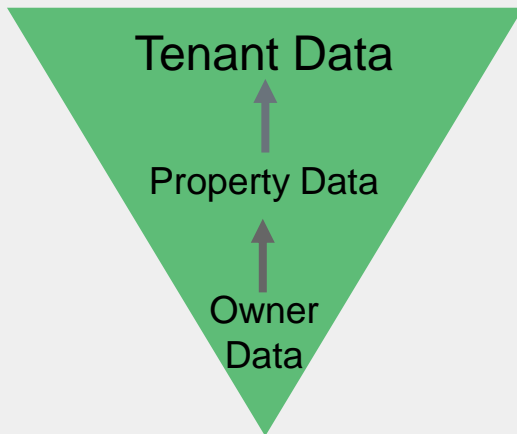


TRAINING REFERENCES

Hierarchy of Master Files



- Merging with **Tenant** allows you to use data from the Tenant, Property & Owner files
- Merging with **Property** allows you to use data from the Property & Owner files
- When merging with the **Owner**, only data on the Owners' file can be used.



Creating a Merge Template

To create a new merge template:

1. Go to **Other > Print Letters / Mail Merge**
2. Choose the appropriate **Merge With**. This will depend on the data you need in your merge.
3. Select **Type of Letter**. This determines the filter available to you.
4. Select some tenants in the **Selection** section
5. Choose the **Output**
6. Select the **New Document** checkbox
7. Deselect the **Update Tenant History** checkbox
8. A blank letter template opens in Microsoft Word where you can create your letter and insert merge fields
9. Save your template with your REST Professional Word Documents

See the Knowledgebase for more on [How to Create and Edit Mail Merge Templates](#) and for a [List of Merge Fields](#)



Sending in Bulk

To send letters in bulk

1. Go to **Other > Print Letters/Mail Merge**
2. Select the **merge criteria**
3. Select the **recipients**
4. Choose the appropriate **output**
5. Click **Preview/Start**
6. Choose the appropriate **output**
7. Click **Preview/Start**
8. In Microsoft Word, click **Finish & Merge**
9. Print your letters

See the [Knowledgebase](#) for more info on How to complete a Mail Merge in REST Professional