

Adding Mail Merge Fields to Library Documents

WorkCenter allows you to add custom fields to your letters, documents and email messages in the library. These custom fields will allow you to mail-merge data you have inside your WorkCenter database into your documents.

Open WorkCenter and click on the LIBRARY TAB. Select the letter you wish to edit and right click on that form and select "EDIT". The letter will open and allow you to modify the text or drag in new field listing merge fields.

Click on VIEW and then SHOW FIELD LIST. You will now see the field list appear with several groups showing. For letters going to Contact records, you will usually use the GROUP: CONTACTS and GROUP: MY CUSTOM FIELDS. For Letters that merge loan information your will use the GROUP: LOANS and for pictures and logos you will use GROUP: IMAGES.CUSTOMFIELDS. To show the field names under any of the groups you need to click the Plus Sign next to the Group Name.

You have 2 ways to add the fields to your letters and emails. The first way is to simply click on the field name and drag it to where you want in the letter. The 2nd way is to put your cursor where you want the field to be in the letter and then double click the field name and it will be placed where your cursor is.

Once this is completed, you will need to save your letter by clicking on FILE and then SAVE. The letter will disappear and your edits will be saved. To test the letter, select a contact and then double click on your letter and you will see it open and that it has populated with your added fields. If you wish to make further edits, repeat the process above.

All of your letters and the Sue Woodard library forms come automatically with the Header1 and Footer1 image field list names programmed into your letters.