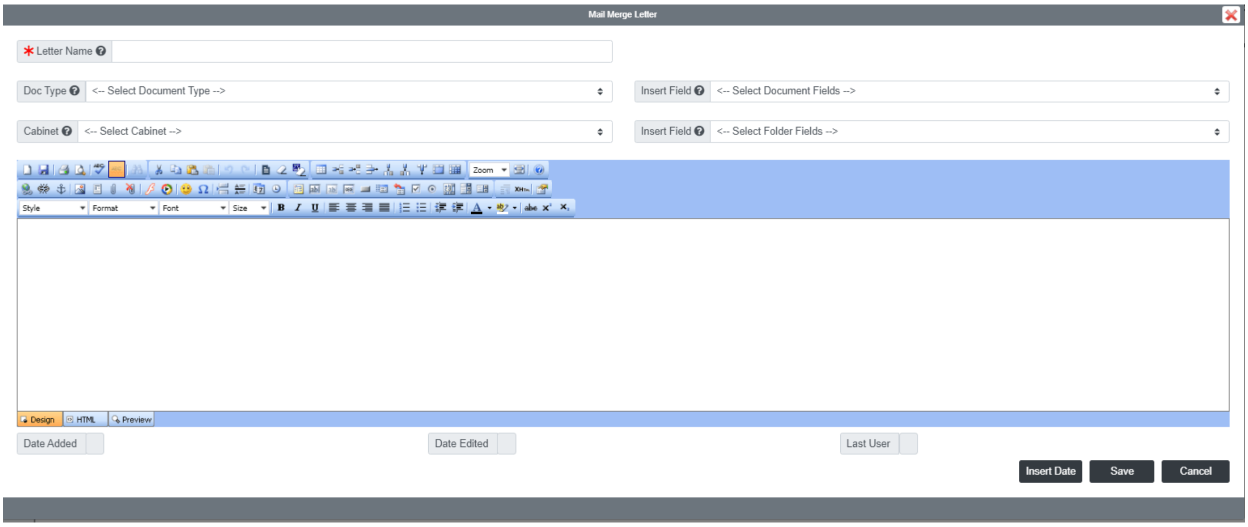
Mail Merge Letters

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

Add Mail Merge Letter

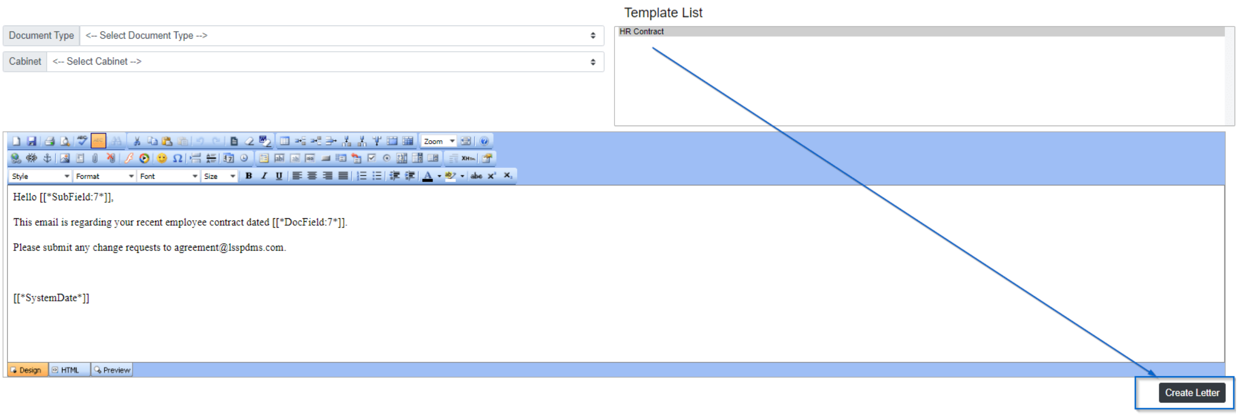
1. Click the Add Letter button.



