

How to Mail Merge

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Tools Required:

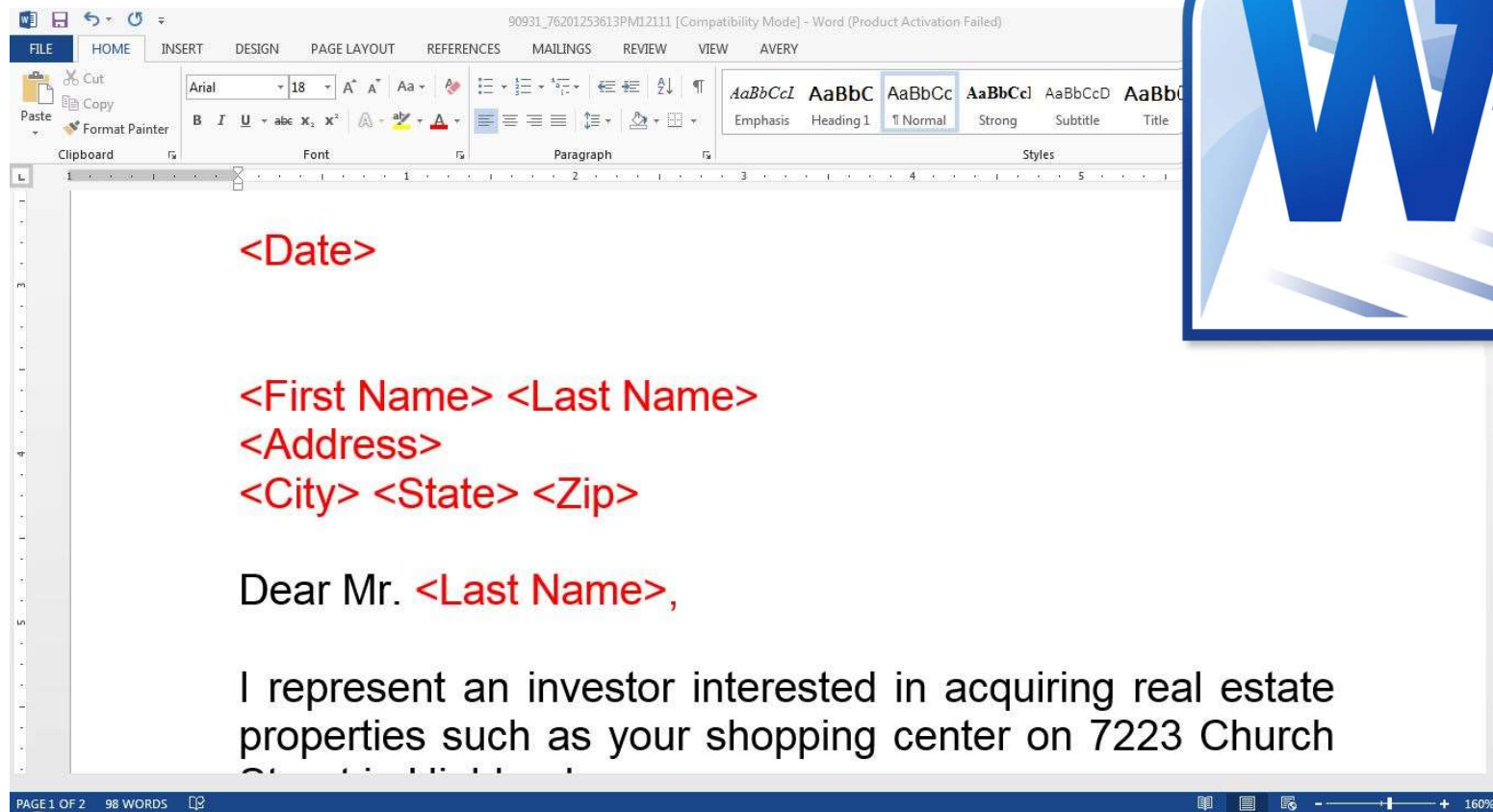


Step 1 – Database in Excel
Step 2 – Name all columns

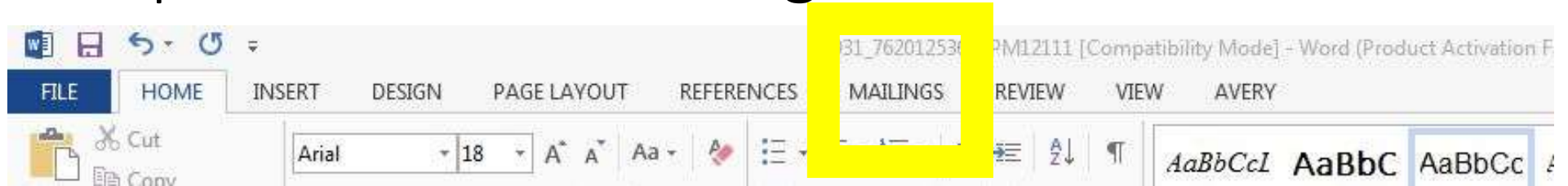
The screenshot shows the Microsoft Excel interface with the following data table:

