMAS produces into an Open Office database file, the steps relating to creating the database must be followed each time. You only need to create the merge letter once.

## FIRST TIME

1. In <<Mailings, Edit Letters>>, create a master letter with all the text substitutions available. The letter does not need to have formatting. It is simply identifying the fields for export.  
Double click each text substitution until they are all selected.
2. In Open Office, 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. Save the letter as an \*.odt file. Note where it is being saved as you will need to find it in Step 6.
3. In PROMAS, <<Mailings, (Owner, Tenant, Vendor) Letters>>, select letter you just created in PROMAS in step 1. Enter any selection criteria.
4. Compile letters. You are now on a Send Letters screen.
5. Click <Select Document>. A Windows screen will display so you can select a document.
6. Choose the letter you created in Open Office in step 2 by highlighting and clicking <Open>.
7. Click <Execute Mail Merge>. A Windows screen will display showing you the CSV file that was created. It will have the same name as your Open Office document, with a file extension of CSV and will be in the same folder.
8. In Open Office, click on File, New, Database.
9. Select Connect to an existing database, with Text as the format. Click <Next>.



10. Specify the path where the CSV file is. Each text file in that directory will be a table in your database. Choose Comma separated value files. The Field separator should default to a comma. Click <Next>.

11. Click <Finish>. Screen will come up with table name displayed. Double click on table name to display the table with all the merge fields.

12. With that screen still open, open your letter in Open Office.

13. Drag each field name that you want to use in the letter from the table to the letter. Save the letter.

14. In the Letter window, choose File, Print. You will see a message asking you whether you want to print a form letter. Click Yes.

15. In the Mail Merge window, click on the + sign next to the database, then click the + sign next Tables, then highlight the database you want to use as your merge file. You can then select all the records or just a particular record.

16. Specify the printer and click OK.

