rockend

How to do a Mail Merge in REST Professional

Overview

In order to successfully process a mail merge in REST Professional you must have a mail merge template already created and ready to merge with. If you do not have this set up, refer to the document **"How to Create a Mail Merge Document in REST Professional"**.

Steps

1. Go to **Other** > **Print Letters / Mail Merge**

2. **Merge with** - Merge with **Tenant**

   NOTE: We recommend that all templates be set up as a tenant merge as there are more merge fields to choose from. The tenant merge includes tenant, property and owner information.

3. **Type of Letter –** choose a letter type which best suits this merge. If you do not need REST to select the criteria for the type of letter leave this set to **General**

4. **Contact** - Select the relevant **Contact, Manager & Property Type**

5. **Filter** – Select your filter criteria as required

6. **Selection** – Select **All, Range or Select a tenant(s).** This will default to All if no selection is made

   NOTE: If you tick the **Property Order** box and then **select** it will show in property order
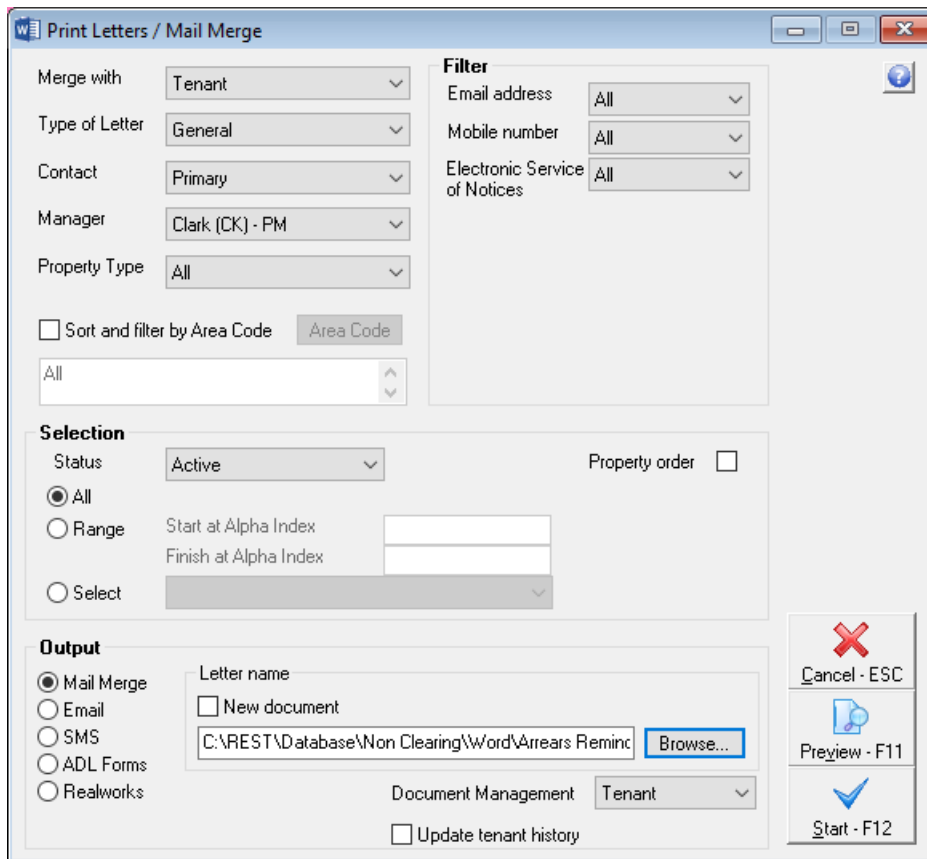
7. **Output** - Select **Mail Merge**

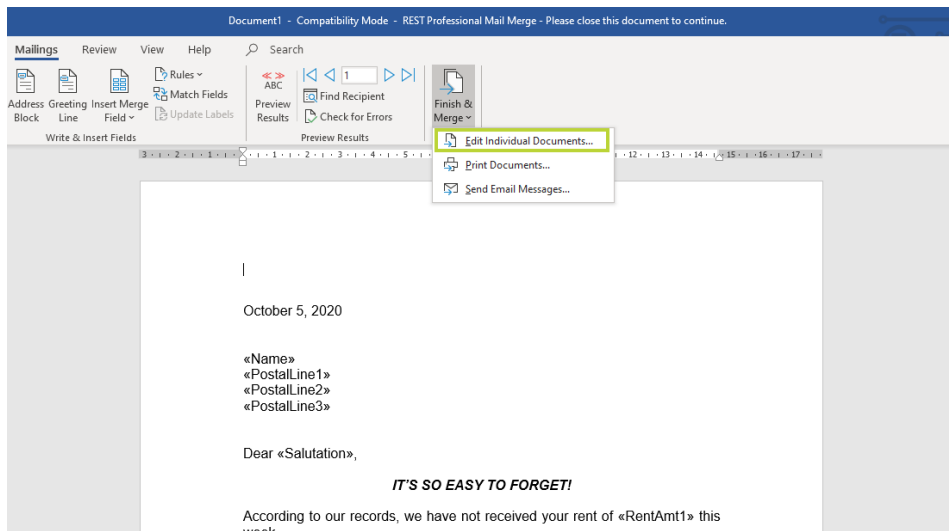8. Click on **Browse**, select the document you wish to merge to & click **Open**

9. If you would like this merge letter to show on your Tenant ledger tick the **Update tenant history** box

   NOTE: Document Management will default to being ticked, deselect if you don't want to save to document management
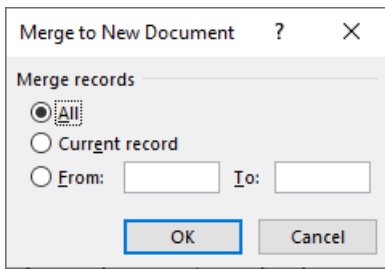
10. Click **Start-F12**

11. The template will now open in WORD

12. Click on **Finish and Merge** and select **Edit Individual Documents**

13. The **Merge to New document** screen will appear, select **All** and click **OK**

NOTE: All your information will now be merged into the relevant merge fields in your template.

14. To print from WORD, go to **File > Print** and print the document as required.

15. Once you have printed, exit (**X**) out of the WORD Document

NOTE: If you selected to save this document into **Document Management** when you exit the WORD document in the previous step you will be prompted with a message "Do you want to save this into Document Management" click **Yes**
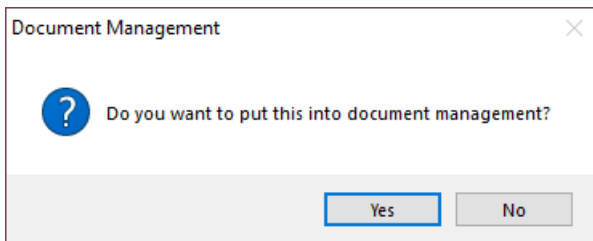
For more information, click the links below to view other articles about Mailmerge:

- How to Create and Edit a Mail Merge Template in REST Professional
- How to do an E-mail Merge in REST Professional
- List of Merge Fields in REST Professional
- Create a Date in Mail Merge Documents

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