	A	B	F	G
	Building Address	City	Owner Address	Owner City State Zip
1	341 1st St	Claremont	2180 Prince All	Riverside, CA 92507
2	150 W 1st St	Claremont	150 W 1st St	Claremont, CA 917114750

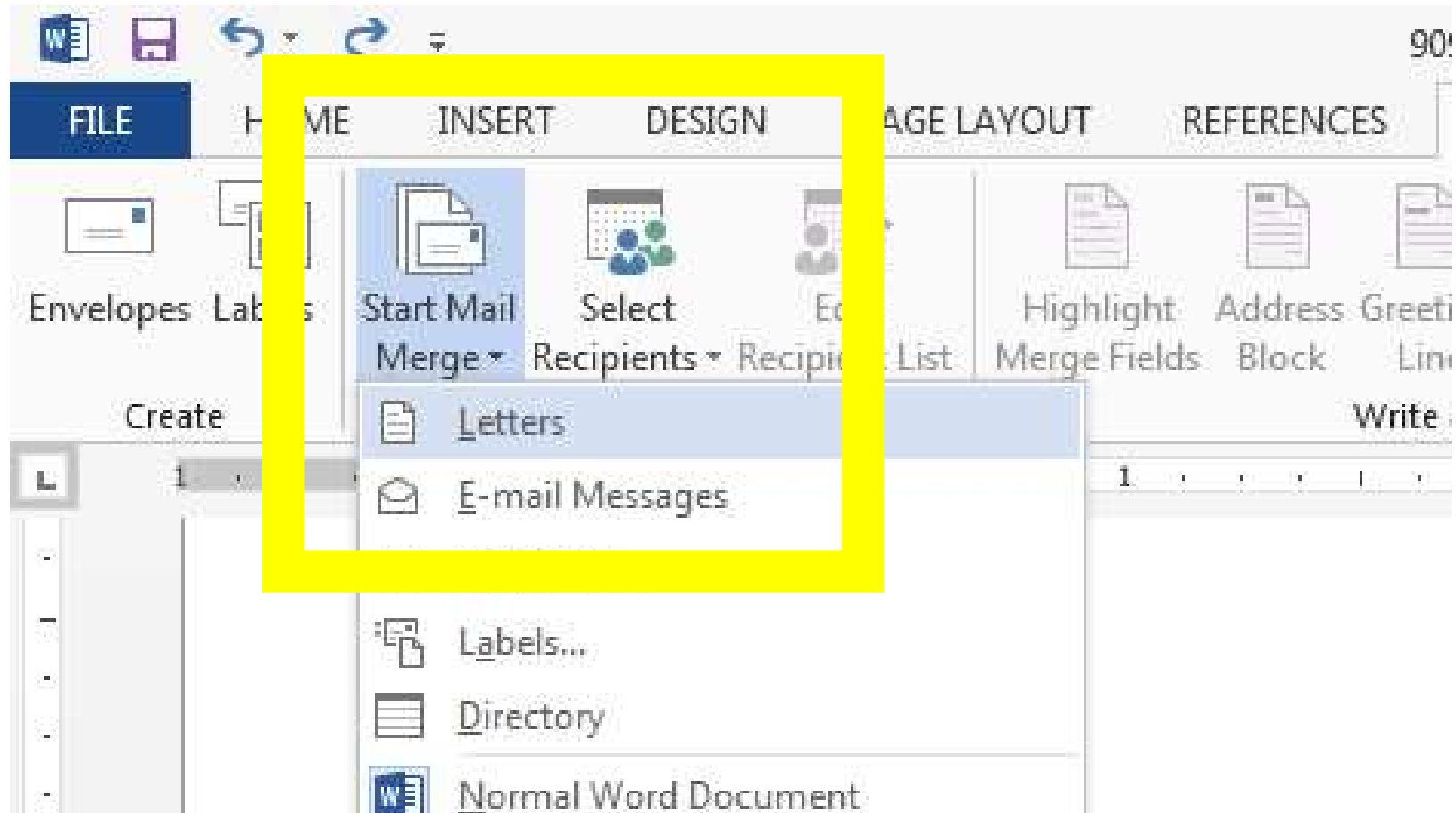
Step 3 – Letter Template



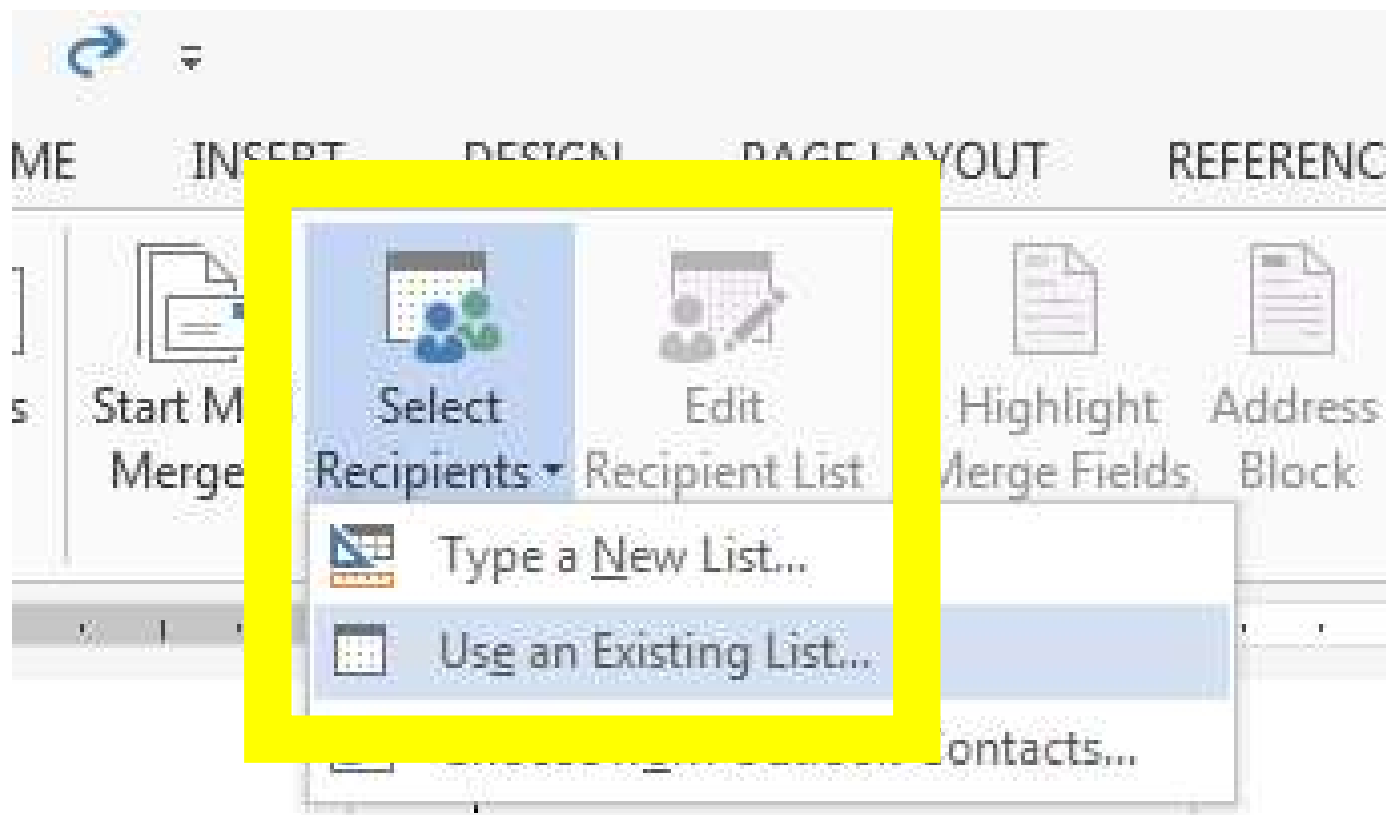
Step 4 – Start Mail Merge



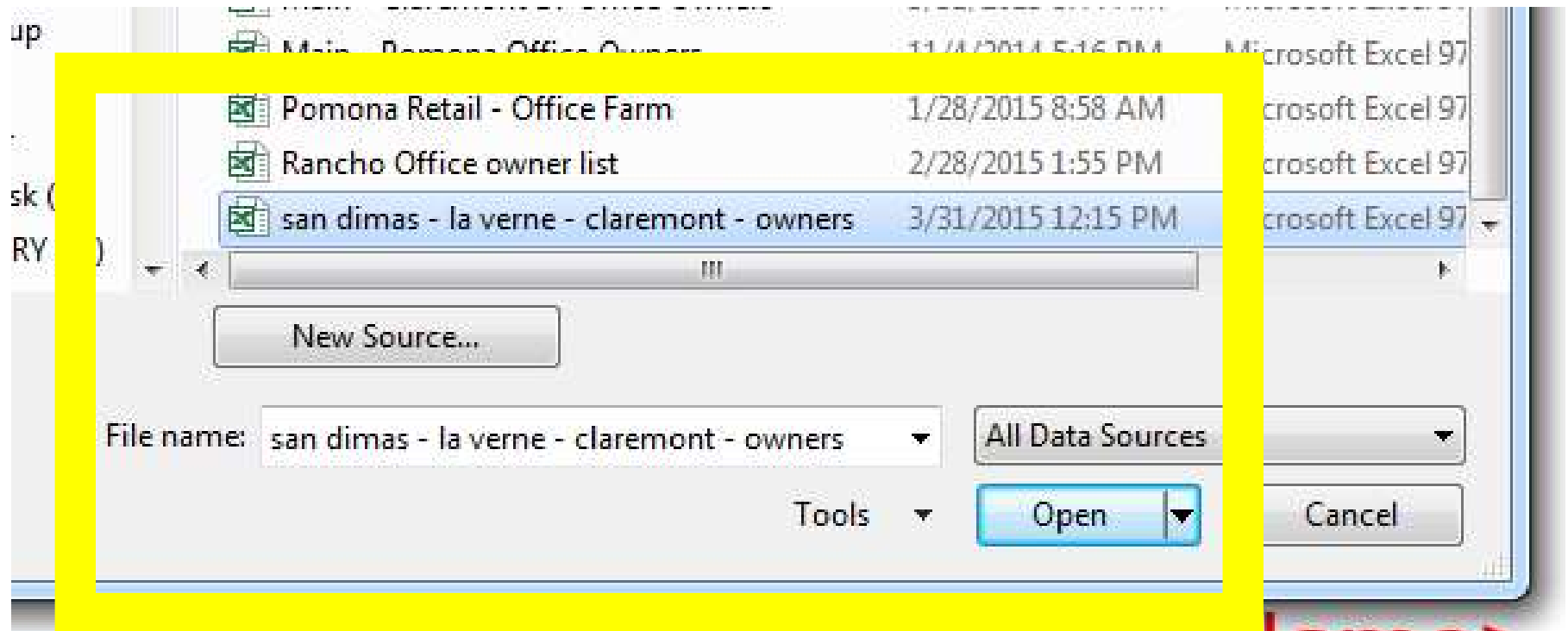
Step 4 – Start Mail Merge – Click Letters