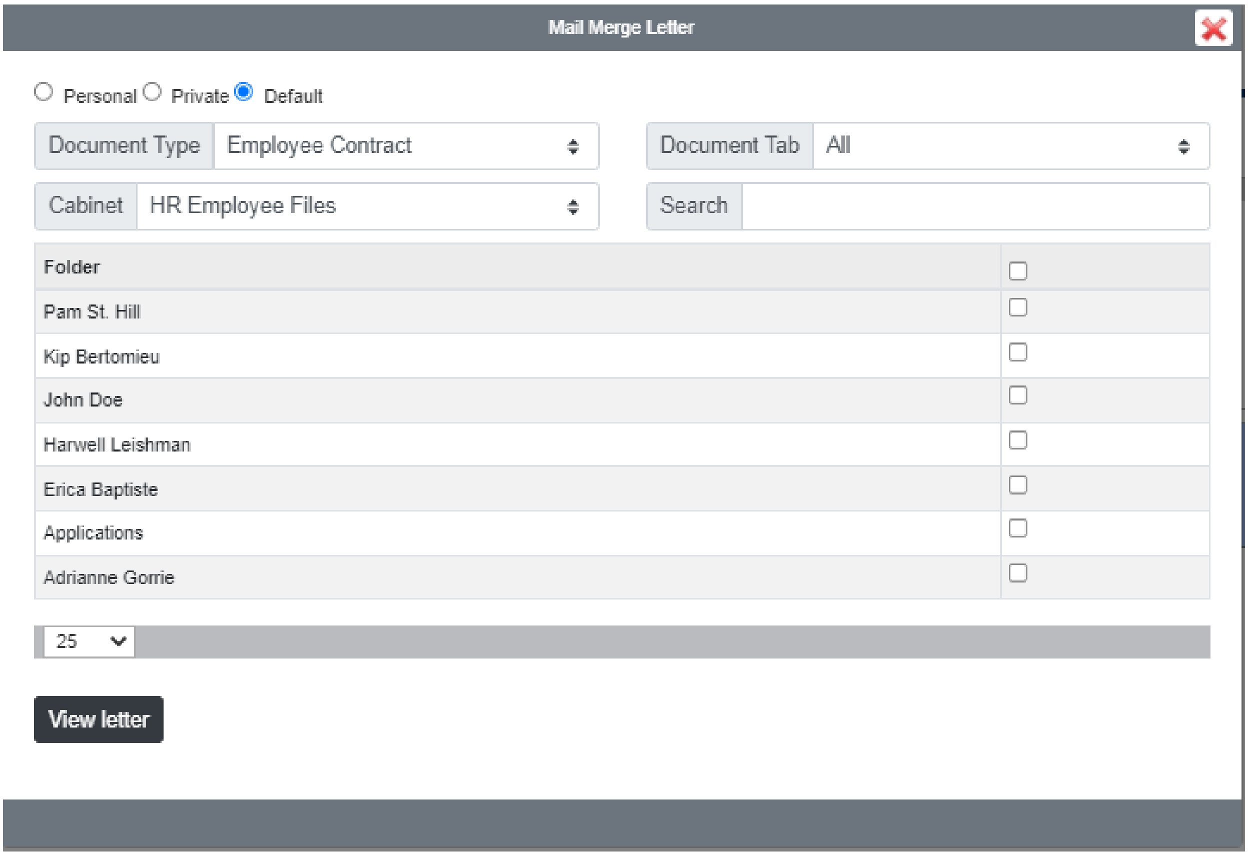
2. Enter the Letter Name.
3. Enter your email message and select the Doc Type and Cabinet fields you want to add to the message:
    - If you wish to add the date to the message, use the Insert Date button at the bottom.
4. When finished, click the Save

Run Mail Merge Letter

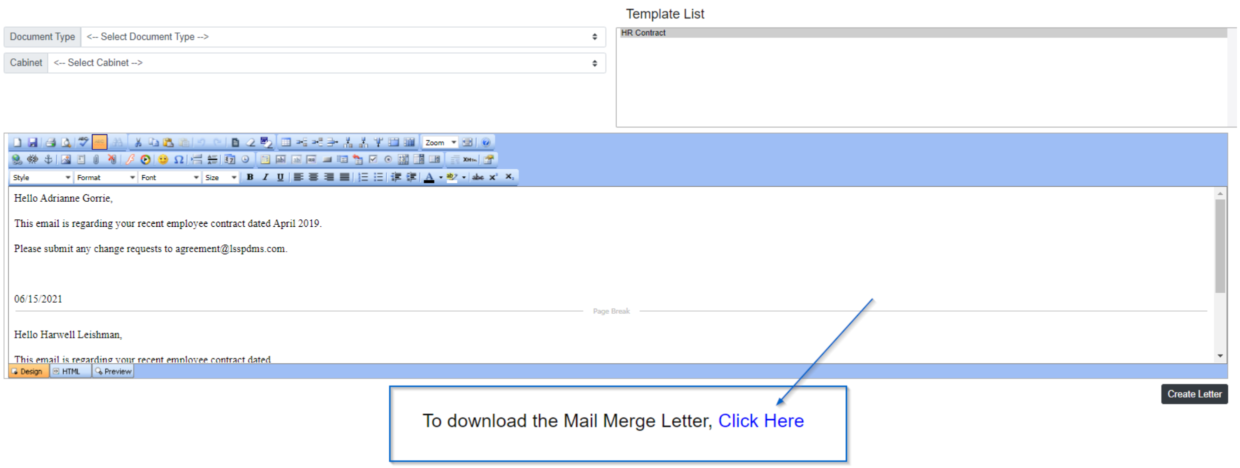
1. Begin by going to Filing > Mail Merge Letter
2. In the Template List box, you will see a list of your existing mail merge letters. Double-Click the mail merge letter you want to open. To filter, you can select a Document Type or Cabinet that the template is assigned to.
3. When ready, click the Create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



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



5. When finished, click the View Letter button.
6. When prompted, click Download Here and the mail merge letter will be downloaded to your workstation.



Edit Mail Merge Letter

To edit a Mail Merge Letter, double-click the letter you want to open.

When finished making your changes, be sure to click the Save button.

Delete Mail Merge Letter

To delete a Mail Merge Letter, select the letter you want to delete, then click the Delete button.