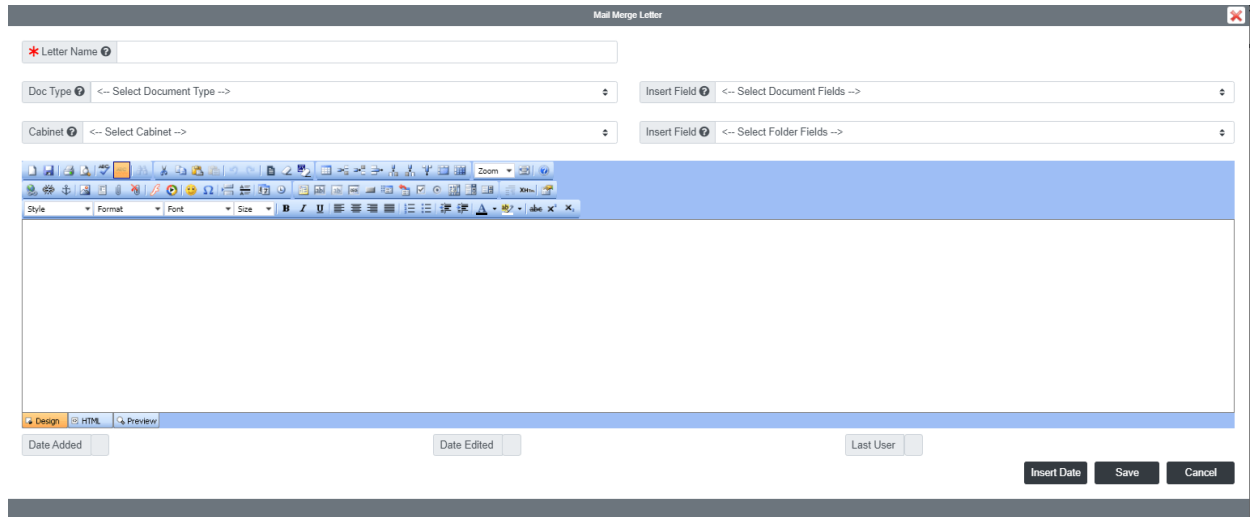


# Mail Merge Letters

From the menu on the left-side of the screen, click Admin, then click Fileroom > Mail Merge Letters.

## Add Mail Merge Letter

1. Click the Add Letter button.

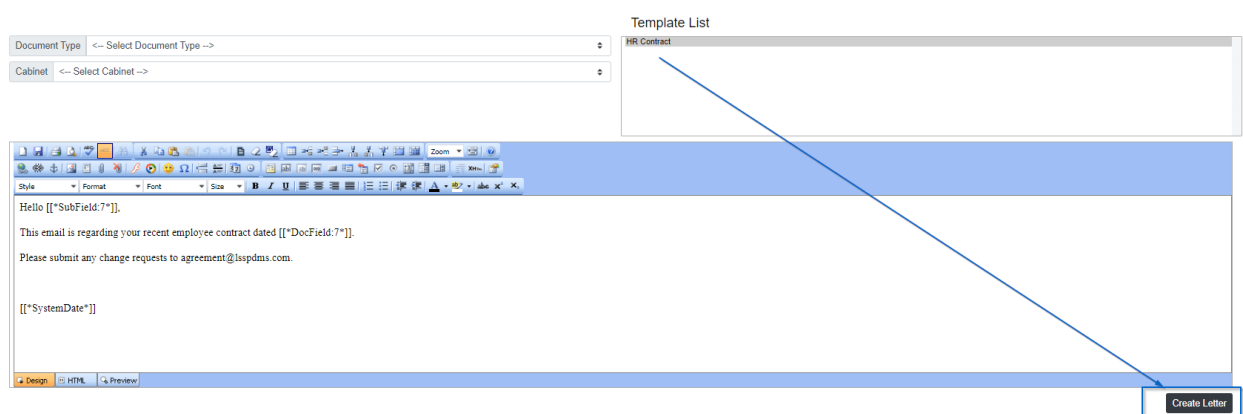


The screenshot shows the 'Mail Merge Letter' form. It includes a 'Letter Name' field with a red asterisk and a help icon. Below are dropdown menus for 'Doc Type' and 'Cabinet', both with 'Select' labels. To the right are 'Insert Field' buttons for 'Document Fields' and 'Folder Fields'. The main area is a large text editor with a toolbar. At the bottom, there are tabs for 'Design', 'HTML', and 'Preview', and buttons for 'Date Added', 'Date Edited', 'Last User', 'Insert Date', 'Save', and 'Cancel'.

2. Enter the Letter Name.
3. Enter your email message and select the Doc Type and Cabinet fields you want to add to the message:
  - If you wish to add the date to the message, use the Insert Date button at the bottom.
4. When finished, click the Save

## Run Mail Merge Letter

1. Begin by going to Filing > Mail Merge Letter
2. In the Template List box, you will see a list of your existing mail merge letters. Double-Click the mail merge letter you want to open. To filter, you can select a Document Type or Cabinet that the template is assigned to.
3. When ready, click the Create Letter button.



The screenshot shows the 'Run Mail Merge Letter' interface. It features a 'Template List' box at the top with a dropdown for 'Document Type' and 'Cabinet'. Below the list is a large text editor containing a sample email template with merge fields like `[[*SubField:7*]]`, `[[*DocField:7*]]`, and `[[*SystemDate*]]`. A blue arrow points from the 'HR Contract' template in the list to the 'Create Letter' button at the bottom right. The bottom of the interface has tabs for 'Design', 'HTML', and 'Preview'.

4. A pop-up window will appear for you to select the Folders for the mail merge letter.