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

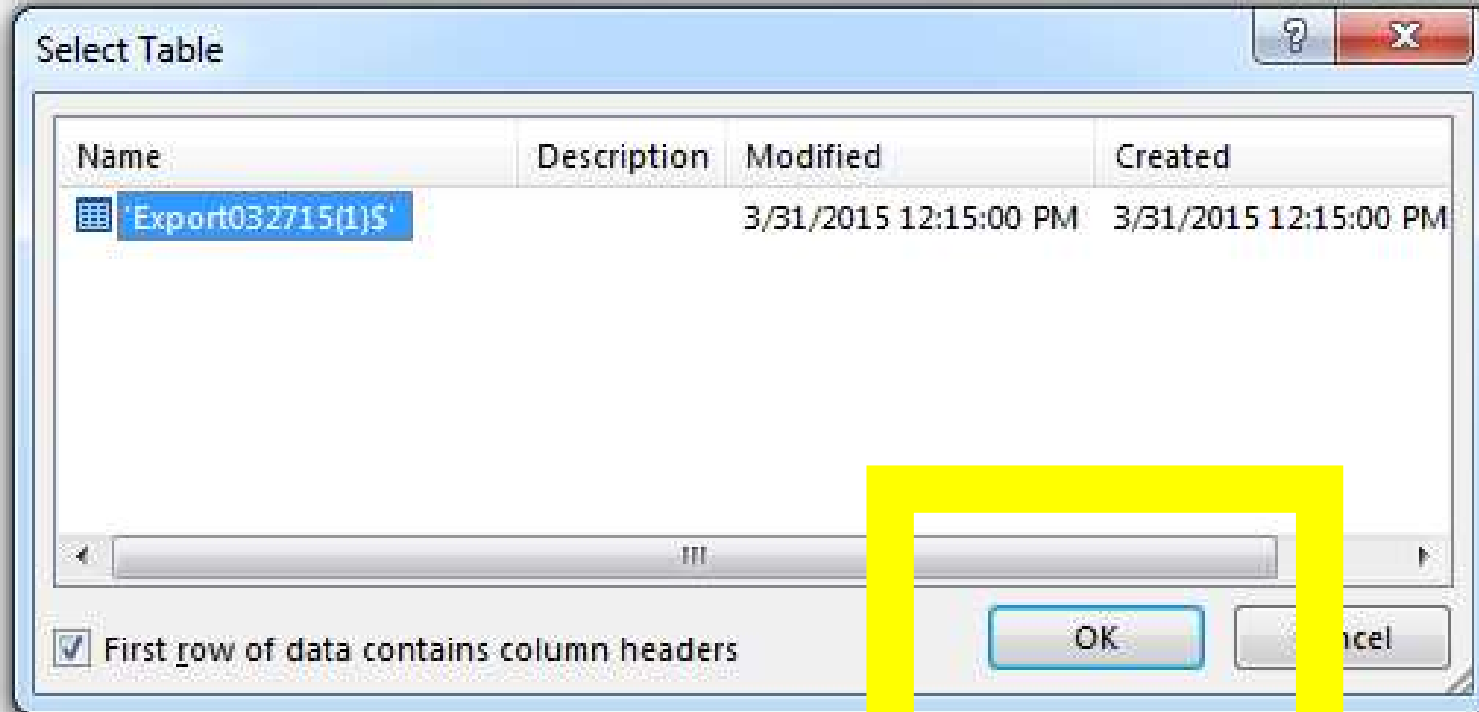


Step 4 – Start Mail Merge – Select Recipients



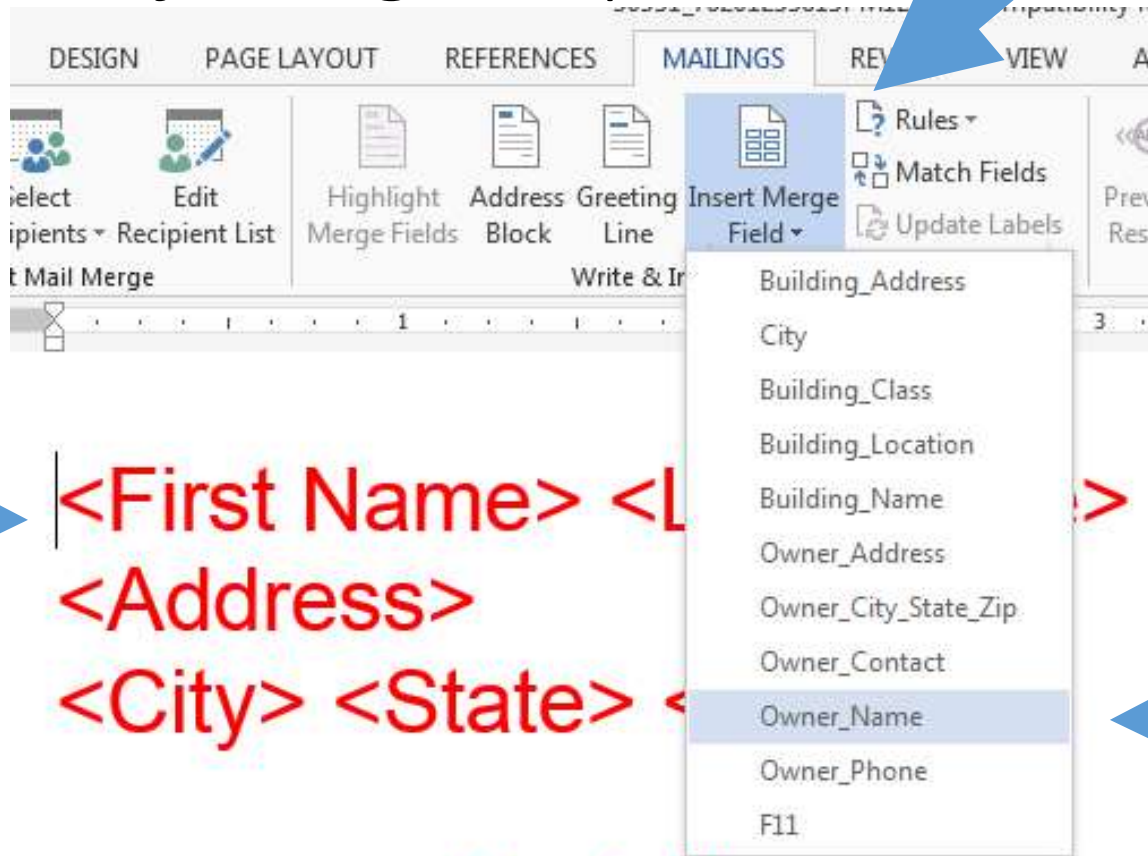
<First Name> <Last Name>
<Address>

