How to Mail Merge

Brought to you by



Tools Required:



Step 1 – Database in Excel Step 2 – Name all columns

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a.	A	В	F	G					
	Building		Owner						
1	Address	City	Address	Owner City State Zip					
2	341 1st St	Claremont	t 2180 Prince All Riverside, CA 92507						
3	150 W 1st St	Claremont	150 W 1st St	Claremont, CA 917114750					
				6					



Step 3 – Letter Template

Step 4 – Start Mail Merge





Step 4 – Start Mail Merge – Click Letters



Step 4 – Start Mail Merge – Select Recipients -Use an Existing List



Step 4 – Start Mail Merge – Select Recipients



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Step 4 – Start Mail Merge – Select Table - OK

Name	Description	Modified	Created		
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Dear Mr. <Last Name>,



Dear Mr. <Last Name>,



Step 5 – Adjusting Template – Delete Place Holders, Change Font



«Owner_Contact_<First Name> <Last Name> «Owner_Address= <Address> «Owner_City_State> <Zip>

Dear Mr. «Owner Name»<Last Name>,

Step 5 – Adjusting Template – Review and Adjust Final



April 6, 2015

```
«Owner_Contact»
«Owner_Address»
«Owner City State Zip»
```

```
Dear Mr. «Owner_Name»,
```

I represent an investor interested in acquiring real estate properties such as your shopping center on «Building_Location»

My client owns a large portfolio of real estate investments and is prepared to negotiate a fair price. If you are willing

Step 6 – Finish & Merge – Edit Individual - OK

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ults		Edit Individual Documents	
		Print Documents	
		🚰 Send Email Messages	>
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1	Merge to New Document
› » te_	Merge records All Current record From: OK ancel

Step 7 – New File – Ready to Print. Make changes to template

PAGE LAYOUT	REFERENCES	MAILINGS R	EVIEW VIE	N AVERY	DESIGN	LAYOUT				
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Font	- 1 · · · ·	Paragraph		3	4 .		Sty	/les	. 6	0

April 6, 2015

Conrad M. & Patricia Wilkinson 2180 Prince Albert Dr Riverside, CA 92507

Dear Mr. Conrad M. & Patricia Wilkinson,

I represent an investor interested in acquiring real estate properties such as your shopping center on 341 1st St Mv client owns a large portfolio of real estate investments