Step 4 – Start Mail Merge – Select Table - OK

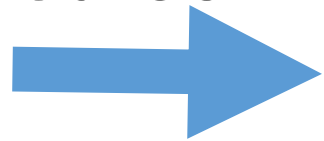


Step 5 – Adjusting Template

2. click



1. Cursor

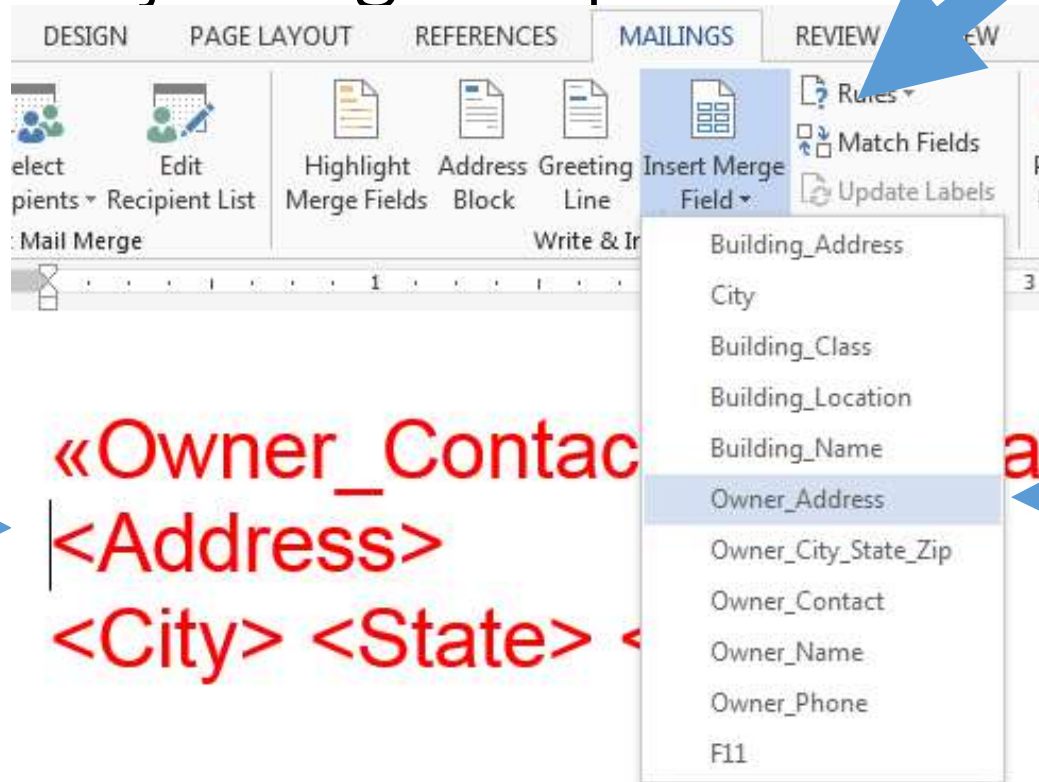


<First Name> <Last Name>
<Address>
<City> <State> <Zip Code>
Dear Mr. <Last Name>,

3. Select

Step 5 – Adjusting Template

2. click



3. Select

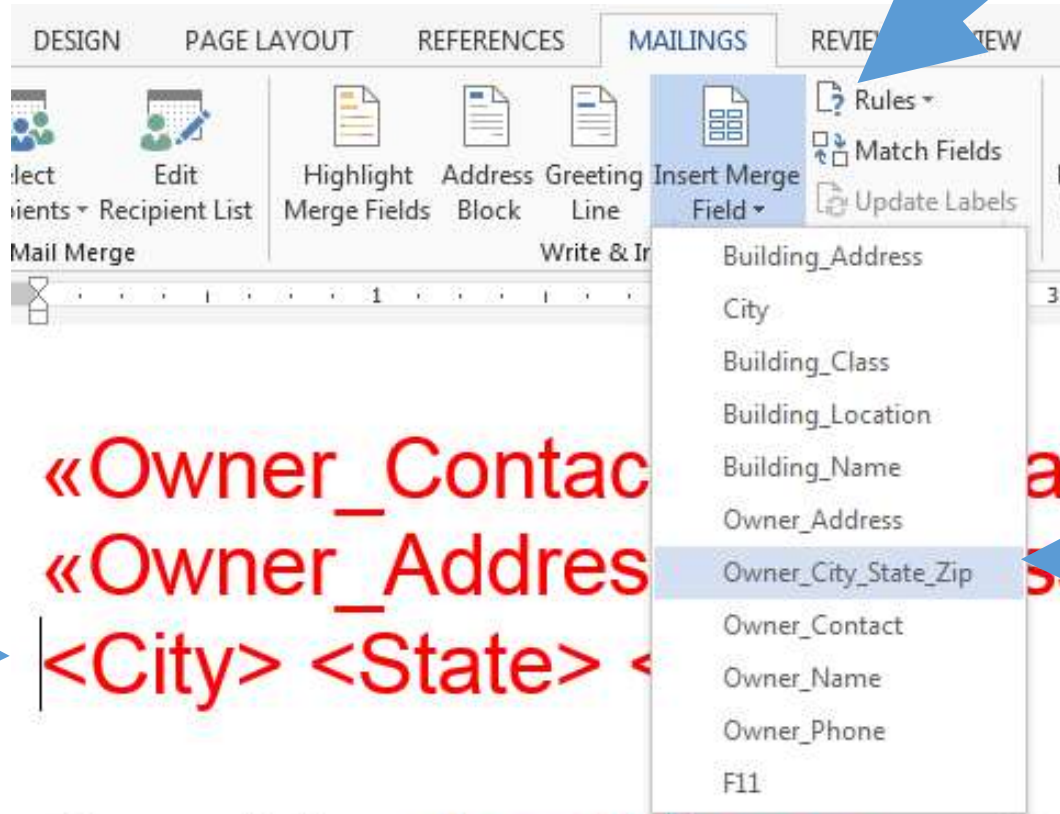
1. Cursor

«Owner Contac
<Address>
<City> <State> <

Dear Mr. <Last Name>,

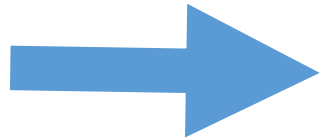
Step 5 – Adjusting Template

2. click



3. Select

1. Cursor

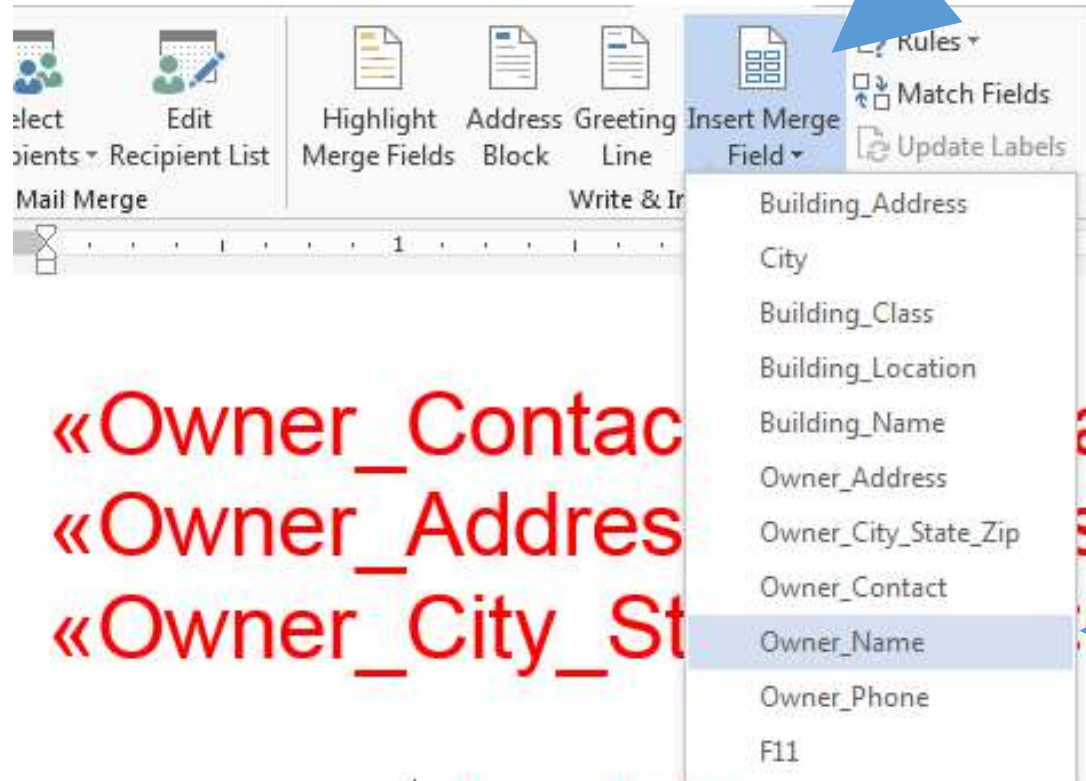


«Owner Contac
«Owner Addres
<City> <State> <

Dear Mr. <Last Name>,

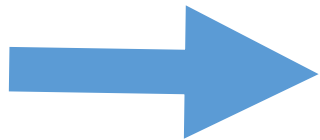
Step 5 – Adjusting Template

2. click



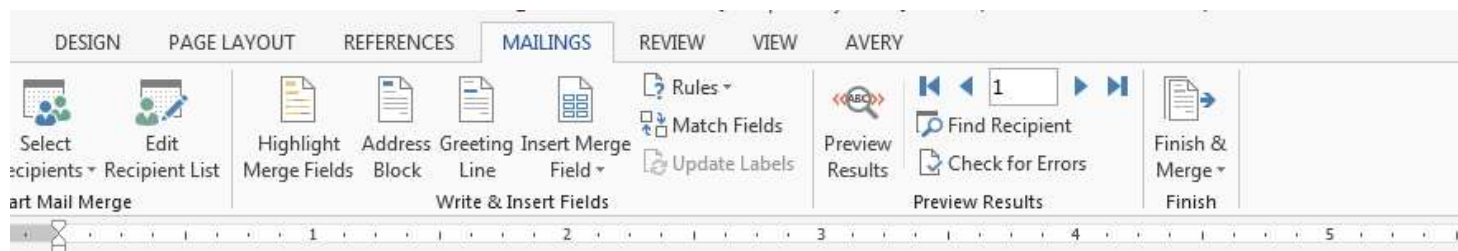
1. Cursor

3. Select



Dear Mr. | <Last Name> ,

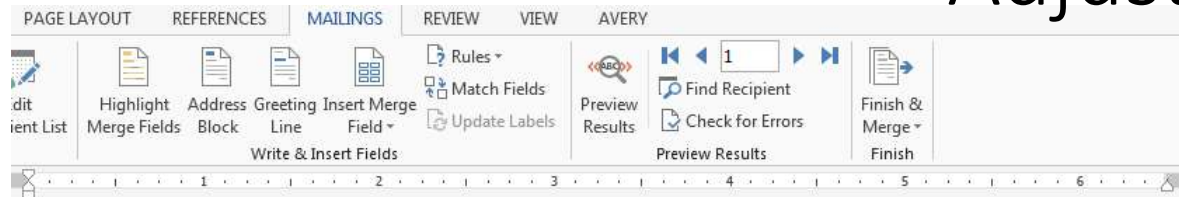
Step 5 – Adjusting Template – Delete Place Holders, Change Font



«Owner_Contact» <First Name> <Last Name>
«Owner_Address» <Address>
«Owner_City_State_Zip» <City> <State> <Zip>

Dear Mr. «Owner Name» <Last Name>,

Step 5 – Adjusting Template – Review and Adjust Final



April 6, 2015

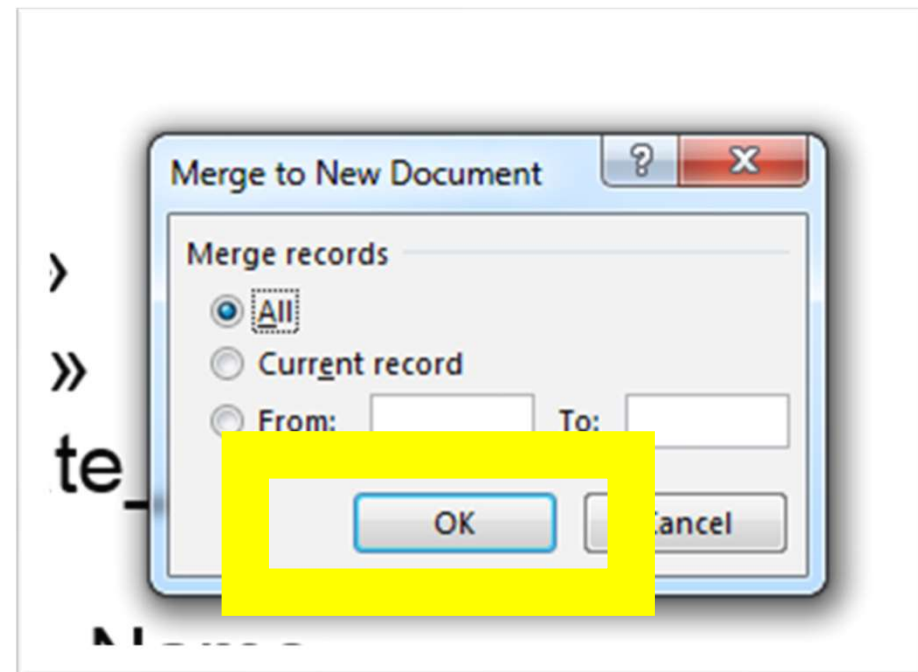
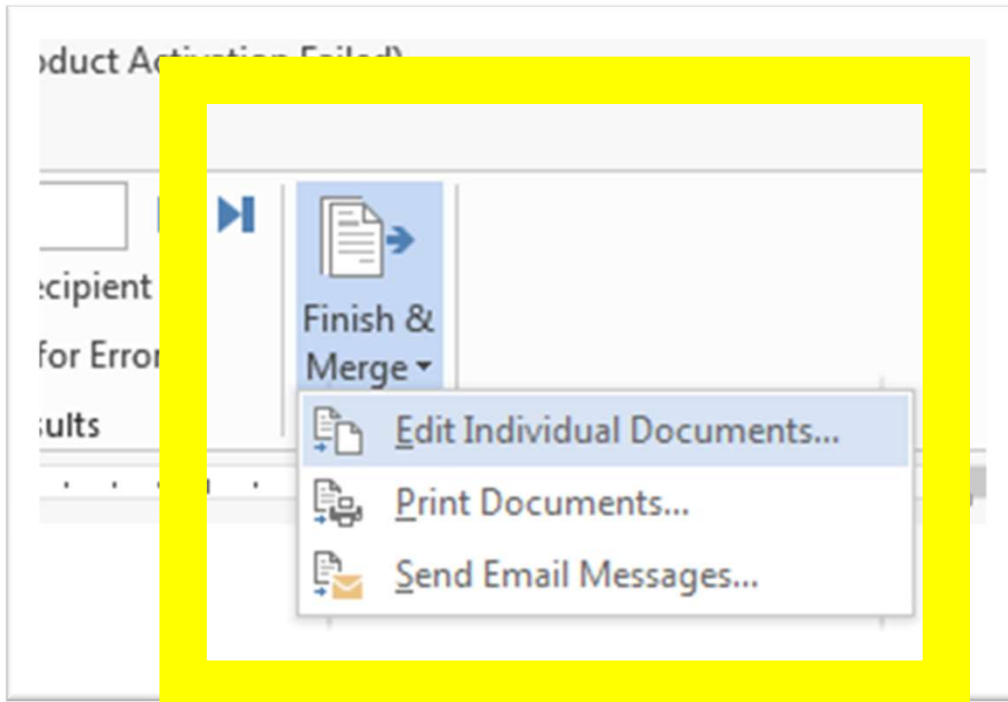
«Owner_Contact»
«Owner_Address»
«Owner_City_State_Zip»

Dear Mr. «Owner_Name»,

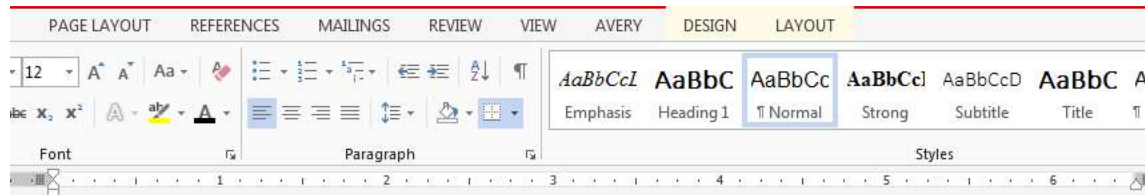
I represent an investor interested in acquiring real estate properties such as your shopping center on «Building_Location»

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



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



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